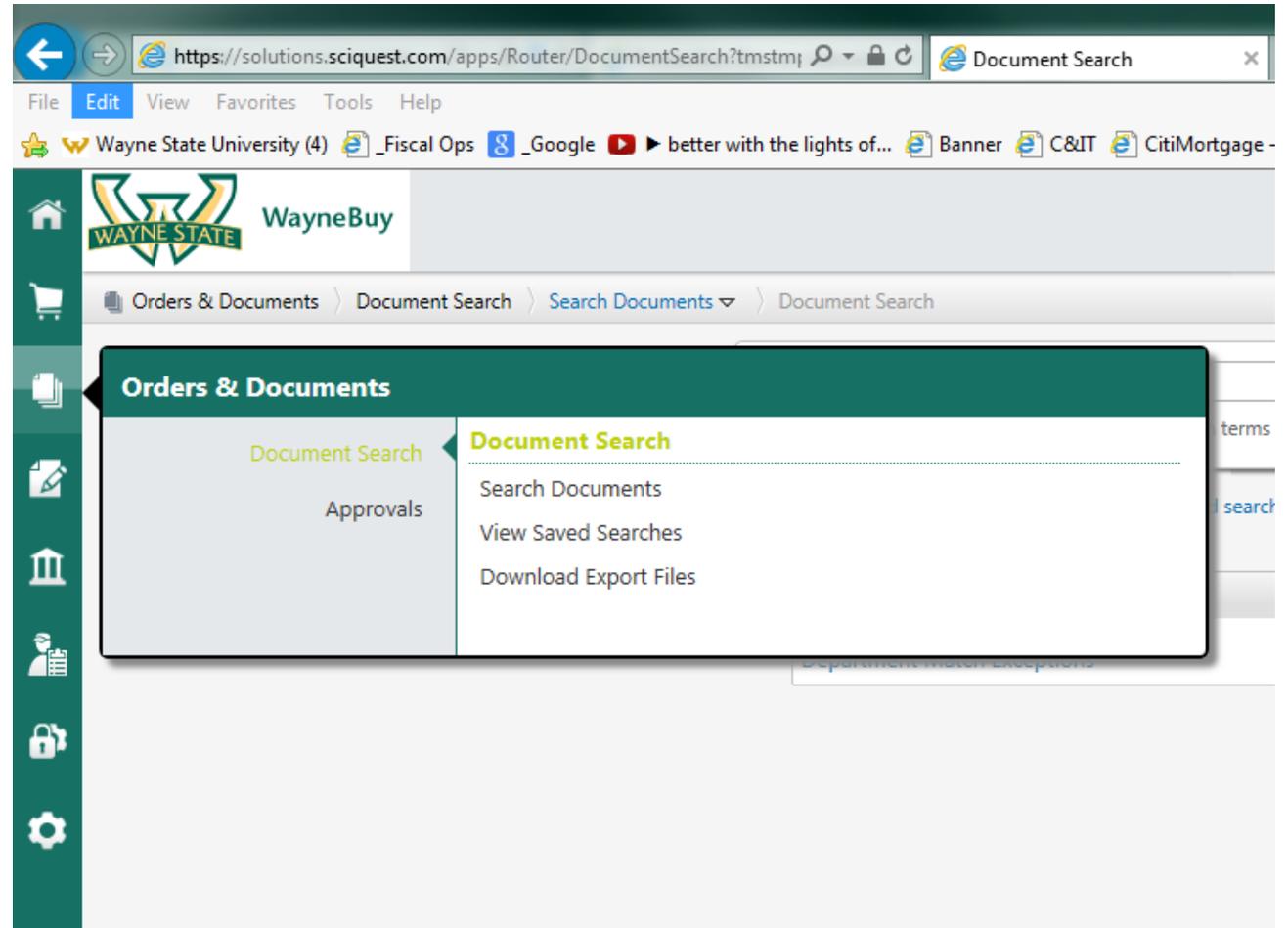
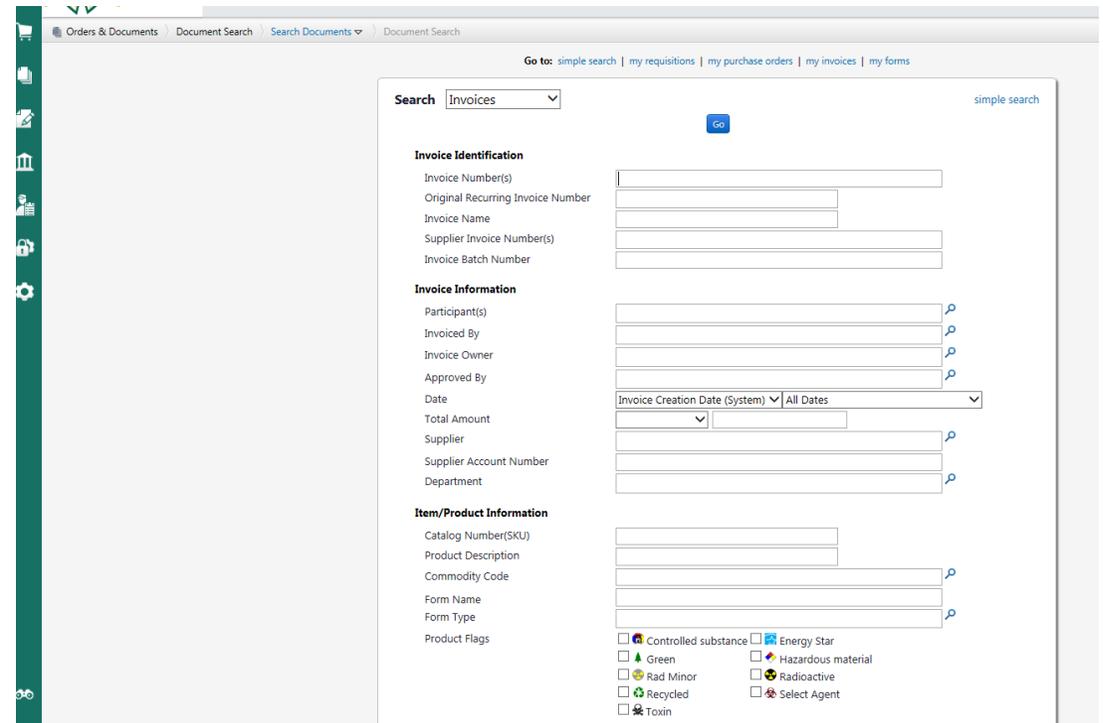
