



# File Search Function

Last Modified: November, 2024  
Revision Number: 14

---

# Table of Contents

**Introduction ..... 3**

**Search Criteria ..... 3**

Search Criteria: Criteria ..... 3

Search Criteria: Types..... 5

Configure ..... 6

**Save Search Query ..... 6**

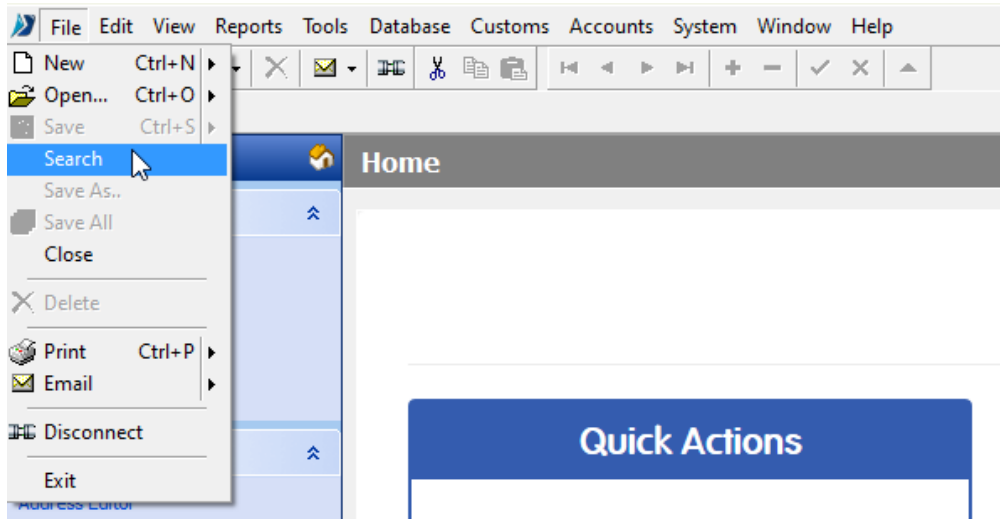
Queries Tab..... 8

Additional Help ..... 9

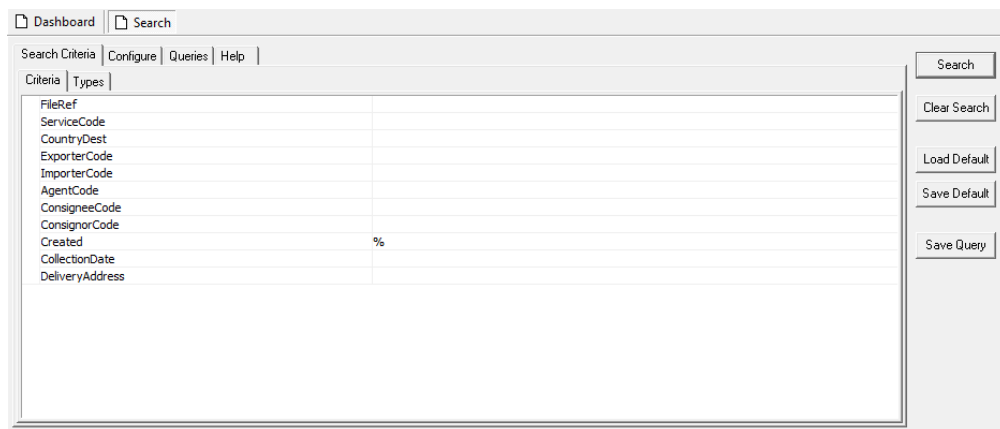
## INTRODUCTION

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' window with the 'Criteria' tab selected. The table lists various search criteria with empty input fields. The criteria are: FileRef, ServiceCode, CountryDest, ExporterCode, ImporterCode, AgentCode, ConsigneeCode, ConsignorCode, Created, CollectionDate, and DeliveryAddress. The 'Created' field contains a '%' symbol. On the right side, there are buttons for Search, Clear Search, Load Default, Save Default, and Save Query.

Criteria	Types
FileRef	
ServiceCode	
CountryDest	
ExporterCode	
ImporterCode	
AgentCode	
ConsigneeCode	
ConsignorCode	
Created	%
CollectionDate	
DeliveryAddress	

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.

This screenshot shows the 'Search Criteria' window with the 'Criteria' tab selected. The 'ConsigneeCode' field is populated with 'SWANC' and has an asterisk (\*) next to it. The 'Created' field contains a '%' symbol. A red box highlights a small icon in the right margin. On the right side, there are buttons for Search, Clear Search, Load Default, Save Default, and Save Query.

Criteria	Types
FileRef	
ServiceCode	
CountryDest	
ExporterCode	
ImporterCode	
AgentCode	
ConsigneeCode *	SWANC
ConsignorCode	
Created	%
CollectionDate	
DeliveryAddress	

Search > Search Criteria > Criteria

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 a 'Date Picker' dialog box overlaid on the 'Search Criteria' window. The dialog box has several options: 'All' (selected), 'Today', 'Tomorrow', 'Within' (3 months), 'Within this' (Month minus 0), 'During' (November 2024), 'Between' (13/10/2024 and 12/11/2024), 'After' (13/10/2024), and 'Before' (12/11/2024). There are 'OK' and 'Cancel' buttons at the bottom.

Search > Search Criteria > Date Picker

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

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.

