Chapter 10: Using the Search Feature

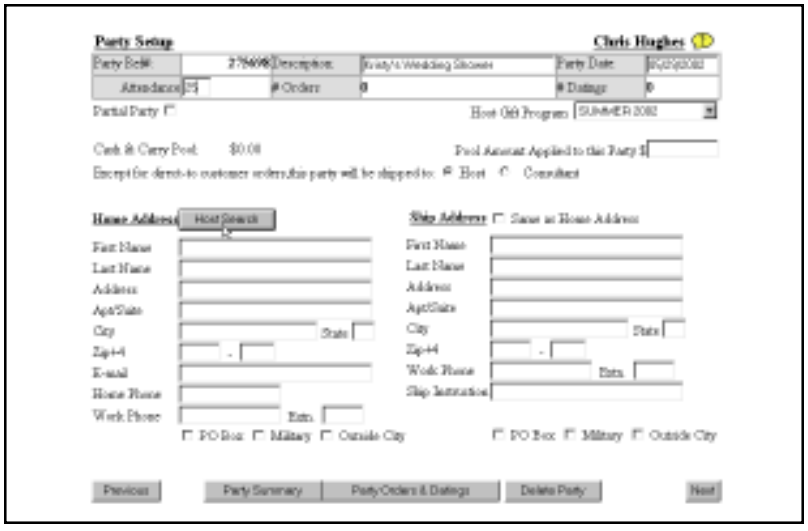
Once you've entered a customer's/Host's personal information (name, address, etc.) into the Web Order Entry system, the information will be stored for future use. To retrieve this information, use the search feature.

Searching for Host Information

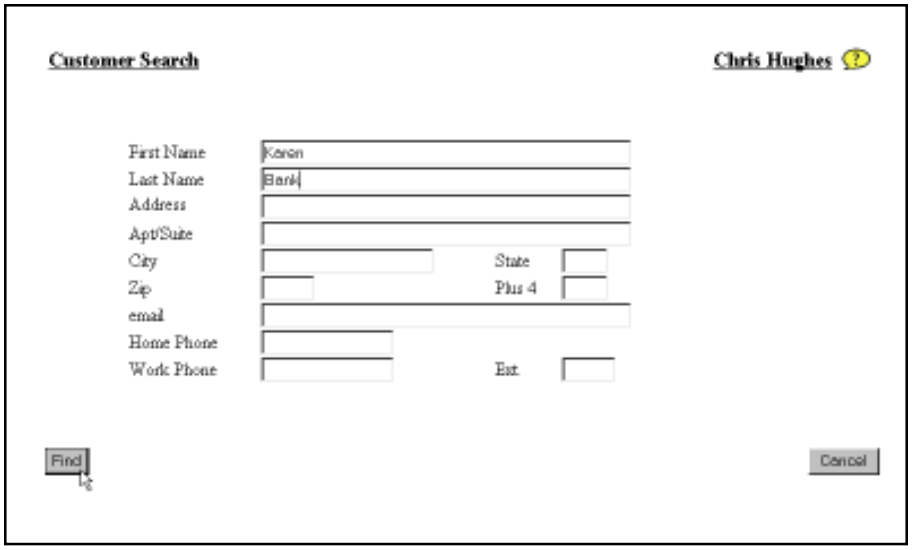
To search for Host information, go to the Party Setup page and follow these steps:

> ✂ 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.



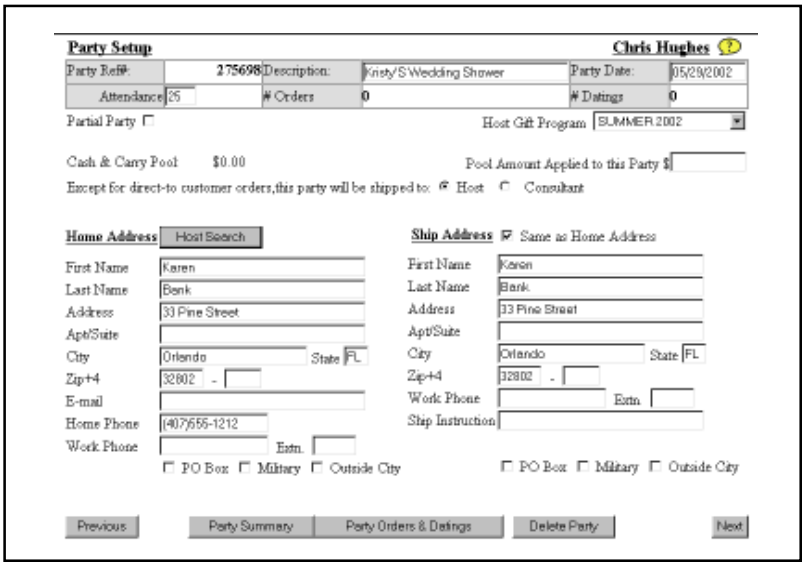
2. Type your Host's name into the appropriate fields of the Customer Search page and then click on the **Find** button.



