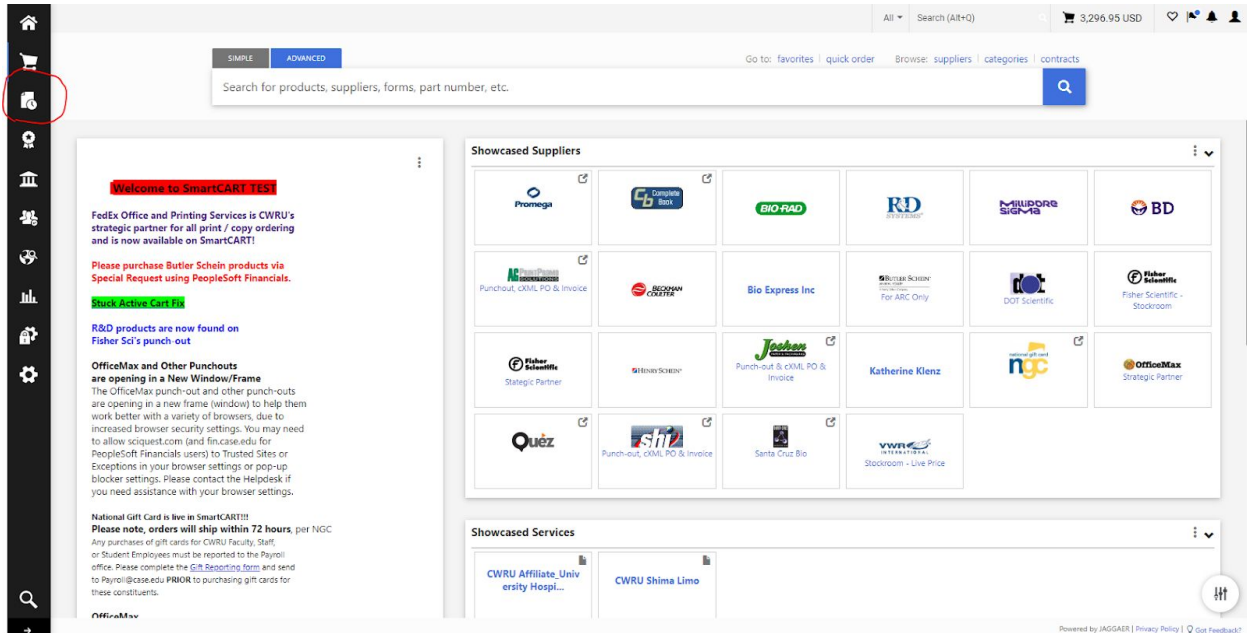


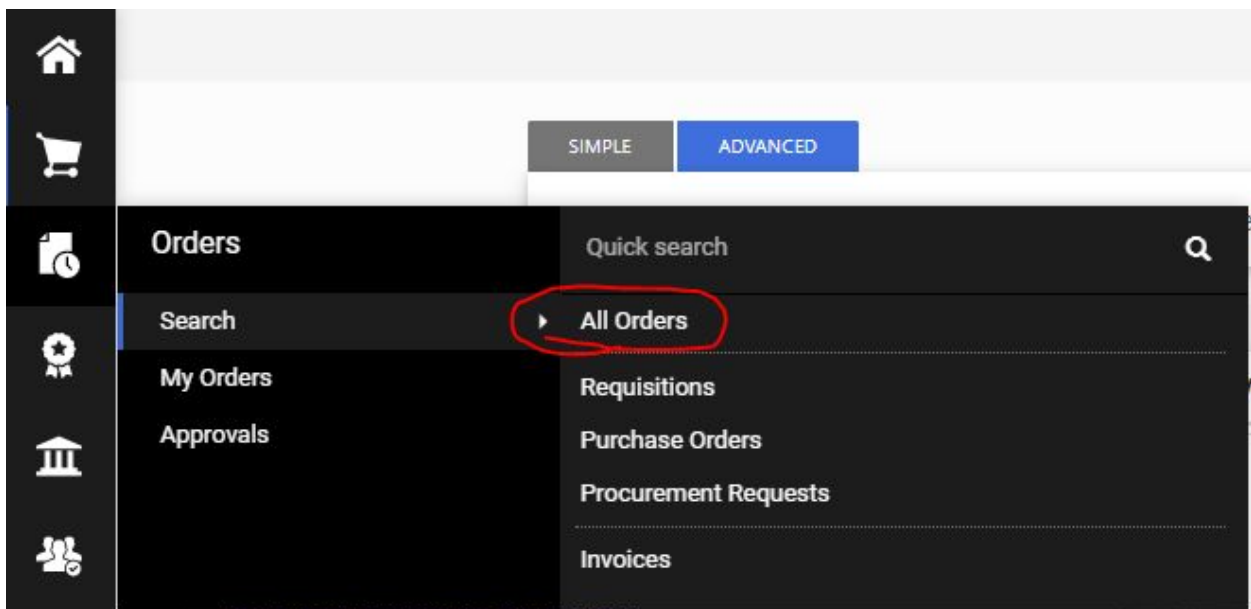
SmartCART Orders Search (Formerly Document Search) - Updated December 2019

