

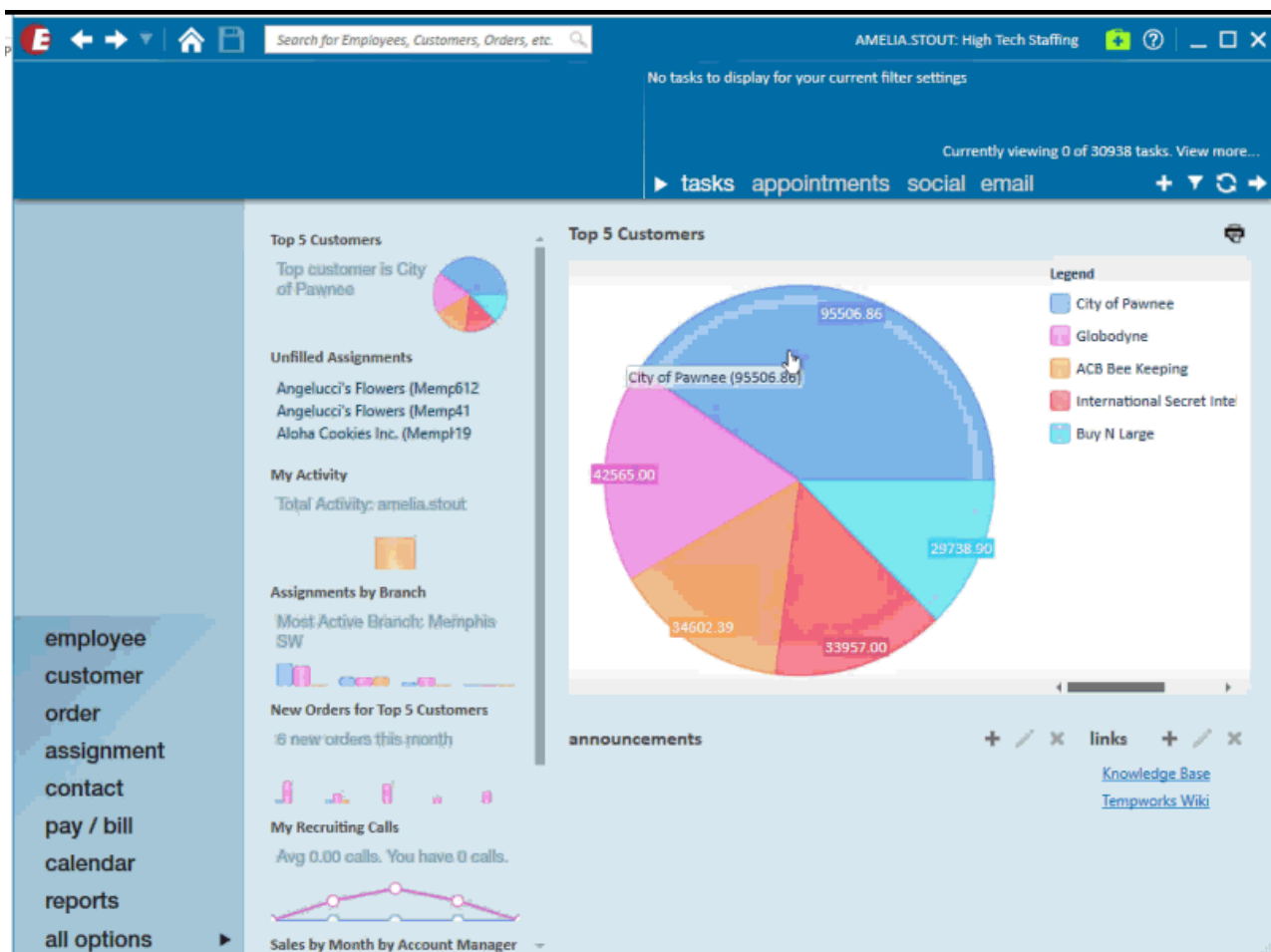
Enterprise - Order Searching

Last Modified on 12/05/2019 3:13 pm CST

Searching for Orders in Enterprise

Trying to find what orders need to be filled? Need to see only specific types of orders? Enterprise gives you plenty of search options when looking for an order record. Whether you are looking for a particular order or trying to create a list of what needs to be done, there are order search options that can help you.

