



TIP OF
THE
MONTH



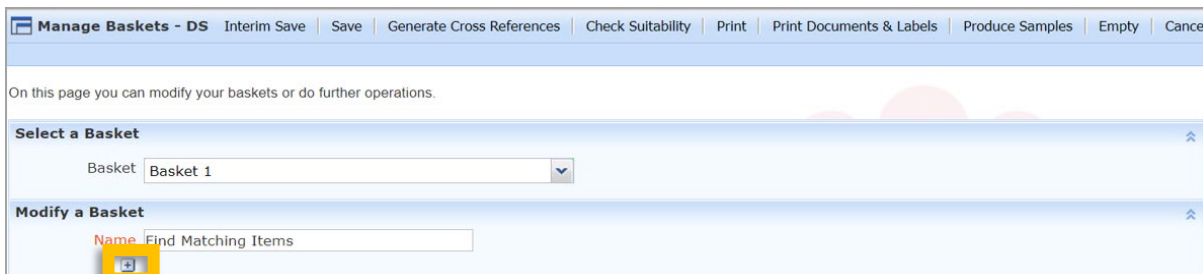
USING BASKETS REVISITED

You can use baskets to check suitability, generate cross references, print documents, use find matching items and print item property reports. Baskets are a key way of moving items (raw materials and formulations) around Formpak. There are 100 baskets available per User. Baskets can also contain a party, applications, cross references, and project properties.

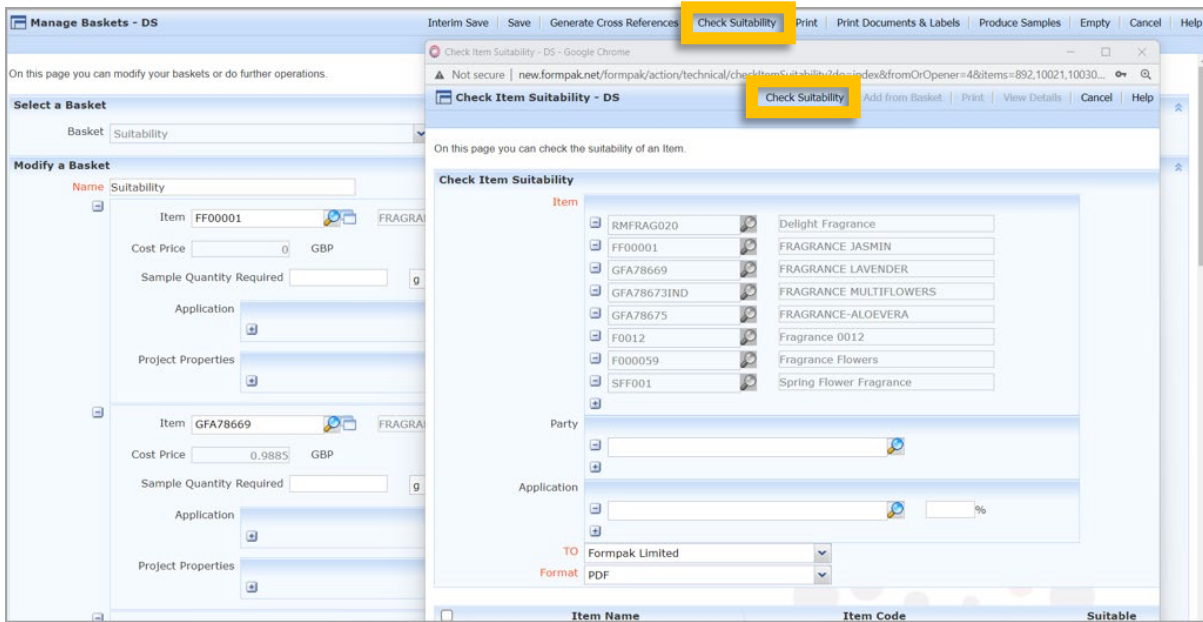
To access baskets, click the 'Baskets' button, which is located on the top right, just under the 'Logout' button.



