



# Search Features



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## 1 V4 SQL Search Features

The **entrée V4 SQL** has brought with it advances in search capabilities and options. The integrated search engine allows users to quickly customize a search and quickly locate the data they need. This chapter will provide an overview of the latest search engine features.



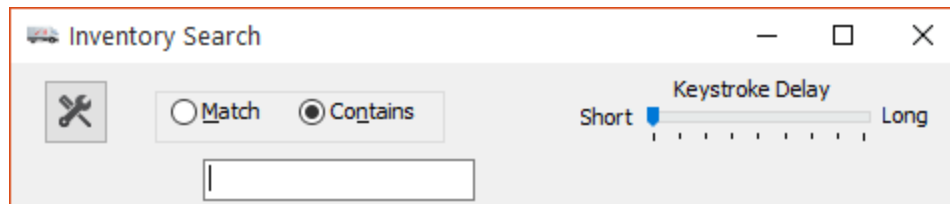
### Note

Any time the  search button is displayed in the entrée system, the appropriate search screen can be opened by clicking that button. Pressing the **F5** key, while the cursor is located in a field that has a search button, will open the search screen.

### New Search System Features

#### • Keystroke Delay Slider

V4 feature enhancements include the new Keystroke Delay Slider feature to searching. This feature allows you to control the amount of time that the system waits before applying a search term that you have typed in.



Moving the slider toward the “Short” setting reduces the time that the system waits but this means that you have to type faster to stay ahead of the computer.

Moving it toward the “Long” setting means you are able to type more slowly but the system will take longer to respond to your input.

This is a “per user” setting but the same setting applies across all searches. However there are separate settings for the “Classic” and “Server Mode” search styles discussed below.

#### • Setting Search System Defaults

In entrée V4 SQL the search system has a few new features one to configure the default search style and the other to refresh the search screen data whenever you like. **Search Style** and **Matching Method** are two new customizable features of the search system.

You can set the default Search Style for **entrée V4 SQL** in the “**Search System Options**” configuration accessed via **Additional Features** on the System Options tab of System Preferences. See the **Additional Features** section of the System Options chapter for detailed information.

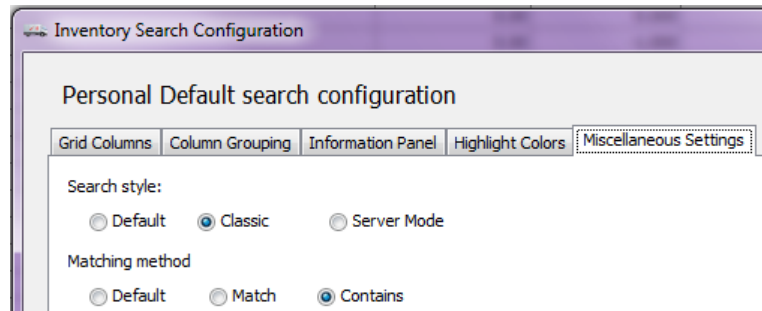
### New Search Configuration Miscellaneous Settings

#### • Search Style

This new feature allows you to select whichever search style works the best for you and allows you to make that the default for all of your entrée searches.


- **Default:** The default search style is configured in the “**Search System Options**” utility found in System Options Additional Features. See the **Additional Features** section of the System Options chapter for more detailed information.
-

- Classic
- Server Mode



### • Matching Method

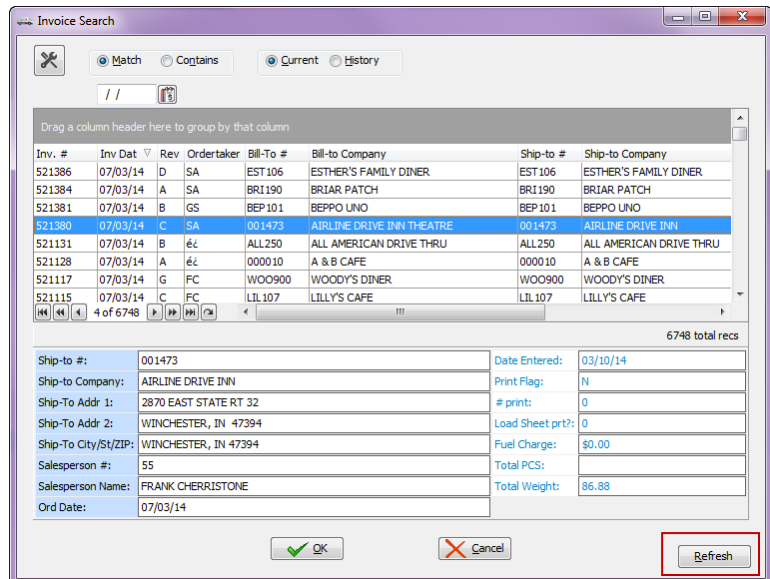
- **Default** - The default matching method built into the **entr e** system for that screen.
- **Match** - Uses the entire input phrase as a whole for the search ('TEST ITEM%') rather than breaking out each word and matching the words individually ('TEST%' and 'ITEM%').
- **Contains**

 **Hot Tip!** See the [Miscellaneous Settings](#) tab topic for more details about the new **Search Style** and **Matching Method** options.

### Search Refresh Button

Caching of the search results can cause the information being shown to become stale (out-of-date) especially in files that change frequently throughout the business day like the Invoices database. The **Refresh** button in the lower right-hand corner of the search screen when clicked will reload the current search with the latest available information.

So as new invoices are processed in the system during the day when you hit the **Refresh** button it will show all the invoices in the system at that moment for you to search.




## Topics covered in the V4 Search Features Chapter

- [Performing a Search](#)
- [Search Configuration Overview](#)
- [Inventory Search screen](#)
- [DOT Foods Inventory](#)
- [Customer Search screen](#)
- [Salesperson Search screen](#)
- [Vendor Search screen](#)
- [Manufacturer Search screen](#)
- [Comment Search screen](#)
- [Invoice Search screen](#)
- [Lot Location Search screen](#)
- [Purchase Order Search screen](#)

### 1.1 Performing a Search

Configurations for searching the Inventory, Customer, Salesperson, Vendor, Manufacturer, Comment, Invoice,






Lot Location and Purchase Order files can easily be customized in entrée by clicking the  **Configure** button. See the [Search Configuration Overview](#) section of this chapter for details.

#### General Search Features

Once the desired search screen opens a white edit box will be located above the default search column. In the Inventory Search screen below the Description column is default. Just start typing the first characters of the value you are seeking and entrée will dynamically move you closer to the correct value.



**Example** For the letters "toma" in the **Description** column the search results are shown below.

| Inventory Search   |        |      |                |                              |
|--|--------|------|----------------|------------------------------|
| <div>  <input type="radio"/> Match <input checked="" type="radio"/> Contains         </div> <div>toma</div> |        |      |                |                              |
| Drag a column header here to group by that column  |        |      |                |                              |
| Item Image   | Item # | UOM  | Brand Name     | Description                  |
|   | 12400  | CASE | FARMERS MARKET | BEEFSTEAK TOMATO LARGE       |
|   | 974474 | CASE | DREW'S         | SALAD DRESSING SMOKED TOMATO |
|   | 974475 | EACH | DREW'S         | SALAD DRESSING SMOKED TOMATO |
|   | 12405  | CASE | FARMERS MARKET | TOMATO CLUSTER VINERIPE      |

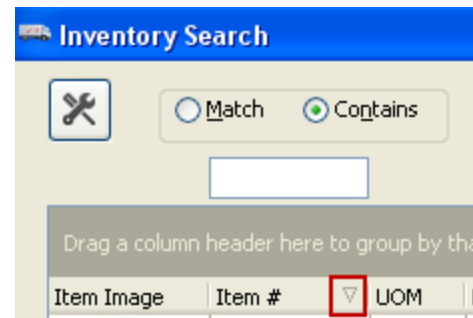
- If you wish to search on a different value than the default for that file click the desired **column heading** and the white edit area will move above that field. Now enter your search text.
- You may re-size a column by clicking and dragging **either edge** of the **column title**.
- The order of the columns may be changed by clicking the **column title** and **dragging** it to a new position.
- Any changes made to the search window are for the **current search only**.

- Sort any column in ascending or descending order by clicking the column header to change the sort arrow into the desired direction.



**Example** In the example on the right the Item # column is being sorted in descending order.

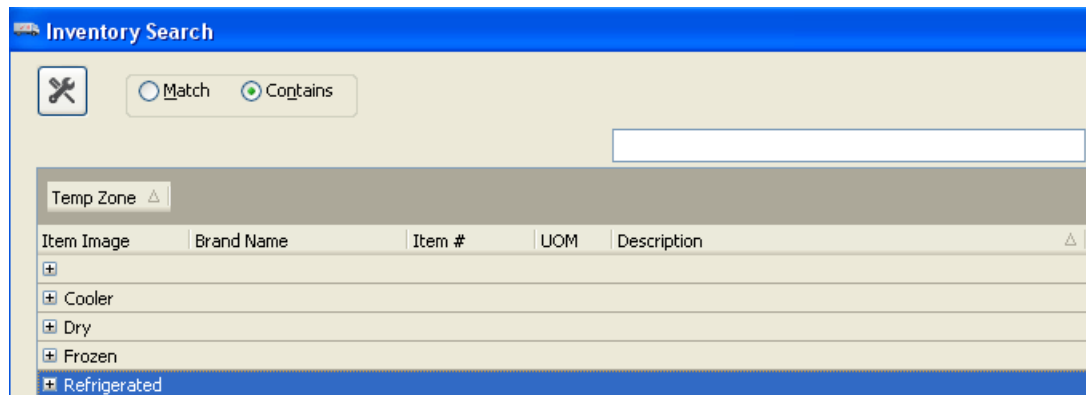
If you click the Item # header again it will reverse the sort order to ascending.



- Drag any column heading to the "Drag any column header here to group by that column" area and the screen data will automatically be grouped by that column. Use the + and - icons to expand or collapse each group list.



**Example** Below the Inventory Search screen was grouped by Temp Zone and the search text box is in the Description column.



- If you would like to save your changes for all subsequent searches you will need to use the Search



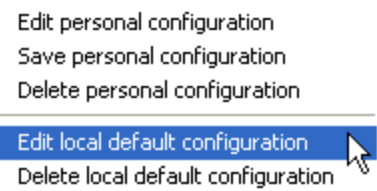
Configuration window accessed by clicking the **Configure** button, located in the top left corner of all entrée search grids. The [Search Configuration Overview](#) section follows with complete details.

## 1.2 Search Configuration Overview

Configurations for searching the Inventory, Customer, Salesperson, Vendor, Manufacturer, Comment, Invoice, Lot Location and Purchase Order files can easily be customized in entrée.



When you click the **Configure** button you will have a drop down menu listing Personal Configuration options and Local Default Configuration options.



- Be sure to check the list of columns on a regular basis because new columns are being added all the time. In the version 4.0.29 release the "Pc Item?" and "Spec Ord?" columns were added to Inventory searches. Both columns show "Yes"/"No" values:
  - "Pc Item?" is "Yes" if the item Units of Measure is "PC."

- If “Spec Ord?” is “Yes” if the item is defined as a “Special Order” item.

