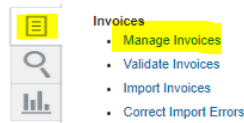
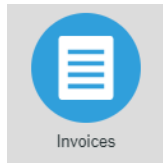


Quantum Financials - Searching for Invoices and Saving Searches

Did you know there's an easy way to generate a search, and save and recall that search, for Debit Memos, NONPO Invoices, and PCard Expense Reports in Quantum Financials? Creating a saved search can help reduce time spent looking for "your" items. You start by clicking on the Invoices icon.



Click Manage Invoices from the Task Pane.

Click the Advanced button (Button toggles between Advanced and Basic). Note that when the Advanced option is selected, search fields display qualifiers such as Equals, Starts With, Contains, etc.

Enter search values, such as:

- Business unit **equals UMB** and Supplier or Party **equals UMB Account Transfers** for debit memos
- Business Unit **equals NONPO** and Supplier or Party **equals** a supplier name (or part of the name) for NONPO Invoices
- Business Unit **equals UMB** and Invoice Number **starts with EXP** for PCard Expense Reports.

To enter a date range in the **Invoice Date** field, select "Between" as the drop-down option. This will allow you to enter "From" and "To" dates.

To add other helpful fields to your search criteria, click the **Add Fields** button. Some recommendations include:

Approval Status - allows you to select statuses such as Workflow Approved, Initiated, Rejected

Org# For Debit Memo Approval Routing - allows you to search for invoices that were sent to a specific Org (department) for approval

Paid Status – allows you to find NONPO invoices in a date range that have been paid or not paid

Pay Group – allows you to select GWF or State to help narrow your choices

Validation Status – allows you to search for Invoices (e.g., PCard expense reports) in Validated or Needs Revalidation status



Manage Invoices

Done

Search Results

Search: Invoice

Business Unit	Equals	NONPO
** Invoice Number	Contains	003654
Invoice Amount	Equals	
** Invoice Date	Between	12/01/2020 - 12/31/2020
** Supplier or Party	Equals	
** Supplier Number	Equals	

Supplier Site	Equals	
Taxpayer ID	Starts with	
** Invoice Group	Starts with	
Paid Status	Equals	Fully paid
Approval Status	Equals	Workflow approved
Context Value	Equals	

** At least one is required

Search Reset Save... Add Fields Reorder

Once you've entered search criteria, click the **Save...** button

Search Reset Save... Add Fields Reorder

Create Saved Search X

* Name

All Invoices copy

Set as Default

Run Automatically

OK Cancel

Name your search. You can also choose to set the search as your default, to have the saved search run automatically when you access this page, or neither. Click **OK**.

Your Named search will be listed in the dropdown on the **Saved Search** field for you to select at a later date.