



## Chapter 10: Using the Search Feature

Once you've entered a customer's/Host's personal information (name, address, etc.) into the Web Order Entry system, the information will be stored for future use. To retrieve this information, use the search feature.

### Searching for Host Information

To search for Host information, go to the Party Setup page and follow these steps:

- ✂ To get to the Party Setup page, first go to the Welcome page by clicking on the Welcome Page link near the top left corner of your browser. Next, click on the **Party Order** button at the bottom of the page.

1. After filling in the Description, Party Date, and Attendance fields, and after selecting the shipping method, click on the **Search for Host** button.

**Party Setup** Chris Hughes

Party Code:	276406	Description:	Party's Wedding Shower	Party Date:	10/20/2012
Attendance:	1	# Orders:	0	# Distributions:	0
Partial Party:	<input type="checkbox"/>	Host Old Program:	SUMMER 2012		

Cash & Carry Post: \$0.00      Pool Account Applied to this Party:

Except for direct-to customer orders, this party will be shipped to: ☐ Host ☐ Consultant

**Home Address**

First Name:

Last Name:

Address:

Apt/State:

City:  State:

Zip+4:

E-mail:

Home Phone:

Work Phone:

☐ PO Box ☐ Military ☐ Outside City

**Ship Address** ☐ Same as Home Address

First Name:

Last Name:

Address:

Apt/State:

City:  State:

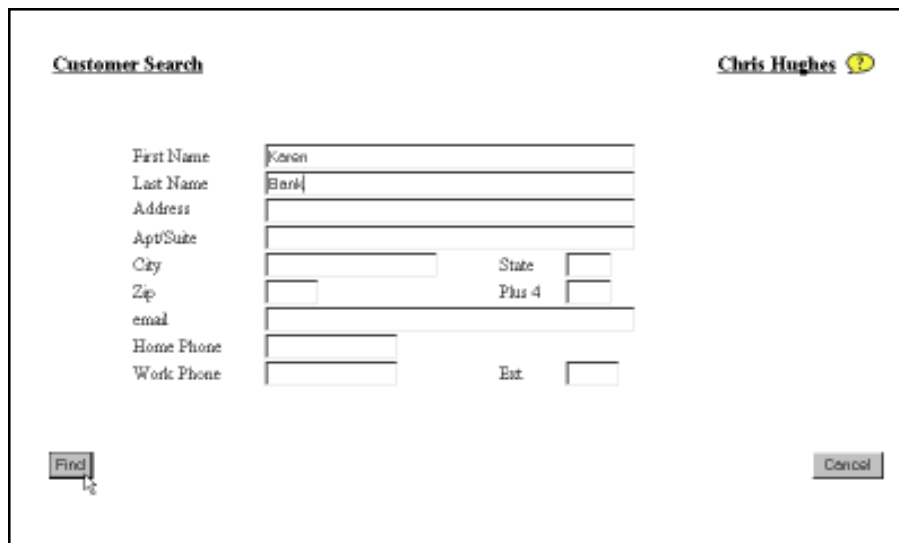
Zip+4:

Work Phone:

Ship Instructions:

☐ PO Box ☐ Military ☐ Outside City

2. Type your Host's name into the appropriate fields of the Customer Search page and then click on the **Find** button.



**Customer Search** Chris Hughes ?

First Name	<input type="text" value="Keron"/>		
Last Name	<input type="text" value="Bank"/>		
Address	<input type="text"/>		
Apt/Suite	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>
Zip	<input type="text"/>	Plus 4	<input type="text"/>
email	<input type="text"/>		
Home Phone	<input type="text"/>		
Work Phone	<input type="text"/>	Ext.	<input type="text"/>

3. If the name and address for your Host is correct, click the **OK** button.



Bank, Keron ..... 33 Pine Street ..... Orlando, FL 32802

If there are multiple names, select the desired Host by clicking on the correct name and address, then click the **Ok** button.