Inventory Search

☐ Match ☒ Contains

| Item # | Class | UOM  | Brand Name    | Pack Size | Pc Item? | Spec Ord? |
|--------|-------|------|---------------|-----------|----------|-----------|
| 20202  | BEEF  | CASE | YODERS        | 12/28OZ   | No       | No        |
| 90273B | BEEF  | PC.  | IBP           | 16#AVG    | Yes      | No        |
| 91134  | BEEF  | CASE | IBP           | 2/30#     | No       | No        |
| 90280B | BEEF  | PC.  | IBP           | 6#AVG     | Yes      | No        |
| 90163B | BEEF  | PC.  | NATIONAL BEEF | 24#AVG    | Yes      | No        |
| 90167B | BEEF  | PC.  | NATIONAL BEEF | 16#AVG    | Yes      | No        |
| 18422F | BEEF  | CASE | PACKER        | 8/9#AVG   | No       | No        |



**Note** The **Configure** button will be hidden if the user does not have authorization to create a **Personal Default** configuration.

### Local Default Configuration

Local Default search configurations are setup by an authorized user, usually the System Administrator, and that configuration will become the search default for all users of entrée.

The System Administrator can customize the Local Default search configuration to align with the way you do business. This option allows each distributor to create their own preferred search layout and have it automatically applied to everyone without the need to update each workstation individually.

Inventory Search Configuration

Local Default search configuration

Grid Columns | Column Grouping | Information Panel | Miscellaneous Settings

Default Sort column: Class

Available columns:

- Alloc Qty
- Avg Wgt
- Base Cost
- Below Cst?
- Broker
- Case Itm #
- CME Cost
- CME Factor
- Constant Wgt
- Descrip 2
- Descrip 3
- Descrip 4
- EARN Itm?
- Edy's Itm?
- FAB Itm?
- FOB
- Gallons
- Gross Wght
- Group Code
- GTIN
- ID

Displayed columns:

- Class
- Item #
- UOM
- Brand Name
- Description
- Pack Size
- Warehouse Loc
- Onhand Qty
- Onhand Wgt
- Temp Zone
- Stock?
- Cubic Ft
- Deposit

OK Cancel

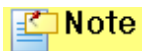
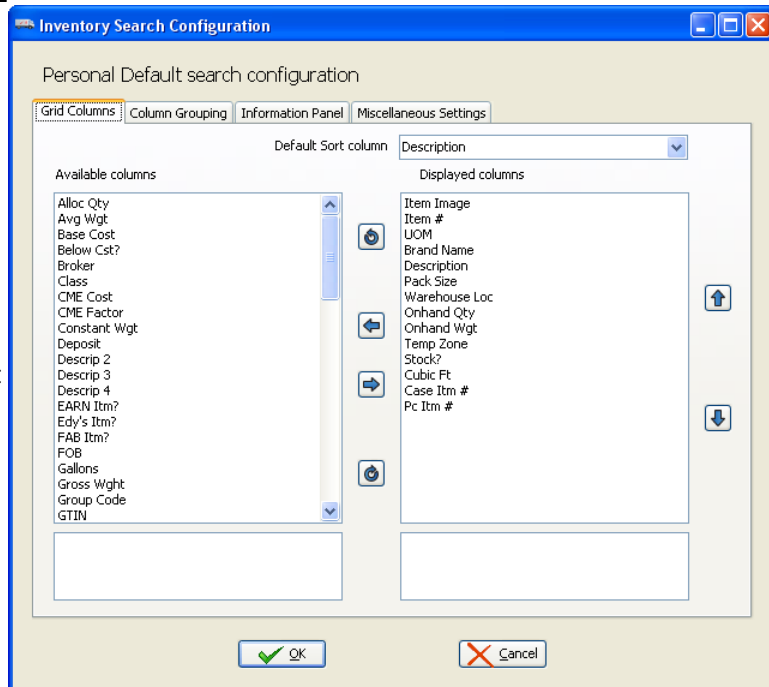


### Personal Default Configuration

The Personal Default Configuration option allows only the authorized User Account to save a customized search configuration that only that user will see and use.

A user who does not have the Personal Default Configuration authorization is prevented from making any changes to the search configuration including not being able to change column positions, column width, or column grouping.

Any saved Personal Default Configurations will be ignored in favor of the Local Default or the built-in default (the default embedded in the entrée code).



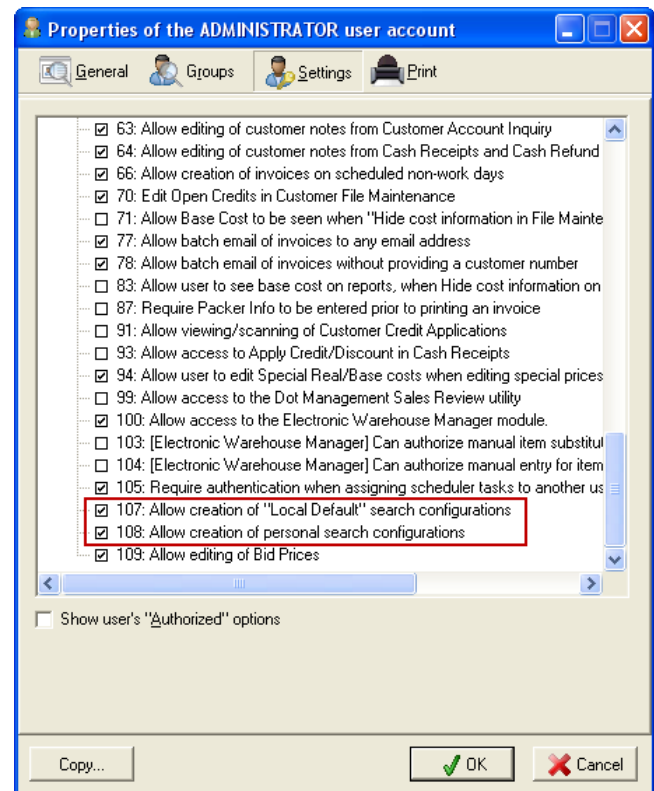
### Note

The Local Default and Personal Default configuration windows use the same tabs and search options as shown here.

### Search Configuration Password Options

In the entrée **Security Manager > Settings > Miscellaneous** options list there are two new options controlling whether a User Account can create Local or Personal search configurations. These options are **#107** and **#108**. Remove the check mark for these options to turn off this feature for individual user accounts.

- Option **#107** is "**Allow creation of 'Local Default search configurations'**" controls whether or not a User Account is authorized to create search configurations that will become the Local Default for all users in entrée. This authorization is usually given to the System Administrator and is tightly controlled.
- Option **#108** is "**Allow creation of personal search configurations**" which controls whether or not the User Account is allowed to save a personal search configuration. Each business can decide if they will allow employees to personalize their search screens or use a standard screen for the entire company.



### Setting Search Configurations

Whether a Local Default or a Personal configuration in entrée V4 SQL the new Search Configuration window has the same four tabs to assist you with search customization.

**These four Search Configuration tabs will be covered in the next sections of this chapter:**


- [Grid Columns](#)
- [Column Grouping](#)
- [Information Panel](#)
- [Miscellaneous Settings](#)

### Using the Available / Displayed Column Configuration Feature

The Grids Columns, Column Grouping and Information Panel tabs will use the Available / Display lists to control columns in the configuration. Below is an explanation of the controls in the Available / Display columns feature.




The **Available Columns** list contains all of the available fields that are not currently displayed on the current search screen.

- A column in the Available columns list can be moved to the Displayed columns list by selecting the column to move and clicking the  button.





The **Displayed Columns** list contains all of the fields that will be displayed in the current search screen.

- A column in the Displayed columns list can be removed and put back in the Available columns list by selecting the column to remove and clicking the  button.




#### Settings Displayed Column Order

- The first field in the displayed fields list will appear on the far **left** of the search grid with each subsequent field appearing to the right of the previous one. To relocate a field in the Displayed columns list, select it with your mouse and click the appropriate  or  buttons until it is where you would like it.


#### Remove All Columns



- All of the columns in the Displayed columns list can be removed at once by clicking the  button.

#### Add All Columns



- All of the columns in the Available columns list can be added to the Displayed columns list at once by clicking the  button.

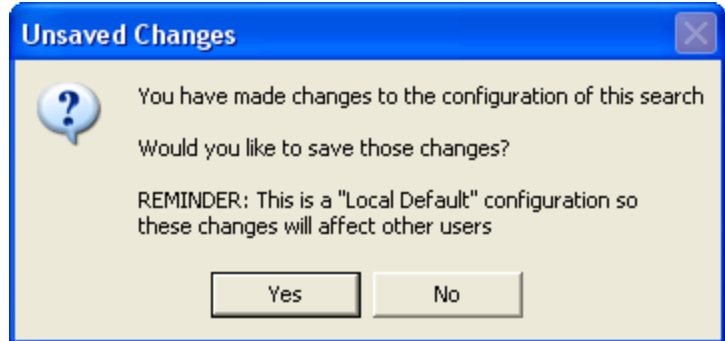
### Unsaved Configuration Changes

Once you have configured your Local Default or Personal Default search screen and click OK. Now use your customized search configuration. When you exit the search screen, if you have changed a search configuration, a message will be displayed. The message displayed is different for Local and Personal search configuration defaults.

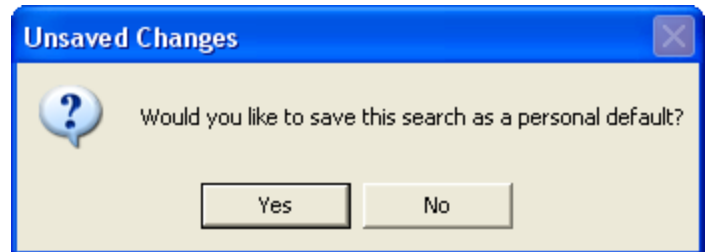
- If you changed the **Local Default** this Unsaved Changes message will display.



**Caution** Click **No** here unless you want the search defaults for every entrée user updated.




- If you changed the **Personal Default** configuration this message will display. Click **Yes** here if you want to save your recent changes as your *new* default.
- Click **No** here and your **Personal Default** configuration will not be changed



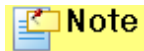
## 1.2.1 Grid Columns Tab

The Grid Columns tab is used to configure the default behavior of the current search screen. Here you can customize which columns will be displayed and their order, the default sort column and the default search column.

### Controlling the Search Screen Grid Columns

- Move a column from the **Available Columns** list to the **Displayed Columns** list by selecting the column to move and clicking the  button. You can do the reverse with the opposite arrow as you customize your configuration.

- Organize the column order in the **Displayed Columns** list using the   arrows.