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

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.

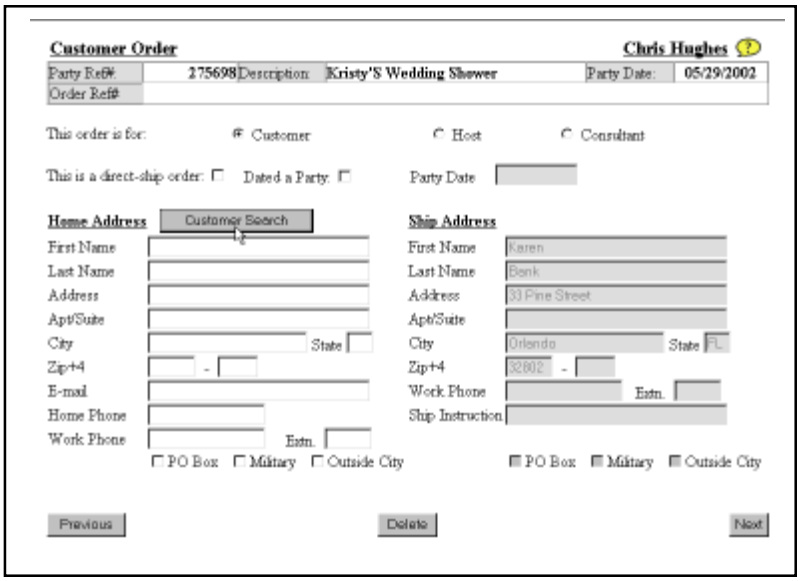


Searching for Customer Information

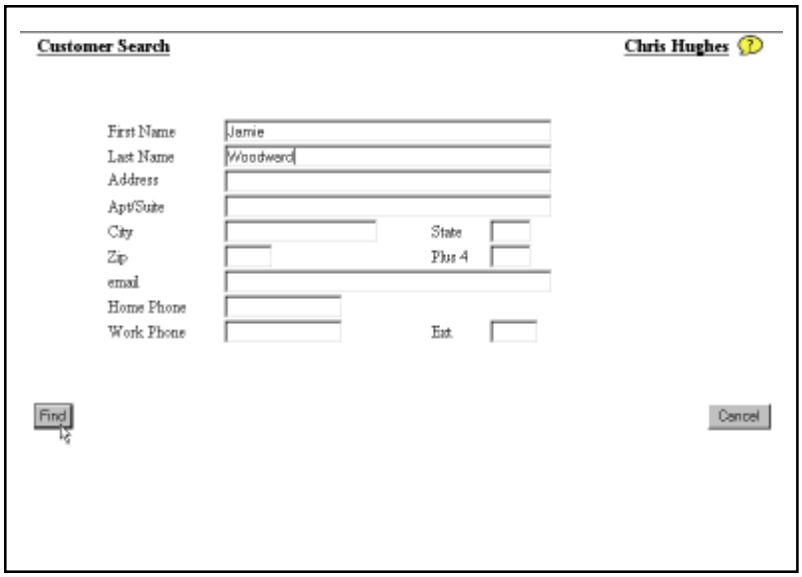
Searching for customer information is similar to searching for Host information. If you've entered the personal information for a customer, then that information is stored in the system for future use.