The system will then insert your Host's personal information into the corresponding fields of the Party Setup page.

**Party Setup** Chris Hughes ?

Party Ref#	275698	Description	Kristy's Wedding Shower	Party Date	05/29/2002
Attendance	25	# Orders	0	# Datings	0

Partial Party ☐ Host Gift Program SUMMER 2002

Cash & Carry Pool \$0.00 Pool Amount Applied to this Party \$ 0.00

Except for direct-to customer orders, this party will be shipped to: ☒ Host ☐ Consultant

**Home Address** Host Search

First Name Karen  
 Last Name Bank  
 Address 33 Pine Street  
 Apt/Suite   
 City Orlando State FL  
 Zip+4 32802 - 0000  
 E-mail   
 Home Phone (407) 655-1212  
 Work Phone  Extn. 0000

☐ PO Box ☐ Military ☐ Outside City

**Ship Address** ☒ Same as Home Address

First Name Karen  
 Last Name Bank  
 Address 33 Pine Street  
 Apt/Suite   
 City Orlando State FL  
 Zip+4 32802 - 0000  
 Work Phone  Extn. 0000  
 Ship Instruction

☐ PO Box ☐ Military ☐ Outside City

Previous Party Summary Party Orders & Datings Delete Party Next

## Searching for Customer Information

Searching for customer information is similar to searching for Host information. If you've entered the personal information for a customer, then that information is stored in the system for future use.

Follow these steps to search for customer information:

1. On the Customer Order page, enter the desired Order Form #. Next, select the Customer option and click on the **Customer Search** button.

**Customer Order** Chris Hughes ?

Party Ref#	275698	Description	Kristy's Wedding Shower	Party Date	05/29/2002
Order Ref#					

This order is for: ☒ Customer ☐ Host ☐ Consultant

This is a direct-ship order: ☐ Dated a Party: ☐ Party Date

**Home Address** Customer Search

First Name   
 Last Name   
 Address   
 Apt/Suite   
 City  State   
 Zip+4  -   
 E-mail   
 Home Phone   
 Work Phone  Extn.

☐ PO Box ☐ Military ☐ Outside City

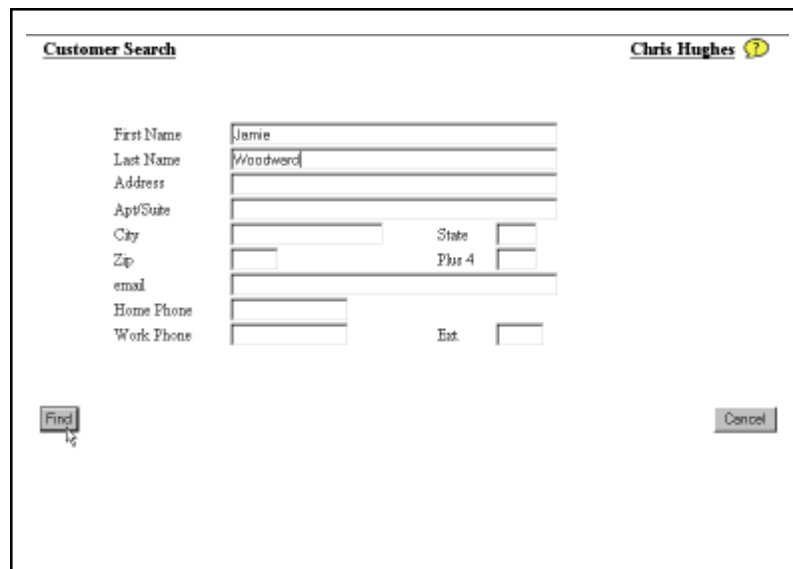
**Ship Address**

First Name Karen  
 Last Name Bank  
 Address 33 Pine Street  
 Apt/Suite   
 City Orlando State FL  
 Zip+4 32802 - 0000  
 Work Phone  Extn. 0000  
 Ship Instruction