To open up the order search, hover over 'order' on your navigation tree on the left and select the magnifying glass:



This article is broken in the following search sections:

- [Basic Search](#)
- [Clear Criteria](#)

- [Enhanced Search](#)
- [Search Examples](#)
- [Order Searching Secrets](#)

Basic Search Options

At the top of the order search page are all your basic search options:

The screenshot shows the top section of the Order Search page. On the left, there is a sidebar with 'visifile', 'details', and 'candidates'. The main area has a header 'Order' with 'No Open Order Records.' and a navigation bar with 'tasks', 'appointments', 'social', and 'email'. Below the header, there are search criteria: 'Customer' and 'Order ID' (text input fields), 'Filled' and 'Active' (toggle buttons, both currently set to 'All Orders' and 'All Statuses' respectively), 'RepName' (dropdown menu, currently 'All Reps'), and 'Branch' (dropdown menu, currently 'All Branches'). There is also a 'Search' button and a 'Clear Criteria' button. The top right corner indicates 'Currently viewing 0 of 30938 tasks. View more...'.

Open text fields:

- Customer- enter customer name.
- Order ID- enter order ID number assigned by Enterprise.

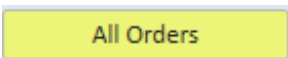
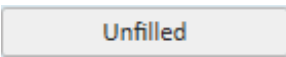
Trainer Tip If you do not know a customer's full name, you can use the **Wild Card** option to search for a part of their name:

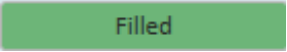
For example, if I have a customer that has the word 'tile' in their name, I can search for '%tile' to see orders for all customers that have the word 'tile' somewhere in their name.

Toggle options:

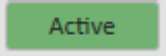
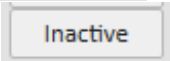
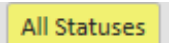
In the top center of the search page you will see 2 toggle buttons: Filled & Active.

Filled- this toggle button allows you to filter your search by:

- All Orders  - All orders regardless of if they have been filled.
- Unfilled  - Orders that do not have the required number of people assigned.

- Filled  - Orders that already have the required number of people assigned.

Active - this toggle button allows you to filter your search by:

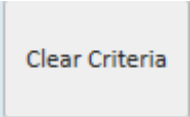
- Active  - Orders that are current active (not completed).
- Inactive  - Orders that have ended or were canceled.
- All Statuses  - All orders regardless of status.

Drop-down fields:

- RepName- select a rep to see only orders that have that specific rep selected under the taken by field on an order.
- Branch- select a branch to narrow your results down to orders tied to a specific branch. Your branch options will depend on your [Hierarchy](#) level.

Clearing Criteria

Enterprise Core will remember your search parameters when you return to the search page during your log in session. Before conducting a new search option, it is important that you select the 'Clear Criteria' button on the right. This will reset the search option and allow you to select new criteria.



Clear Criteria

Enhanced Search Options

Enhanced search options provide you with additional search field options separated into categories. Click on 'Enhanced Search' under the basic search options to see categories:

The screenshot shows a web application interface for 'Trees & Leaves, Primary'. The top navigation bar includes a search bar and user information. The main content area displays search results for orders. The table below shows the first 1000 results, with columns for Order ID, Customer, Department, Job Title, Order Status, and various financial and date fields.