Follow these steps to search for customer information:

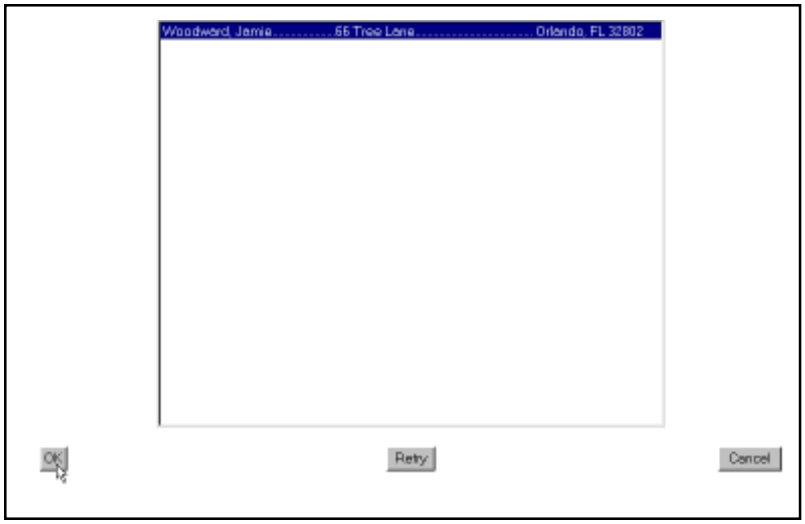
1. On the Customer Order page, enter the desired Order Form #. Next, select the Customer option and click on the **Customer Search** button.



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



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



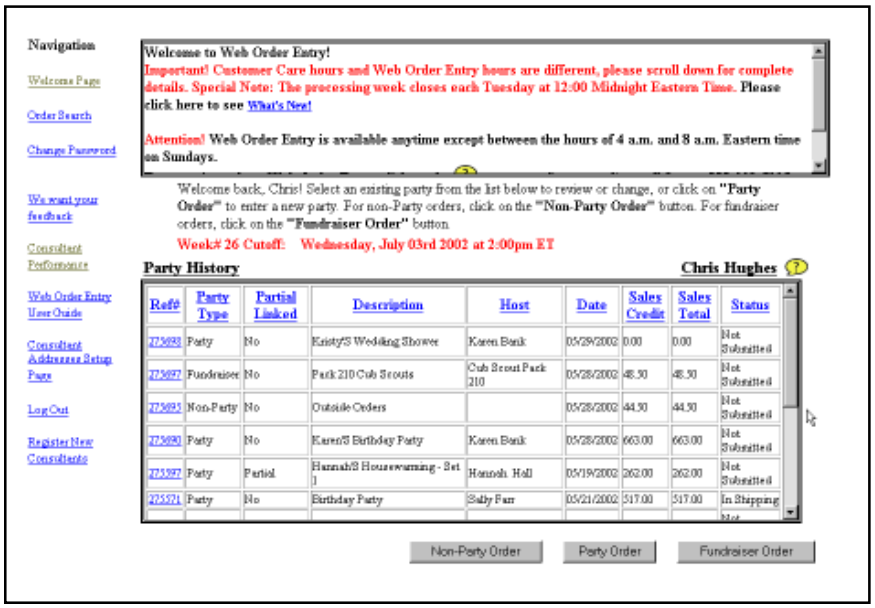
If there are multiple names, select the desired customer by clicking on the correct name and address, then click on the **OK** button.

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.



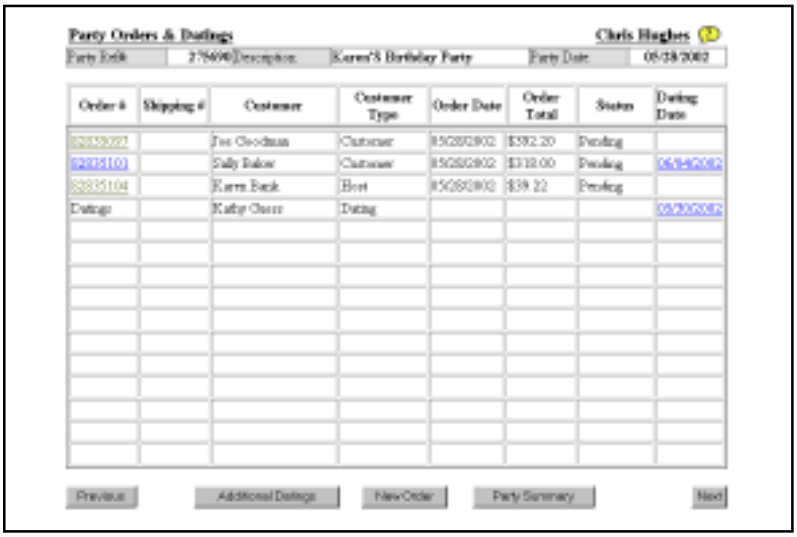
- Additional sections will appear that list party and/or non-party information based on when you entered the information. (The more current entries will be listed at the top.)

