SmartCART Orders Search (Formerly Document Search) - Updated December 2019

The Orders menu can be used to look up Invoices, Purchase Orders, and other important stored information in SmartCART.

To use the search function, start by navigating to the sidebar:



1. Click the icon, Select what document type you want to search in that sub-menu: All Orders, Requisitions, Purchase Orders, or Invoices. (Procurement Requests not used)

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Ξ		SIMPLE ADVANCED	
í c	Orders	Quick search	۹
•	Search	All Orders	
*	My Orders	Requisitions	
血	Approvals	Purchase Orders	
		Procurement Requests	
3 25		Invoices	

2. Apply the desired filters to the search, or type the PO/Invoice number in the bar:

ly Recent Orders	1-3 of 3 Results								🌣 20 Per l	Page r
worite Searches	Order Identifier 🗢	Туре	Order Stat	us Order Owners	Creatio	n Date/Time 🔻 🖸	mpleted Date 🗢	Supplier	Total Amou	nt 🗢
/ou do not have any favorite searches yet.	2826835	Requisition	-	Aleksandr Robertovich	Briskin 11,	/14/2019 2:45:16 PM		- Beckman Coulter Inc 🛛	173.03	USD
	2826780	Requisition	-	Aleksandr Robertovich	Briskin 11/1	4/2019 12:58:40 PM		- BD Biosciences 🕲	245.00	USD
	2826755	Requisition		Aleksandr Robertovich	Briskin 11/1	4/2019 12:54:35 PM		- Beckman Coulter Inc ⊕	173.03	USD
Type of Order: All ▼ Created Date: Last 90 da				Within	Last 90 days		•			
1										
Invoice				Pativoan	(
 Invoice Purchase 				Between		m	and		1	
Invoice				Between		Í	and			

- 3. If you want to save a particular setting as default, you can Save As to create a particular set of criteria, or Pin Filters.
- 4. To adjust the categories displayed, click the Settings gear to the right

									All 👻	Search (Alt+Q)	a '	3,296.9	5 USD	♡ № ♣ 1
Orders > Search >	Invoices + Search	Invoices												
My Searches	Search In	voices Save	As 🔻											Export
K Manage Searches		All 👻 Quick sea				Q 3 Add Filter • Clear	All Filters						C	
My Invoices	< >		of 17 1-	20 of 328 Re									C	20 Per Page
Favorite Searches	Invoice Number ♡	Supplier Invoice Number(s)	∽Supplier	Purchase Order Number	ii Invoice Status	Creation Date/Time 🔻	Due Date 🗢	Discount Date 🗢	Discount Amount 🗢	Submitted Date 🗢	Invoice Source	Invoice Type	Pay Status	Total Amount
You do not have any favorite searches yet.	1471664	400659284	The M. Conley Compan y 🕲	5000620 322	Complete	7/3/2019 4:54:33 PM	8/2/2019	-	0.00 USD	7/3/2019 4:54:33 PM	Electro nic	PO Invoice	In Proces s	61.34 USD
	1470289	400658958	The M. Conley Compan y 🕲	5000620 320	Complete	7/2/2019 10:34:19 AM	8/1/2019	-	0.00 USD	7/2/2019 10:34:19 AM	Electro nic	PO Invoice	In Proces s	151.19 USD
	1469721	400658707	The M. Conley Compan y 🕲	5000620 318	Complete	7/1/2019 4:18:06 PM	7/31/2019	-	0.00 USD	7/1/2019 4:18:06 PM	Electro nic	PO Invoice	In Proces s	153.60 USD

5. In this menu, you can check and uncheck fields you would like displayed and re-order the fields on the right, then click Apply. (Most users can remove Discount Date and Amount)