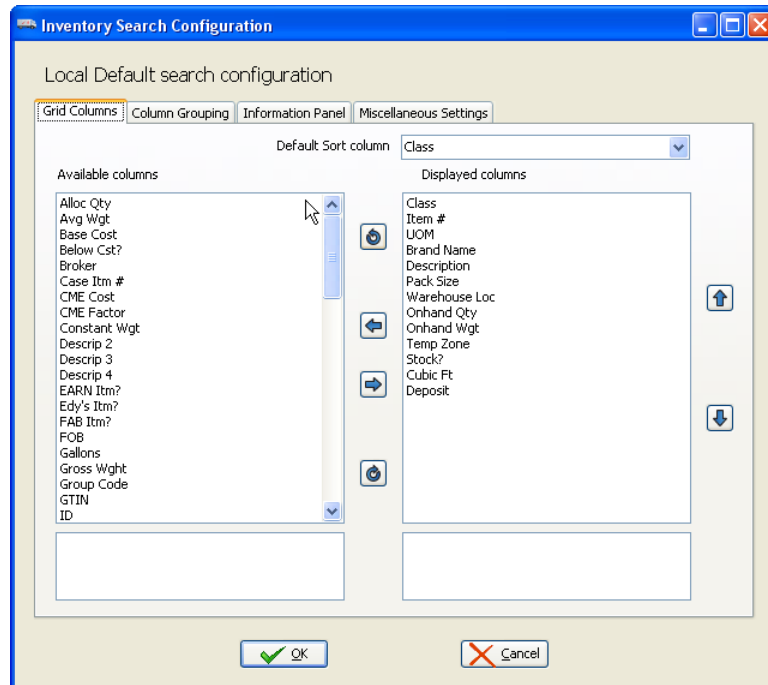


**Note** Find a detailed explanation of the **Available / Displayed Columns** feature in the [Search Configuration Overview](#) section of this chapter.

- **Default Sort Column**

Once the columns to be displayed are added to the **Displayed Columns** area use this drop down menu to select your default sort column.

Click **OK** to save your selections.



**Example** Typically Class, as seen in the image below, or Item # are used as the default sort column for Inventory Search.

| Class      | Item # | UOM  | Brand Name | Description                 | Pack Size | Warehouse Loc |
|------------|--------|------|------------|-----------------------------|-----------|---------------|
| APPETIZERS | 30118  | CASE | CONTESSA   | BATTERED GREEN BEANS        | 4/3#      | FA1322B       |
| APPETIZERS | 30133  | CASE | ALEXIA     | ONION RINGS BEER BATTERED   | 6/2.5#    | FA1261B       |
| APPETIZERS | 30145  | CASE | ANCHOR     | BREADED FIESTA BOLD POPPERS | 2/4#      | FA1302A       |
| APPETIZERS | 30147  | CASE | ANCHOR     | BREADED MAC & CHEESE WEDGES | 6/3#      | FA1222B       |

### 1.2.2 Column Grouping Tab

The Column Grouping tab is used to configure a hierarchical data structure in the Inventory Search screen and will become the default behavior of the current search screen. In the column grouping example below Class is first followed by Item # then Onhand Qty. The top column in the Displayed fields list is the first level of the grouping hierarchy.

#### Customizing Column Grouping

- Move a column from the **Available Columns** list to the **Displayed Columns** list by selecting the column to move and clicking the  button.
- Organize the column order in the **Displayed Columns** list using the   arrows.



**Note** Find a detailed explanation of the **Available / Displayed Columns** feature in the [Search Configuration Overview](#) section of this chapter.

- Click **OK** to save your default selections.

**Inventory Search Configuration**

Personal Default search configuration

Grid Columns | **Column Grouping** | Information Panel | Miscellaneous Settings

Available fields

- Lot Itm?
- Lst Cost
- Lst Rcvd
- Lst Sale
- Market Cost
- Max Wght
- Mfg ID
- Mfg Item #
- Min Wght
- Min. Sell Prc
- Misc Code
- MTD Qty.
- On Order Qty
- Onhand Wgt**
- Order Pt
- Overflow
- Oversell?
- Pack Size

Displayed fields

- Class
- Item #
- Onhand Qty

Table Name: arinv01  
On-hand Weight

OK Cancel



**Example** Here we see the columns grouped in the Inventory Search screen according to our Column Grouping tab settings above, Class, Item # and Onhand Qty. In Inventory Search once you open the 3 grouping levels the rest of the columns are displayed as shown in the **Anti-Oxidants** example here.

**Inventory Search**

Match Contains

Class Item # Onhand Qty

| UOM             | Brand Name  | Description                    | Pack Size | Warehouse Loc | Onhand Wgt | Temp Zone | Stock? | Cubic Ft | Deposit |
|-----------------|-------------|--------------------------------|-----------|---------------|------------|-----------|--------|----------|---------|
| 1000 ISLAND DRE |             |                                |           |               |            |           |        |          |         |
|                 |             | Z214867                        |           |               | 0.000      |           |        |          |         |
| ALFREDO SAUCE   |             |                                |           |               |            |           |        |          |         |
|                 |             | Z48185                         |           |               | 0.000      |           |        |          |         |
| ALMONDS         |             |                                |           |               |            |           |        |          |         |
|                 |             | Z384211                        |           |               | 0.000      |           |        |          |         |
| ANTI-OXIDANTS   |             |                                |           |               |            |           |        |          |         |
|                 |             | Z168035                        |           |               | 0.000      |           |        |          |         |
| CASE            | SUGAR FOODS | PRESERV CRISP FRESH 50 COUNT 1 | 50/1 OZ   |               | 0.0000     | Dry       | No     | 0.21     | \$0.000 |
| APPETIZERS      |             |                                |           |               |            |           |        |          |         |
| APPETIZERS/HORS |             |                                |           |               |            |           |        |          |         |

1 of 1440

Order Breakdown Item Notes

1440 total recs

|            |                |              |               |
|------------|----------------|--------------|---------------|
| Prc Lev 1: | Min. Sell Prc: | Base Cost:   | On Order Qty: |
| Prc Lev 2: | Real Cost:     | Market Cost: | Pcs/Case:     |
| Prc Lev 3: | Landed Cost:   | Avg Wgt:     | UPC #:        |

OK Cancel


### 1.2.3 Information Panel Tab

The **Information Panel** feature is used to further customize your view of an item's information by adding more item information in the panel located in the lower section of the Inventory, Customer, Salesperson, Vendor, Invoice and Purchase Order search screens.

When you click an item in the Inventory search screen more item information can be displayed in the Information Panel below. Here you see the Information Panel display created by the Personal Default search configuration shown below.

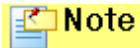
|                      |                         |                       |                       |                     |                     |                    |  |
|----------------------|-------------------------|-----------------------|-----------------------|---------------------|---------------------|--------------------|--|
| Lots                 |                         | Order Breakdown       |                       | Item Notes          |                     | 1440 total recs    |  |
| Prc Lev 1: \$11.8100 | Prc Lev 3: \$12.2000    | Real Cost: \$9.5500   | Base Cost: \$10.9825  | Avg Wgt: 0.00       | Pcs/Case: 0         | Onhand Qty: 28.000 |  |
| Prc Lev 2: \$11.9400 | Min. Sell Prc: \$0.0000 | Landed Cost: \$9.5500 | Market Cost: \$0.0000 | On Order Qty: 0.000 | UPC #: 076808536270 |                    |  |

#### Customizing the Information Panel

- Move a column from the **Available Columns** list to the **Displayed Columns** list by selecting the column to move and clicking the  button.

- Organize the column order in the **Displayed Columns** list using the   arrows.

- Click **OK** to save your selections.
- The **Preview** area below will show the Displayed fields as they will appear in the Information Panel.



**Note**  
Find detailed explanations of the **Available / Displayed Columns** feature in the [Search Configuration Overview](#) section of this chapter.

**Inventory Search Configuration**

Personal Default search configuration

Grid Columns | Column Grouping | **Information Panel** | Miscellaneous Settings

Available fields

- Lot Itm?
- Lst Cost
- Lst Rcvd
- Lst Sale
- Max Wght
- Mfg ID
- Mfg Item #
- Min Wght
- Misc Code
- MTD Qty.
- Onhand Wgt**
- Order Pt
- Overflow
- Oversell?
- Pack Size

Table Name: arinv01  
On-hand Weight

Displayed fields

- Prc Lev 1
- Prc Lev 2
- Prc Lev 3
- Min. Sell Prc
- Real Cost
- Landed Cost
- Base Cost
- Market Cost
- Avg Wgt
- On Order Qty
- Pcs/Case
- UPC #
- Onhand Qty

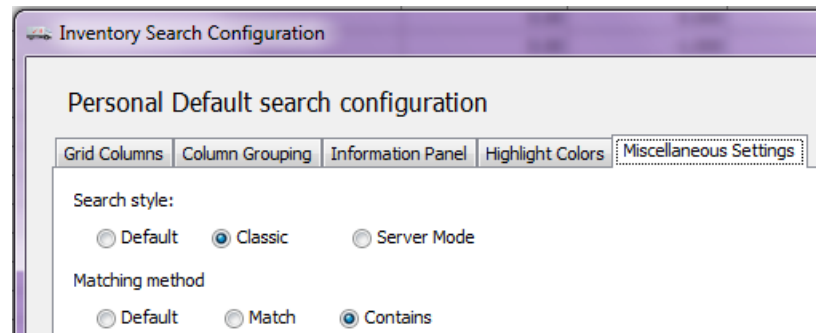
OK Cancel

|                |                   |               |                   |             |                  |
|----------------|-------------------|---------------|-------------------|-------------|------------------|
| Prc Lev 1:     | \$99,999,999.9999 | Landed Cost:  | \$99,999,999.9999 | Pcs/Case:   |                  |
| Prc Lev 2:     | \$99,999,999.9999 | Base Cost:    | \$99,999,999.9999 | UPC #:      | MMMMMMMMMMMMMMMM |
| Prc Lev 3:     | \$99,999,999.9999 | Market Cost:  | \$99,999,999.9999 | Onhand Qty: | 999,999,999.999  |
| Min. Sell Prc: | \$99,999,999.9999 | Avg Wgt:      | 9,999,999.999     |             |                  |
| Real Cost:     | \$99,999,999.9999 | On Order Qty: | 999,999,999.999   |             |                  |

## 1.2.4 Miscellaneous Settings Tab

The **Miscellaneous Settings** tab options will vary for each of the files; Inventory, Customer, Salesperson, Vendor, Manufacturer, Comment, Invoice, Lot Location and Purchase Order.

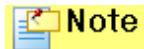
- All search configuration dialogs in the system will have **Search Style** and **Matching method** on the **Miscellaneous Settings** tab.



### Search Style

Select whichever search style works the best for your environment and make that the default for all of your searches. At NECS we have found that the "Classic" style can be faster than "Server Mode" and in other cases they are more or less the same speed in returning search results. Choose what works best in within your technology and networking environment.

- **Default:** The default search style is configured in the "**Search System Options**" utility found in System Options Additional Features. See the **Additional Features** section of the System Options chapter for more detailed information.
- **Classic:** To try and maximize performance in the search grid the "buffering" option is enabled. So it only physically loads a set number of records into the grid at any one time (currently set to 150 records). Column grouping is not supported in this search style. When you select it a message box will display warning you about this and ask if you would like to proceed.
- **Server Mode:** Collects all of the records in the database at once to load the search grid.




**Note** Having your Personal or Local Default configurations explicitly set to "Classic" Search Style overrides the default setting in System Preferences.

### Matching Method

- **Default** - The default matching method built into the entrée system for that screen.
- **Match:** By default the **entrée V4 SQL** search system will use **Match**. You can use the Up, Down, Home, End, Page Up and Page Down keys on your keyboard in the search screen once you run your initial search.
- **Contains:** Performs a partial match which is good if you only know a portion of the value you are looking for. The search screen will update immediately as you enter the search text, only showing items that contain the text you are typing.



**Hot Tip!** In each search configuration in the system you can override the **Search Style** or **Matching**

**method** setting on a "per search" basis using the  **Configure** button and changing the options on the Miscellaneous Settings Tab.