- 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.

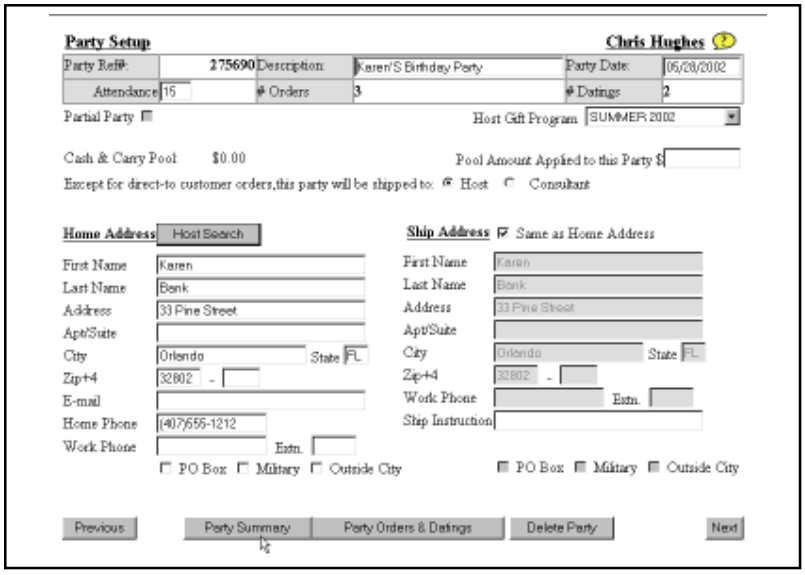
> ✂ You can click on the Welcome Page link in the Navigation menu to quickly return to the first Party History section of the Welcome page.

- 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.

- 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.)

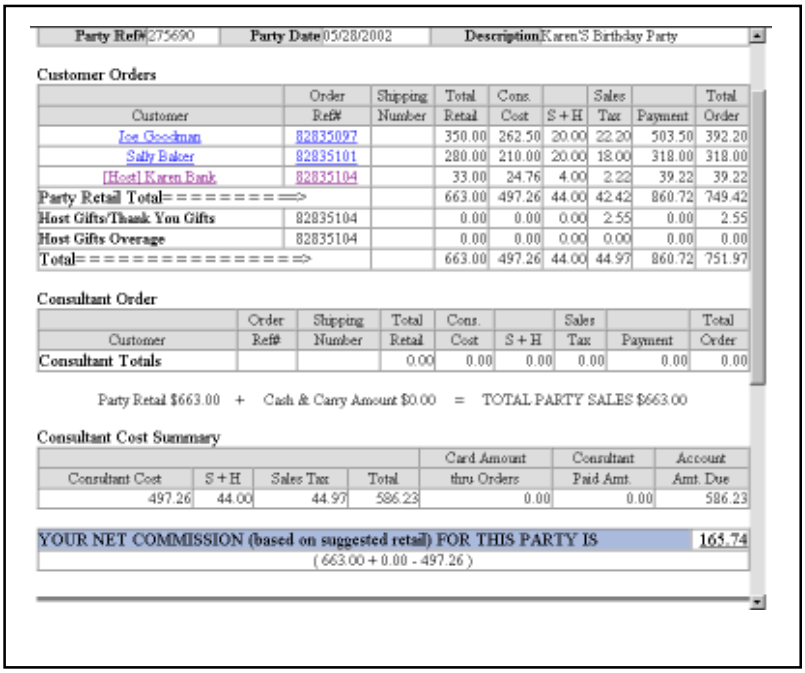


- From the Party Setup screen, you can view a summary list of all orders associated with a party by clicking on the **Party Summary** button.



