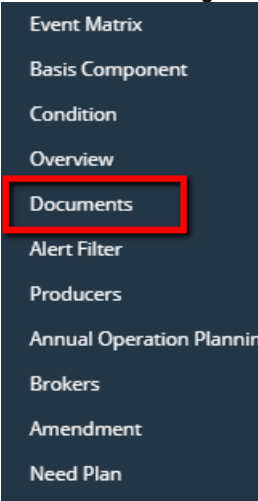


How To Open Existing Documents via Search Screen

Here are the steps on how to open existing record via Search screen:

1. Select **Contract Management Documents** from **Menu**.



2. Double-click mouse to open screen. If there's already an existing record, Search screen will open.

| Contract Document | | | | | | | |
|-------------------------------|---------------------------|---------------------------|-----------|----------|--------------------|--------------------|------------------|
| New Open Refresh Report | | | | | | | |
| Contract Document | | | | | | | |
| View Filter (F3) 25 record(s) | | | | | | | |
| | Document Name | Description | Commodity | Standard | Certification Name | Certification Code | Certification Id |
| <input type="checkbox"/> | Bill of Lading | Bill of Lading | Coffee | ✓ | | | |
| <input type="checkbox"/> | Commercial Invoice | Commercial Invoice | Coffee | ✓ | | | |
| <input type="checkbox"/> | Phytosanitary Certificate | Phytosanitary Certificate | Coffee | | | | |
| <input type="checkbox"/> | Bill Of Lading | Bill Of Lading | Tea | ✓ | | | |
| <input type="checkbox"/> | Commercial Invoice | Invoice | Tea | ✓ | | | |
| <input type="checkbox"/> | CoA - Micro | Micro | Tea | | | | |
| <input type="checkbox"/> | CoA - Gluten | Gluten | Tea | | | | |
| <input type="checkbox"/> | CoA - Pesticide | Pesticide | Tea | | | | |
| <input type="checkbox"/> | 4C License | 4C License | Coffee | | 4C | 4 | 2 |
| <input type="checkbox"/> | Shipping Advice | Shipping Advice | Coffee | | | | |
| <input type="checkbox"/> | Transaction Certificate | Organic tea | Tea | | Organic | | |

3. Select the existing records and click **Open** button.

| Contract Document | | | | | |
|--|---------------------------|---------------------------|-----------|----------|-----------------|
| New Open Refresh Report | | | | | |
| Contract Document | | | | | |
| View Filter (F3) 25 record(s) (1 selected) | | | | | |
| | Document Name | Description | Commodity | Standard | Certification I |
| <input checked="" type="checkbox"/> | Bill of Lading | Bill of Lading | Coffee | ✓ | |
| <input type="checkbox"/> | Commercial Invoice | Commercial Invoice | Coffee | ✓ | |
| <input type="checkbox"/> | Phytosanitary Certificate | Phytosanitary Certificate | Coffee | | |
| <input type="checkbox"/> | Bill Of Lading | Bill Of Lading | Tea | ✓ | |

4. The screen for the selected record will open.

Document - Bill of Lading

New Save Search Delete Undo Close

Details

Document Name * Bill of Lading

Description Bill of Lading

Document Type * Contract

Commodity * Coffee

Certification

Original 3

Copies 1

Standard ☒

? Home Lightbulb Mail Ready Page 1 of 1

5. For opening Multiple records, select Multiple records you want to open and click on **Open** Button.

6. It will open all the selected records.

7. Search for the existing record you want to open manually by entering a keyword on the **Filter** field and click on **Refresh**.

Contract Document

New Open Refresh Report

Contract Document

View Bill of Lading x 2 record(s)

| | Document Name | Description | Commodity | Standard | Certification |
|--------------------------|----------------|----------------|-----------|-------------------------------------|---------------|
| <input type="checkbox"/> | Bill of Lading | Bill of Lading | Coffee | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Bill Of Lading | Bill Of Lading | Tea | <input checked="" type="checkbox"/> | |

8. Or you can also use the **Advance Filter**.

- a. Click on the Filter button to show filter field.

Contract Document

New Open Refresh Report

Contract Document

View Filter (F3) 25 record(s)

| | Document Name | Description | Commodity |
|--------------------------|----------------|----------------|-----------|
| <input type="checkbox"/> | Bill of Lading | Bill of Lading | Coffee |

- b. Click on the drop down button to select criteria. Criteria are based on the columns present in the grid.

Contract Document

New Open Refresh Report

Contract Document

View Clear All Filters Filter (F3) 25 record(s)

Document Name

Description

Commodity

Standard

Certification Name

Certification Code

Certification Id

Commercial Invoice

| | Document Name | Description | Commodity |
|--------------------------|--------------------|---------------------------|-----------|
| <input type="checkbox"/> | Bill of Lading | Bill of Lading | Coffee |
| <input type="checkbox"/> | Commercial Invoice | Commercial Invoice | Coffee |
| <input type="checkbox"/> | Certification Name | Phytosanitary Certificate | Coffee |
| <input type="checkbox"/> | Certification Code | Bill Of Lading | Tea |
| <input type="checkbox"/> | Certification Id | Invoice | Tea |

- c. Select criteria and add conditions.

Contract Document

New Open Refresh Report ▾

Contract Document

View X Clear All Filters Filter (F3) 25 record(s)

X Commodity ▾ Contains ▾

| Document Name | Description | Commodity | Standard |
|---|----------------|-----------|-------------------------------------|
| <input type="checkbox"/> Bill of Lading | Bill of Lading | Coffee | <input checked="" type="checkbox"/> |

- d. You can select additional criteria to tighten your search further.

Contract Document

New Open Refresh Report ▾

Contract Document

View X Clear All Filters Filter (F3) 25 record(s)

X Commodity ▾ Contains ▾

X Certification Nan ▾ Equals ▾

| Document Name | Description | Commodity |
|---------------|-------------|-----------|
|---------------|-------------|-----------|