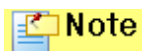
- At this time there are some files that only have the **Matching method** option in the Miscellaneous Settings Tab. These files are: Purchase Order, Manufacturer, Vendor, Salesperson, Invoice, Comment and Warehouse Location.

### Inventory Search Miscellaneous Settings

In addition to **Search Style** and **Matching method** you have the following options.

#### Buttons:

- **Show Lots button**
- **Show Order Breakdown button**
- **Show Item Notes button**



**Note** If you do not have Lots turned on in entrée the **Show Lots** button will not be displayed.

The dialog box shows the 'Miscellaneous Settings' tab for 'Personal Default search configuration'. It includes options for Search style (Default, Classic, Server Mode), Matching method (Default, Match, Contains), and checkboxes for showing various buttons and panels.

**Search style:**  
☐ Default ☒ Classic ☐ Server Mode

**Matching method:**  
☐ Default ☐ Match ☒ Contains

**Show buttons:**  
☒ Show "Lots" button  
☒ Show "Order Breakdown" button  
☒ Show "Item Notes" button

**Show image panel:**  
☒ Show image panel

**Show images:**  
☒ Show Item Image  
☒ Show Brand Image  
☒ Show Class Image

#### Images:

- **Show Image Panel** - Check to display the image panel to the left of the Information Panel at the bottom of the inventory search screen.

The screenshot shows the inventory search results interface. On the left, there is an image panel with three images: yellow tomatoes, a bunch of green herbs, and a single red tomato. To the right of the images are buttons for 'Lots', 'Order Breakdown', and 'Item Notes'. Further right is a table with pricing and cost information.

|            |           |                |           |              |           |               |       |
|------------|-----------|----------------|-----------|--------------|-----------|---------------|-------|
| Prc Lev 1: | \$21.8100 | Min. Sell Prc: | \$21.5000 | Base Cost:   | \$20.5000 | On Order Qty: | 0.000 |
| Prc Lev 2: | \$22.2800 | Real Cost:     | \$18.0000 | Market Cost: | \$0.0000  | Pcs/Case:     | 0     |
| Prc Lev 3: | \$22.7800 | Landed Cost:   | \$19.5000 | Avg Wgt:     | 0.00      | UPC #:        |       |

1440 total recs

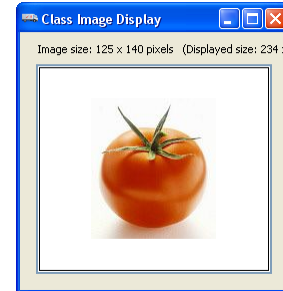
Once the Image Panel is enabled you can choose what images to display in the panel depending on the images you have in your entrée system.

- **Show Item Image** - Assigned to the item in Inventory File Maintenance.
- **Show Brand Image** - Added to entrée in Brand Maintenance and assigned to the item in Inventory File Maintenance.





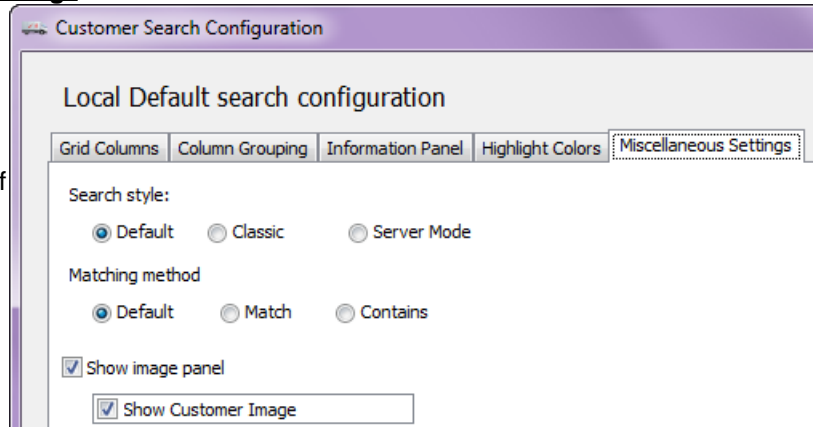
- **Show Class Image** - Added to entrée in Class Maintenance and assigned to the item in Inventory File Maintenance.



### Customer Search Miscellaneous Settings

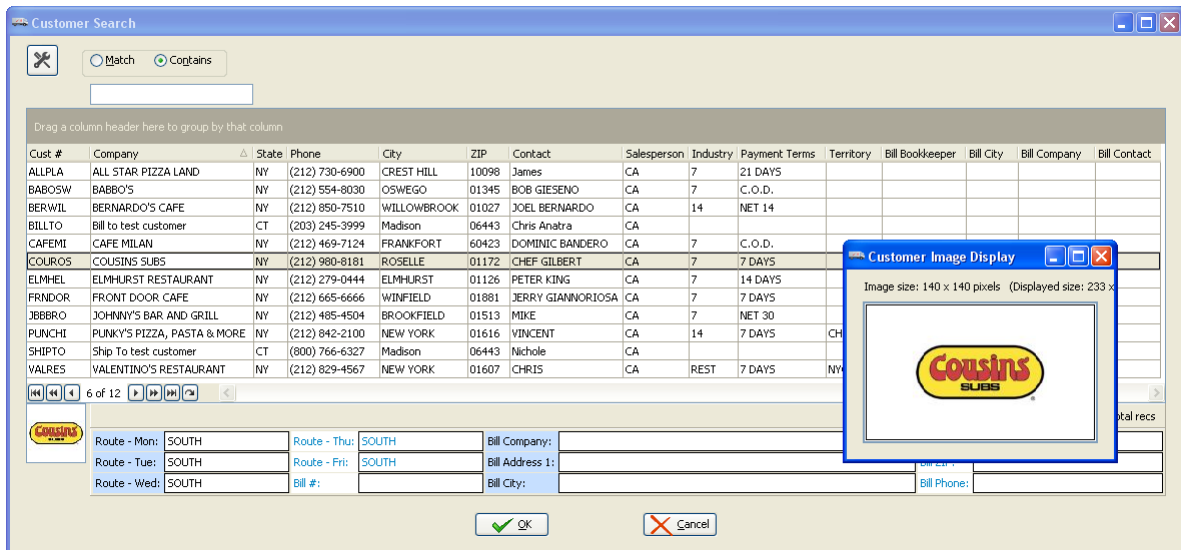
In addition to **Search Style** and **Matching method** you have the following options.

- **Show Image Panel** - Check to display the image panel to the left of the Information Panel at the bottom of the search screen.
- **Show Customer Image** - Assigned in entrée Customer File Maintenance.



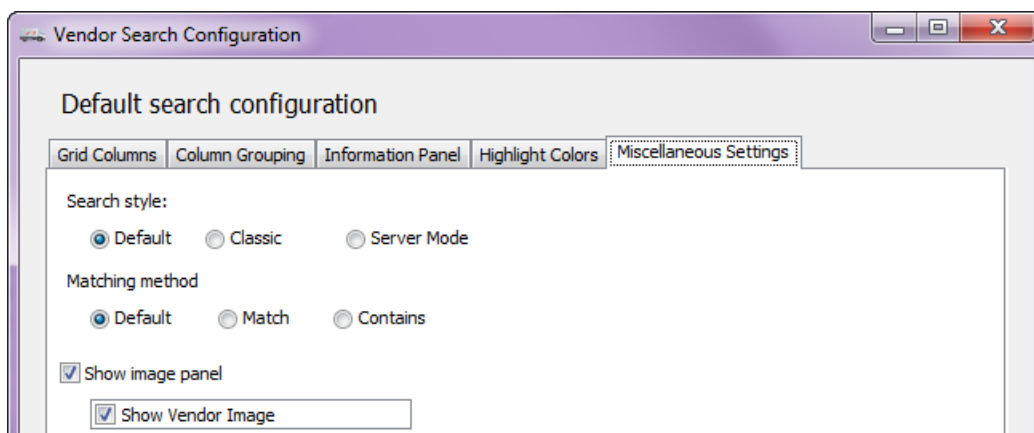
### Example

The Customer Search screen below shows the image panel in the lower left corner. When the customer's small image in the image panel is clicked a larger image is displayed in the Customer Image Display dialog box. Click the red X box to close the image display box.

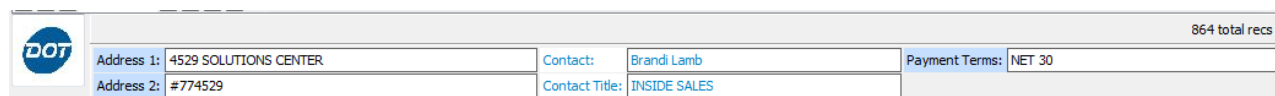


### Vendor Search Miscellaneous Settings

In addition to **Search Style** and **Matching method** you have the following options you have the new vendor image.



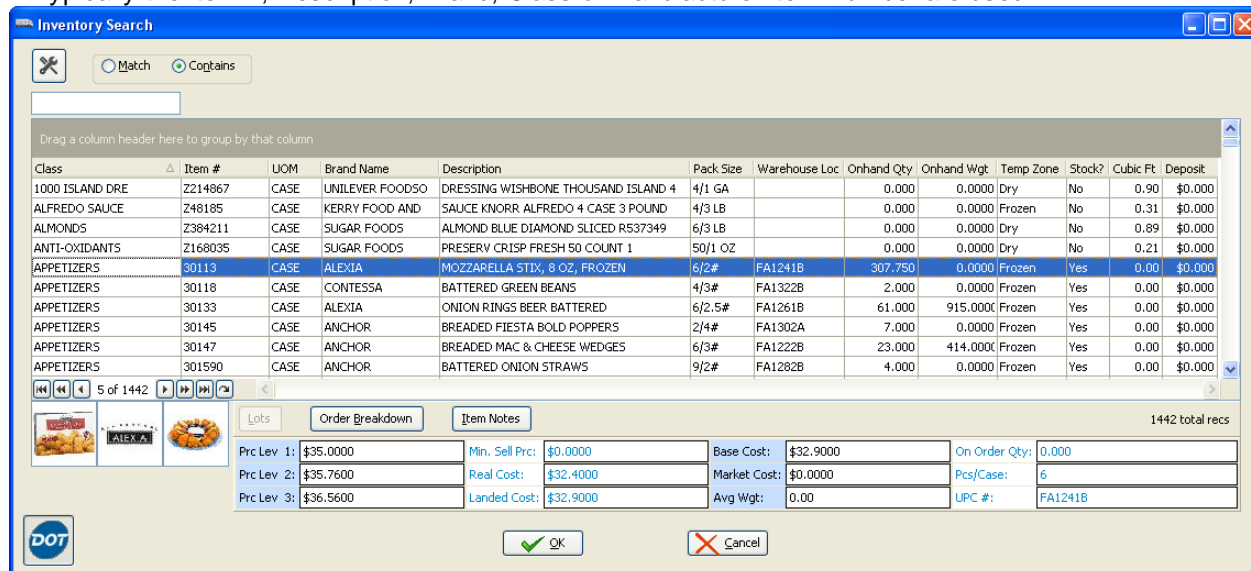
- **Show Image Panel** - Check to display the image panel to the left of the Vendor Panel at the bottom of the search screen (image below).
  - **Show Customer Image** - Assigned in entrée Vendor File Maintenance.



## 1.3 Inventory Search Screen

The **Inventory Search** screen will assist you in looking up any inventory item.