- 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# 275690 **Party Date** 05/28/2002 **Description** Karen'S Birthday Party

Customer Orders

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

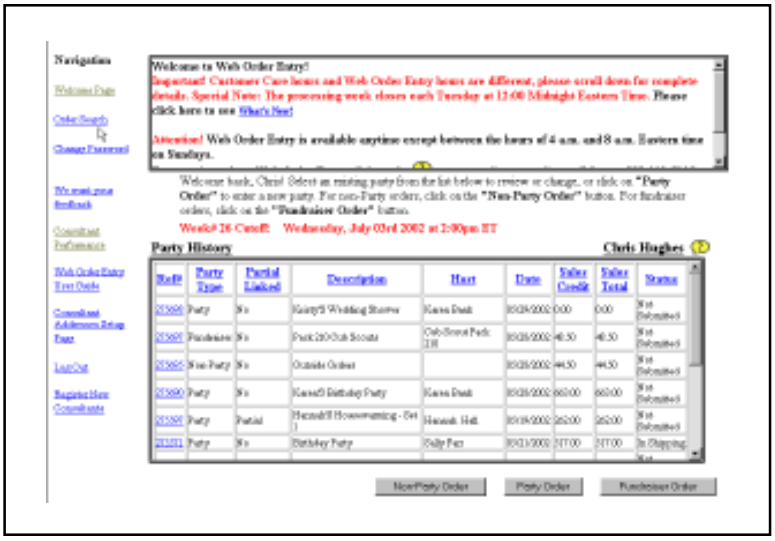
YOUR NET COMMISSION (based on suggested retail) FOR THIS PARTY IS 165.74

(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.)

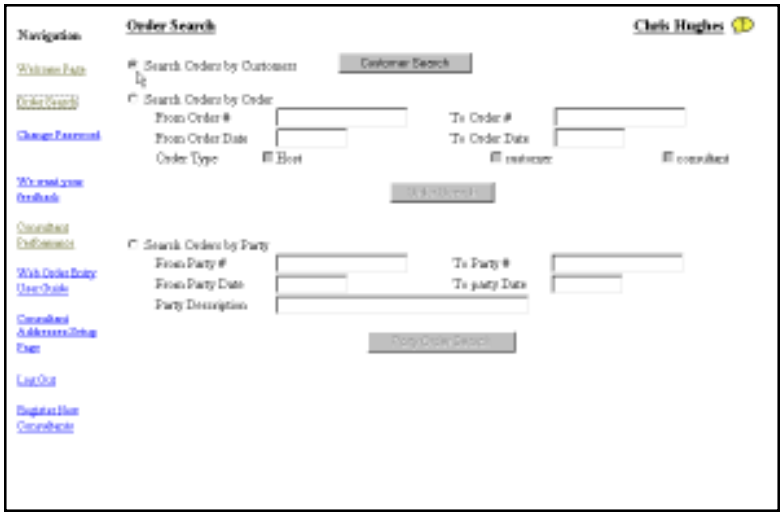
Searching for Order Information

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.



