

Quick Guide to Adding Filters to Summary-Type Screens



Introduction

This document provides a quick guide explaining how to add filters to a summary-type screen in the One Network system. This functionality will allow you to add a variety of different filter criteria when performing a search on the summary-type screen.

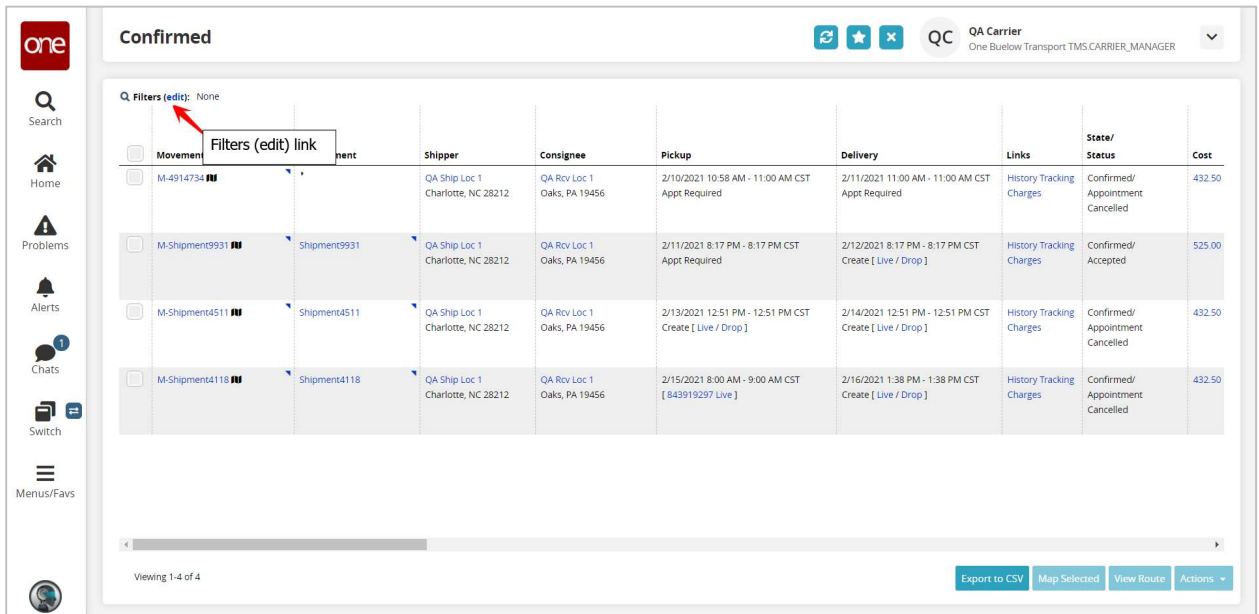
Note – this Quick Guide is for the NEO UI

Adding Filters to a Summary-Type Screen

1. Login to the One Network system.
2. Open a summary-type screen such as the **Confirmed** screen by navigating to Menus/Favs ->Transportation -> Confirmed.
3. The **Confirmed** screen displays.

Movement	Shipment	Shipper	Consignee	Pickup	Delivery	Links	State/Status	Cost
M-4914730		QA Ship Loc 1 Charlotte, NC 28212	QA Rcv Loc 1 Oaks, PA 19456	2/10/2021 10:58 AM - 11:00 AM CST Appt Required	2/11/2021 11:00 AM - 11:00 AM CST Appt Required	History Tracking Charges	Confirmed/ Appointment Cancelled	432.50
M-Shipment9931	Shipment9931	QA Ship Loc 1 Charlotte, NC 28212	QA Rcv Loc 1 Oaks, PA 19456	2/11/2021 8:17 PM - 8:17 PM CST Appt Required	2/12/2021 8:17 PM - 8:17 PM CST Create [Live / Drop]	History Tracking Charges	Confirmed/ Accepted	525.00
M-Shipment4511	Shipment4511	QA Ship Loc 1 Charlotte, NC 28212	QA Rcv Loc 1 Oaks, PA 19456	2/13/2021 12:51 PM - 12:51 PM CST Create [Live / Drop]	2/14/2021 12:51 PM - 12:51 PM CST Create [Live / Drop]	History Tracking Charges	Confirmed/ Appointment Cancelled	432.50
M-Shipment4118	Shipment4118	QA Ship Loc 1 Charlotte, NC 28212	QA Rcv Loc 1 Oaks, PA 19456	2/15/2021 8:00 AM - 9:00 AM CST [843919297 Live]	2/16/2021 1:38 PM - 1:38 PM CST Create [Live / Drop]	History Tracking Charges	Confirmed/ Appointment Cancelled	432.50

- To see the current filters that were used to return the data on the screen, select the **Filters (edit)** link.