- Searches can be performed using any column in the search screen.
- Click the desired column and enter your search text in the white search text box that appears above the column.
- Typically the Item #, Description, Brand, Class or Manufacturer Item Number are used.



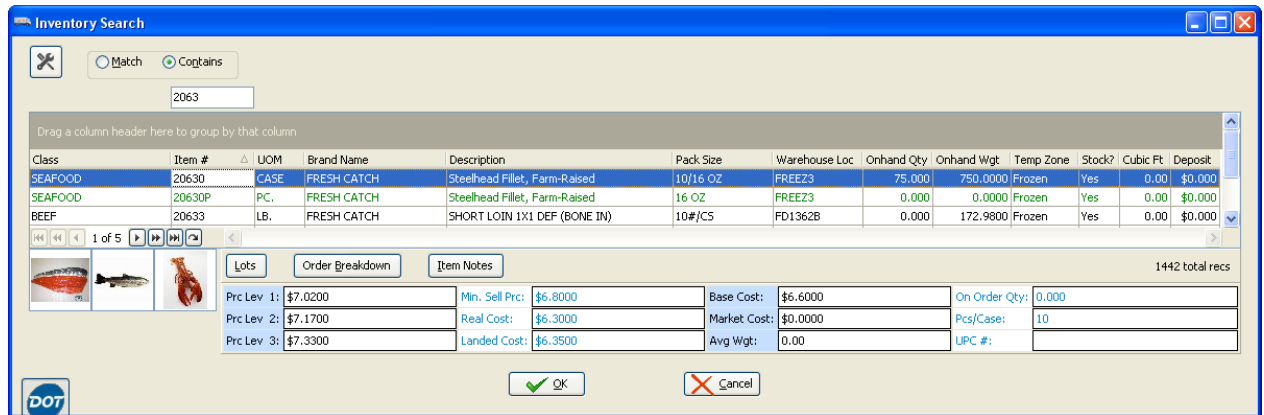
- When you click an item in the Inventory search screen more item information can be displayed in the Information Panel below if the configuration for the Information Panel tab has columns in the Displayed fields section in your search configuration.

## Inventory Search Buttons

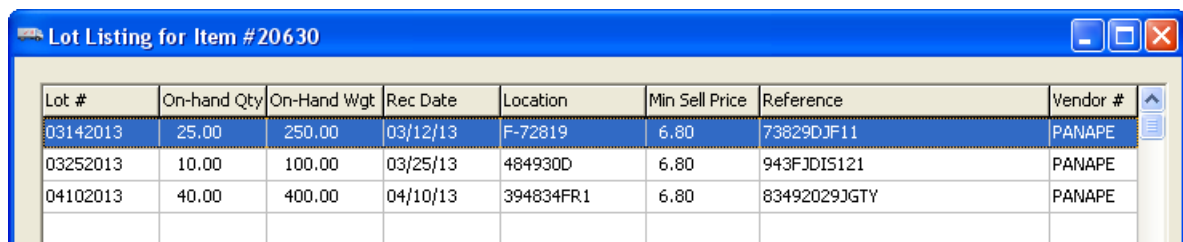


### Lots Button

- If the currently selected item is a Lot based item the **Lots** button will be enabled as seen in the image below.

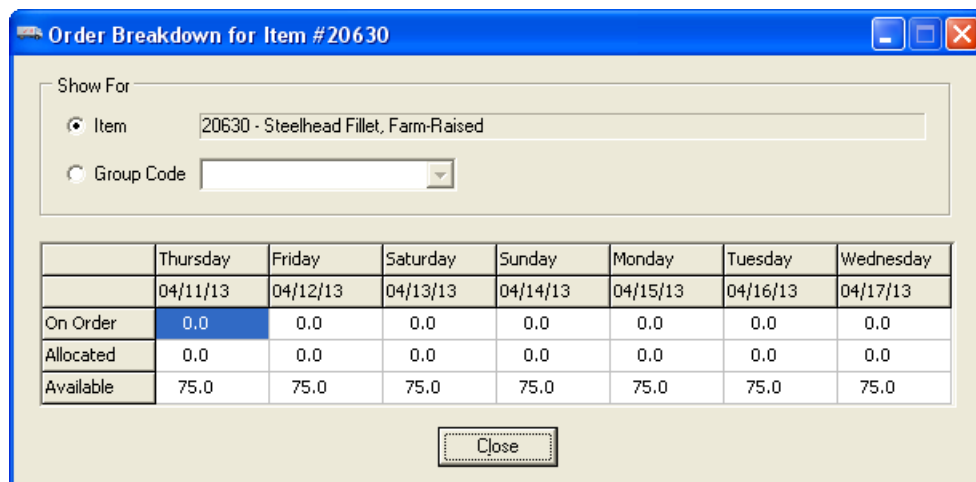


- Click the **Lots** button to view the **Lot Listing** details for the selected item.



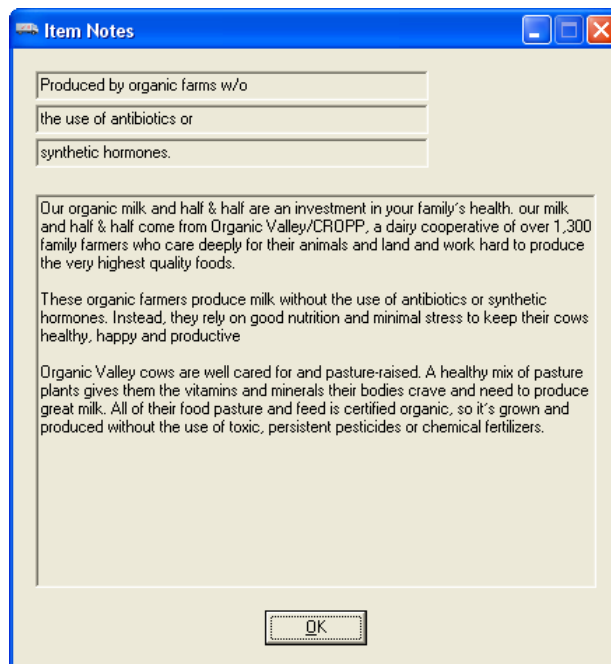
### Order Breakdown Button

- Click the **Order Breakdown** button for the selected item to see the next seven days of orders. Here you see the information for a Lot Item.

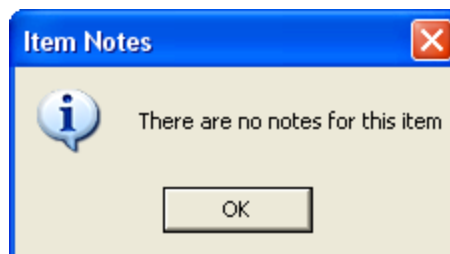


### Item Notes Button

- Click the **Item Notes** button to view any notes on the item.



- If no there are no **Item Notes** this message box will display.



- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.

### 1.3.1 DOT Foods Inventory

The [entrée.DOT](#) software add-on module is designed for NECS **entrée** users who purchase from [Dot Foods](#). It allows **entrée** users to automate procedures related to costs, pricing, purchasing and receiving, along with the ability to make your entire order guide from Dot Foods available to your customers.

Items purchased from Dot Foods can be integrated into the NECS **entrée** system providing you the ability to drastically increase the number of products you can supply to your customers – without having to increase the size of your warehouse.



#### Note

If your company does not have the [entrée.DOT](#) software module you will not see this feature.

**entrée V4 SQL** gives you the ability to control whether items from the **DOT Foods** catalog are visible or hidden in the Inventory Search screen.

The **DOT** icon in the lower left corner of the Inventory Search screen is the switch used to hide or show items from the **DOT Foods** catalog.



When the DOT icon is gray DOT Foods catalog items are hidden.

Click the gray DOT icon to load your DOT Foods Catalog items into the Inventory Search screen.




When the DOT icon is the color blue your DOT Foods catalog items are loaded and visible.

Click the blue DOT icon to hide the DOT Foods Catalog items again.

- In the Inventory Search screen DOT Foods item numbers usually begin with the letter 'Z' as seen in the example below.

Drag a column header here to group by that column

| Item Image  | Brand Name      | Item #  | UOM  | Description                         | Pack Size | Warehouse Loc | Temp Zone    | Onhand Qty | Onhand Wgt | Stock? | Cubic Ft | Case Itm # | Pc Itm # |
|---|-----------------|---------|------|-------------------------------------|-----------|---------------|--------------|------------|------------|--------|----------|------------|----------|
|  | ACADEMIA BARILL | 53627   | EACH | 100% ITALIAN EXTRA VIRGIN OLIVE OIL | 17 OZ     | D450A         | Dry          | 28.000     | 0.0000     | Yes    | 0.00     |            |          |
|   | COMMODITY BEEF  | Z545949 | CASE | 120 BEEF BRISKET CHOICE 5 CASE 11   | 5/11 LB   |               | Refrigerated | 0.000      | 0.0000     | No     | 2.40     |            |          |
|   | COMMODITY BEEF  | Z545957 | CASE | 180 BEEF STRIPLOIN BONELESS CHOICE  | 6/11 LB   |               | Refrigerated | 0.000      | 0.0000     | No     | 1.95     |            |          |
|   | COMMODITY BEEF  | Z545101 | CASE | 185C BEEF TRIANGULAR TIP 4 CASE 18  | 4/18 LB   |               | Refrigerated | 0.000      | 0.0000     | No     | 1.95     |            |          |

### Manufacturer's Item Number and DOT Foods

#### Why would you need the manufacturer's item number?

If you purchase from Dot Foods or would like to in the future this field will be used for those items. Also using the manufacturer and their item numbers on your **entrée** inventory items can assist you in the event of product recalls. Over 65 reports in **entrée** can print, group by and sort by Manufacturer ID, Manufacturer Name and Manufacturer Item Number as well as filter by Manufacturer ID.

**How to add manufacturer's item numbers:** Use Manufacturer File Maintenance to add manufacturers to the **entrée** system. Then add the manufacturer's item numbers to each item using the Vendor tab in Inventory File Maintenance.

## 1.4 Customer Search Screen

The **Customer Search** screen will assist you in looking up any customer in entrée.

- entrée will allow users to perform searches against any of the columns in the grid including customer number, company, bill to #, city, zip, and phone number.