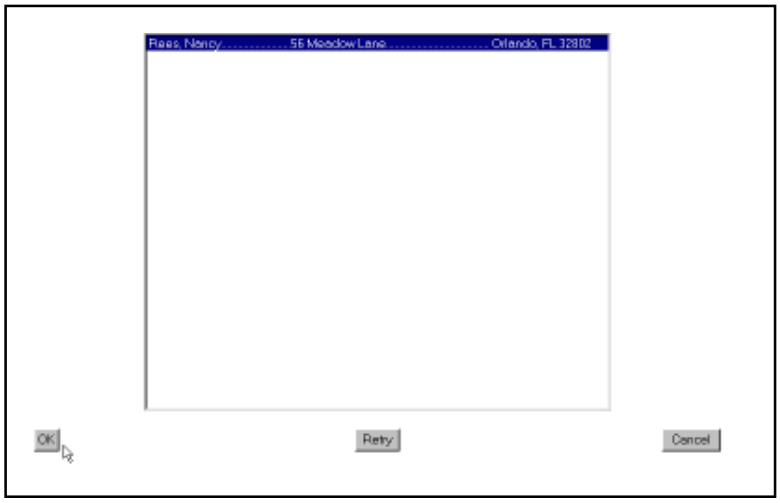
Searching by Customer

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



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

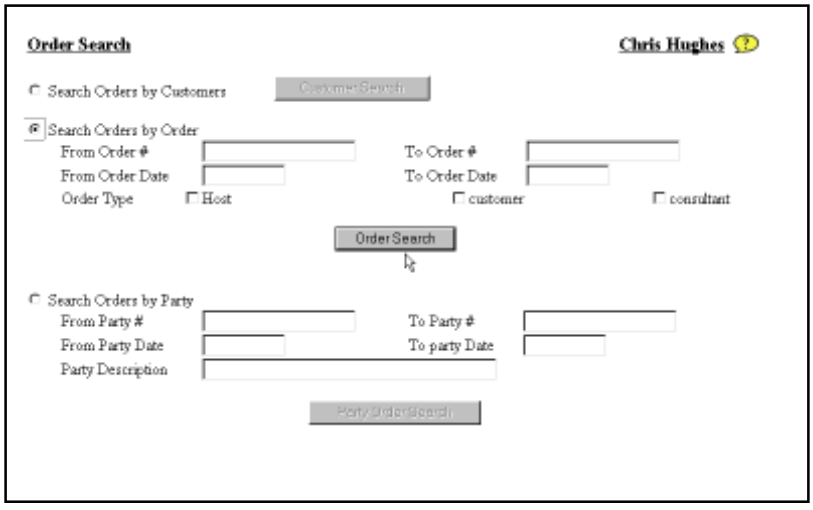
Select the customer's name from the list and click on the **OK** button.



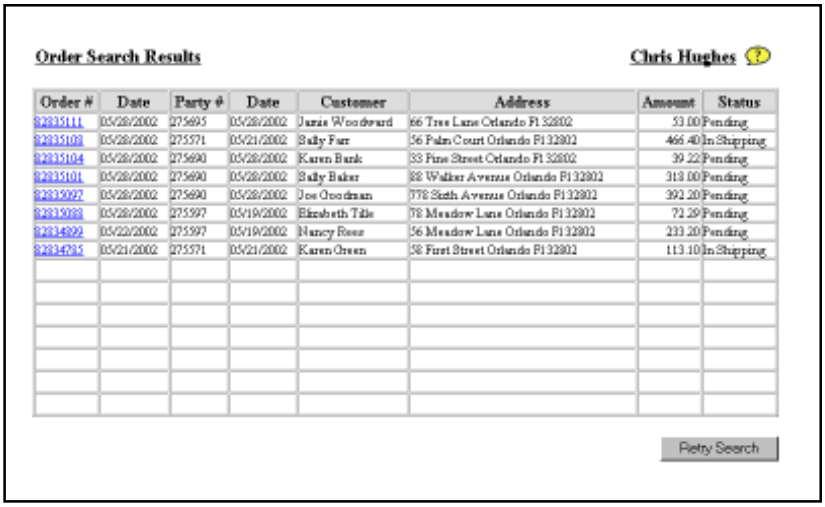
The Order Search Results page will then display in your browser listing all of the orders pertaining to the customer. To view a specific order, click on the desired order number in the **Order #** column.

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).



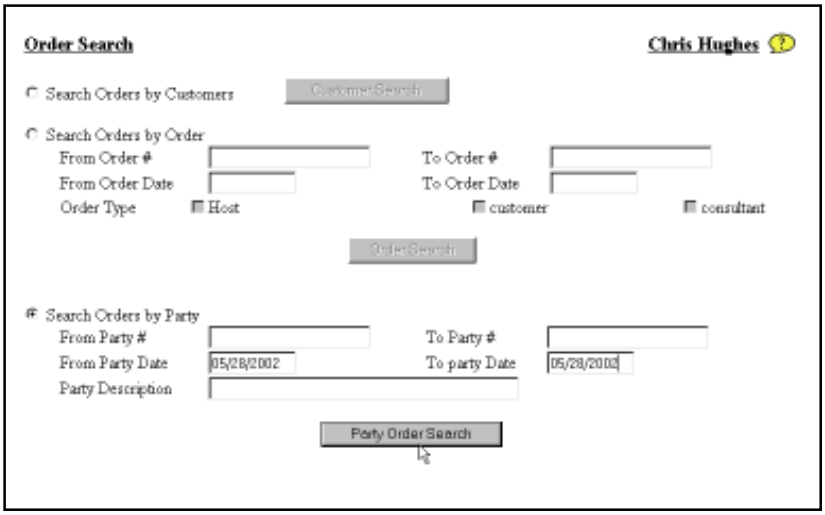
Simply enter your search criteria and click on the **Order Search** button. The system will then return all orders meeting your criteria.