FileRef	ServiceCo...	CountryDest	ExporterCo...	ImporterCo...	AgentCo...	ConsigneeCo...	ConsignorCo...	AirportofDischar...	AirportofLoadi...	PortofLoadi...	PortofDischar...
AE000010		FR	NAB00			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.

Dashboard | Search

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 &gt; Search Criteria &gt; 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.

Dashboard | Search

Search Criteria | Configure | Queries | Help

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

Available Fields

- AccountInfo
- AgentContact
- AgentNotes
- AgentRef
- AirlineCode
- AirlineContact
- AirlineNotes
- AirportofDischarge
- AirportofLoading
- 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 &gt; Configure &gt; 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

The screenshot shows the 'Search Criteria' configuration window. The 'Criteria' tab is active, displaying a table with search criteria and their values. The 'Save Query' button on the right is highlighted with an orange border.

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

Buttons on the right: Search, Clear Search, Load Default, Save Default, **Save Query**.

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.

The screenshot shows the 'Save Query' dialog box. The text 'Please enter a name for the query' is displayed above an empty text input field. The 'OK' and 'Cancel' buttons are at the bottom right.

Buttons: OK, Cancel.

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

Query names must be under 100 characters.

The screenshot shows the 'Save Query' dialog box. The text 'Please enter a name for the query' is displayed above a text input field containing the name 'SWANC-France-6Months'. The 'OK' and 'Cancel' buttons are at the bottom right.

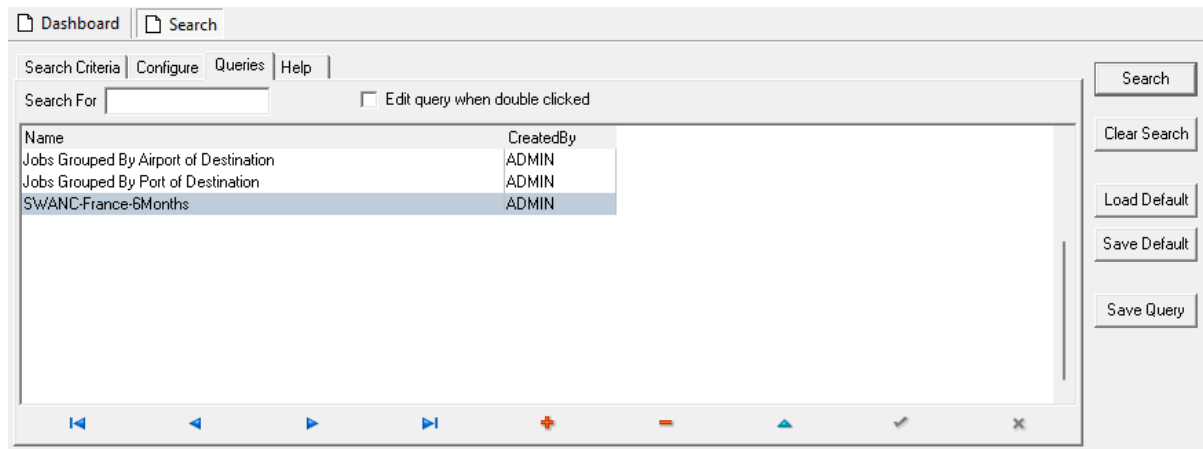
Buttons: OK, Cancel.

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

Click 'OK' to save the query.

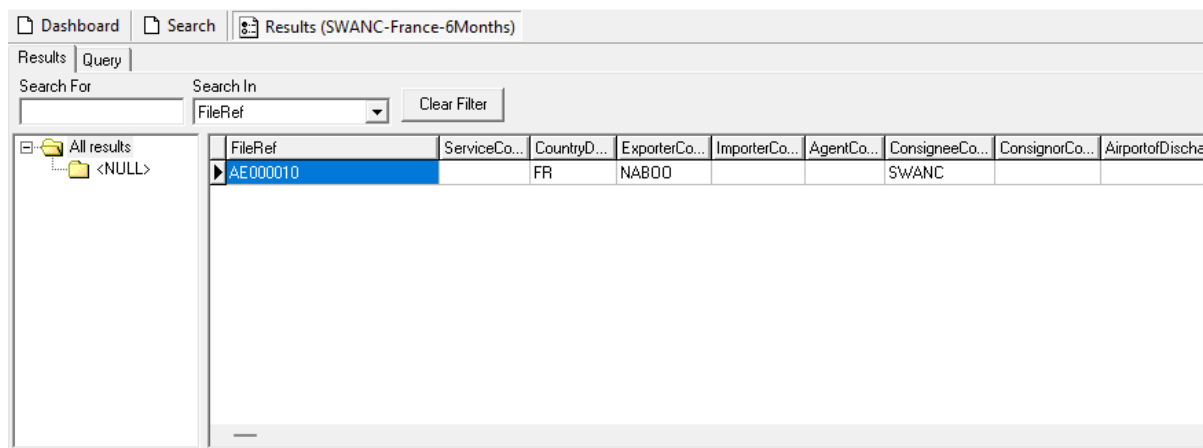
## Queries Tab

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



Search > Queries

Double-click the saved query to run it.



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.



Dashboard

Search

Search Criteria

Configure

Queries

Help

SWANC-France-6Months

Criteria

Types

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

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](mailto:helpdesk@sigmafreight.com)

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