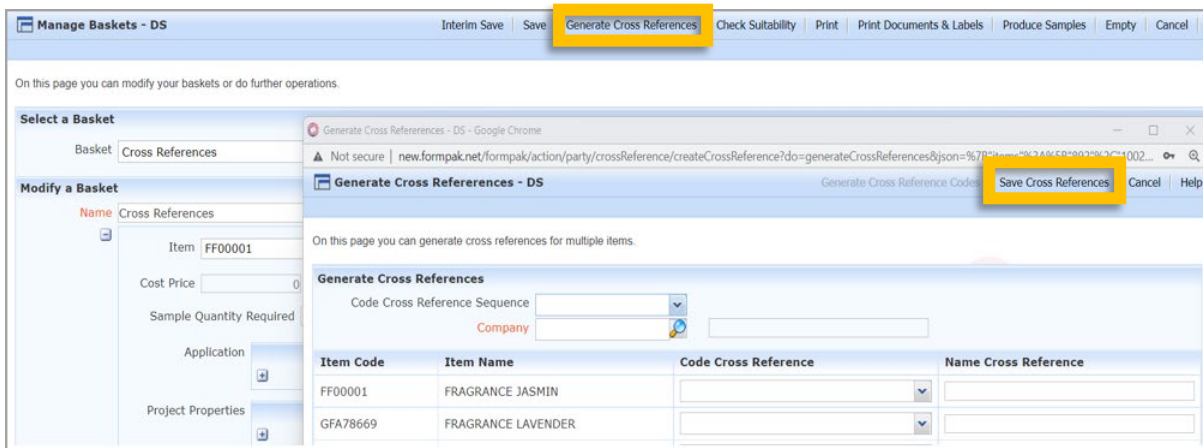
1. Rename the basket for its purpose.
2. Add Raw Materials and or Formulations to the basket by clicking on the + button.



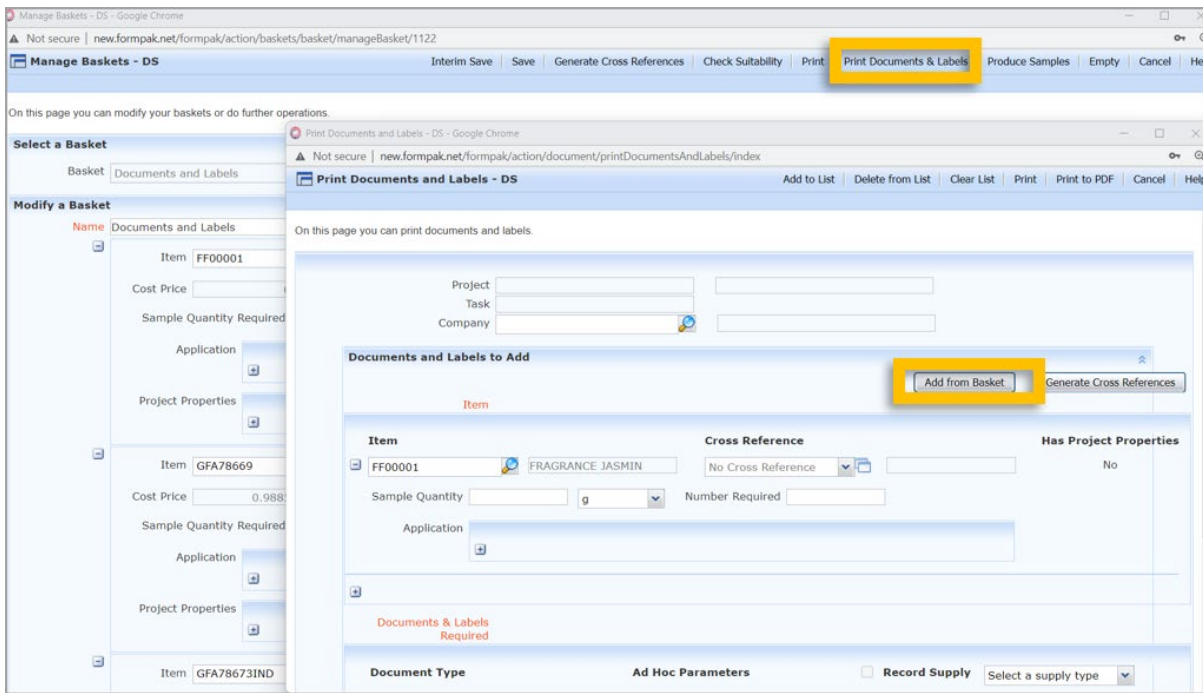
3. Within the Basket feature there is the option to 'Check Suitability'. This function enables the items to be checked for suitability constraints, which are rules or compliance checks which have been set up to apply to parties, regions, and customers.