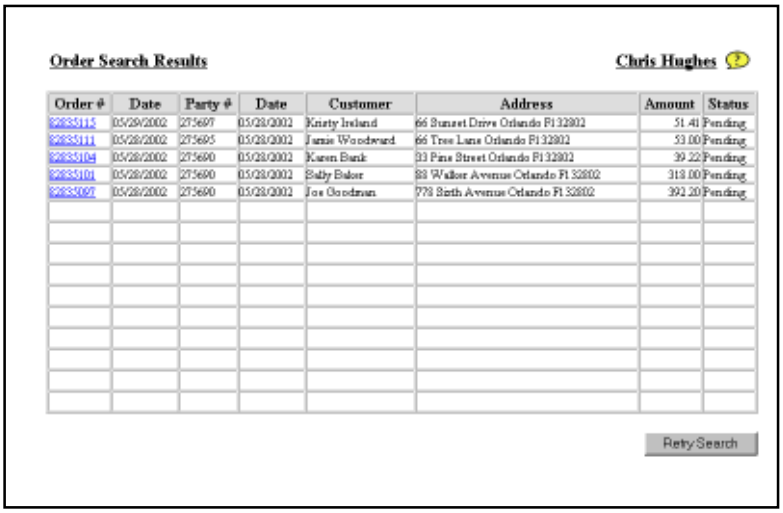
If your search results do not provide you with the information you're looking for, then click on the **Retry Search** button to change your search criteria.

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.



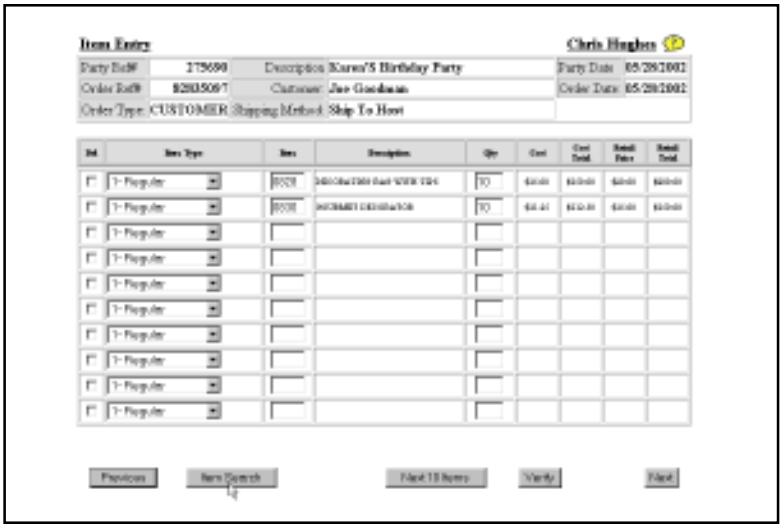
Enter your search criteria and click on the **Party Order Search** button. The system will then return all orders meeting your criteria.



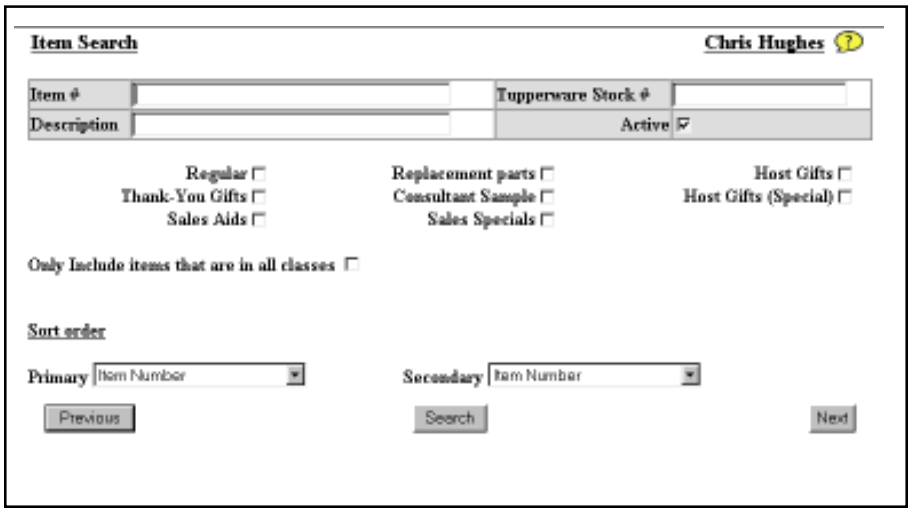
> If your search results do not provide you with the information you're looking for, then click on the **Retry Search** button to change your search criteria.