**Customer Search**

Match Contains

Drag a column header here to group by that column

| Cust # | Company                     | City        | State | Phone          | ZIP   | Contact           | Salesperson | Industry | Payment Terms | Territory | Bill Bookkeeper | Bill City | Bill Company | Bill Contact |
|--------|-----------------------------|-------------|-------|----------------|-------|-------------------|-------------|----------|---------------|-----------|-----------------|-----------|--------------|--------------|
| ALLPLA | ALL STAR PIZZA LAND         | CREST HILL  | NY    | (212) 730-6900 | 10098 | James             | CA          | 7        | 21 DAYS       |           |                 |           |              |              |
| BABOSW | BABBO'S                     | OSWEGO      | NY    | (212) 554-8030 | 01345 | BOB GIESENO       | CA          | 7        | C.O.D.        |           |                 |           |              |              |
| BERWIL | BERNARDO'S CAFE             | WILLOWBROOK | NY    | (212) 850-7510 | 01027 | JOEL BERNARDO     | CA          | 14       | NET 14        |           |                 |           |              |              |
| BILLTO | Bill to test customer       | Madison     | CT    | (203) 245-3999 | 06443 | Chris Anatra      | CA          |          |               |           |                 |           |              |              |
| CAFEMI | CAFE MILAN                  | FRANKFORT   | NY    | (212) 469-7124 | 60423 | DOMINIC BANDERO   | CA          | 7        | C.O.D.        |           |                 |           |              |              |
| COUROS | COUSINS SUBS                | ROSELLE     | NY    | (212) 980-8181 | 01172 | CHEF GILBERT      | CA          | 7        | 7 DAYS        |           |                 |           |              |              |
| ELMHIL | ELMHURST RESTAURANT         | ELMHURST    | NY    | (212) 279-0444 | 01126 | PETER KING        | CA          | 7        | 14 DAYS       |           |                 |           |              |              |
| FRNDOR | FRONT DOOR CAFE             | WINFIELD    | NY    | (212) 665-6666 | 01881 | JERRY GIANVORIOSA | CA          | 7        | 7 DAYS        |           |                 |           |              |              |
| JBBBRO | JOHNNY'S BAR AND GRILL      | BROOKFIELD  | NY    | (212) 485-4504 | 01513 | MIKE              | CA          | 7        | NET 30        |           |                 |           |              |              |
| PUNCHI | PUNKY'S PIZZA, PASTA & MORE | NEW YORK    | NY    | (212) 842-2100 | 01616 | VINCENT           | CA          | 14       | 7 DAYS        | CHI       |                 |           |              |              |
| SHIPTO | Ship To test customer       | Madison     | CT    | (800) 766-6327 | 06443 | Nichole           | CA          |          |               |           |                 |           |              |              |
| VALRES | VALENTINO'S RESTAURANT      | NEW YORK    | NY    | (212) 829-4567 | 01607 | CHRIS             | CA          | REST     | 7 DAYS        | NYC       |                 |           |              |              |

1 of 12 12 total recs

Route - Mon: NORTH Route - Thu: SOUTH Bill Company: Bill State: Bill ZIP: Bill Phone: Bill Address 1: Bill City: Bill #:

OK Cancel

- When the search configuration **Miscellaneous Settings Show Customer Image** option is enabled any customer image assigned in entrée Customer File Maintenance will be displayed in the **Image Panel**. Click the customer's small image and a larger image is displayed in the Customer Image Display box as shown below.

**Customer Search**

Match Contains

Drag a column header here to group by that column

| Cust # | Company                     | State | Phone          | City        | ZIP   | Contact           | Salesperson | Industry | Payment Terms | Territory | Bill Bookkeeper | Bill City | Bill Company | Bill Contact |
|--------|-----------------------------|-------|----------------|-------------|-------|-------------------|-------------|----------|---------------|-----------|-----------------|-----------|--------------|--------------|
| ALLPLA | ALL STAR PIZZA LAND         | NY    | (212) 730-6900 | CREST HILL  | 10098 | James             | CA          | 7        | 21 DAYS       |           |                 |           |              |              |
| BABOSW | BABBO'S                     | NY    | (212) 554-8030 | OSWEGO      | 01345 | BOB GIESENO       | CA          | 7        | C.O.D.        |           |                 |           |              |              |
| BERWIL | BERNARDO'S CAFE             | NY    | (212) 850-7510 | WILLOWBROOK | 01027 | JOEL BERNARDO     | CA          | 14       | NET 14        |           |                 |           |              |              |
| BILLTO | Bill to test customer       | CT    | (203) 245-3999 | Madison     | 06443 | Chris Anatra      | CA          |          |               |           |                 |           |              |              |
| CAFEMI | CAFE MILAN                  | NY    | (212) 469-7124 | FRANKFORT   | 60423 | DOMINIC BANDERO   | CA          | 7        | C.O.D.        |           |                 |           |              |              |
| COUROS | COUSINS SUBS                | NY    | (212) 980-8181 | ROSELLE     | 01172 | CHEF GILBERT      | CA          | 7        | 7 DAYS        |           |                 |           |              |              |
| ELMHIL | ELMHURST RESTAURANT         | NY    | (212) 279-0444 | ELMHURST    | 01126 | PETER KING        | CA          | 7        | 14 DAYS       |           |                 |           |              |              |
| FRNDOR | FRONT DOOR CAFE             | NY    | (212) 665-6666 | WINFIELD    | 01881 | JERRY GIANVORIOSA | CA          | 7        | 7 DAYS        |           |                 |           |              |              |
| JBBBRO | JOHNNY'S BAR AND GRILL      | NY    | (212) 485-4504 | BROOKFIELD  | 01513 | MIKE              | CA          | 7        | NET 30        |           |                 |           |              |              |
| PUNCHI | PUNKY'S PIZZA, PASTA & MORE | NY    | (212) 842-2100 | NEW YORK    | 01616 | VINCENT           | CA          | 14       | 7 DAYS        | CHI       |                 |           |              |              |
| SHIPTO | Ship To test customer       | CT    | (800) 766-6327 | Madison     | 06443 | Nichole           | CA          |          |               |           |                 |           |              |              |
| VALRES | VALENTINO'S RESTAURANT      | NY    | (212) 829-4567 | NEW YORK    | 01607 | CHRIS             | CA          | REST     | 7 DAYS        | NYC       |                 |           |              |              |

6 of 12 12 total recs

Route - Mon: SOUTH Route - Thu: SOUTH Bill Company: Bill State: Bill ZIP: Bill Phone: Bill Address 1: Bill City: Bill #:

OK Cancel

**Customer Image Display**

Image size: 140 x 140 pixels (Displayed size: 233 x 233 pixels)

Cousins SUBS



**Example** This is an example of customers grouped by City in the Customer Search when the column header was dragged to the group by area.

Customer Search

Match Contains

City

| Cust #        | Company                     | State | Phone          | ZIP   | Contact | Salesperson | Industry | Payment Terms | Territory | Bill Bookkeep | Bill City | Bill Company | Bill Contact |
|---------------|-----------------------------|-------|----------------|-------|---------|-------------|----------|---------------|-----------|---------------|-----------|--------------|--------------|
| + BROOKFIELD  |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| + CREST HILL  |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| + ELMHURST    |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| + FRANKFORT   |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| + Madison     |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| + NEW YORK    |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| PUNCHI        | PUNKY'S PIZZA, PASTA & MORE | NY    | (212) 842-2100 | 01616 | VINCENT | CA          | 14       | 7 DAYS        | CHI       |               |           |              |              |
| VALRES        | VALENTINO'S RESTAURANT      | NY    | (212) 829-4567 | 01607 | CHRIS   | CA          | REST     | 7 DAYS        | NYC       |               |           |              |              |
| + OSWEGO      |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| + ROSELLE     |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| + WILLOWBROOK |                             |       |                |       |         |             |          |               |           |               |           |              |              |
| + WINFIELD    |                             |       |                |       |         |             |          |               |           |               |           |              |              |

8 of 12

12 total recs

|              |       |              |      |                 |  |             |  |
|--------------|-------|--------------|------|-----------------|--|-------------|--|
| Route - Mon: | MAIN  | Route - Thu: | EAST | Bill Company:   |  | Bill State: |  |
| Route - Tue: | NORTH | Route - Fri: | WEST | Bill Address 1: |  | Bill ZIP:   |  |
| Route - Wed: | SOUTH | Bill #:      |      | Bill City:      |  | Bill Phone: |  |

OK Cancel

- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.

## 1.5 Salesperson Search Screen

The **Salesperson Search** screen will assist you in looking up any Salesperson or Broker.

- entrée will allow users to perform searches against the salesperson's number or the salesperson's name.

Salesperson Search

Match Contains

an

Drag a column header here to group by that column

| #  | Salesperson Name |
|----|------------------|
| CA | Chris Anatra     |

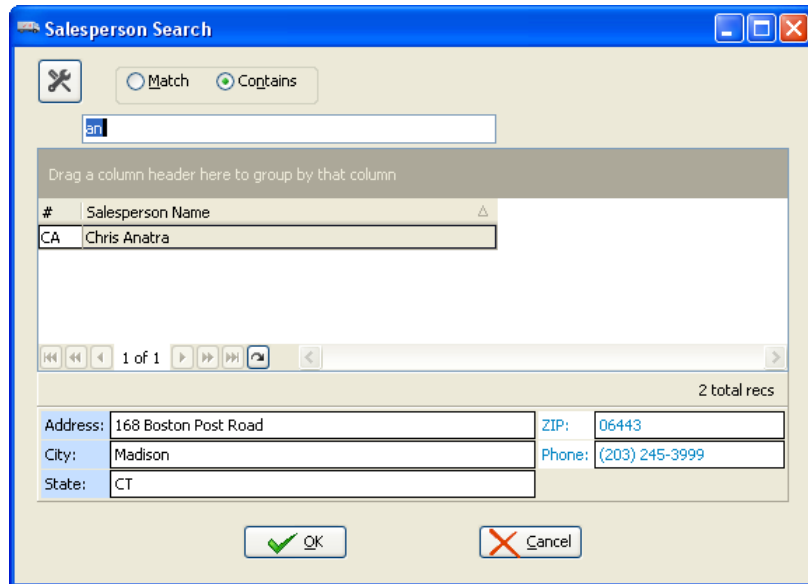
1 of 1

2 total recs

OK Cancel



**Example** This is an example of a search using the **Salesperson Name** field using the letters 'an' with the Information Panel displayed.



The image shows a 'Salesperson Search' dialog box. At the top, there are radio buttons for 'Match' and 'Contains', with 'Contains' selected. Below this is a search input field containing the text 'an'. A message 'Drag a column header here to group by that column' is displayed above a table. The table has two columns: '#' and 'Salesperson Name'. The first row contains 'CA' and 'Chris Anatra'. Below the table is a pagination bar showing '1 of 1' and navigation icons. To the right of the pagination bar, it says '2 total recs'. At the bottom, there are fields for 'Address' (168 Boston Post Road), 'City' (Madison), 'State' (CT), 'ZIP' (06443), and 'Phone' ((203) 245-3999). At the very bottom are 'OK' and 'Cancel' buttons.

| #  | Salesperson Name |
|----|------------------|
| CA | Chris Anatra     |

1 of 1

2 total recs

Address: 168 Boston Post Road ZIP: 06443

City: Madison Phone: (203) 245-3999

State: CT

OK Cancel

- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.



## 1.6 Vendor Search Screen

The Vendor Search screen will assist you in looking up any vendors that have been added to the system using Vendor File maintenance.

- Searches can be performed using any column in the search screen grid.



**Example** This is an example of a search using the Company field using the letters 'do' with the Information Panel displayed below.

