

File Search Function

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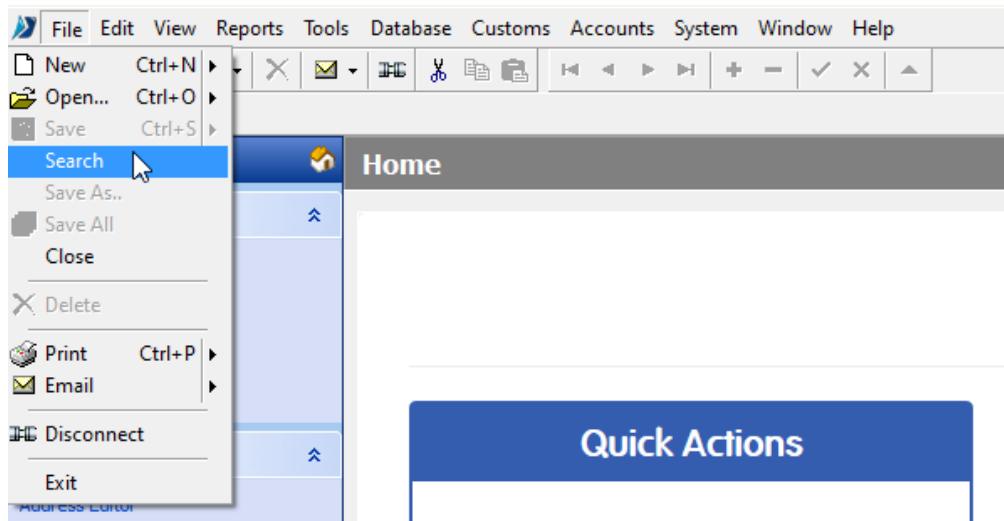
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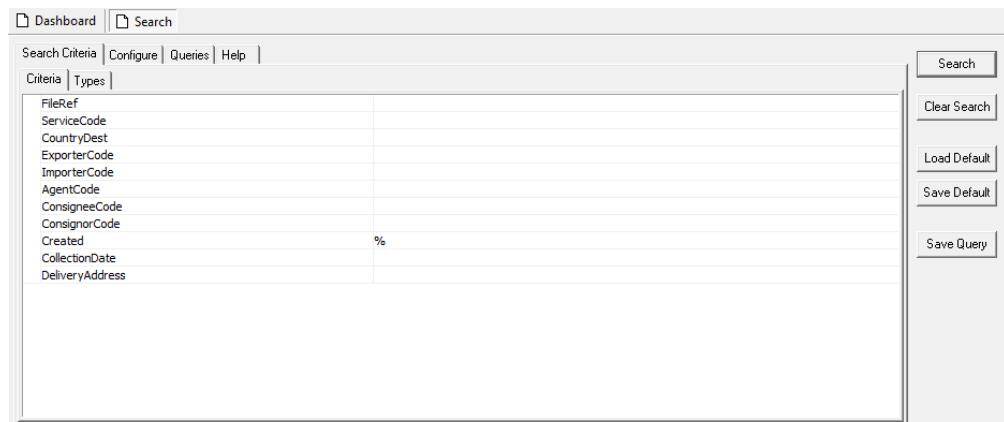
INTRODUCTION

Searching within FM3 can be done through the File Search Function. Recent Jobs will only show you Jobs, therefore, when searching for a different type of document you can use the Search Function. You can also configure the fields you need to search, such as Collection Ref or Delivery Date.

To access the 'Search' feature, open the 'File' menu, and select 'Search'.