- In Baskets there is the option to 'Generate Cross References'. The items from your Basket are sent to 'Generate Cross References' where you can add and save Cross References, which are additional codes and names that can be given to items so each product has a specific name and code for each customer.



- Also in Baskets is the option to 'Print Documents & Labels' this enables the user to print multiple documents and labels for multiple items for a company and documents are generated into a zip file.



Other Places where Baskets are useful

Many search screens in Formpak have an 'Add to Basket' option. For example, in 'Manage Cross References', you can search for the products associated with a specific customer and then use 'Add to Basket' to compile them into a list.

There is also an option in some screens to 'Add from Basket', for example on a Sample task of a Project, you can add items from a previously saved Basket.

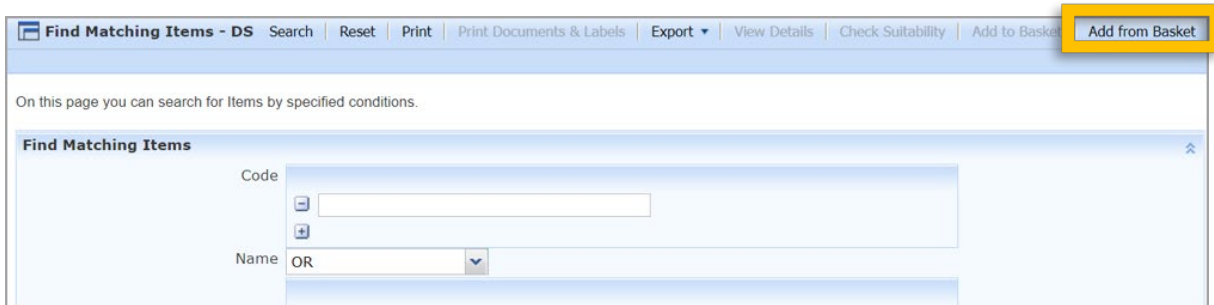
1. Find Matching Items – Add to Basket

When you search in Find Matching Items, the list of matching items are shown as results in a list. You can select all, or some of the items and choose 'Add to Basket'. Then you can use all the features of 'Baskets' for those items, e.g. Print Documents and Labels.

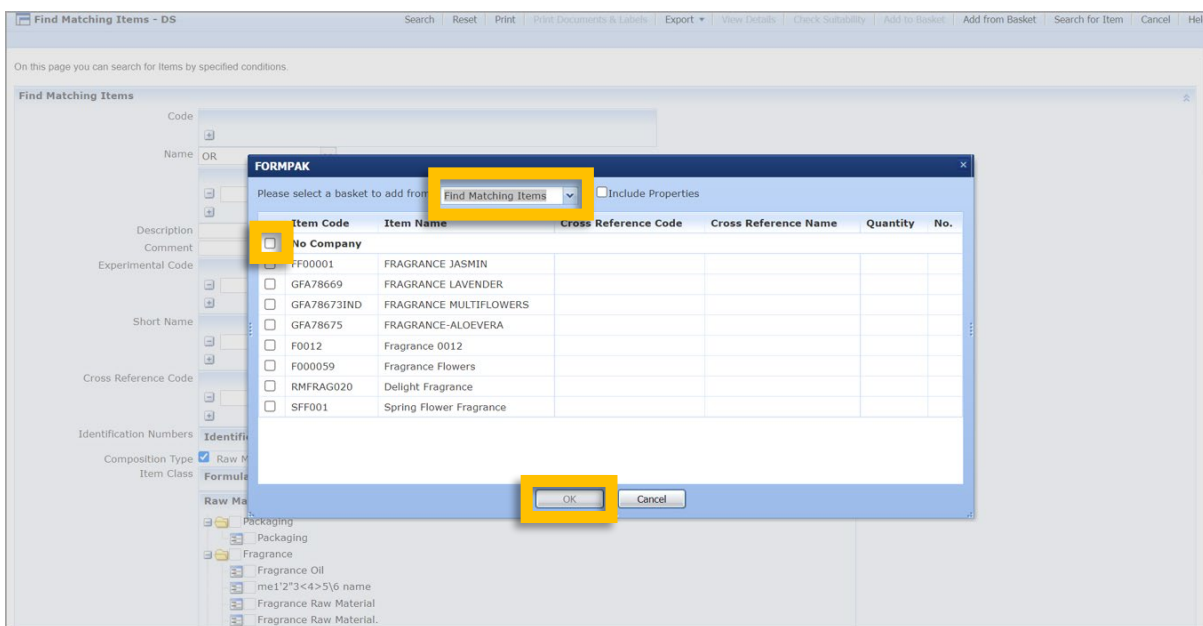
2. Find Matching Items – Add from Basket

