



Find Matching Items

The very first Tip of the Month featured Find Matching Items. Since then new search criteria has been added. Here is a new overview of Find Matching Items. New additions have been **highlighted**.

Find Matching Items is the key tool for searching and reporting items (raw materials and formulations).

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

Searchable criteria includes:

Item Code

Search for items with specific Item Codes.

This can be used to find items within a specific code sequence. Codes are also used when adding items from a basket into a Find Matching Items search.

When searching for a 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 "ro=se"
- "ro\"=se" means contains "ro\"=se"

Wild cards were previously only available to use when search for Item Names. This functionality is now available when searching the Item Codes also.

Item Name

Search using Item Names

Another addition to this group is the 'and/or' functionality when searching by Item Name. 'Short Name' and 'Cross Reference Code' have also been added recently.

The screenshot shows a search interface titled "Find Matching Items". It features several search criteria, each with a text input field and expand/collapse icons (minus and plus signs). The criteria are: Code, Name (with a dropdown menu currently set to "OR"), Description, Comment, Experimental Code, Short Name, and Cross Reference Code. The "Name" field is highlighted with a blue background.

Identification Numbers

Search using Identification Numbers such as CAS and EC numbers.

Item Class

You can 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 such as the status of 'Preserve When Exploding' or the 'Component Count'.

You can also search for items containing specific components.

A searchable attribute recently added to this group is 'Used in Complex Raw Materials'.

| | |
|------------------------|---|
| 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 <ul style="list-style-type: none"> <input type="checkbox"/> Fragrance <ul style="list-style-type: none"> <input type="checkbox"/> Fragrance Formulation <input type="checkbox"/> Fragrance Solution <input type="checkbox"/> Fragrance Dilution <input type="checkbox"/> Fragrance Base <input type="checkbox"/> Formulation Recipe <input type="checkbox"/> Flavour <ul style="list-style-type: none"> <input type="checkbox"/> Flavour Formulation <input type="checkbox"/> Flavour Solution <input type="checkbox"/> Flavour Dilution <input type="checkbox"/> Flavour Base <input type="checkbox"/> Flavour Emulsion <input type="checkbox"/> Obsolete <ul style="list-style-type: none"> <input type="checkbox"/> Obsolete Formulation |
| Composition Details | Raw Material 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" value="="/> <input type="text"/> Component <input type="text" value="OR"/> <input type="text"/> <input type="text"/> |

Unit Price

Find items within a specific price range.

'Costing Method' is another recent addition.

Sales

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

Like Sales, you can also search for items that have sampled, and last sampled within a specified time frame.

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' was added in 2018 and 'Exclusive Party' was added earlier this year as searchable attributes.

Suitability Checking

You have the option to include a suitability check for the items in your search. If selected, this will open further options for the suitability check.

Active Possible Inactive

Unit Price ~ GBP

Standard Cost ---Any---

Unit of Measure

Availability (minimum) ---Any---

Costing Method ---Any---

Yield

Has Been Sold ---Any---

Last Sale Date ~ E.g. d/m/yyyy

Has Been Sampled ---Any---

Last Sample Date ~ E.g. d/m/yyyy

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

Supplier OR

Suitability Check Yes No

State Solid Powder Liquid Viscous Liquid Not Applicable

Property

Searching using properties 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' was added as a searchable attribute last year. It allows you to specify if items have property calculation enabled or disabled.

Creator and Modifier

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

A recent addition allows you can also find items that have been modified or had the composition modified by specific users, including the option to add a time frame.

| | | | |
|--------------------------------|--|---|---|
| Chemical Class | <input type="text"/> | | |
| NAT (minimum) | ---Any--- | | |
| Property | <input type="text"/> | | |
| Needs Assessment | <input type="checkbox"/> No | <input type="checkbox"/> Yes - Changed Item | <input type="checkbox"/> Yes - Dependent Item |
| Properties Determined | <input type="checkbox"/> No - Requires Dependency Assessment | <input type="checkbox"/> Yes - Requires Dependency Assessment | <input type="checkbox"/> Constituent Hazards Not Determined |
| Property Calculation | ---Any--- | | |
| Document Type | OR | | |
| Attachment Type | OR | | |
| Scope | OR | | |
| Creator | <input type="text"/> | <input checked="" type="checkbox"/> Show Enabled User Only | |
| Created Date | <input type="text"/> | <input checked="" type="checkbox"/> Show Enabled User Only | 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 checked="" type="checkbox"/> Show Enabled User Only | 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 checked="" type="checkbox"/> Show Enabled User Only | E.g. d/m/yyyy |

Search Results and Reporting

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 a table listing the search results. There are also quick links to print documents and labels, check suitability, add to a basket and view details of an item.

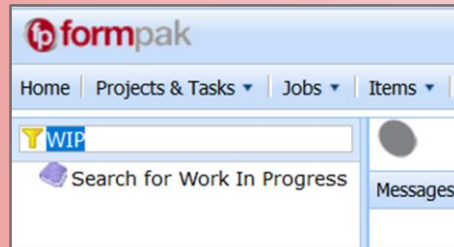
Please contact us if you would like a copy of our PowerPoint presentation on Find Matching Items, which contains embedded video examples.

Please email Support@formpak-software.com if you would like further details or if you have any questions. Thank you

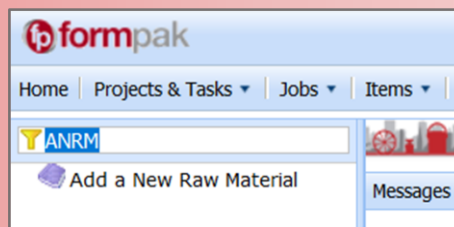
Mini Tip

Here is a tip when using the smart search in the side menu. You can abbreviate the name of the function to search quicker. For example, 'Find Matching Items' can be found by searching 'FMI'. Please note that the abbreviation needs to be entered in uppercase. Please see other examples below:

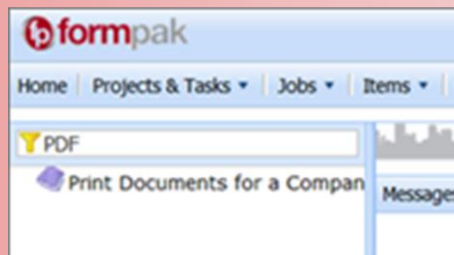
WIP – for Search for Work In Progress



ANRM – Add a New Raw Material



PDF - Print Documents for a Company



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

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>