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Using Document Search

1. If you'd like to find a certain document, you can use the Document Search in ShopBlue. Start first by clicking "Search Documents" in the Documents fly-out menu on the left side of your homepage (Figure 1).
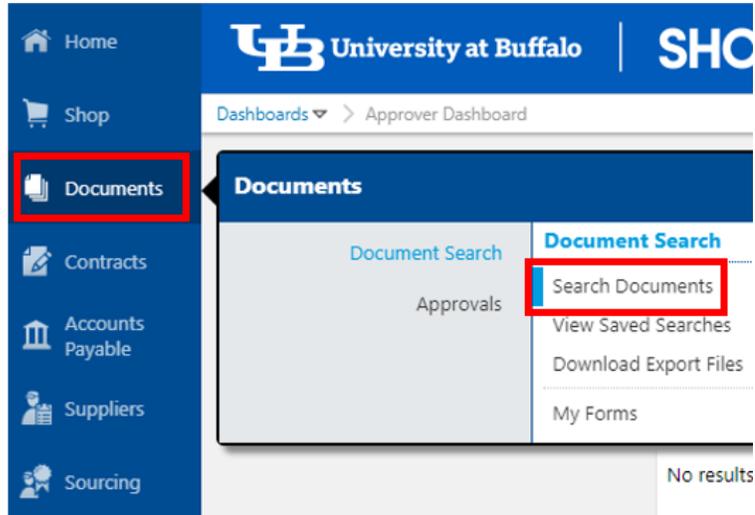

Figure 1

2. Next, select the type of documents you are searching for from the left dropdown, and select the range of dates, or enter a custom range of dates in the right dropdown. Now, you can enter your search term (PO number, supplier name, etc.) (Figure 2).
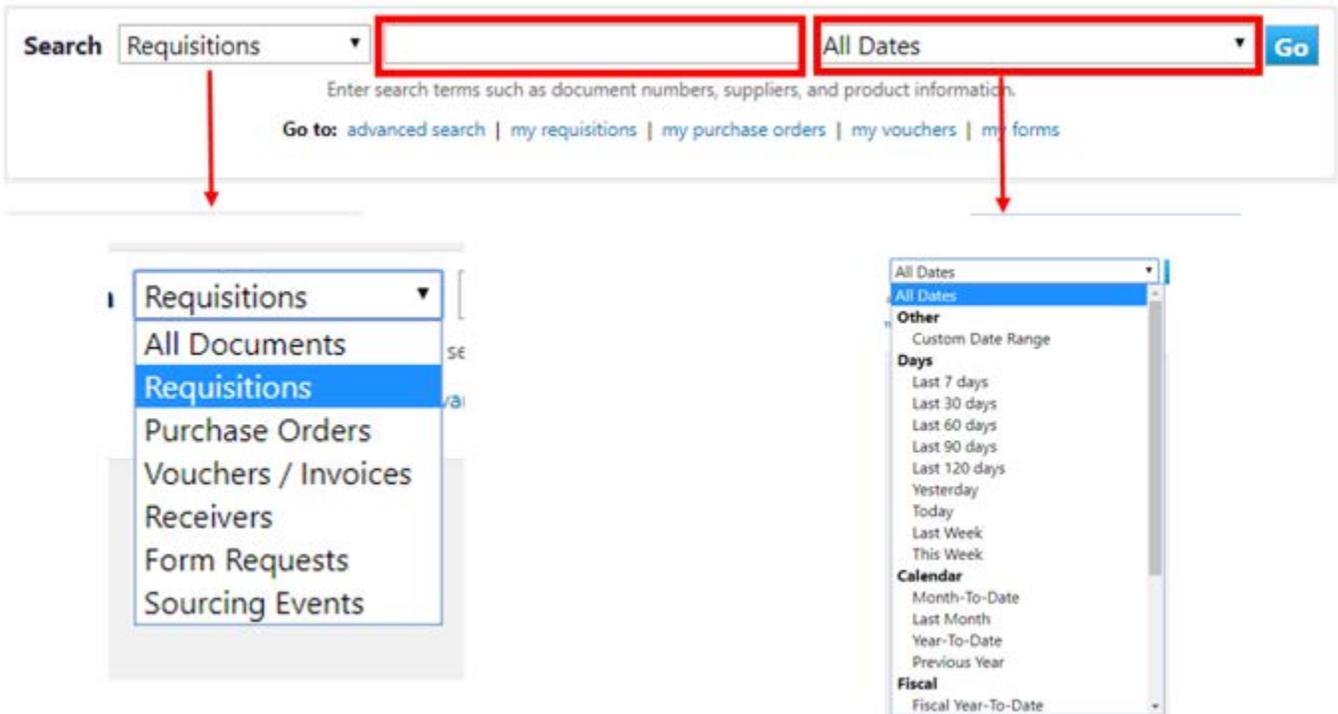