Dashboard > File Menu > Search



Search Open

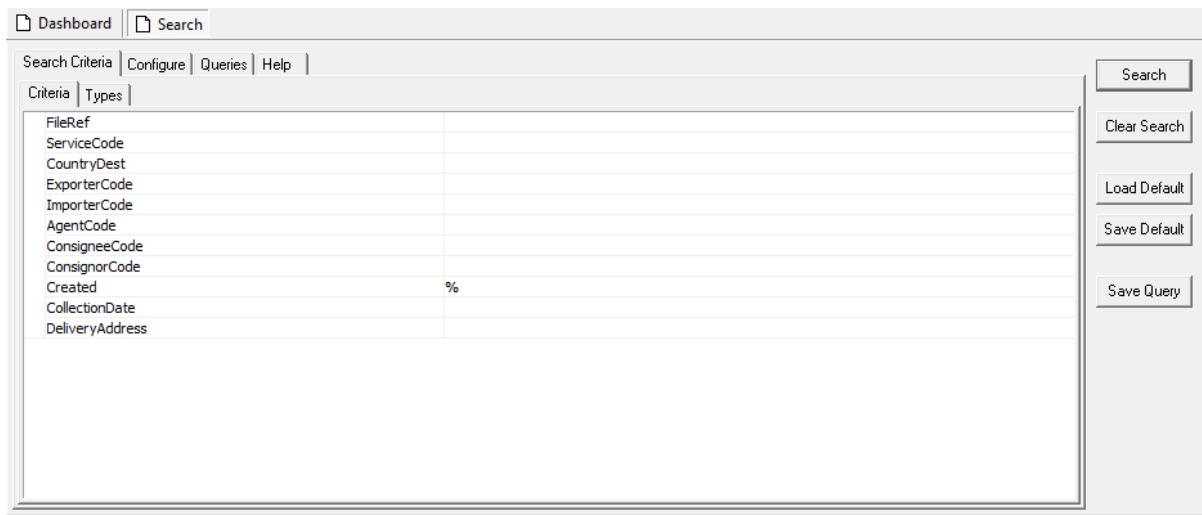
SEARCH CRITERIA

The Search function opens by default on the 'Search Criteria' tab, which has two sub-tabs: 'Criteria' and 'Types'.

Search Criteria: Criteria

Within the 'Criteria' sub-tab you can add parameters to the search.

File Search Function



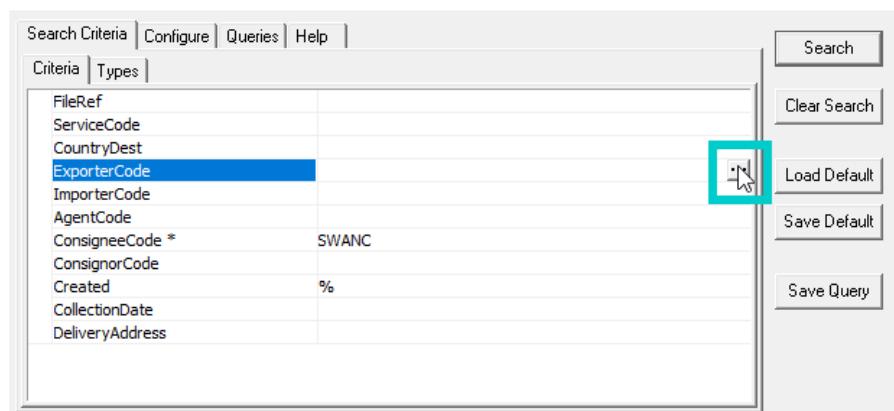
The screenshot shows the 'Search Criteria' interface. At the top, there are buttons for 'Dashboard' and 'Search'. Below that is a menu bar with 'Search Criteria', 'Configure', 'Queries', and 'Help'. A sub-menu 'Criteria' is open, showing a list of fields: FileRef, ServiceCode, CountryDest, ExporterCode, ImporterCode, AgentCode, ConsigneeCode, ConsignorCode, Created, CollectionDate, and DeliveryAddress. To the right of the list is a search bar with a placeholder '%'. On the far right, there is a vertical toolbar with buttons for 'Search', 'Clear Search', 'Load Default', 'Save Default', and 'Save Query'.