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)



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

Order Identifier	Type	Order Status	Order Owners	Creation Date/Time	Completed Date	Supplier	Total Amount
2826835	Requisition	-	Aleksandr Robertovich Briskin	11/14/2019 2:45:16 PM		Beckman Coulter Inc	173.03 USD
2826780	Requisition	-	Aleksandr Robertovich Briskin	11/14/2019 12:58:40 PM		BD Biosciences	245.00 USD
2826755	Requisition	-	Aleksandr Robertovich Briskin	11/14/2019 12:54:35 PM		Beckman Coulter Inc	173.03 USD

Created Date: Last 90 days

Quick search

All

Within Last 90 days

Between and

more options >

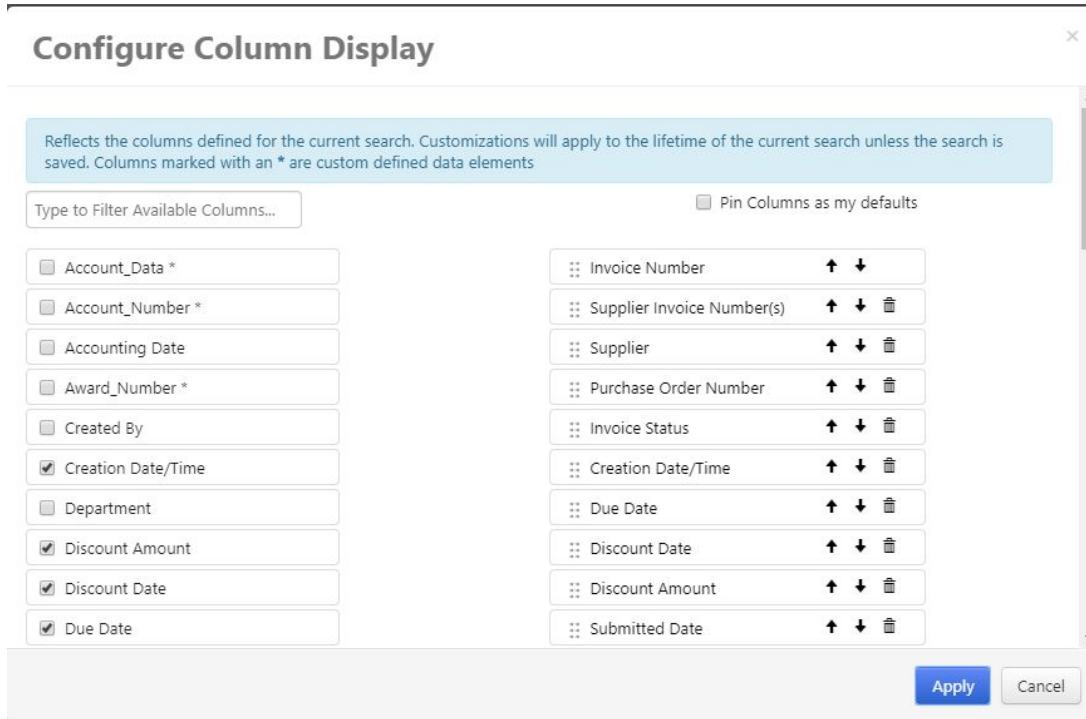
Apply Cancel

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

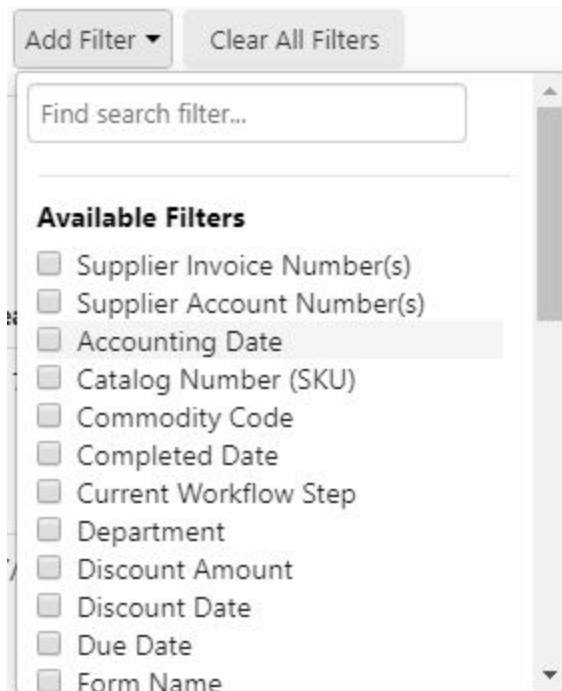
Invoice Number	Supplier Invoice Number(s)	Supplier	Purchase Order Number	Invoice Status	Creation Date/Time	Due Date	Discount Date	Discount Amount	Submitted Date	Invoice Source	Invoice Type	Pay Status	Total Amount
1471664	400659284	The M. Conley Company	5000620322	Complete	7/3/2019 4:54:33 PM	8/2/2019	-	0.00 USD	7/3/2019 4:54:33 PM	Electronic	PO Invoice	In Process	61.34 USD
1470289	400658958	The M. Conley Company	5000620320	Complete	7/2/2019 10:34:19 AM	8/1/2019	-	0.00 USD	7/2/2019 10:34:19 AM	Electronic	PO Invoice	In Process	151.19 USD
1469721	400658707	The M. Conley Company	5000620318	Complete	7/1/2019 4:18:06 PM	7/31/2019	-	0.00 USD	7/1/2019 4:18:06 PM	Electronic	PO Invoice	In Process	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)



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

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



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