In Find Matching Items, you can use 'Add from Basket' to populate the list of items in the basket. This offers a quick way to check multiple Formulations and or Raw Materials for specific criteria e.g. how many of the items contain allergens. You can also use it to print information about the items.

- a. Navigate to Find Matching Items and click 'Add from Basket'.



- b. A box will appear, select the basket you want to add from and select all the Formulations, and or Raw Materials you want to include by clicking on the box so a tick will appear. Select all by clicking on the top tick box. Click 'OK'.

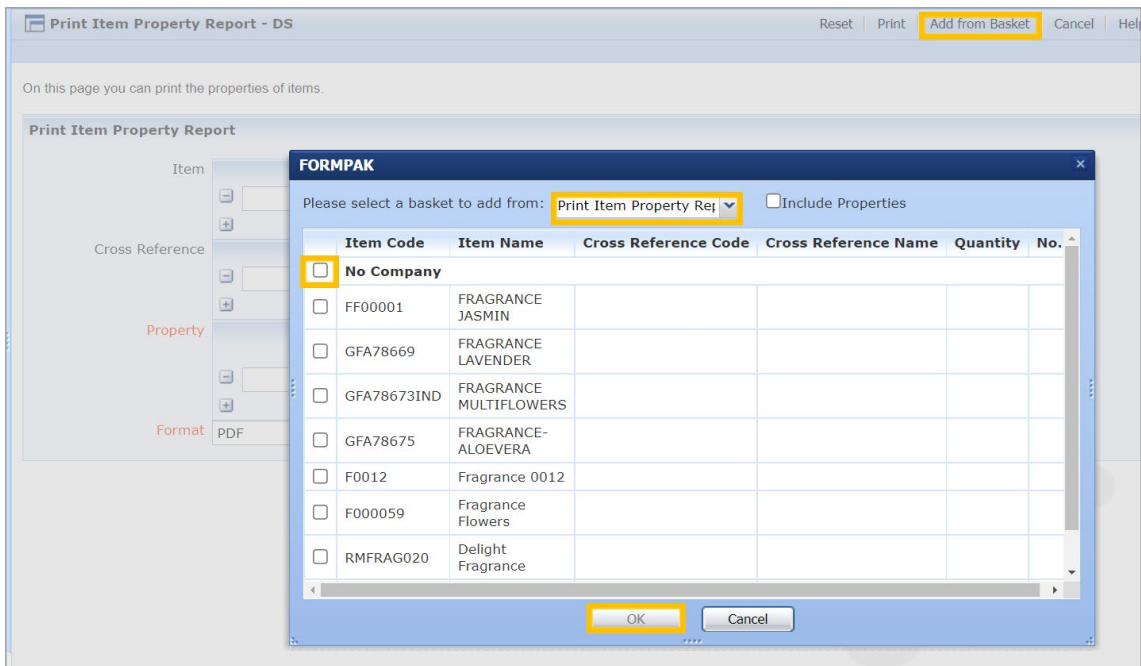


- c. You can combine different criteria in the search, for Item Classes, Properties, Suitability Checks and print the results in a format you require.

3. Print Item Property Report – Add from Basket

The Print Item Property Report feature allows you to print a report showing properties of an item or multiple items.

