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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1		SIMPLE ADVANCED	
J.	Orders	Quick search	٩
~	Search	All Orders	
₽ E	My Orders Approvals	Requisitions Purchase Orders Procurement Requests	
-12 ,		Invoices	

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

y Recent Orders	1-3 of 3 Results								20 Per Page
rorite Searches	Order Identifier 🗢	Туре	Order St	atus Order Owners	Creatio	n Date/Time 🔻	Completed Date	Supplier	Total Amount
ou do not have any favorite earches yet.	2826835	Requisition	-	Aleksandr Robertovich	n Briskin 11/	14/2019 2:45:16 PM		- Beckman Coulter Inc 🖯	173.03 USD
	2826780	Requisition	2	Aleksandr Robertovich	n Briskin 11/1	4/2019 12:58:40 PM		- BD Biosciences 🖯	245.00 USD
	2826755	Requisition	÷	Aleksandr Robertovich	n Briskin 11/1	4/2019 12:54:35 PM		- Beckman Coulter Inc ⊖	173.03 USD
 Invoice Purchase Order Requisition 				Between		ĺ	and		1

- 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)	٩	3,296.9	95 USD	♡ ▲ ▲ ▲
Orders Search	Invoices + Search	Invoices												
My Searches	Search In	voices Save	As 🔻											Export -
K Manage Searches	Created Date:	All 🔻 Quick se	arch			Q 🕜 Add Filter 🕶 Clear	All Filters						C	
My Invoices	< >	Page 1	of 17 1-	20 of 328 Re	sults								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 ම	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 m	ny d	efaults	
Account_Data *	Invoice Number	t	ŧ		
Account_Number *	E Supplier Invoice Number(s)	t	ŧ	â	
Accounting Date	II Supplier	t	ŧ	â	
Award_Number *	II Purchase Order Number	ŧ	ŧ	â	
Created By	Invoice Status	ŧ	ŧ	â	
✓ Creation Date/Time	:: Creation Date/Time	t	ŧ	â	
Department	II Due Date	ŧ	ŧ	â	
🕑 Discount Amount	II Discount Date	t	ŧ	â	
 Discount Date 	II 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	*
ŀ	Available Filters	
L	Supplier Invoice Number(s)	
54	Supplier Account Number(s)	
	Accounting Date	
1	Catalog Number (SKU)	
L	Commodity Code	
L	Completed Date	
ľ	Current Workflow Step	
ł	Department	
1	Discount Amount	
L	Discount Date	
Ŀ	Due Date	
L	E Form Name	*

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



8. Results will then be displayed

Search Invoices Save As 💌													Export 💌
Created Date:	All 👻 Quick sea	irch			Q 🕜 Add Filter 🕶 Clear a	All Filters							
Supplier Invoi	ce Number(s): 40	0658958 - (0										
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 Compan y ම	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.

Search In	voices Save	As 💌											Export 💌
Created Date	All 🔻 Quick sea	rch			Q 3 Add Filter - Clea	r All Filters							
Supplier Invo	ice Number(s): 400 Results	0658958 👻 (3										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 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

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

Export Request	t Options (Step 1 of 1)	
Title *	Export request for Invpice	
	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 Exp	port Schedules							
> Click to Filter								Refresh this Page
Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
1nvoices-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