



TIP OF
THE
MONTH



Find Matching Items – New Functionality

Find Matching Items

Find Matching Items is the key tool for searching and reporting Items (Raw Materials and Formulations).

You can select individual or a combination of attributes to find and report Items with many configurable options.

You can now specify Basket(s) to focus the search on the Basket(s) selected.

When searching by Code or Name. You can add 'wild cards' for a closer match.

For example, searching for a name containing 'rose':

"rose" means "rose" (in upper or lower case) anywhere

"=rose" means begins with "rose"

"rose=" means ends with "rose"

"=rose=" means just "rose"

"\=rose" means contains "rose"

"rose\"=" means contains "rose"

"\=rose\"=" means contains "rose"

"ro=se" means contains "rose"

"ro\"=se" means contains "rose"

In version 45509 it is now possible to exclude Items when searching this way.

“^rose” means does not contain “rose”

“^=rose” means does not start with “rose”

“^rose=” means does not end with “rose”

“^=rose=” means is not an exact match “rose”

Wild cards were previously only available to use when searching for Item Codes and Names. This functionality is now available when searching the Code, Experimental Code, Short Name and Alternative Code.

Other additions to this group include the functionality of searching:

'Alternative Code of an Item', the + is an implied 'or'.

'Has Print Alternative Item', this function has the option for Yes, No or All.

'Print Alternative Item' enables search of the Item if present in 'Print Alternative Item'

'Modification of' enables search of the Items that are a modification of an existing Item.

The new search criteria are shown highlighted.

Find Matching Items - TEST (DB2 V10.5) Search | Reset | Display Format ▾ | Print | Print Doc

On this page you can search for Items by specified conditions.

Find Matching Items

Basket ▾

Code

Name OR ▾

Description

Comment

Experimental Code

Alternative Code

Has Print Alternative Item ---Any--- ▾

Print Alternative Item

Modification Of

Short Name

Cross Reference Code

Search using Identification Numbers such as CAS and EC numbers.

Item Class, choose to include or omit specific Formulation and Raw Material Item Classes in your search.

Composition Details, in this section you can choose to include criteria based on the composition of an Item.

Identification Numbers	Identification Numbers CAS Number <input type="text"/> EC Number <input type="text"/> EC Index Number <input type="text"/> FEMA Number <input type="text"/> COE Number <input type="text"/> FDA Number <input type="text"/>
Composition Type	<input checked="" type="checkbox"/> Raw Material <input checked="" type="checkbox"/> Formulation
Item Class	Formulation Raw Material
Composition Details	Composition Details Has Composition <input type="text" value="---Any---"/> Used in Complex Raw Materials <input type="text" value="---Any---"/> Allowed to Use in Complex Raw Materials <input type="text" value="---Any---"/> Used in Formulations <input type="text" value="---Any---"/> Preserve When Exploding <input type="text" value="---Any---"/> Prevent Explosion <input type="text" value="---Any---"/> Component Count = <input type="text"/> Component <input type="text" value="OR"/> <input type="text"/> <input type="text"/>

In this section you can search via Item Status displayed on the Key Details tab of the Item Unit Price you can find items within a specific price range.

Search for Items by sales activity, including if it has been sold or not. You can also search for items that were last sold within a specified time frame.

Samples, the same criteria as Sales, you can also search for Items that have been sampled and last sampled within a specified time frame.

Active	<input type="checkbox"/> Active <input type="checkbox"/> Possible <input type="checkbox"/> Inactive
Unit Price	<input type="text"/> ~ <input type="text"/> EUR
Standard Cost	<input type="text" value="---Any---"/>
Unit of Measure	= <input type="text"/>
Availability (minimum)	<input type="text" value="---Any---"/>
Costing Method	<input type="text" value="---Any---"/>
Yield	= <input type="text"/>
Has Been Sold	<input type="text" value="---Any---"/>
Last Sale Date	<input type="text"/> ~ <input type="text"/> E.g. d/m/yyyy
Has Been Sampled	<input type="text" value="---Any---"/>
Last Sample Date	<input type="text"/> ~ <input type="text"/> E.g. d/m/yyyy
Stock Class	<input type="text" value="---Any---"/> Stock Quantity <input type="text"/> ~ <input type="text"/> g

Library Details

In this section you can add criteria to find Items linked to Parties such as customers and suppliers.