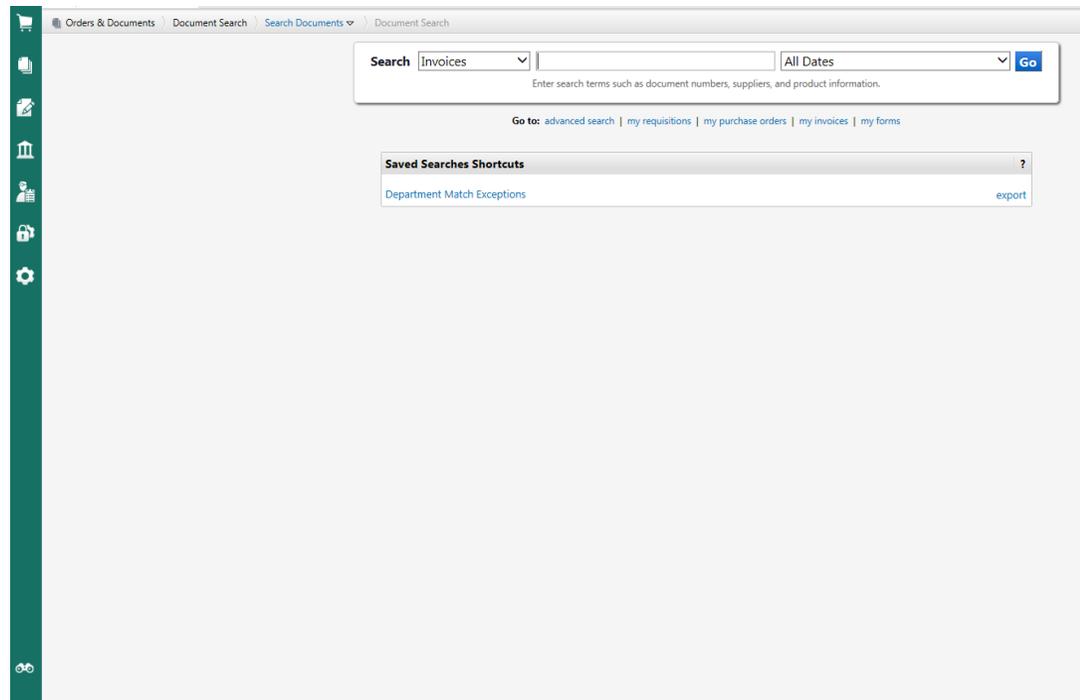