Search > Search Criteria > Criteria [Empty Criteria]

Most fields will have a text box to type in, however, some Criteria fields will have pickers that allow you to select from an existing list, for example, Exporter/Importer Codes will allow you to pick from Address Editor and Country Code for Country Disp/Dest fields.

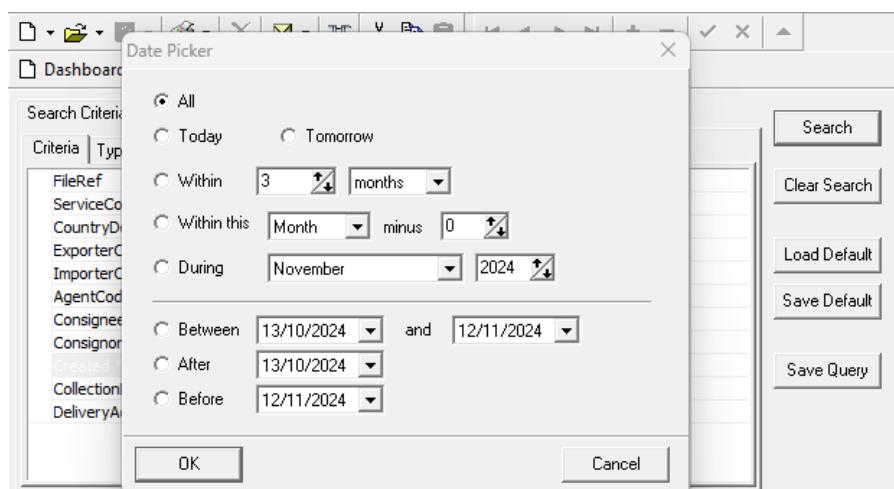
Dates can also be selected using a specific Date Picker. This allows you to select a relative date (Today/Tomorrow), a relative date range (such as Within 3 months), a specific month (November 2024) or a specific range (e.g. Between 13/10/2024 and 12/11/2024).

Populated fields will have an asterisk (*) against them. This can be useful when trying to spot accidental spaces etc.



The screenshot shows the 'Search Criteria' interface with a selected criterion. The 'ExporterCode' field is highlighted with a blue selection bar. To the right, there is a vertical toolbar with buttons for 'Search', 'Clear Search', 'Load Default', 'Save Default', and 'Save Query'. A cursor icon is positioned over the 'Load Default' button.

