

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-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

- 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

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Viewing 1-4 of 4

Export to CSV Map Selected View Route Actions

- 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.

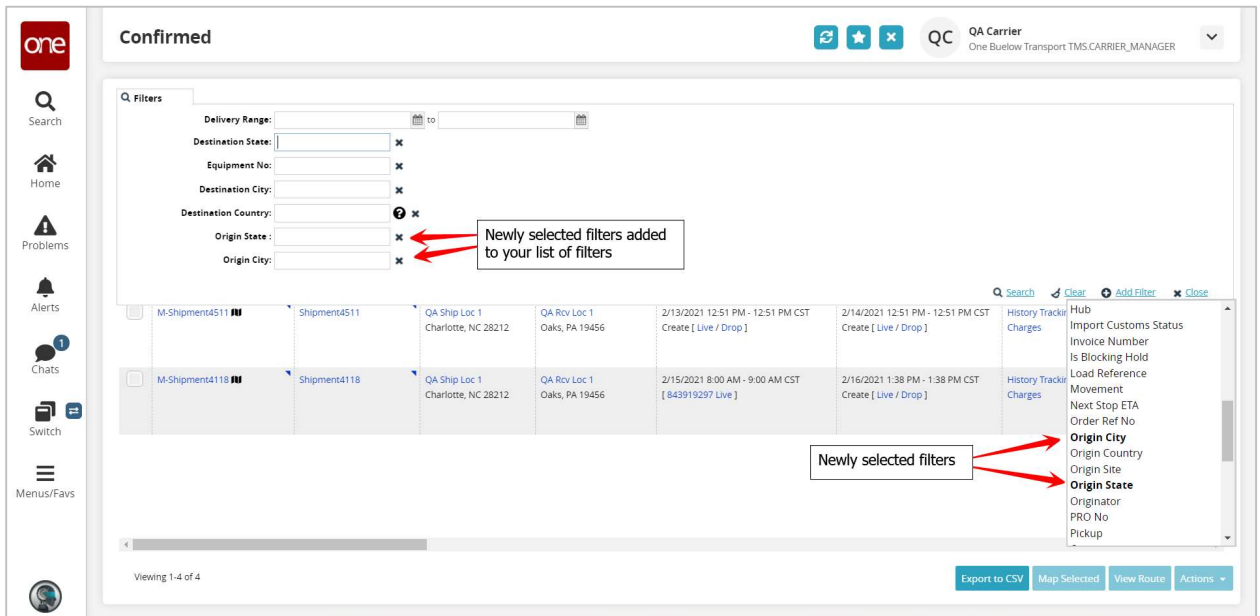
To add additional filters, select the **Add Filter** link.

The screenshot shows the 'Confirmed' screen with a sidebar on the left containing navigation icons for Search, Home, Problems, Alerts, Chats, Switch, and Menus/Favs. The main content area has a 'Q Filters' section with the following fields: Delivery Range (with a date range selector), Destination State (with a dropdown and a close button 'x'), Equipment No. (with a dropdown and a close button 'x'), Destination City (with a dropdown and a close button 'x'), and Destination Country (with a dropdown and a close button 'x'). A red arrow points to these fields with the label 'Current selected filters'. Below the filters is a table with columns for shipment details. In the top right of the table area, there is a search bar and an 'Add Filter' link with a plus icon, which is also highlighted by a red arrow and a callout box labeled 'Add Filter link'. At the bottom right, there are buttons for 'Export to CSV', 'Map Selected', 'View Route', and 'Actions'.

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

This screenshot is similar to the previous one but shows a dropdown menu open next to the 'Add Filter' link. The dropdown is titled 'List of available filters' and contains a scrollable list of 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 this dropdown with the label 'List of available filters'. The rest of the interface, including the sidebar, filter fields, and table, remains 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.



- 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.