# Using Document Search in WayneBuy

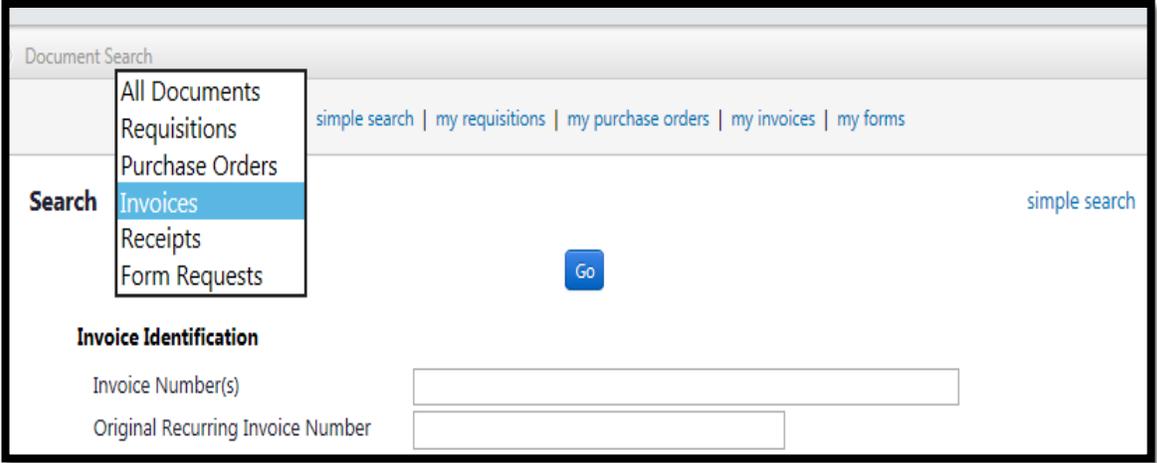
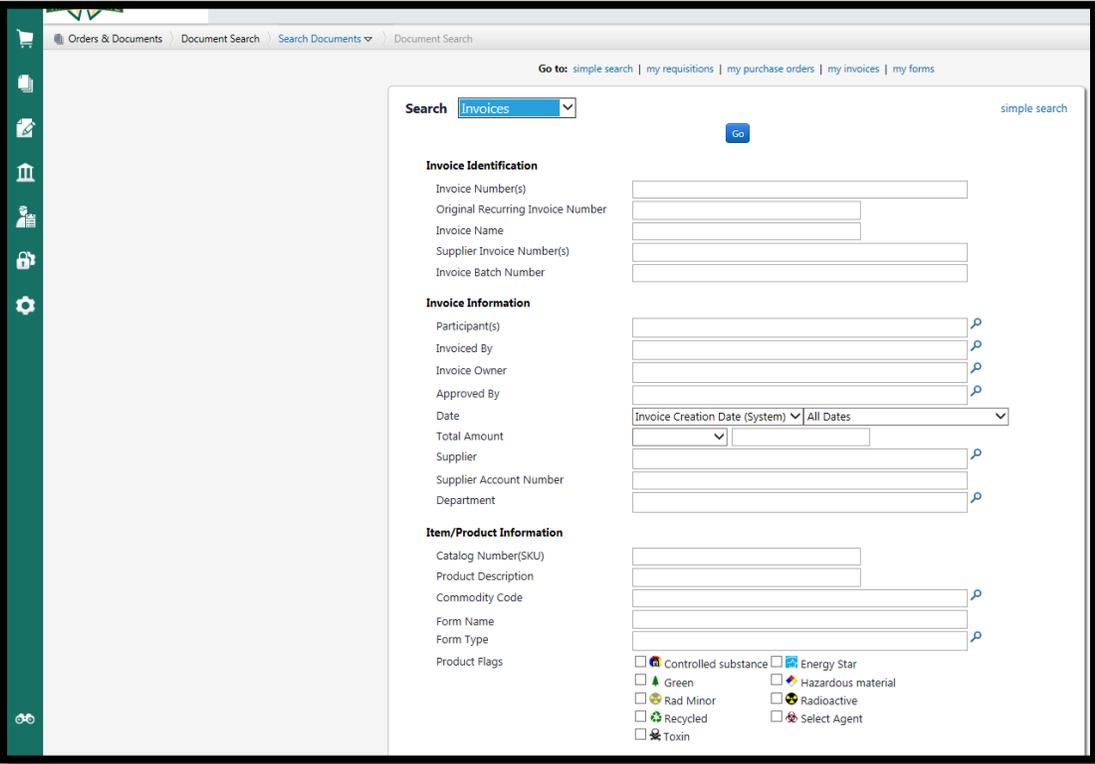
- Locate the icon 
- Select Document Search