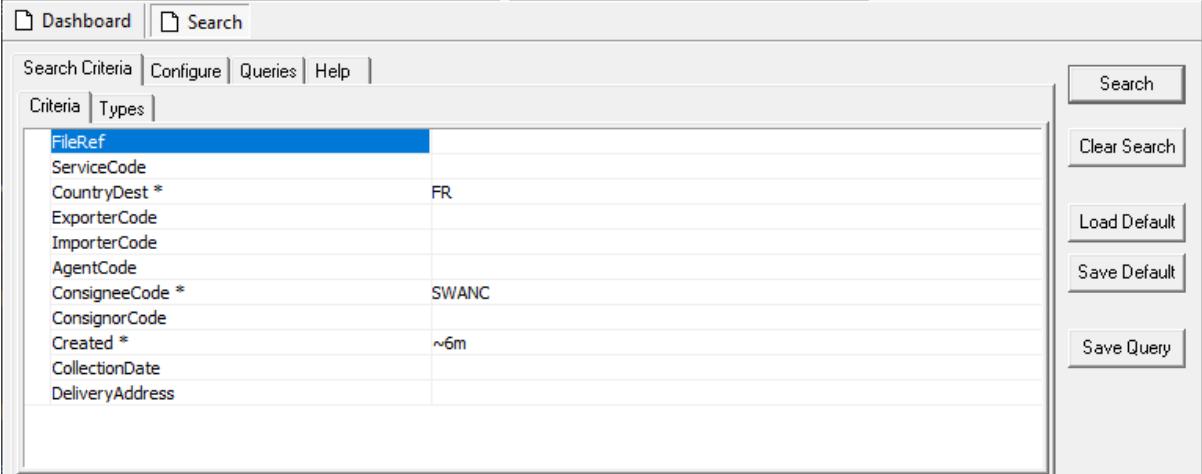
Search > Search Criteria > Criteria



The screenshot shows the 'Date Picker' interface. At the top, there are buttons for 'OK' and 'Cancel'. Below that is a title bar 'Date Picker'. The main area contains a list of criteria: FileRef, ServiceCode, CountryDest, ExporterCode, ImporterCode, AgentCode, ConsigneeCode, ConsignorCode, Created, CollectionDate, and DeliveryAddress. To the right, there are several date selection options: 'All', 'Today', 'Tomorrow', 'Within 3 months', 'Within this Month minus 0', 'During November 2024', 'Between 13/10/2024 and 12/11/2024', 'Alter 13/10/2024', and 'Before 12/11/2024'. On the far right, there is a vertical toolbar with buttons for 'Search', 'Clear Search', 'Load Default', 'Save Default', and 'Save Query'.

Search > Search Criteria > Date Picker

File Search Function



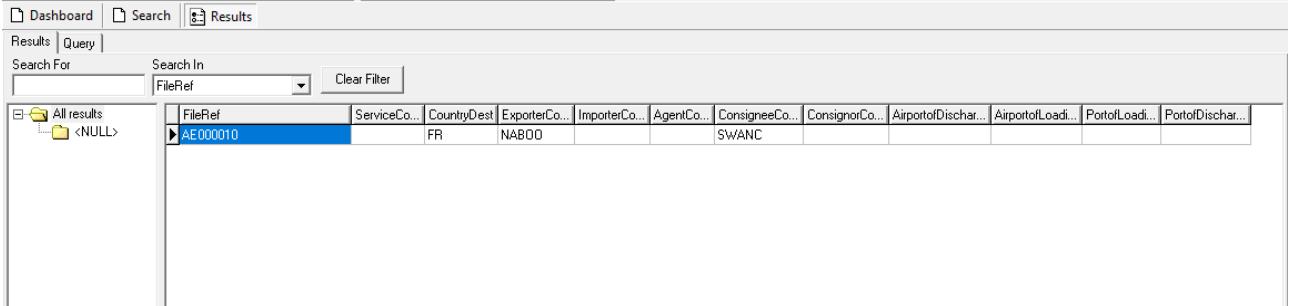
The screenshot shows the 'Search Criteria' page with the 'Criteria' tab selected. A table displays search parameters:

Criteria	Value
FileRef	
ServiceCode	
CountryDest *	FR
ExporterCode	
ImporterCode	
AgentCode	
ConsigneeCode *	SWANC
ConsignorCode	
Created *	~6m
CollectionDate	
DeliveryAddress	

On the right, buttons for 'Search', 'Clear Search', 'Load Default', 'Save Default', and 'Save Query' are visible.

Search > Search Criteria > Criteria [Populated Fields]

Once all parameters are set, select the 'Search' button to the right of the Criteria Grid. Another tab will then open with all jobs that satisfy the Criteria.



The screenshot shows the 'Results' page. The search criteria are displayed at the top, and the results table shows one item:

FileRef	ServiceCo...	CountryDest	ExporterCo...	ImporterCo...	AgentCo...	ConsigneeCo...	ConsignorCo...	AirportofDischar...	AirportofLoadi...	PortofLoadi...	PortofDischar...
AE000010		FR	NABOO			SWANC					

Results Page

Search Criteria: Types

If you are searching for a specific type of document, you can tick them within the 'Type' tab. Both 'Type' and 'Criteria' fields can be used at the same time and you can multi-select different types.

To search for a Job with all selected document types, tick the box above the type listing.