The screenshot shows the 'Vendor Search' window. At the top, there are radio buttons for 'Match' (selected) and 'Contains'. Below them is a search text box containing 'do'. A message 'Drag a column header here to group by that column' is displayed above a table. The table has columns: Vend #, Company, City, State, Phone, and a small 'T' column. The table lists several vendors, with 'DOT' and 'DOT FOODS' highlighted in blue. Below the table is a pagination bar showing '5 of 7' records. At the bottom, there is an 'Information Panel' with fields for Address 1, Address 2, Contact, Contact Title, and Payment Terms. The 'DOT' logo is visible on the left side of the panel. At the bottom right, there are buttons for 'OK', 'Cancel', and 'Refresh'.

| Vend # | Company                           | City          | State | Phone        | T |
|--------|-----------------------------------|---------------|-------|--------------|---|
| DORAL  | DORAL PACKAGING                   | BELLEFONTAINE | OH    | / -          |   |
| DAWSON | DOROTHY DAWSON FOOD PRODUCTS, INC | JACKSON       | MI    | 800/552-9226 | 8 |
| DOSS   | DOSS BUSINESS SYSTEMS             | GREENVILLE    | OH    | 937/548-9009 |   |
| DOTBEE | DOT BOXED BEEF                    | CHICAGO       | IL    | / -          |   |
| DOT    | DOT FOODS                         | CHICAGO       | IL    | 765/312-0100 | 8 |
| DOWN   | DOWN'S CONCESSIONS                | RUSSELLS PT   | OH    | / -          |   |

864 total recs

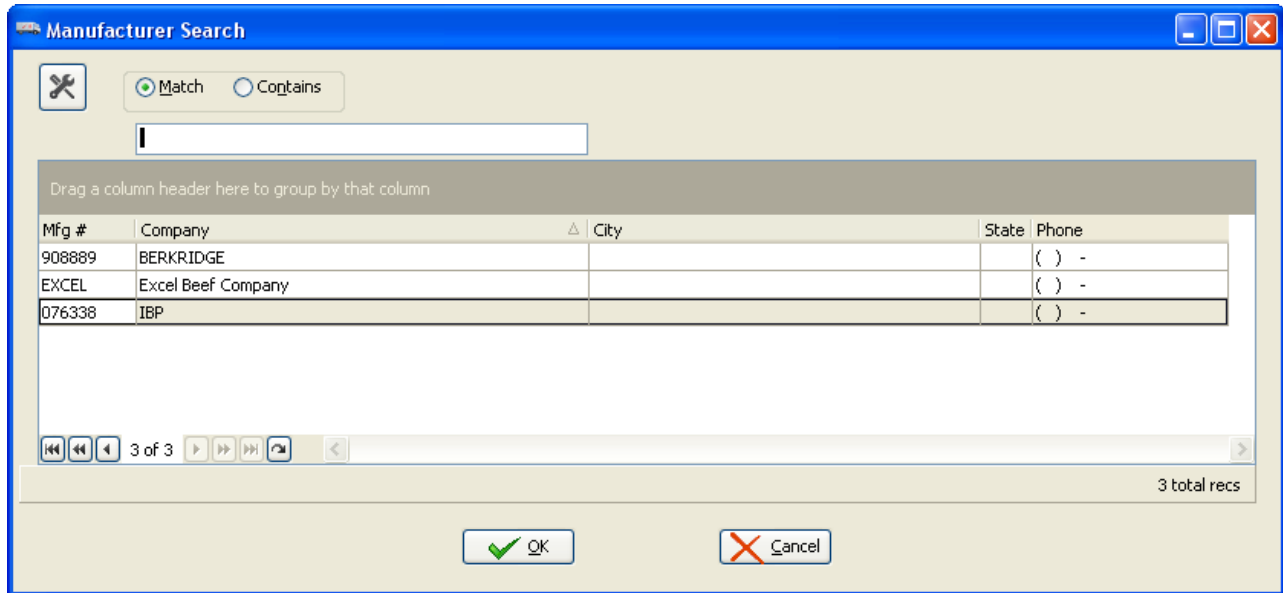
Address 1: 4529 SOLUTIONS CENTER  
 Address 2: #774529  
 Contact: Brandi Lamb  
 Contact Title: INSIDE SALES  
 Payment Terms: NET 30

- Click the desired column and enter your search text in the white search text box that appears above the selected column.
- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.

## 1.7 Manufacturer Search Screen

The Manufacturer Search screen will assist you in looking up any vendors that have been added to the system using Manufacturer File maintenance.

- Searches can be performed using any column in the search screen.
- Click the desired column and enter your search text in the white search text box that appears above the column.



The screenshot shows the 'Manufacturer Search' window. At the top, there's a search icon and two radio buttons: 'Match' (selected) and 'Contains'. Below them is a search text box containing the letter 'I'. A message 'Drag a column header here to group by that column' is displayed above a table. The table has five columns: 'Mfg #', 'Company', 'City', 'State', and 'Phone'. It contains three rows of data. At the bottom, there are navigation buttons (first, previous, next, last, refresh) and a status bar showing '3 of 3' and '3 total recs'. 'OK' and 'Cancel' buttons are at the bottom right.

| Mfg #  | Company            | City | State | Phone |
|--------|--------------------|------|-------|-------|
| 908889 | BERKRIDGE          |      |       | ( ) - |
| EXCEL  | Excel Beef Company |      |       | ( ) - |
| 076338 | IBP                |      |       | ( ) - |

- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.

## 1.8 Comment Search Screen

The Comment Search screen will assist you in looking up any **Comment ID**.

- entrée will list each line of text in the comment on the Comment Search screen.
- When selecting a comment be sure to select the first line of the desired comment.
- The Comment Search screen displays the comment ID and the Comment Text. In the image here the search text box is over the Comment Text field where you can enter text or words to search for in the Comment Text field. In this example we searched for 'time' in the Comment Text with the results you see below.

The screenshot shows the 'Comment Search' window with the search criteria set to 'Contains' and the search text 'time'. The results are grouped by ID. The first group, QUIT003, contains the text 'ARE TO □'. The second group, QUIT036, also contains 'ARE TO □'. The third group, QUIT046, contains 'AT TIME OF DELIVERY!'. This pattern continues for several other IDs (QUIT012, QUIT007, QUIT006, QUIT019, QUIT013, QUIT022, QUIT032, QUIT049, QUIT023, QUIT025, QUIT045) all with the text 'AT TIME OF DELIVERY!'. Other IDs like CON010, QUIT018, SPACCA, HAR002, EUROFR, CITY04, CITY07, SUP010, and MEI001 have different comment texts. The status bar at the bottom indicates '1333 total recs'.



**Example** This is an example of comment grouped by ID in the Comment Search when the column header was dragged to the group by area.

This screenshot shows the 'Comment Search' window with the search criteria set to 'Match'. The results are grouped by ID. The first group, AGOSTA, contains the text '\*\*\*\*\* KEY STOP \*\*\*\*\*'. The second group, ALBCIC, contains the text '\*\*AFTER 1:00 DELIVERY\*\*'. The third group, ALBOBS, contains the text '\*\*\*\*\* MUST BE COD CASH ONLY\*\*\*\*\*'. The fourth group, ALDLAG, contains the text '\*\* CANNOT DELIVER BETWEEN 1:00 pm & 4:00 pm'. The fifth group, ALFRED, contains the text 'COD CASH ONLY'. The sixth group, ALS004, contains the text '\*ATTN. DRIVER NO DELIVERS BETWEEN 10:30 AM'. The seventh group, ALS006, contains the text '\*ATTN. DRIVER NO DELIVERS BETWEEN 10:30 AM'. The eighth group, ALS007, contains the text '\*ATTN. DRIVER NO DELIVERS BETWEEN 10:30 AM'. The ninth group, ALS008, contains the text '\*ATTN. DRIVER NO DELIVERS BETWEEN 10:30 AM'. The tenth group, ALS009, contains the text '\*ATTN. DRIVER NO DELIVERS BETWEEN 10:30 AM'. The status bar at the bottom indicates '2 of 1333' and '1333 total recs'.

- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.

## 1.9 Invoice Search Screen

The Invoice Search screen will assist users in looking up any invoice number. The addition of "Current" or "History" file selection along with the Match / Contains feature allows you to perform a more focused search especially when looking for an older invoice that may be in the History file.

entrée will allow users to perform searches against any column including the invoice number, customer number, invoice date, order number, ship to company, and the bill to company.

- Invoices that have been moved to the history files by the Close Period Utility may also be searched for here.

The screenshot shows the 'Invoice Search' window. At the top, there are radio buttons for 'Match', 'Contains', 'Current', and 'History'. The 'Current' button is selected and highlighted with a red box. Below this is a search bar. The main area displays a list of invoices with columns: Inv. #, Rev, Ordertaker, Bill-To #, Bill-to Company, Ship-to #, and Ship-to Company. The list is filtered by 'Inv Date' with a dropdown menu. The first two groups of invoices are for dates 05/15/14 and 04/10/14. The third group, for 04/09/14, is expanded, showing three invoices. The second invoice in this group, 521384, is selected and highlighted in blue. Below the list, there are navigation buttons and a status bar indicating '2 of 6748' records and '6748 total recs'. At the bottom, there is a detailed view of the selected invoice, showing fields for Ship-to #, Ship-to Company, Ship-To Addr 1, Ship-To Addr 2, Ship-To City/St/ZIP, Salesperson #, Salesperson Name, Ord Date, Date Entered, Print Flag, # print, Load Sheet prt?, Fuel Charge, Total PCS, and Total Weight.

| Inv. #   | Rev | Ordertaker | Bill-To #   | Bill-to Company       | Ship-to #   | Ship-to Company       |
|----------|-----|------------|-------------|-----------------------|-------------|-----------------------|
| 05/15/14 |     |            |             |                       |             |                       |
| 521386   | B   | SA         | EST 106     | ESTHER'S FAMILY DINER | EST 106     | ESTHER'S FAMILY DINER |
| 04/10/14 |     |            |             |                       |             |                       |
| 521384   | SA  | BRI190     | BRIAR PATCH | BRI190                | BRIAR PATCH | BRIAR PATCH           |
| 521385   | A   | SA         | MAD 101     | MADISON FUN FOODS     | MAD 101     | MADISON FUN FOODS     |
| 04/09/14 |     |            |             |                       |             |                       |

|                      |                       |                  |          |
|----------------------|-----------------------|------------------|----------|
| Ship-to #:           | BRI190                | Date Entered:    | 04/09/14 |
| Ship-to Company:     | BRIAR PATCH           | Print Flag:      | N        |
| Ship-To Addr 1:      | 190 WASHINGTON STREET | # print:         | 0        |
| Ship-To Addr 2:      |                       | Load Sheet prt?: | 0        |
| Ship-To City/St/ZIP: | PENNVILLE, IN 47369   | Fuel Charge:     | \$0.00   |
| Salesperson #:       | 55                    | Total PCS:       |          |
| Salesperson Name:    | FRANK CHERRISTONE     | Total Weight:    | 36.00    |
| Ord Date:            | 04/09/14              |                  |          |

- When a date field is selected the calendar is displayed to allow you to search by date.

This screenshot shows the 'Invoice Search' window with a calendar overlay. The 'Current' radio button is selected. A date field is active, and a calendar for July 2014 is displayed. The calendar shows days of the week (S M T W T F S) and dates. The date 31 is highlighted. Below the calendar, the list of invoices is visible, showing columns for Inv. #, Inv Dat, Rev, Bill-to Company, Ship-to #, and Ship-to Company. The first three invoices are for dates 07/03/14.

| Inv. # | Inv Dat  | Rev | Bill-to Company       | Ship-to # | Ship-to Company       |
|--------|----------|-----|-----------------------|-----------|-----------------------|
| 521386 | 07/03/14 | D   | ESTHER'S FAMILY DINER | EST 106   | ESTHER'S FAMILY DINER |
| 521384 | 07/03/14 | A   | BRIAR PATCH           | BRI190    | BRIAR PATCH           |
| 521381 | 07/03/14 | B   | BEPPONO               | BEP 101   | BEPPONO               |



### Example

This is an example of invoices grouped by **Bill-to Company** in the Invoice Search when the column header was dragged to the group by area.