Figure 2

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3. Next, click on the "PO No" you wish to view (this search was for Purchase Orders from Corr Distributors over the last 90 days) (Figure 3). You can refine your search results by using any of the filters on the side of your screen by clicking on the filter icon.

Figure 3

Advanced Search

The Advanced Search is also a very useful tool. The Advanced search allows you to search by a particular user, supplier, specific date range, one or more chart fields, dollar amount, commodity code, etc. In the following example, we will, once again, start by going to "Search Documents" in the Documents fly-out, then clicking "advanced search" (Figures 4 and 5).

Figure 4

Figure 5

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Next, for the following example, we will search for all Purchase Orders prepared by Dalton Holler over the Last 60 days, then click Search at the bottom of the page (Figure 6).

Figure 6

Add the user your wish to search by (Figure 7).

Figure 7

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Save Searches as Favorites
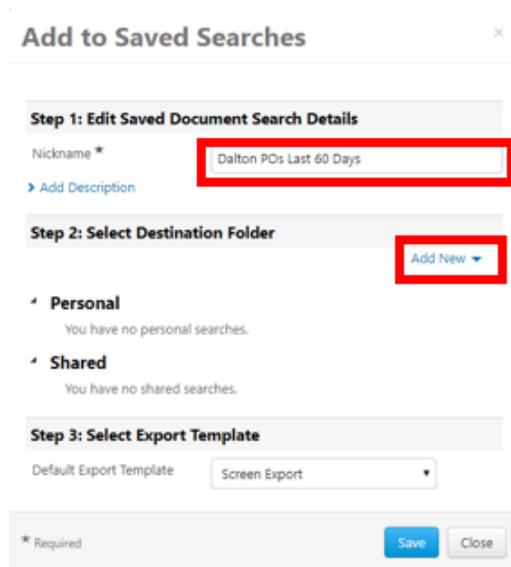Continuing from the example, click the Save New Search button on your results screen (Figure 8).

Figure 8

Give your Search a name and add a description (Figure 9). **Note:** If you do not have a folder under your Personal Favorites, you will need to create one by clicking Add New.

Figure 9

Create a Personal Folder for your saved searches (Figure 10).
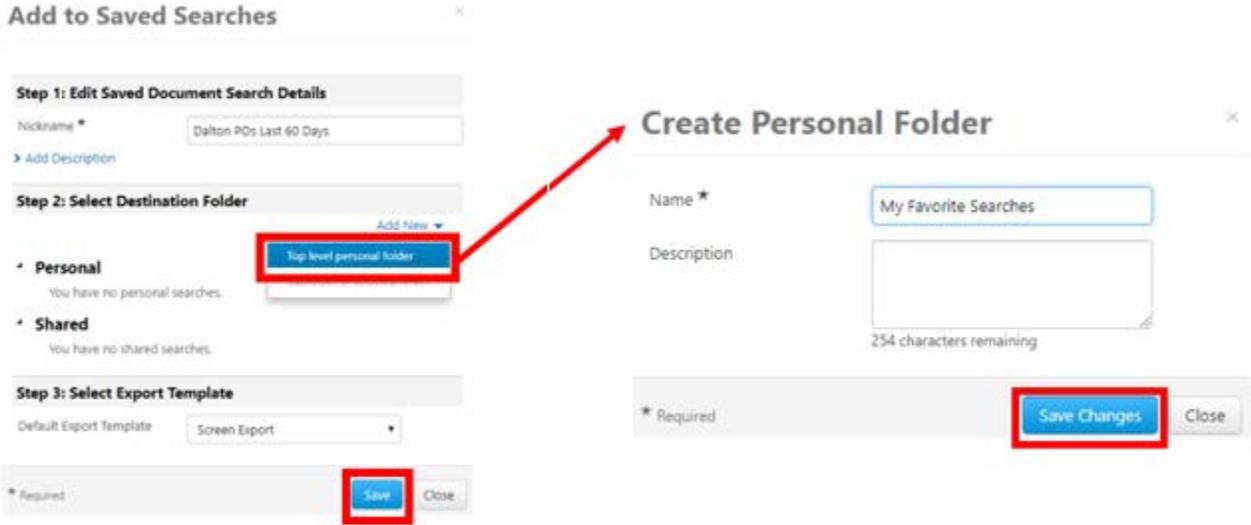
Save the search to your Saved Searches (Figure 11).