Configure Column Display

Type to Filter Available Columns	🔲 Pin Column	s as n	ny d	efaults	
Account_Data *	Invoice Number	t	ŧ		
Account_Number *	E Supplier Invoice Number(s)	t	ŧ	â	
Accounting Date	II Supplier	ŧ	ŧ	â	
Award_Number *	🗄 Purchase Order Number	ŧ	ŧ	â	
Created By	Invoice Status	ŧ	ŧ	â	
✓ Creation Date/Time	: Creation Date/Time	ŧ	ŧ	â	
Department	🗄 Due Date	t	ŧ	â	
🕑 Discount Amount	E Discount Date	t	ŧ	â	
 Discount Date 	🗄 Discount Amount	t	ŧ	â	
Due Date	Submitted Date	ŧ	ŧ	â	

Make sure to check Pin Columns as my defaults to save this view if you want

6. To narrow your search results by a category (such as Supplier, Supplier Invoice No., or Supplier Invoice Date), select the filter from the dropdown:

	Add Filter 👻 Clear All Filters	
	Find search filter	-
	Available Filters	
56	 Supplier Invoice Number(s) Supplier Account Number(s) Accounting Date 	
	Catalog Number (SKU) Commodity Code	
	Completed Date Current Workflow Step	
7	Department Discount Amount	
	Discount Date	
1	Form Name	*

7. Then, enter the actual search term (such as the actual Supplier Invoice Number):



8. Results will then be displayed

Ireated Date:	All 🔻 Quick sea	rch			Q 🕜 Add Filter 👻 Clear	All Filters							
Supplier Invoi	ice Number(s): 400	658958 - (3										
1-1 of 1 F	Results												20 Per Page
Invoice Number ▽	Supplier Invoice Number(s)	▽Supplier	Purchase Order Number	Invoice Status	Creation Date/Time 🔻	Due Date 🗢	Discount Date 🗢	Discount Amount 🗢	Submitted Date 🗢		Invoice Type	Pay Status	Total Amount
1470289	400658958	The M. Conley Compan	5000620 320	Complete	7/2/2019 10:34:19 AM	8/1/2019	-	0.00 USD	7/2/2019 10:34:19 AM	Electro nic	PO Invoice	In Proces s	151.19 USD

Export Search

Export Search allows one to export their search results to various formats

1. With your desired search results displaying, click Export at the top right.

Created Date:	All 🔻 Quick sea	arch			Q 🕜 Add Filter 🕶	Clear All Filters							
Supplier Invoi	ice Number(s): 40	0658958 - (Э										
1-1 of 1 F	Results												20 Per Page
Invoice Number ▽	Supplier Invoice Number(s)	∽Supplier	Purchase Order Number	Invoice Status	Creation Date/Tim	e 🔻 Due Date 🗢	Discount Date 🗢	Discount Amount 🗢	Submitted Date 🗢	Invoice Source	Invoice Type	Pay Status	Total Amount
470289	400658958	The M. Conley Compan y ම	5000620 320	Complete	7/2/2019 10:34:19	9 AM 8/1/2019	-	0.00 USD	7/2/2019 10:34:19 AM	Electro nic	PO Invoice	In Proces S	151.19 USD

2. Select your Export format (usually Screen Export is fine)

Export Request	t Options (Step 1 of 1)	
Title *	Export request for Invbice	
	74 characters remaining	
Туре	Screen Layout	
Format	Excel	

You'll see this notification if the export is successful:



3. You may need to wait for the export process to complete, in which case, simply Refresh, then proceed to click Export -> Manage Search Exports to retrieve your results:

	Export	-
Export		
Manage Sea	rch Exports	
Manage Sch	eduled Expor	ts

4. Proceed to download your file by clicking on the filename.

Manage Exports								
Export Requests Export S	chedules							
> Click to Filter								Refresh this Pa
Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Linvoices-Test-2019	Completed	Invoice	Screen Layout (Excel)	12/10/2019 2:42:26 PM	12/10/2019 2:42:32 PM	12/17/2019	Total Records: 1	Delete