The screenshot shows the 'Invoice Search' window with the 'Match' radio button selected. The 'Group By' dropdown is set to 'Bill-to Company'. The list of invoices is grouped by company name, with expand/collapse icons on the left. The 'Inv. #', 'Inv Date', 'Bill-To #', and 'Inv. Total' columns are visible. The status bar shows '225 of 321' records. At the bottom, there are input fields for 'Ship-to Company:', 'Ship-To Addr 1:', 'Ship-To Addr 2:', and 'Ship-To City/St/ZIP:', along with 'OK' and 'Cancel' buttons.

| Inv. # | Inv Date                    | Bill-To # | Inv. Total |
|--------|-----------------------------|-----------|------------|
| +      | ALL STAR PIZZA              |           |            |
| +      | ALL STAR PIZZA LAND         |           |            |
| +      | BABBO'S                     |           |            |
| +      | BERNARD'S CAFE              |           |            |
| +      | BERNARD'S CAFE              |           |            |
| +      | Bill to test customer       |           |            |
| +      | CAFE MILAN                  |           |            |
| +      | COUSINS RESTURANT           |           |            |
| +      | COUSINS RESTURANT*          |           |            |
| +      | ELMHURST RESTAURANT         |           |            |
| +      | FRONT DOOR CAFE             |           |            |
| +      | JOHNNY B'S BAR AND GRILL    |           |            |
| +      | JOHNNY'S BAR AND GRILL      |           |            |
| +      | PUNKY'S PIZZA & PASTA       |           |            |
| +      | PUNKY'S PIZZA, PASTA & MORE |           |            |
| +      | Ship To test customer       |           |            |
| +      | VALENTINO'S RESTAURANT      |           |            |
| +      | VIAGGIO RESTAURANT          |           |            |



### Example

This is an example of invoices grouped by **Inv Date** in the Invoice Search when the column header was dragged to the group by area.

The screenshot shows the 'Invoice Search' window with the 'Match' radio button selected. The 'Group By' dropdown is set to 'Inv Date'. The list of invoices is grouped by date, with expand/collapse icons on the left. The 'Inv. #', 'Bill-to Company', 'Bill-To #', and 'Inv. Total' columns are visible. The status bar shows '106 of 321' records. At the bottom, there are input fields for 'Ship-to Company:', 'Ship-To Addr 1:', 'Ship-To Addr 2:', and 'Ship-To City/St/ZIP:', along with 'OK' and 'Cancel' buttons.

| Inv. # | Bill-to Company            | Bill-To # | Inv. Total |
|--------|----------------------------|-----------|------------|
| +      | 2012-11-22                 |           |            |
| +      | 2012-12-17                 |           |            |
| +      | 2012-12-18                 |           |            |
| +      | 2012-12-19                 |           |            |
| +      | 2012-12-20                 |           |            |
| +      | 2012-12-21                 |           |            |
| +      | 2012-12-26                 |           |            |
| +      | 2013-01-01                 |           |            |
| +      | 2013-01-02                 |           |            |
| +      | 2013-01-03                 |           |            |
| +      | 2013-01-04                 |           |            |
| +      | 231311 ALL STAR PIZZA LAND | ALLPLA    | \$5.00     |
| +      | 231312 ALL STAR PIZZA LAND | ALLPLA    | \$1,487.58 |
| +      | 231313 COUSINS RESTURANT   | COURO5    | \$86.35    |

- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.

## 1.10 Warehouse Location Search screen

The **Warehouse Location Search** screen is accessed in the File menu and will assist users in looking up any Lot's location ID.

- The Warehouse Location search screen can display these fields for lots: Location, Reference, Description of the location, and the designated Item # for that location.

The screenshot shows the 'Warehouse Location Search' window. It has a search bar at the top, a 'Match' radio button selected, and a 'Contains' radio button. Below the search bar is a table with two columns: 'Location' and 'Reference'. The table contains two rows: '125' and '32536' in the first row, and 'SLADE' and 'LOST' in the second row. Below the table is a pagination bar showing '1 of 2' and '2 total recs'. At the bottom are 'OK' and 'Cancel' buttons.

| Location | Reference |
|----------|-----------|
| 125      | 32536     |
| SLADE    | LOST      |

- The Warehouse Location search screen is only search-able on the **Location** field.
- In this example the Information Panel below has been enabled by adding columns to the Displayed fields list above.

This screenshot shows the 'Warehouse Location Search' window with the 'Information Panel' enabled. The search results table is the same as in the previous screenshot. Below the table, there are two input fields: 'Item #' and 'Description:'. The 'Item #' field is currently empty, and the 'Description:' field is also empty. The 'OK' and 'Cancel' buttons are at the bottom.

| Location | Reference |
|----------|-----------|
| 125      | 32536     |
| SLADE    | LOST      |


Item #:

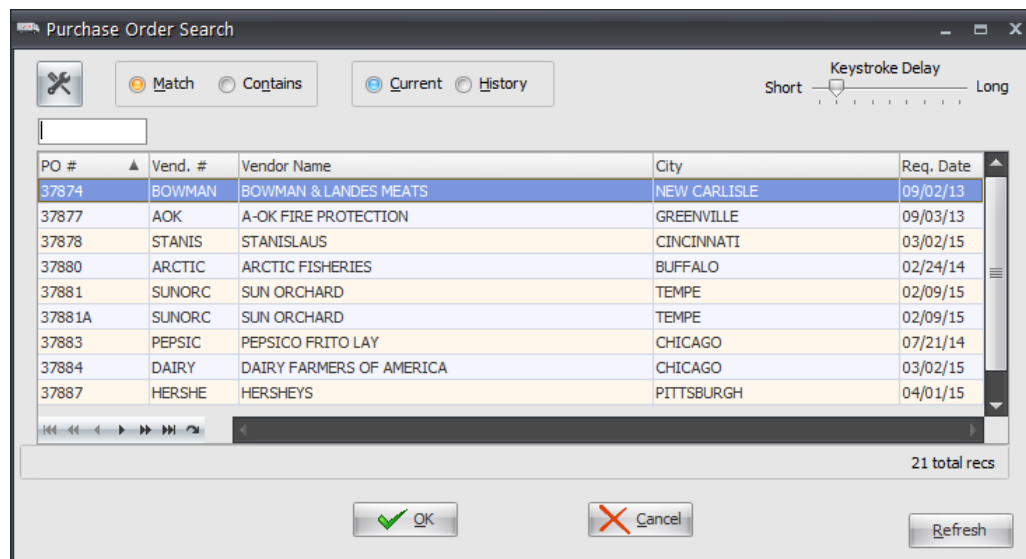
Description:

- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.

## 1.11 Purchase Order Search Screen

The Purchase Order Search screen will assist users in looking up any purchase order numbers. entrée allow users to perform searches against any column including the purchase order number, vendor number, and the vendor name.


-  **Hot Tip!** Use the **Current / History** file selection options to limit the number of records searched.
- Searching the **"Current"** Purchase Order file will *not include* "Closed" Purchase Orders.
  - Searching the **"History"** file will show you the **"Closed"** Purchase Orders.

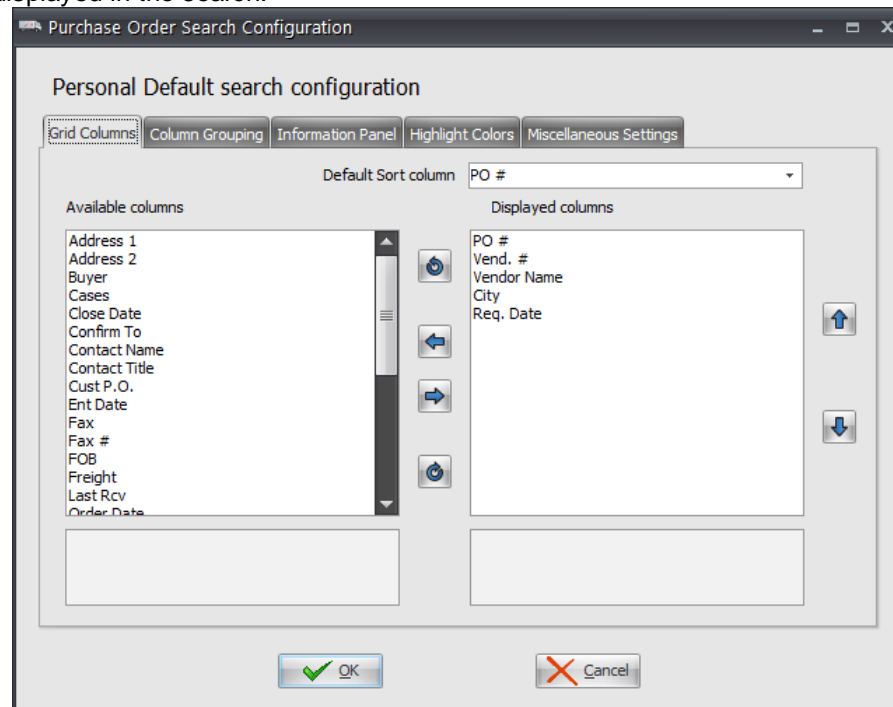


The Purchase Order Search dialog box features a search criteria section with radio buttons for 'Match' and 'Contains', and another set for 'Current' and 'History'. A 'Keystroke Delay' slider is set to 'Short'. Below is a table with 21 records.

| PO #   | Vend. # | Vendor Name              | City         | Req. Date |
|--------|---------|--------------------------|--------------|-----------|
| 37874  | BOWMAN  | BOWMAN & LANDES MEATS    | NEW CARLISLE | 09/02/13  |
| 37877  | AOK     | A-OK FIRE PROTECTION     | GREENVILLE   | 09/03/13  |
| 37878  | STANIS  | STANISLAUS               | CINCINNATI   | 03/02/15  |
| 37880  | ARCTIC  | ARCTIC FISHERIES         | BUFFALO      | 02/24/14  |
| 37881  | SUNORC  | SUN ORCHARD              | TEMPE        | 02/09/15  |
| 37881A | SUNORC  | SUN ORCHARD              | TEMPE        | 02/09/15  |
| 37883  | PEPSIC  | PEPSICO FRITO LAY        | CHICAGO      | 07/21/14  |
| 37884  | DAIRY   | DAIRY FARMERS OF AMERICA | CHICAGO      | 03/02/15  |
| 37887  | HERSHE  | HERSHEYS                 | PITTSBURGH   | 04/01/15  |

At the bottom right, it indicates '21 total recs'. Navigation buttons (OK, Cancel, Refresh) are at the bottom.

 **Example** The example below the PO Search Configuration dialog where you can customize the columns to be displayed in the search.



The Purchase Order Search Configuration dialog box shows the 'Personal Default search configuration' tab. It includes a 'Default Sort column' dropdown set to 'PO #'. Below are two lists: 'Available columns' and 'Displayed columns'.

**Available columns:** Address 1, Address 2, Buyer, Cases, Close Date, Confirm To, Contact Name, Contact Title, Cust P.O., Ent Date, Fax, Fax #, FOB, Freight, Last Rcv, Order Date.

**Displayed columns:** PO #, Vend. #, Vendor Name, City, Req. Date.

Navigation buttons (OK, Cancel) are at the bottom.

- See the [Search Configuration Overview](#) topic for more information about searching capabilities and options.