File Search Function

Search Criteria | Configure | Queries | Help |

Criteria | Types |

Find jobs with all selected documents attached

<input type="checkbox"/> Bill of Lading	<input type="checkbox"/> Export Job	<input type="checkbox"/> Road Transport
<input type="checkbox"/> BOL Letter of Credit	<input type="checkbox"/> FBL	<input type="checkbox"/> Sales Quote
<input type="checkbox"/> CDS Declaration	<input type="checkbox"/> FBL Letter of Credit	<input type="checkbox"/> SSN
<input type="checkbox"/> CMR	<input type="checkbox"/> HAWB	
<input type="checkbox"/> Coll Del Note	<input type="checkbox"/> HAWB Letter of Credit	
<input type="checkbox"/> Collection Note	<input type="checkbox"/> Import Consol	
<input type="checkbox"/> Delivery Note	<input type="checkbox"/> Import Job	
<input type="checkbox"/> DGN	<input type="checkbox"/> MAWB	
<input type="checkbox"/> eAWB House AWB	<input type="checkbox"/> MAWB Letter of Credit	
<input type="checkbox"/> eAWB Master AWB	<input type="checkbox"/> Proof of Delivery	
<input type="checkbox"/> Export Consol	<input type="checkbox"/> Road Freight	

Search | Clear Search | Load Default | Save Default | Save Query

Search > Search Criteria > Types

Configure

You can configure the fields used as Criteria from within the 'Configure' tab. Here you can move fields between two lists: Available Fields and Selected Search fields. Available Fields are those that you can add to the Criteria whereas Selected Search fields are those already in the Criteria.

Arrows between both listings are action buttons which will move selected fields across the listing in the direction of the arrow (> left to right and < right to left). The double '<<' button will move all fields from the Selected Search fields listing to the Available Fields, removing all Criteria fields to allow you to start fresh.

Search Criteria | Configure | Queries | Help |

Search Fields | Display Fields | Group By Fields | Order By Fields |

Available Fields

- AccountInfo
- AgentContact
- AgentNotes
- AgentRef
- AirlineCode
- AirlineContact
- AirlineNotes
- AirportDischarge
- AirportLoading
- Apportion
- AreaCode
- ArrivalDate
- AvailableCube
- AvailableGross
- BillOfLading
- BookingNo

Selected Search fields

- FileRef
- ServiceCode
- CountryDest
- ExporterCode
- ImporterCode
- AgentCode
- ConsigneeCode
- ConsignorCode
- Created
- CollectionDate
- DeliveryAddress

> < << Default Move Up Move Down

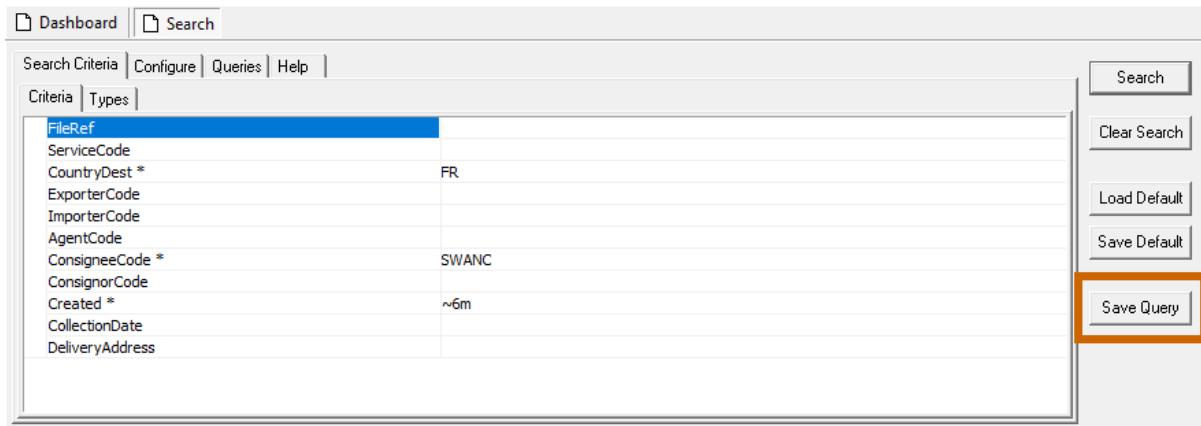
Search | Clear Search | Load Default | Save Default | Save Query