Order...	Customer	Department	Job Title	Order...	Pay R...	Bill Ra...	Start Date	Order Status	Nu...	Nu...	Worksite
429508...	Aloha Cookies Inc.	Primary	Forklift	TE	\$10.00	\$17.10	6/11/2018	Unfilled	3	2	Warehouse
429508...	Aloha Cookies Inc.	Primary	Unknown	TE	\$0.00	\$0.00		Unfilled	1	0	Island Factory
429508...	Aloha Cookies Inc.	Primary	Bar Staff	DH	,000.00	,000.00		Closed	1	1	Island Factory
429508...	Aloha Cookies Inc.	Primary	Food And Bevera...	TE	\$0.00	\$0.00		Filled	1	1	Island Factory
429508...	Aloha Cookies Inc.	Primary	Unknown	TE	\$0.00	\$0.00		Unfilled	1	0	Island Factory
429508...	Aloha Cookies Inc.	Primary	Production Worker	TE	\$20.00	\$28.40	10/15/2018	Unfilled	20	1	Factory B
429508...	Aloha Cookies Inc.	Primary	Benefits Audit Cle...	TE	\$30.00	\$50.10		Master	2	0	Primary
429508...	Aloha Cookies Inc.	Primary	Unknown	TE	\$0.00	\$0.00		Unfilled	1	0	Island Factory
429508...	Aloha Cookies Inc.	Primary	Baker	TE	\$20.00	\$30.00	9/10/2018	Unfilled	4	0	Island Factory
429508...	Aloha Cookies Inc.	Primary	Baker	TE	\$20.00	\$30.00	9/10/2018	Unfilled	4	0	Island Factory
429508...	Alpine Ski Gear	Primary	Welder	TE	\$15.00	\$37.50	6/1/2018	Filled	6	6	Board Manufa...
429508...	American Banks	Primary	Warehouse Worker	TE	\$14.00	\$18.06	8/7/2018	Filled	3	3	Warehouse
429508...	American Banks	Primary	Forklift	TE	\$14.00	\$19.60	8/6/2018	Filled	4	4	Primary
429508...	American Choppers	Primary	Welder	TE	\$13.00	\$18.85	7/16/2018	Filled	1	1	Welding Place
429508...	Andrew Industrial, Inc.	Primary	Unknown	TE	\$15.00	\$21.15		Filled	1	3	Primary
429508...	Andrew Industrial, Inc.	Primary	Unknown	TE	\$15.00	\$21.15		Unfilled	1	0	Primary
429509...	Angelucci's Flowers	Human Resources	Forklift	TE	\$15.00	\$25.50		Unfilled	6	8	Primary

Select a category on the left to see search field options.

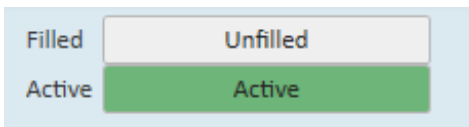
Search Examples

Now that you understand all the search options available to you, here is a list of some of our favorite searches.

Unfilled and Active:

This search will allow you to see all orders that still need people assigned. This is a great starting point for recruiters.

To run this search, simply change the toggles at the top of your search page to 'unfilled' and 'active':