☐ PO Box ☐ Military ☐ Outside City

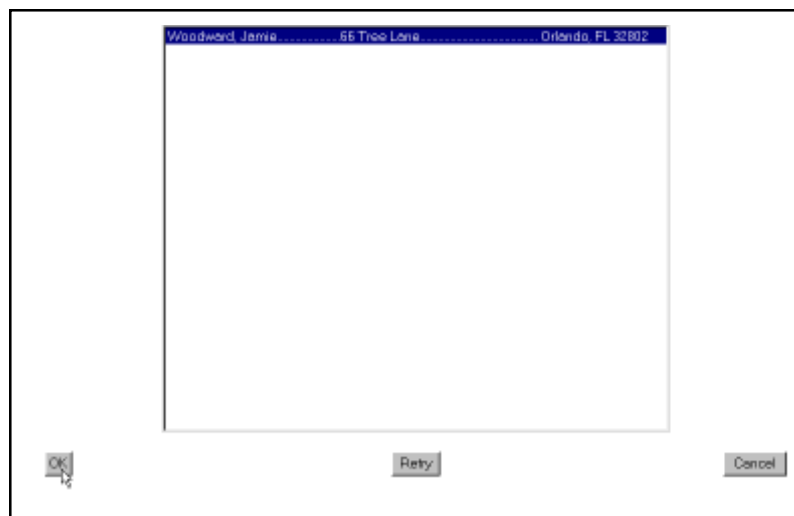
Previous Delete Next

2. On the Customer Search page, type your customer information into the applicable fields and then click on the **Find** button.



The screenshot shows a web form titled "Customer Search" with a user name "Chris Hughes" and a help icon in the top right. The form contains several input fields: "First Name" (containing "Jamie"), "Last Name" (containing "Woodward"), "Address", "Apt/Suite", "City", "State", "Zip", "Plus 4", "email", "Home Phone", and "Work Phone". There are also "Find" and "Cancel" buttons at the bottom.

3. If the name and address for your customer is correct, click the **OK** button.



The screenshot shows a dialog box with a list of search results. The first result is "Woodward, Jamie ..... 85 Ties Lane ..... Orlando, FL 32802". At the bottom of the dialog are "OK", "Retry", and "Cancel" buttons.

If there are multiple names, select the desired customer by clicking on the correct name and address, then click on the **OK** button.

The system will then insert your customer's personal information into the applicable fields of the Party Setup page.

## Searching for Party Information

The Party History section of the Welcome page displays the party history for the last six parties and/or non-parties you entered.

- If the party or fundraiser you're searching for doesn't appear in the first Party History section of the Welcome page, you can view additional sections by using the slide bar.

**Navigation**

- [Welcome Page](#)
- [Order Search](#)
- [Change Password](#)
- [Want your feedback](#)
- [Contact Performance](#)
- [Web Order Entry User Guide](#)
- [Contact Address Setup Page](#)
- [Log Out](#)
- [Register New Consultants](#)

Welcome to Web Order Entry!

**Important!** Customer Care hours and Web Order Entry hours are different, please scroll down for complete details. **Special Note:** The processing week closes each Tuesday at 12:00 Midnight Eastern Time. Please click here to see [What's New!](#)

**Attention!** Web Order Entry is available anytime except between the hours of 4 a.m. and 8 a.m. Eastern time on Sundays.

Welcome back, Chris! Select an existing party from the list below to review or change, or click on "Party Order" to enter a new party. For non-Party orders, click on the "Non-Party Order" button. For fundraiser orders, click on the "Fundraiser Order" button.