Search > Configure > Search Fields

SAVE SEARCH QUERY

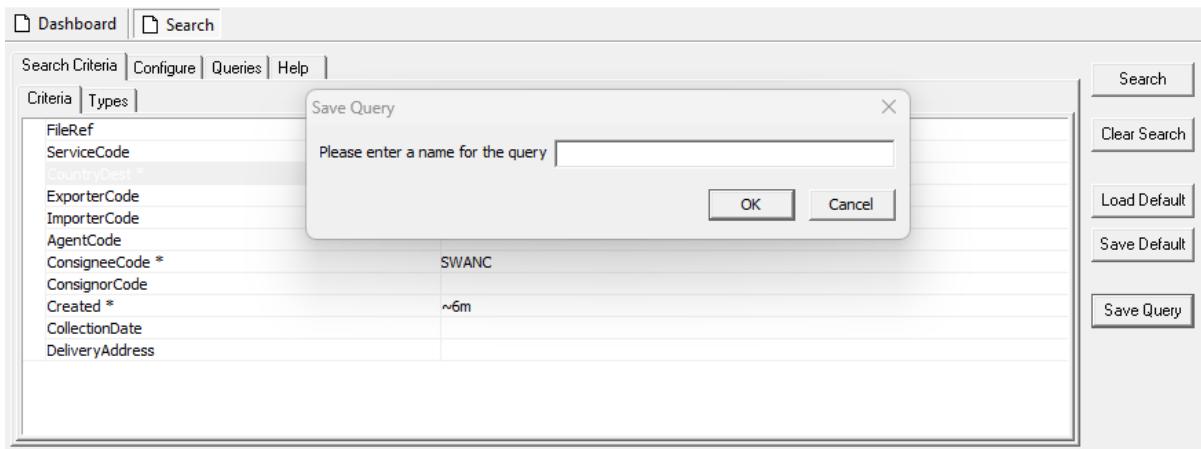
If a particular search needs to be run more than once, it is possible to save the criteria in the fields.

File Search Function



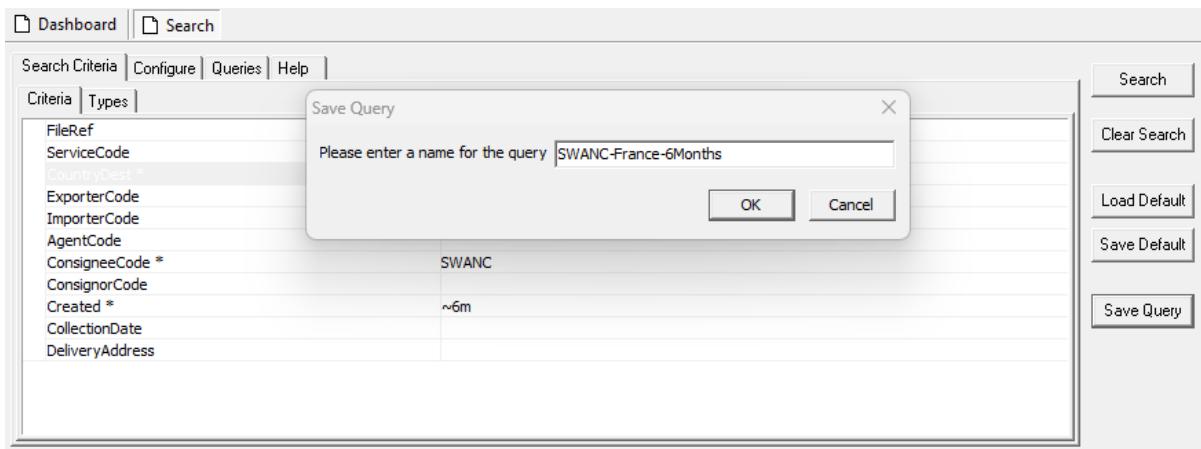
Search > Search Criteria > Criteria [Save Query Highlighted]

To save the search click on 'Save Query', the search will be saved under the 'Queries' tab, but before it saves it will ask for a name.