Search Invoices Save As ▾

Created Date: All ▾ Quick search

Supplier Invoice Number(s): All ▾ +

Search for 1 or more Terms

Multiple values can be separated by a comma(,).

Apply Cancel

8. Results will then be displayed

Search Invoices Save As ▾ Export ▾

Created Date: All ▾ Quick search Q Add Filter ▾ Clear All Filters

Supplier Invoice Number(s): 400658958 ▾ +

1-1 of 1 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 Source	Invoice Type	Pay Status	Total Amount ▾
1470289	400658958 The M. Conley Company	5000620 320	Complete	7/2/2019 10:34:19 AM	8/1/2019	-	0.00 USD	7/2/2019 10:34:19 AM	Electronic	PO Invoice	In Process	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.

Search Invoices Save As ▾ Export ▾

Created Date: All ▾ Quick search Q Add Filter ▾ Clear All Filters

Supplier Invoice Number(s): 400658958 ▾ +

1-1 of 1 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 Source	Invoice Type	Pay Status	Total Amount ▾
1470289	400658958 The M. Conley Company	5000620 320	Complete	7/2/2019 10:34:19 AM	8/1/2019	-	0.00 USD	7/2/2019 10:34:19 AM	Electronic	PO Invoice	In Process	151.19 USD

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

Export Invoices

Export Request Options (Step 1 of 1)

Title * 74 characters remaining

Type

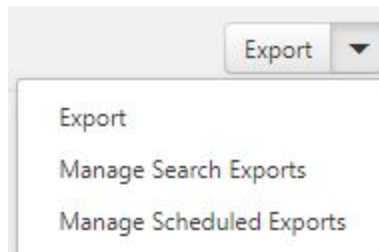
Format

* Required

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:



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

Manage Exports

Export Requests | Export Schedules

> Click to Filter

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Invoices-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	<input type="button" value="Delete"/>