**Week# 26 Cutoff: Wednesday, July 03rd 2002 at 2:00pm ET**

**Party History**

Ref#	Party Type	Partial Linked	Description	Host	Date	Sales Credit	Sales Total	Status
773093	Party	No	Kristy's Wedding Shower	Karen Bank	05/28/2002	0.00	0.00	Not Submitted
773097	Fundraiser	No	Park 210 Cub Scouts	Cub Scout Park 210	05/28/2002	48.50	48.50	Not Submitted
773093	Non-Party	No	Outside Orders		05/28/2002	44.50	44.50	Not Submitted
773090	Party	No	Karen's Birthday Party	Karen Bank	05/28/2002	663.00	663.00	Not Submitted
773097	Party	Partial	Hannah's Housewarming - Set 1	Hannah Hall	05/19/2002	262.00	262.00	Not Submitted
773094	Party	No	Birthday Party	Sally Parr	05/21/2002	517.00	517.00	In Shipping

Chris Hughes ?

Non-Party Order    Party Order    Fundraiser Order

- Additional sections will appear that list party and/or non-party information based on when you entered the information. (The more current entries will be listed at the top.)
- You can also click on the column headings (Ref#, Party Type, Partial Linked, Description, Host, Date, Sales Credit, Sales Total, and Status) to sort the entries in that column. For example, to sort the Fundraiser parties from all others, click on the column heading of Party Type to sort all of your parties by type. Fundraiser orders will be listed first, as the sort for this column is sorting them alphabetically.



You can click on the Welcome Page link in the Navigation menu to quickly return to the first Party History section of the Welcome page.

- You can view the details of any party, fundraiser, or non-party you've previously entered by clicking on the corresponding **Ref#** link in the Party History section.

Navigation

Welcome Page

Order Search

Change Password

My Party Order

Feedback

Completed

Performance

Web Order Entry

Web Order Entry

Completed

Completed

Log Out

Register Your

Commission

Welcome to Web Order Entry!

Important! Customer Care hours and Web Order Entry hours are different, please scroll down for complete details. Special Note: The processing week closes each Tuesday at 11:00 Midnight Eastern Time. Please click here to see What's New!

Attention! Web Order Entry is available anytime except between the hours of 4 a.m. and 8 a.m. Eastern time on Sundays.

Welcome back, Chris! Select an existing party from the list below to review or change, or click on "Party Order" to enter a new party. For non-Party orders, click on the "New Party Order" button. For fundraiser orders, click on the "Fundraiser Order" button.

Week 26 Cutoff: Wednesday, July 9th 2003 at 2:00pm ET

Chris Hughes

Party History

Ref#	Party Type	Partial Linked	Description	Host	Date	Sales Credit	Sales Total	Status
422488	Party	No	Kathy's Wedding Shower	Karen Davis	8/10/2002	9.00	9.00	Not Submitted
422489	Fundraiser	No	Park 28.8 Oak Grove	Cub Scout Pack 280	8/10/2002	40.00	40.00	Not Submitted
422490	Non-Party	No	Outside Orders		8/10/2002	44.00	44.00	Not Submitted
422491	Party	No	Karen's Birthday Party	Karen Davis	8/10/2002	160.00	160.00	Not Submitted
422492	Party	Partial	Round 228 fundraising - 2nd	Round 228	8/10/2002	260.00	260.00	Not Submitted
422493	Party	No	Birthday Party	Dolly Fox	8/10/2002	117.00	117.00	Not Submitted

Non-Party Order Party Order Fundraiser Order

- From the Party Setup screen, you can view a summary of the orders associated with a party or non-party by clicking on the **Party Orders & Datings** button. The Party Orders & Datings screen will then appear. (Click on the desired order # to view the corresponding order information.)

Order #	Shipping #	Customer	Customer Type	Order Date	Order Total	Status	Dating Date
852852802		Joe Goodman	Customer	8/5/2002	\$592.20	Pending	
852852802		Sally Baker	Customer	8/5/2002	\$318.00	Pending	06/25/2002
852852802		Karen Bank	Host	8/5/2002	\$39.22	Pending	
Datings		Kathy Chen	Dating				06/25/2002

Previous Additional Datings New Order Party Summary Next

- From the Party Setup screen, you can view a summary list of all orders associated with a party by clicking on the **Party Summary** button.