Search > Search Criteria > Criteria > Save Query [Name Empty]

Query names must be under 100 characters.

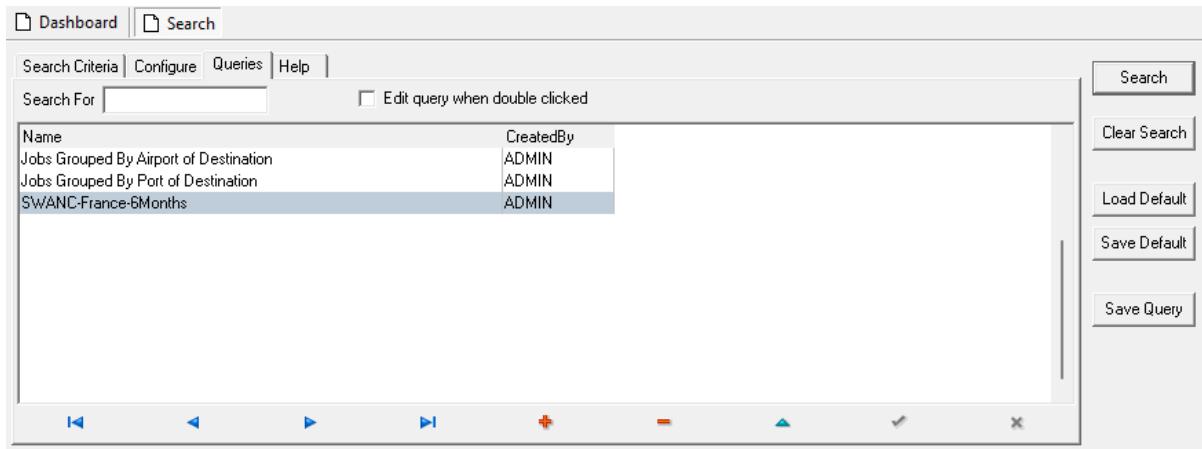


Search > Search Criteria > Criteria > Save Query [Name Provided]

Click 'OK' to save the query.

Queries Tab

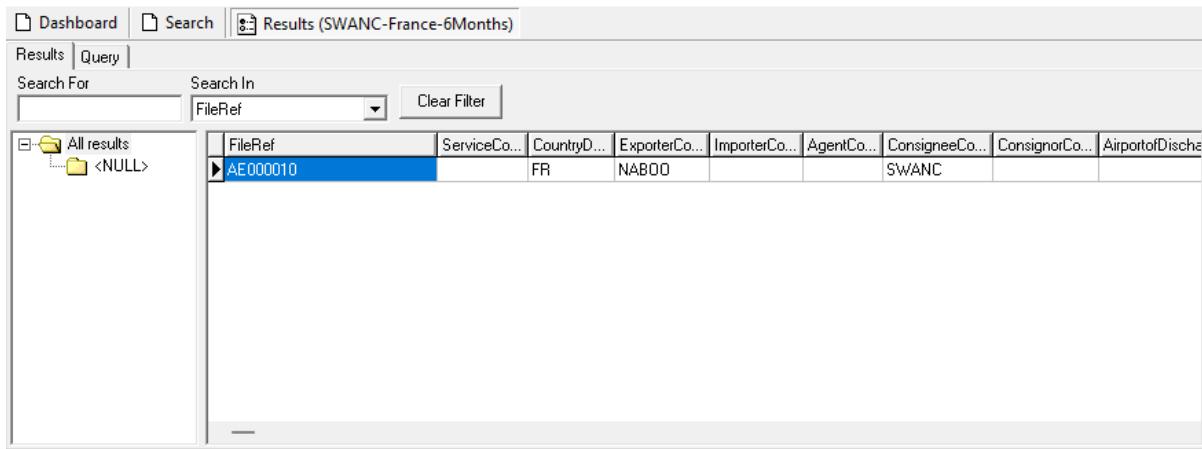
All saved Queries are stored within the 'Queries' tab.