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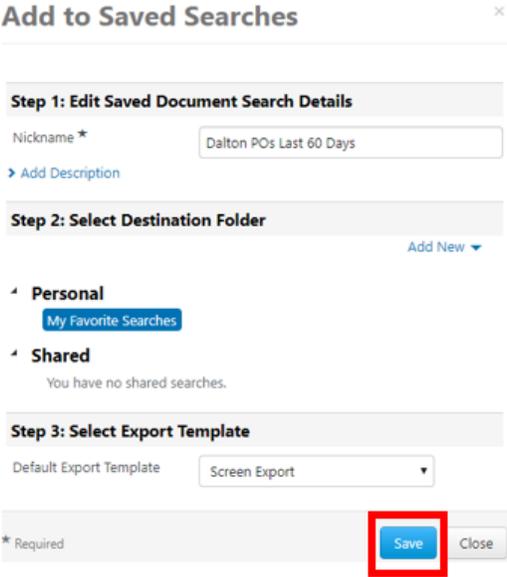
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Retrieve a Saved Search

Click "Search Documents" from the Documents fly-out (Figure 12).
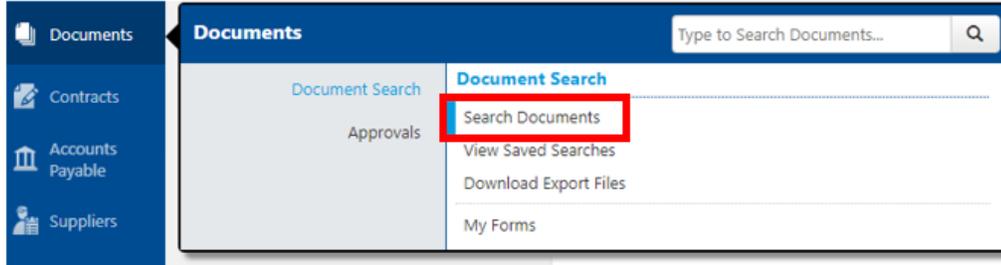

Figure 12

From the breadcrumb trail, click the "Search Documents" dropdown, and select "View Saved Searches" (Figure 13).
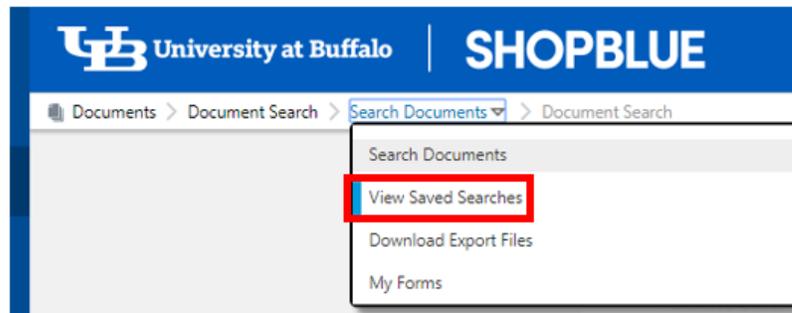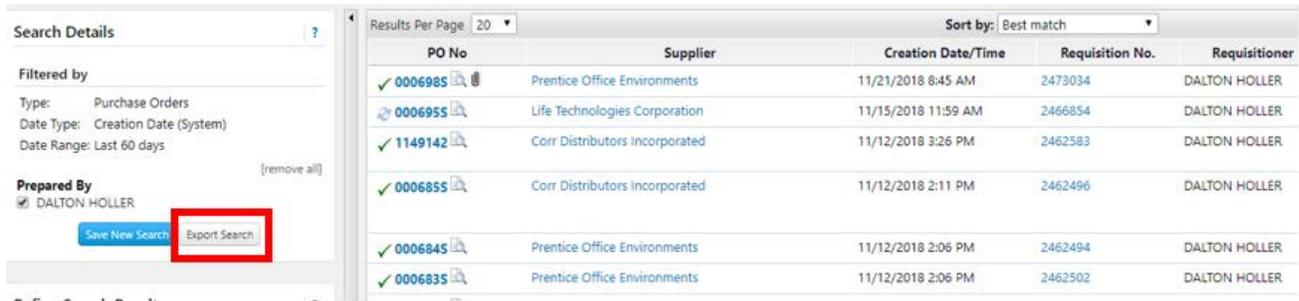

Figure 13

Click on your saved folder in "Personal", and click "Go" (Figure 14).