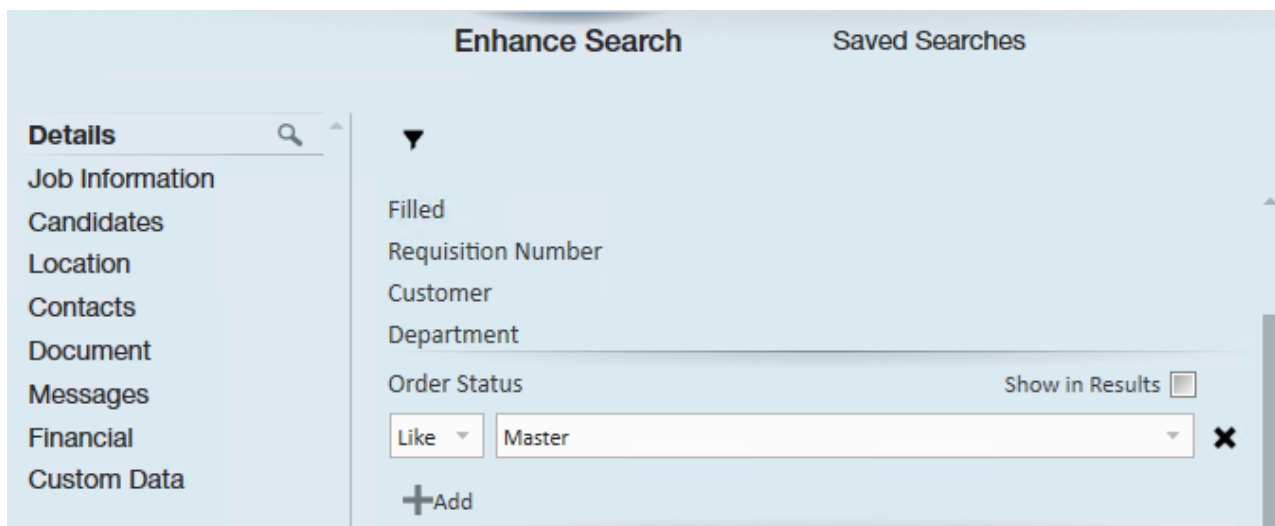
Have a lot of results? Try narrowing down by customer or rep name to see a smaller list of orders.

Master Orders:

Master orders are templates set up for reoccurring orders. To learn more about how to create master orders: [Master Orders](#).

To search for all master orders:

1. Navigate to Enhance Search.
2. Select the 'Details' category.
3. Select 'Order Status.'
4. Choose 'Master' from the drop-down.
5. Select 'Search.'




Select the master order you were looking for and you can copy it to create a new order using the master order information.

Order Searching Secrets

Here are a few additional searching tips:

Saving Searches

Find a search you like? Save it for later.

1. Create your search that you wish to save
2. Select the  icon in the upper left to save your current search criteria.
3. Enter the following information:
 - Enter a name for your search.
 - Optionally, enter a description for this search.
 - Select the check box next to 'Share Search?' to share this search with your team.
 - Select the check box next to each search criteria you want to be prompted to change each time.
 - For example, the search created below should be prompted to change the start date.

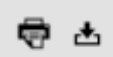
4. Select 'Save.'

Your saved search will appear under 'Saved Searches' section under basic search options.

Note This does not save the search results- only the criteria for the search is saved so that you can run this search again later.

Exporting Search Results


When you want to save the results of the search you just created for your records, you can print or export the results to Excel.