Name	CreatedBy
Jobs Grouped By Airport of Destination	ADMIN
Jobs Grouped By Port of Destination	ADMIN
SWANC-France-6Months	ADMIN

Search > Queries

Double-click the saved query to run it.

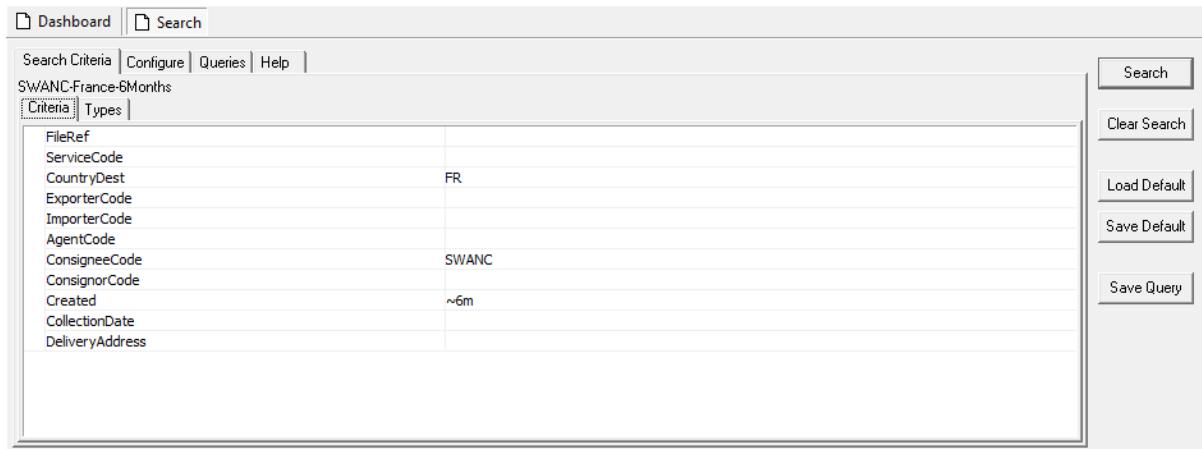


FileRef	ServiceCo...	CountyD...	ExporterCo...	ImporterCo...	AgentCo...	ConsigneeCo...	ConsignorCo...	AirportofDischa
AE 000010		FR	NABOO			SWANC		

Results

Unless you have the 'Edit query when double clicked' which will take you back to the 'Criteria' tab. While in this mode the name of the query selected will show between the tab levels. After adding or editing the fields, select 'Save Query' again to re-save the edits under a new name.

File Search Function



The screenshot shows the 'Search' interface with the 'Queries' tab selected. The main area displays a table of search criteria:

Criteria	Value
FileRef	
ServiceCode	
CountryDest	FR
ExporterCode	
ImporterCode	
AgentCode	
ConsigneeCode	SWANC
ConsignorCode	
Created	~6m
CollectionDate	
DeliveryAddress	

On the right, a sidebar contains the following buttons:

- Search
- Clear Search
- Load Default
- Save Default
- Save Query

Search > Queries ['Edit Query...' Tickbox On Then Double-Click Query]

Additional Help

If you need additional guidance, please get in touch with us via email or telephone.

Tel: +44 (0) 330 223 5813

Email: helpdesk@sigmafreight.com

Website: <https://www.sigmafreight.com/support/>