Confirmed

QA Carrier
One Buelow Transport TMS CARRIER_MANAGER

Q Filters (edit): None

Movement	Shipment	Shipper	Consignee	Pickup	Delivery	Links	State/Status	Cost
M-4914734		QA Ship Loc 1 Charlotte, NC 28212	QA Rcv Loc 1 Oaks, PA 19456	2/10/2021 10:58 AM - 11:00 AM CST Appt Required	2/11/2021 11:00 AM - 11:00 AM CST Appt Required	History Tracking Charges	Confirmed/ Appointment Cancelled	432.50
M-Shipment9931	Shipment9931	QA Ship Loc 1 Charlotte, NC 28212	QA Rcv Loc 1 Oaks, PA 19456	2/11/2021 8:17 PM - 8:17 PM CST Appt Required	2/12/2021 8:17 PM - 8:17 PM CST Create [Live / Drop]	History Tracking Charges	Confirmed/ Accepted	525.00
M-Shipment4511	Shipment4511	QA Ship Loc 1 Charlotte, NC 28212	QA Rcv Loc 1 Oaks, PA 19456	2/13/2021 12:51 PM - 12:51 PM CST Create [Live / Drop]	2/14/2021 12:51 PM - 12:51 PM CST Create [Live / Drop]	History Tracking Charges	Confirmed/ Appointment Cancelled	432.50
M-Shipment4118	Shipment4118	QA Ship Loc 1 Charlotte, NC 28212	QA Rcv Loc 1 Oaks, PA 19456	2/15/2021 8:00 AM - 9:00 AM CST [843919297 Live]	2/16/2021 1:38 PM - 1:38 PM CST Create [Live / Drop]	History Tracking Charges	Confirmed/ Appointment Cancelled	432.50

Viewing 1-4 of 4

Export to CSV Map Selected View Route Actions

5. The current filters and their associated filter values, if any, will display.

You can add additional filters and perform a new search in order to find Shipments or Movements that would then match your new filter criteria.

To add additional filters, select the **Add Filter** link.

The screenshot shows the 'Confirmed' screen in the QA Carrier interface. On the left is a sidebar with navigation icons: Search, Home, Problems, Alerts, Chats, Switch, and Menus/Favs. The main area has a 'Q Filters' section with fields for Delivery Range, Destination State, Equipment No., Destination City, and Destination Country. A red arrow points to the 'Current selected filters' label. Below the filters is a table with columns: M-Shipments, Shipment, QA Ship Loc, QA Rcv Loc, Appt required, Create [Live / Drop], History Tracking, and Charges. Two rows of shipment data are visible. At the bottom right, there are buttons for 'Export to CSV', 'Map Selected', 'View Route', and 'Actions'. A red arrow points to the 'Add Filter' link in the top right corner of the table area.

6. A list of available filters will display. Select one or more filters from the list.

This screenshot shows the same 'Confirmed' screen as the previous one, but with the 'List of available filters' dropdown menu open. The dropdown menu lists various filter options: Actual Delivery, Actual Pickup, Appointment Status, Appointment Type, BOL No, Commercial Invoice Number, Consignee Province, Consignee[Filter1], Consignee[Filter2], Consignee[Filter3], Creation Date, Delivery, Destination City, Destination Country, and Destination Site. A red arrow points to the 'List of available filters' label. The table and other UI elements remain the same as in the previous screenshot.

- As you select a filter from the list, it will then display in bold in the list under the **Add Filter** link and that filter will be added as a new filter under your list of filters. If you need to remove one of these added filters, select the **X** symbol next to that filter.

Confirmed

QA Carrier
One Buelow Transport TMS.CARRIER_MANAGER

Q Filters

Delivery Range: [] to []

Destination State: [] X

Equipment No: [] X

Destination City: [] X

Destination Country: [] X

Origin State: [] X

Origin City: [] X

Newly selected filters added to your list of filters

Shipment	Shipments	QA Ship Loc 1	QA Rcv Loc 1	2/13/2021 12:51 PM - 12:51 PM CST	2/14/2021 12:51 PM - 12:51 PM CST	History Tracking
M-Shipments4511	Shipment4511	Charlotte, NC 28212	Oaks, PA 19456	Create [Live / Drop]	Create [Live / Drop]	Hub Import Customs Status Invoice Number Is Blocking Hold Load Reference Movement Next Stop ETA Order Ref No Origin City Origin Country Origin Site Origin State Originator PRO No Pickup
M-Shipments4118	Shipment4118	Charlotte, NC 28212	Oaks, PA 19456	2/15/2021 8:00 AM - 9:00 AM CST [843919297 Live]	2/16/2021 1:38 PM - 1:38 PM CST Create [Live / Drop]	History Tracking Charges

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Export to CSV Map Selected View Route Actions

- For the filters you have added, enter information in each filter and then press the **Search** link to perform a search and view the data returned that matches your search criteria. Only data that matches all of the filter information will be returned.

Confirmed

QA Carrier
One Buelow Transport TMS.CARRIER_MANAGER

Q Filters

Delivery Range: [] to []

Destination State: [] X

Equipment No: [] X

Destination City: [] X

Destination Country: [] X

Origin State: NC X

Origin City: Charlotte X

Values entered in filters

Shipment	Shipments	QA Ship Loc 1	QA Rcv Loc 1	2/13/2021 12:51 PM - 12:51 PM CST	2/14/2021 12:51 PM - 12:51 PM CST	History Tracking
M-Shipments4511	Shipment4511	Charlotte, NC 28212	Oaks, PA 19456	Create [Live / Drop]	Create [Live / Drop]	Confirmed/ Appointment Cancelled
M-Shipments4118	Shipment4118	Charlotte, NC 28212	Oaks, PA 19456	2/15/2021 8:00 AM - 9:00 AM CST [843919297 Live]	2/16/2021 1:38 PM - 1:38 PM CST Create [Live / Drop]	Confirmed/ Appointment Cancelled

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Export to CSV Map Selected View Route Actions