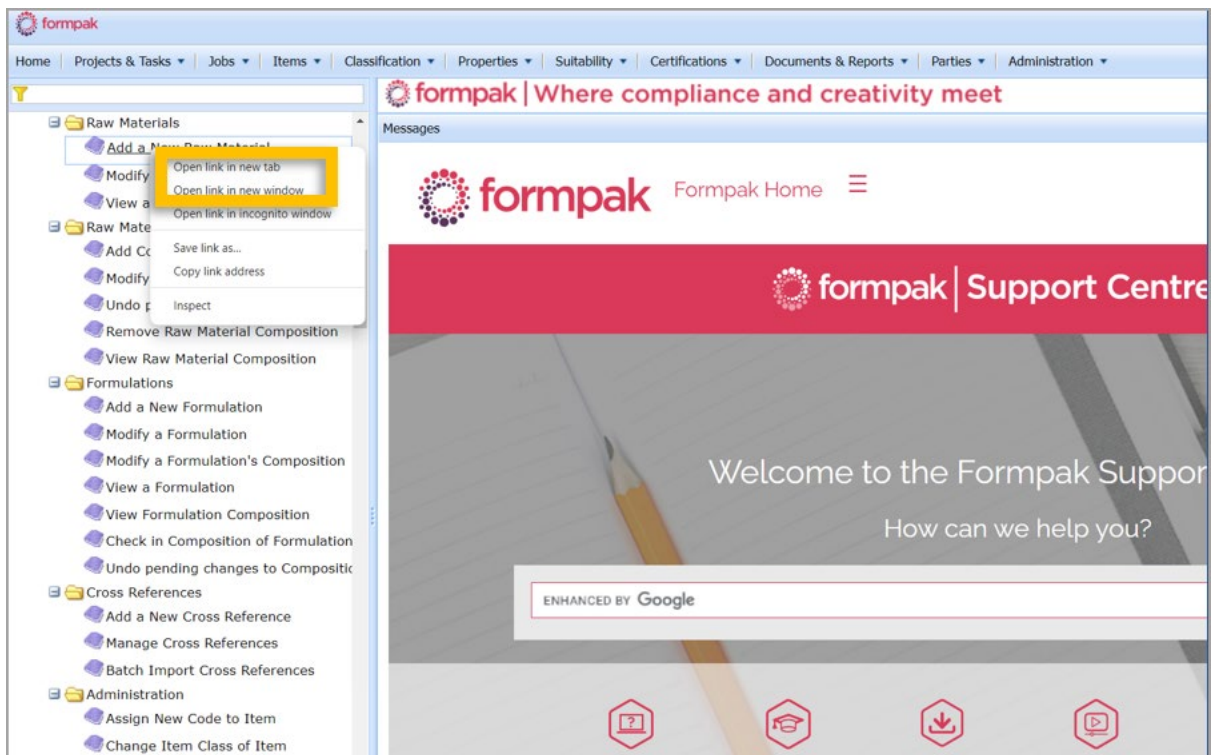
- a. Navigate to Print Item Property Report and select Add from Basket on the right of the screen, and a box will appear. Select the basket you want to add from. Select all the Formulations, and or Raw Materials you want to include by clicking on the box so a tick will appear. Select all by clicking on the top tick box. Click 'OK'.



- b. Input the specific individual properties or 'Select by Property Group' this will report on all the properties allocated in the Property Group(s) selected. You have the option to print in the format you require.

Mini Tip

Right click on the options in the navigation menu, and a small menu option will appear giving the option of opening the selected function in a new tab or a new window. Right clicking enables the user to view or modify in other functions without having to navigate away from incomplete work.



To see previous 'Tip of the Month' articles, please see [here](#).

All of our training and support material can be accessed from our **Support Centre**. The Support Centre is available 24/7 and is a great resource to use at your convenience. It includes:

- Over 100 training and support articles
- Links to training videos
- Quick Start Guides
- The Formpak Training Matrix

The Support Centre can be accessed on the Home screen of Formpak software or via the following link: https://www.formpak-software.com/Support_Centre/Pages/Support_Centre.html

Our **Support Team** are available:

Monday - Thursday: 8:30 - 17:00 (GMT)

Friday: 8:30 - 16:00 (GMT)

Email: support@formpak-software.com

Telephone: +44 (0) 1235 250 020

The Formpak **Help Centre** is included directly in Formpak software, just press the 'Help' button to access it. The Formpak Help Centre offers explanations for each function of the application as well as a glossary of the technical terminology used.

View our **YouTube** channel with lots of helpful guides and information about Formpak

<https://www.youtube.com/user/FormpakSoftware/videos>