



Running Basic Searches

The Search functionality allows users the ability to quickly find Shipments based on a variety of Criteria. The returned results will be displayed in a table view that provides quick insight to the details of the Shipment.

The screenshot shows the 'Advanced Search' interface with the following sections and fields:

- Search Criteria:** Bill To Name, Customer PO, Invoice Number, Billing ID, BOL Number, Manifest/Pro #, Pickup #, Created By, Carrier Name (dropdown), Status (dropdown), Search Archive checkbox, Product SKU #, Carrier Services (dropdown), Excel Import Number.
- Date Constraints:** Reference Type (dropdown), Begin Date, End Date, Date Type (radio buttons: Created Date, Pickup Date, Delivery Date), Reference Type (dropdown), Reference Number, Issue Types (checkboxes: Accounting, Claims, Operation, Show Resolved Issues), Load Type (checkboxes: Multi-stop, EZ, Full).
- Origin/Shipper Address:** Merchant Name, Location Name, City, State (dropdown), Country (dropdown), Zip Code.
- Destination/Consignee Address:** Merchant Name, Location Name, City, State (dropdown), Country (dropdown), Zip Code.

Buttons for 'Search' and 'Reset Criteria' are located at the bottom right of the form.

Common Searches

1. Search by Customer PO Number
2. Search by BOL Number
3. Search by the Carrier Pro Number
4. View last year's shipments with "X" Carrier, for example Fed Ex
 - i. Begin Date - 1/1/2015
 - ii. End Date - 12/31/2016
 - iii. Data Type - Created Date
 - iv. Carrier Name - Fed Ex
5. View all the shipments needed to be called and scheduled for pickup for UPS/Overnite
 - i. Name - UPS/Overnite
 - ii. Status - Booked
6. View all the issues logged for the 1st quarter of 2016 with Roadway
 - a. Begin Date - 1/1/2016



- b. End Date – 3/31/2016
- c. Data Type – Created Date
- d. Carrier – Roadway
- e. Issue Type – Accounting, Claims and Operational, optionally Resolved
- 7. View how many times “X” client was shipped to during the first half of the year
 - a. Begin Date 1/1/2016
 - b. End Date – 6/30/2016
 - c. Status – Delivered
 - d. Destination Location Name or Destination Zip Code.

Example of how results will display

Search Criteria				Date Constraints			
Bill To Name:	<input type="text"/>	Begin Date:	<input type="text" value="6/1/2016"/>				
Customer PO:	<input type="text"/>	End Date:	<input type="text" value="7/18/2016"/>				
Invoice Number:	<input type="text"/>	Date Type:	<input checked="" type="radio"/> Created Date <input type="radio"/> Pickup Date <input type="radio"/> Delivery Date				
Billing ID:	<input type="text"/>	Carrier Name:	<input type="text" value="- None Selected -"/>				
BOL Number:	<input type="text"/>	Status:	<input type="text" value="- None Selected -"/> <input type="checkbox"/> Search Archive				
Manifest/Pro #:	<input type="text"/>	Issue Types:	<input type="checkbox"/> Accounting <input type="checkbox"/> Claims <input type="checkbox"/> Operation <input type="checkbox"/> Show Resolved Issues				
Pickup #:	<input type="text"/>	Load Type:	<input type="checkbox"/> Multi-stop <input type="checkbox"/> EZ <input type="checkbox"/> Full				
Product SKU #:	<input type="text"/>	Carrier Services:	<input type="text" value="- None Selected -"/>				
<input type="checkbox"/> Include Cancelled Loads?							

Origin/Shipper Address				Destination/Consignee Address			
Merchant Name:	<input type="text"/>	Merchant Name:	<input type="text"/>				
Location Name:	<input type="text"/>	Location Name:	<input type="text"/>				
City:	<input type="text"/>	City:	<input type="text"/>				
State:	<input type="text" value="- None Selected -"/>	State:	<input type="text" value="- None Selected -"/>				
Country:	<input type="text" value="- None Selected -"/>	Country:	<input type="text" value="- None Selected -"/>				
Zip Code:	<input type="text"/>	Zip Code:	<input type="text"/>				

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EZ	Action	BOL #	PRO #	PO #	Invoice ID #	Origin	Dest.	Pickup	Deliver	Carrier	Wt.	Qty	Status
	<input type="button" value="Details"/>	1619400001				Banyan Technology Elyria OH, 44035	Banyan Technology Illinois Chicago IL, 60606	07/12/2016	07/12/2016		1500.00	1	Quoted (Created: 07/12/2016 08:02:51)
X	<input type="button" value="Details"/>	1619400002				Banyan Technology Elyria OH, 44035	Mexico City Gym Edgewater FL, 32132	07/12/2016	07/12/2016		1500.00	1	Quoted (Created: 07/12/2016 08:05:21)

Keep in mind that when using date constraints you MUST select a Date Type