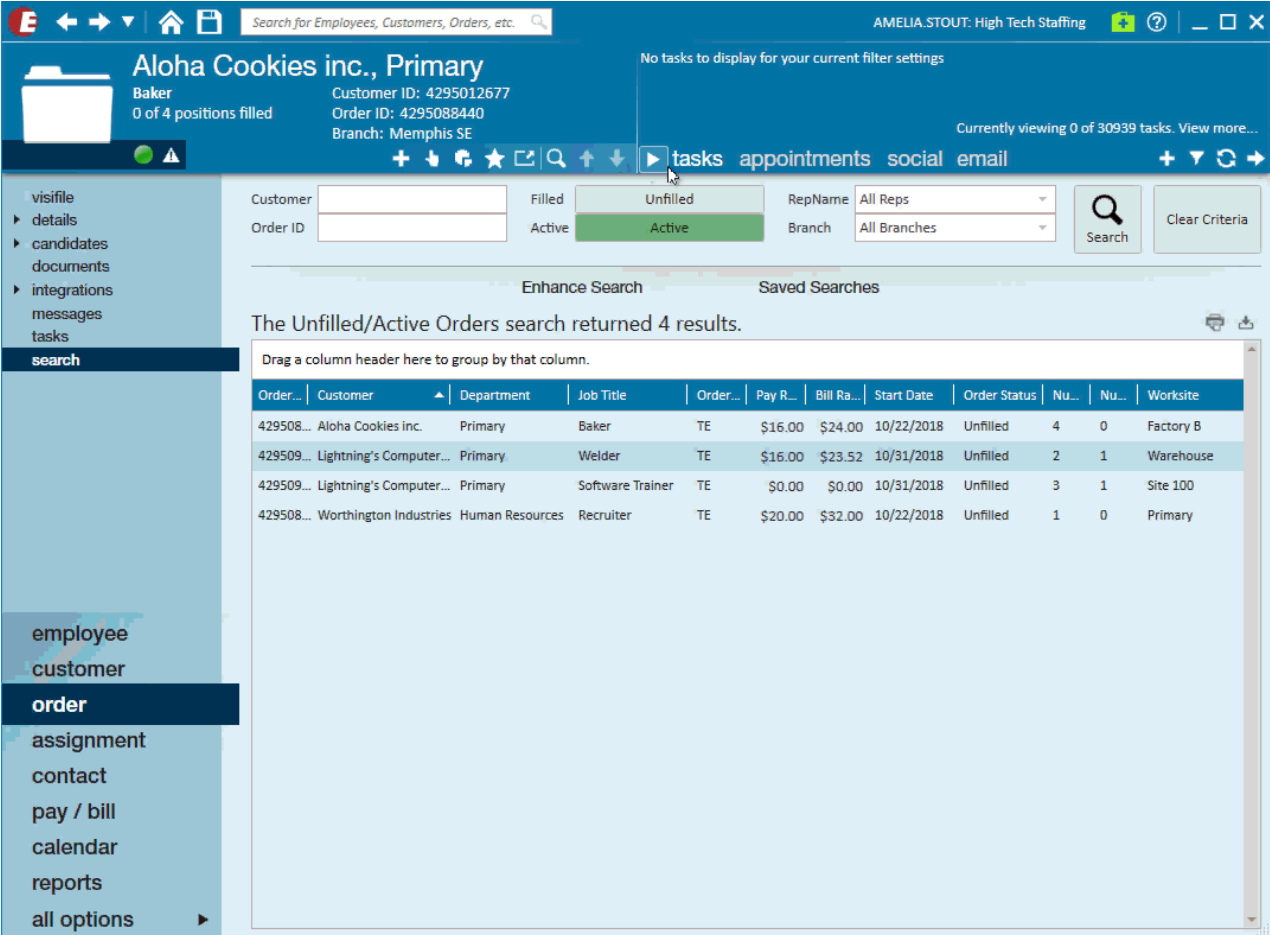
1. Create a search you wish to export.
2. Utilize the  (print or export) options in the upper right corner of the search results.

3. Select your printer or select a folder to save your results in.

Tearaway Page

Create a search that you need to keep coming back to? Use this tearaway option to open the search results in a separate window.

1. Create the search you want to keep open.
2. Select the  icon in the top center of Enterprise.
3. Your search results will open in a new window, double click on any search result to have it open in the full Enterprise window.



The screenshot shows the Enterprise software interface. The top navigation bar includes a search bar, user information (AMELIA STOUT: High Tech Staffing), and navigation icons. The main content area displays search results for 'Aloha Cookies inc., Primary'. The search criteria are: Customer: Aloha Cookies inc., Primary; Order ID: 4295012677; Branch: Memphis SE. The search results table is as follows:

Order...	Customer	Department	Job Title	Order...	Pay R...	Bill Ra...	Start Date	Order Status	Nu...	Nu...	Worksite
429508...	Aloha Cookies inc.	Primary	Baker	TE	\$16.00	\$24.00	10/22/2018	Unfilled	4	0	Factory B
429509...	Lightning's Computer...	Primary	Welder	TE	\$16.00	\$23.52	10/31/2018	Unfilled	2	1	Warehouse
429509...	Lightning's Computer...	Primary	Software Trainer	TE	\$0.00	\$0.00	10/31/2018	Unfilled	3	1	Site 100
429508...	Worthington Industries	Human Resources	Recruiter	TE	\$20.00	\$32.00	10/22/2018	Unfilled	1	0	Primary

Want to learn more? Check out [The Tearaway Page](#).

Related Articles