Party Setup Chris Hughes

Party Ref#: 275690 Description: Karen/S Birthday Party Party Date: 05/28/2002

Attendance: 15 # Orders: 3 # Datings: 2

Partial Party ☐ Host Gift Program: SUMMER 2002

Cash & Carry Pool: \$0.00 Pool Amount Applied to this Party: \$

Except for direct-to customer orders, this party will be shipped to: ☒ Host ☐ Consultant

Home Address: Host Search Ship Address: ☒ Same as Home Address

First Name: Karen First Name: Karen

Last Name: Bank Last Name: Bank

Address: 33 Pine Street Address: 33 Pine Street

Apt/Suite: Apt/Suite:

City: Orlando State: FL City: Orlando State: FL

Zip+4: 32802 - Zip+4: 32802 -

E-mail: Work Phone: Estn:

Home Phone: (407) 655-1212 Ship Instruction:

Work Phone: Estn:

☐ PO Box ☐ Military ☐ Outside City ☐ PO Box ☐ Military ☐ Outside City

Previous Party Summary Party Orders & Datings Delete Party Next

- The Host Gift screens will then display for your review.

- On the Party Summary screen, click on the down arrow to scroll down and view the Consultant cost, payment, and commission information.

Party Ref#	Party Date	Description
275690	05/28/2002	Karen's Birthday Party

**Customer Orders**

Customer	Order Ref#	Shipping Number	Total Retail	Cons. Cost	S + H	Sales Tax	Payment	Total Order
<a href="#">Joe Goodman</a>	<a href="#">82835097</a>		350.00	262.50	20.00	22.20	503.50	392.20
<a href="#">Sally Baker</a>	<a href="#">82835101</a>		280.00	210.00	20.00	18.00	318.00	318.00
<a href="#">[Host] Karen Bank</a>	<a href="#">82835104</a>		33.00	24.76	4.00	2.22	39.22	39.22
<b>Party Retail Total</b> =====			663.00	497.26	44.00	42.42	860.72	749.42
<b>Host Gifts/Thank You Gifts</b>			82835104	0.00	0.00	0.00	2.55	0.00
<b>Host Gifts Coverage</b>			82835104	0.00	0.00	0.00	0.00	0.00
<b>Total</b> =====			663.00	497.26	44.00	44.97	860.72	751.97

**Consultant Order**

Customer	Order Ref#	Shipping Number	Total Retail	Cons. Cost	S + H	Sales Tax	Payment	Total Order
<b>Consultant Totals</b>				0.00	0.00	0.00	0.00	0.00

Party Retail \$663.00 + Cash & Carry Amount \$0.00 = TOTAL PARTY SALES \$663.00

**Consultant Cost Summary**

Consultant Cost	S + H	Sales Tax	Total	Card Amount thru Orders	Consultant Paid Amt.	Account Amt. Due
497.26	44.00	44.97	586.23	0.00	0.00	586.23

**YOUR NET COMMISSION (based on suggested retail) FOR THIS PARTY IS** **165.74**  
 ( 663.00 + 0.00 - 497.26 )

You can also view individual orders by clicking on the underlined order number or customer's name. (The underline indicates a link.)



## Searching for Order Information

You can search the Web Order Entry system for any customer, Host, and/or personal Consultant order you've previously entered. To do this, access the Order Search page by clicking the Order Search link found on the Welcome page.

The screenshot shows the Web Order Entry interface. On the left is a navigation menu with links: Welcome Page, Order Search, Change Password, My Account, Consultant Performance, Web Order Entry, Error Checks, Consultant Address/Status, User, Log Out, Register New Consultant, and Consultants. The main content area has a welcome message and a "Party History" table for user Chris Hughes.