In some cases the view of the screen may appear different to the user, which is called **Simple search** and **Advance Search**  
In the case of looking for invoice transactions needing involvement of the Invoice Owner or Disbursement staff you would use the **Advance Search view**



The **Advance Search view** provides you multiple Document Types to search under, Select **Invoices**. Using **invoices** as the document type gives you multiple options to do a search.



The most useful options to utilize are as follow:

Invoice Owner(recommended if you handle multiple indexes/units)

Payment Status(In Process and Payable)

Current Workflow Step(AP Matching Exceptions)

Custom Fields(Index, Org. Code, Acct. Code and Fund)

After you have made your selections Click GO

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#) | [my forms](#)

Search  simple search

**Invoice Identification**

Invoice Number(s)

Original Recurring Invoice Number

Invoice Name

Supplier Invoice Number(s)

Invoice Batch Number

**Invoice Information**

Participant(s)

Invoiced By

Invoice Owner

Approved By

Date

Total Amount

Supplier

Supplier Account Number

Department

**Item/Product Information**

Catalog Number(SKU)

Product Description

Commodity Code

Form Name

Form Type

Product Flags

<input type="checkbox"/> Controlled substance	<input type="checkbox"/> Energy Star
<input type="checkbox"/> Green	<input type="checkbox"/> Hazardous material
<input type="checkbox"/> Rad Minor	<input type="checkbox"/> Radioactive
<input type="checkbox"/> Recycled	<input type="checkbox"/> Select Agent
<input type="checkbox"/> Toxin	

**Workflow Status**

- Pending  Rejected  
 Complete

**Matching Status**

- Partially Matched  Matched  
 Unmatched

**Invoice Source**

- Manual  Electronic  
 Supplier Portal  Supplies Manager  
 Automated  Digital Mailroom Import  
 Recurring  Form Request