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.



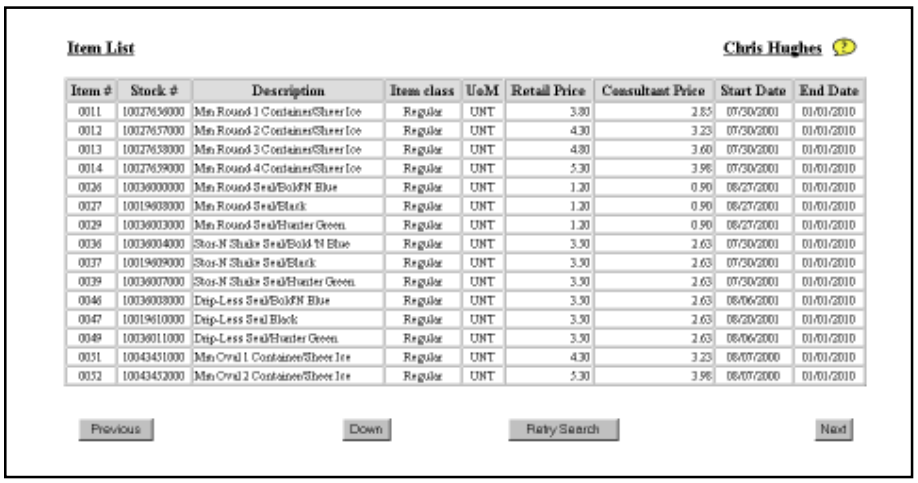
Once you've clicked on the **Item Search** button, the main Item Search Web page will display. You can determine how you wish to search for item information from this page.



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	10027656000	Mm Round 1 Container/Sheer Ice	Regular	UNT	3.80	2.85	07/30/2001	01/01/2010
0012	10027657000	Mm Round 2 Container/Sheer Ice	Regular	UNT	4.30	3.23	07/30/2001	01/01/2010
0013	10027658000	Mm Round 3 Container/Sheer Ice	Regular	UNT	4.80	3.60	07/30/2001	01/01/2010
0014	10027659000	Mm Round 4 Container/Sheer Ice	Regular	UNT	5.30	3.98	07/30/2001	01/01/2010
0026	10036000000	Mm Round Seal/Bold'N Blue	Regular	UNT	1.20	0.90	08/27/2001	01/01/2010
0027	10019603000	Mm Round Seal/Black	Regular	UNT	1.20	0.90	08/27/2001	01/01/2010
0029	10036003000	Mm Round Seal/Hunter Green	Regular	UNT	1.20	0.90	08/27/2001	01/01/2010
0036	10036004000	Stor-N Shake Seal/Bold 'N Blue	Regular	UNT	3.50	2.63	07/30/2001	01/01/2010
0037	10019609000	Stor-N Shake Seal/Black	Regular	UNT	3.50	2.63	07/30/2001	01/01/2010
0039	10036007000	Stor-N Shake Seal/Hunter Green	Regular	UNT	3.50	2.63	07/30/2001	01/01/2010
0046	10036008000	Drip-Less Seal/Bold'N Blue	Regular	UNT	3.50	2.63	08/06/2001	01/01/2010
0047	10019610000	Drip-Less Seal Black	Regular	UNT	3.50	2.63	08/20/2001	01/01/2010
0049	10036011000	Drip-Less Seal/Hunter Green	Regular	UNT	3.50	2.63	08/06/2001	01/01/2010
0051	10043451000	Mm Oval 1 Container/Sheer Ice	Regular	UNT	4.30	3.23	08/07/2000	01/01/2010
0052	10043452000	Mm Oval 2 Container/Sheer Ice	Regular	UNT	5.30	3.98	08/07/2000	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.