Order #	Party Type	Order Linked	Description	Host	Date	Order Credit	Order Total	Status
000001	Party	No	Karen's Wedding Shower	Karen Dink	05/08/2002	000	000	Not Submitted
000002	Purchase	No	Franklin's Club Soda	Club Street Peds. LLC	05/08/2002	46.50	46.50	Not Submitted
000003	New Party	No	Outside Order		05/08/2002	44.50	44.50	Not Submitted
000004	Party	No	Karen's Birthday Party	Karen Dink	05/08/2002	660.00	660.00	Not Submitted
000005	Party	Partial	Meredith's Housewarming - Set 1	Meredith Hall	05/08/2002	265.00	265.00	Not Submitted
000006	Party	No	Birthday Party	Sally Fox	05/11/2002	217.00	217.00	In Shipping

Buttons at the bottom: None Party Order, Party Order, Purchase Order.

## Searching by Customer

On the Order Search page, select Search Orders by Customers and then click on the **Customer Search** button.

The screenshot shows the "Order Search" page. The "Search Orders by Customer" section is active, with the "Customer Search" button highlighted. Other search options include "Search Orders by Order" and "Search Orders by Party".

**Search Orders by Customer**

From Order #  To Order #   
 From Order Date  To Order Date   
 Order Type: ☒ Host ☐ Customer ☐ Consultant

**Search Orders by Order**

From Party #  To Party #   
 From Party Date  To Party Date   
 Party Description

The Customer Search page will then display in your browser. Next, enter the text to search for and click on the **Find** button.

Select the customer's name from the list and click on the **OK** button.



The Order Search Results page will then display in your browser listing all of the orders pertaining to the customer. To view a specific order, click on the desired order number in the **Order #** column.

## Search by Order

On the Order Search page, when you select to search Orders by Order, you have the ability to search by a range of order numbers, by a range of order dates, or by a type of order (Host, Customer, or Consultant).

A screenshot of the "Order Search" page in a web application. The page has a title "Order Search" and a user name "Chris Hughes" with a help icon. There are three main search sections. The first section, "Search Orders by Customers", has a "Customer Search" button. The second section, "Search Orders by Order", is selected with a radio button. It contains fields for "From Order #", "To Order #", "From Order Date", "To Order Date", and "Order Type" with checkboxes for "Host", "customer", and "consultant". Below these fields is an "Order Search" button. The third section, "Search Orders by Party", has fields for "From Party #", "To Party #", "From Party Date", "To party Date", and "Party Description", with a "Party/Order Search" button below.

Simply enter your search criteria and click on the **Order Search** button. The system will then return all orders meeting your criteria.

[illegible]

- ☒ If your search results do not provide you with the information you're looking for, then click on the **Retry Search** button to change your search criteria.

## Search by Party

When you select to Search Orders by Party, you have the ability to search by a range of Party #'s, by a range of Party Dates, and/or by a Party Description.

**Order Search** Chris Hughes ?

☐ Search Orders by Customers Customer Search

☐ Search Orders by Order

From Order # <input type="text"/>	To Order # <input type="text"/>
From Order Date <input type="text"/>	To Order Date <input type="text"/>
Order Type <input type="checkbox"/> Host <input type="checkbox"/> customer <input type="checkbox"/> consultant	

Order Search

☐ Search Orders by Party

From Party # <input type="text"/>	To Party # <input type="text"/>
From Party Date <input type="text" value="05/28/2002"/>	To party Date <input type="text" value="05/28/2002"/>
Party Description <input type="text"/>	

Party Order Search


Enter your search criteria and click on the **Party Order Search** button. The system will then return all orders meeting your criteria.

[illegible]☒

If your search results do not provide you with the information you're looking for, then click on the **Retry Search** button to change your search criteria.

## Searching for Item Information

Item Search is a powerful feature available on the Web Order Entry Web site. You can search for items using different criteria by first clicking the Item Search button at the bottom of most product web pages.