**Invoice Type**

- PO Invoice  PO Credit Memo  
 Non-PO Invoice  Non-PO Credit Memo

**Payment Status**

- In Process  Payable  
 Paid  Cancelled  
 Dispute

**Message Category**

- Invoice  Payment  
 Other  Dispute

**Status Flags**

- With Errors  With Forced Matches  
 Has Substitute Items  Has Non-PO Lines  
 Pending Auto-Match  With Attachments  
 With Retainage

**Tax Engine Errors**

- Invoice Data Error  System Error  
 Service not Available

**Custom Fields**

**Custom Fields**

Account Code	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Account Code
		Select from all values...	
Additional Shipping Charges	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Additional Shipping Charges
		Select from profile values...	
Buyer Code	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Buyer Code
		Select from all values...	
Enclosure Code	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Enclosure Code
		Select from all values...	
Grouping Indicator	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Grouping Indicator
		Select from all values...	
Index	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Index
		Select from all values...	
Fund	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Fund
Organization	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Organization
Internal Reference #	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Internal Reference #
Invoice Stamp Date	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Invoice Stamp Date
PASS Receiver Override	Is Exactly	<input type="text"/>	
Prepay Check Request	<input type="text" value="Is Exactly"/>	<input type="text"/>	Add another Prepay Check Request
		Select from all values...	

# Use the Search Details and Refine Search Results

For Example: Do a search using Payment Status (In Process)

The system will provide a list of invoices.

Using the Refine Search Results you are able to find details relate to the transactions

Under **Current Workflow** the invoice(s) are in several steps, the step needing the Invoice Owner Involvement are:

- AP Matching Exceptions (Receiver Required or Price different my require a COR)
- AP Status Exception (The PO is closed)
- Hold Unit Match (Receiver Required- an email is being sent to the Invoice Owner daily for 10days)

Type	Invoices	Date Range	Workflow Status	Supplier	Department	Current Workflow Step	Invoice ID	Amount	Due Date	Discount	Created	Due	Type	Pay Status	Source	Amount
			Pending (1771) Complete (6)	Metro Welding Supply Corp (73) Fisher Scientific (46) Pine State Enterprises, Inc. (39) Airgas Great Lakes (35) [more]	No Department (1769)	DMR Invoice Import Errors (965) AP Matching Exceptions (404) AP Status Exception (137) AP Review (102) Accounting Date Check (66) Hold until matched (47) FP&M Invoice Review (21) Invoice Review (7) Sales Tax Approval (6) Change Order Exception (4) Non-PO Approvals (4) DMR Supplier Data Check (2) DPR Form Approval (1)										
							K0206936	1750	8/3/2015		8/4/2015 1:22 PM	8/4/2015	Automated	In Process	PO Invoice	24,887.29
							K0206933	48105	8/4/2015		8/4/2015 11:59 AM	4/10/2015	Automated	In Process	PO Invoice	446.64
							K0206930	117-7211	8/4/2015		8/4/2015 11:33 AM	8/4/2015	Manual	In Process	PO Invoice	3,700.65
							K0206929	10037	8/4/2015		8/4/2015 11:32 AM	8/4/2015	Manual	In Process	PO Invoice	3,685.00
							K0206928	1851-684	8/4/2015		8/4/2015 11:28 AM	8/9/2015	Manual	In Process	PO Invoice	4,755.00
							K0206927	2015-5052	8/4/2015		8/4/2015 11:27 AM	8/4/2015	Manual	In Process	PO Invoice	1,138.22
							K0206926	635930	8/4/2015		8/4/2015 11:24 AM	8/19/2015	Manual	In Process	PO Invoice	41,500.00
							K0206925	P0727543-1	8/4/2015		8/4/2015 11:20 AM	8/30/2015	Manual	In Process	PO Invoice	3,346.00
							K0206924	LAT-07-29-15	8/4/2015		8/4/2015 11:08 AM		Automated	In Process	PO Invoice	36.00