Include Character Class, Character Notes and Sensory Descriptions in your search to find Items with similar characteristics. Sensory Description, Market details and Supplier are also a searchable attribute. You have the option to include a Suitability Check for the Items in your search.

Library Details **Library Details**

Library Core Library General Exclusive Support Suspense

Exclusive Party OR

Intended Parties OR

Intended Applications OR

Character Class

Character Notes OR

Sensory Description

Market Class

Market Note OR

Marketing Description

Supplier OR

Suitability Check Yes No

Searching using the Item State, Chemical Class, NAT and or Properties which is a key feature of Find Matching Items. You can use a single Property or a combination of Properties in your search. You can also choose to find items with a specific value for the Property.

'Property Calculation' allows you to specify if items have property calculation enabled or disabled.

State Solid Powder Liquid Viscous Liquid Not Applicable

Chemical Class

NAT (minimum) ---Any---

Property

Needs Assessment No Yes - Changed Item Yes - Dependent Item
 No - Requires Dependency Assessment Yes - Requires Dependency Assessment

Properties Determined Yes No Constituent Hazards Not Determined

Property Calculation ---Any---

Document Type OR

Attachment Type OR

Scope OR

Creator and Modifier

You can search for Items created by specific users, with the option to specify a time frame.

Find items that have been modified or had the composition modified by specific users, including the option to add a time frame.

Creator	<input type="text"/>	<input checked="" type="checkbox"/>	Show Enabled User Only
Created Date	<input type="text"/> ~ <input type="text"/>		E.g. d/m/yyyy
Last Modifier	<input type="text"/>	<input checked="" type="checkbox"/>	Show Enabled User Only
Last Modified Date	<input type="text"/> ~ <input type="text"/>		E.g. d/m/yyyy
Composition Last Modifier	<input type="text"/>	<input checked="" type="checkbox"/>	Show Enabled User Only
Composition Last Modified Date	<input type="text"/> ~ <input type="text"/>		E.g. d/m/yyyy

The Items found based on the search criteria are listed in alphabetical order. You can re-order the Items based on the other information such as Code or Unit Price by clicking the column headers. From your search results, you are given the option to print a customisable report containing a summary of the search criteria submitted and include Properties or additional attributes. There are also quick links to Print Documents and Labels, Check Suitability, Add to a Basket, Add from a Basket and View Details of an Item.

Mini Tip

Abbreviate Name Search

Abbreviate Name of the Function to Search.

When using the Smart Search in the side menu. You can abbreviate the name of the function to search quicker. Please note that the abbreviation needs to be entered in uppercase.

For example, 'Find Matching Items' can be found by searching 'FMI'.

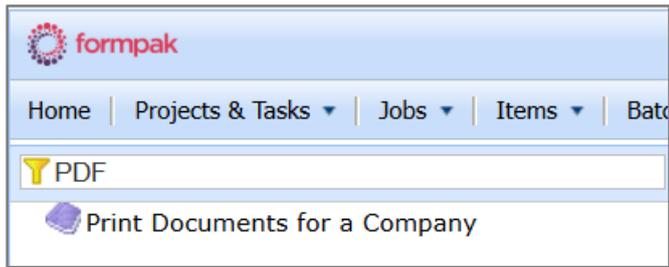
The screenshot shows the formpak application header with navigation tabs: Home, Projects & Tasks, Jobs, Items, and Batch. A search bar contains the text 'FMI'. Below the search bar, a dropdown menu displays 'Find Matching Items' with a blue gear icon.

Please see other examples below:

ANRM – Add a New Raw Material

The screenshot shows the formpak application header with navigation tabs: Home, Projects & Tasks, Jobs, Items, and Batch. A search bar contains the text 'ANRM'. Below the search bar, a dropdown menu displays 'Add a New Raw Material' with a blue gear icon.

PDF - Print Documents for a Company



There are many more shortcuts available, they are useful for screens you use on a regular basis.