Items Entry				Chris Hughes 			
Party Ref#	175690	Description	Karen's Birthday Party	Party Date	05/28/2002		
Order Ref#	82803067	Customer	Joe Goodman	Order Date	05/28/2002		
Order Type	CUSTOMER		Shipping Method	Ship To Host			

Id	Item Type	Item	Description	Qty	Cost	Cost Total	Sell Price	Sell Total
F1	1- Popcorn	25	POPCORN	10	\$4.00	\$4.00	\$4.00	\$4.00
F1	1- Popcorn	25	POPCORN	10	\$4.44	\$4.44	\$4.00	\$4.00
F1	1- Popcorn	25						
F1	1- Popcorn	25						
F1	1- Popcorn	25						
F1	1- Popcorn	25						
F1	1- Popcorn	25						
F1	1- Popcorn	25						
F1	1- Popcorn	25						
F1	1- Popcorn	25						

Previous
Item Search
Next 10 Items
Verify
Print

Once you've clicked on the **Item Search** button, the main Item Search Web page will display. You can determine how you wish to search for item information from this page.

Any item search you perform will provide you with a list with the following details:

- Item number
- Stock number
- Description
- Item Class
- Units of Measure
- Retail Price
- Consultant Price
- Start Date
- End Date



You can view a complete list of all Active items by verifying the Active check box is checked and clicking the **Search** button at the bottom of the Item Search page.

**Item List** Chris Hughes

Item #	Stock #	Description	Item class	UoM	Retail Price	Consultant Price	Start Date	End Date
0011	10027650000	Min Round 1 Containers/Sheer Ice	Regular	UNT	3.90	2.85	07/30/2001	01/01/2010
0012	10027657000	Min Round 2 Containers/Sheer Ice	Regular	UNT	4.30	3.25	07/30/2001	01/01/2010
0013	10027653000	Min Round 3 Containers/Sheer Ice	Regular	UNT	4.90	3.60	07/30/2001	01/01/2010
0014	10027659000	Min Round 4 Containers/Sheer Ice	Regular	UNT	5.30	3.96	07/30/2001	01/01/2010
0026	10036000000	Min Round Seal/Bold N Blue	Regular	UNT	1.30	0.90	06/27/2001	01/01/2010
0027	10019403000	Min Round Seal/Black	Regular	UNT	1.30	0.90	06/27/2001	01/01/2010
0029	10036003000	Min Round Seal/Hunter Green	Regular	UNT	1.30	0.90	06/27/2001	01/01/2010
0036	10036004000	Stor-N Shade Seal/Bold N Blue	Regular	UNT	3.30	2.63	07/30/2001	01/01/2010
0037	10019409000	Stor-N Shade Seal/Black	Regular	UNT	3.30	2.63	07/30/2001	01/01/2010
0039	10036007000	Stor-N Shade Seal/Hunter Green	Regular	UNT	3.30	2.63	07/30/2001	01/01/2010
0046	10036003000	Deep-Less Seal/Bold N Blue	Regular	UNT	3.30	2.63	06/06/2001	01/01/2010
0047	10019410000	Deep-Less Seal/Black	Regular	UNT	3.30	2.63	06/20/2001	01/01/2010
0049	10036011000	Deep-Less Seal/Hunter Green	Regular	UNT	3.30	2.63	06/06/2001	01/01/2010
0051	10043451000	Min Oval 1 Containers/Sheer Ice	Regular	UNT	4.30	3.25	06/07/2000	01/01/2010
0052	10043453000	Min Oval 2 Containers/Sheer Ice	Regular	UNT	5.30	3.96	06/07/2000	01/01/2010

Previous
Down
Retry Search
Next

### Defining the Search Criteria

You can define the item search criteria by selecting any category or combination of categories displayed on the Item Search page.

You can further define how the search results are displayed by using the Sort Items feature.



Click the **Retry Search** button if you'd like to perform another search or the **Previous** button to cancel the search.