Figure 14

Export a Search to Microsoft Excel

For this example, in order to export your POs from the last 60 days, first, follow the instructions from the Advanced Search section to view POs from the last 60 days (Figure 15).

Figure 15

Give your export a name and choose the type of Export Template (Figure 16):

- **Screen Export** – exports only the information available in the search results screen for each document.
- **Transaction Export** – exports an expanded set of information on the documents.
- **Full Export** – exports transactions with history.
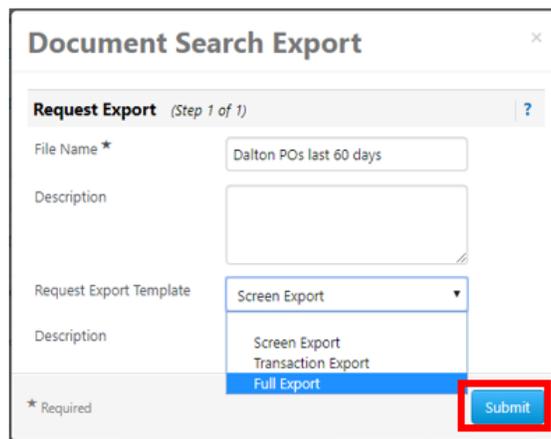
Figure 16

Next, click **Go to Page: Download Export Files** (Figure 17):

Figure 17

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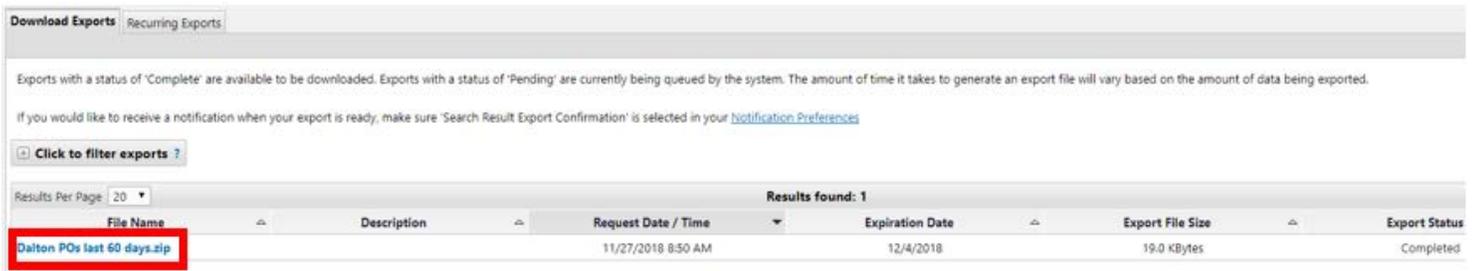Click on the File Name, and choose which of the exported search results you wish to view (Figures 18 and 19).
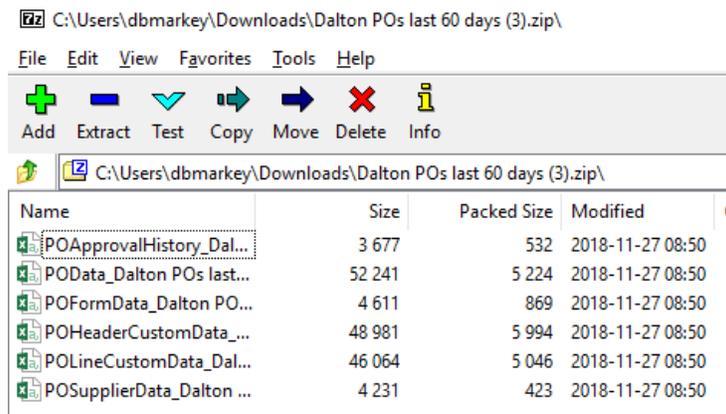

Figure 18

Figure 19

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