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| <b>Application</b>          | ChreosClient – Chreos 3                                        |
| <b>Module</b>               | Generic                                                        |
| <b>Access</b>               | Various screens where an item is needed                        |
| <b>Minimum service pack</b> | SP27                                                           |
| <b>This document</b>        | Item search<br>Ref 1.5<br>Release 1<br>Published February 2002 |

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## Overview

Specific items are located by using a variety of searches. Where the 'Item ref/code' is known it is entered directly. If the name is known the client is found using the 'Name'. If neither is known the Client Search screen allows the client to be searched for using a range of classifications and other search parameters.

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## To Search for an Item:

There are four ways to search for an Item.

### Item Code / Ref

- Type or scan the 'Item code / ref' into the 'Item code / ref' combo and if an exact match is found the item will be visible. If this is not the required item, the <Up> and <Down> keys move to the previous or next item. If there is also a 'Name' combo the 'Name' will be displayed here.

Note: when the 'Clear on fail' check box is checked if you enter an item 'Code' or 'Ref' that does not exist in the system then the entry field be automatically cleared. If it is not checked then it will not be cleared.

### Name

- Begin to type the 'Name' into the 'Name' combo. The 'Name' is normally the part of the name that comes first in an alphabetical listing. The Name that is the nearest match will be visible. Note that unlike 'Item code / ref', names are not necessarily unique so several items may have the same one. If this is not the required item, the <Up> and <Down> keys move to the previous or next item. The 'Item code / ref' will be displayed in the 'Item code / ref' combo.
- Note: not all screens will have a 'Name' combo.

- Note: only the first ten characters on an item 'Name' can be searched on.

### Item Find

- Enter the item 'Name', 'Code' or 'Ref' into the 'Item find' entry point and press the <Enter> key. If this item exists then it will be displayed in the screen that you are currently working on in *ChreosClient*. If it does not exist an item grid will appear displaying the item that is the closest match to the text that you have entered. Alternatively if you click on the small square on the right-hand side of this entry point the item grid will appear allowing you to scroll through the table to select the required item. See "Setup (9.1)" for details on how to set up 'Item find'.

### Find Button

Click on the [Item Search] button or press the <F2> function key and a search engine will appear with three tab page options that each allow you to search and/or display the results in different ways.

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## Search Engine Tab Pages

### Text Search

- There are two entry fields displayed:
  - **Starting With** – Enter all, or the first part of the 'Name'. This is not case sensitive and when you use this field you can not also use the 'Containing' field.
  - **Containing** – Enter any part of the 'Name'. This is not case sensitive and when you use this field you can not also use the 'Starting With' field. While this is not a multi-word search it will find a string that is offered where a string is a contiguous group of letters, spaces and other characters. For example, 'a ch' as a search brings up 'Nutra **ch**oc 100g' and 'Sancho tortilla **ch**ips double cheese 190g'. If you want to search for two words that do not form a single string, search for one and then search for the other as a second search on the subset.

### Define Filters

- User-defined entry fields are displayed in three areas:
  - **Three Check Boxes** – Tick the check boxes where the value for the item is true. If you do not tick a check box the value will be false.
  - **Two Character Boxes** – Enter the value into these character boxes that is applicable to the item. These are optional.
  - **Seven Combo Boxes** – Select the value from these drop-down combos that is applicable to the item. To empty any of these fields click the button with the red circle to the right of the field.

Note: the three check boxes, two character boxes and the last two combo boxes are the same as the user-defined fields discussed in "Setup (9.1)" that

appear in “Stock | Stock management”. Any that have not been defined in “Maintenance | Setup” will not appear on this page.

The first five combos also appear in “Stock | Stock management” and the options within these combos are defined in “Stock | Stock table maintenance”.

### Display Settings

- There will be two list boxes displayed:
  - **Available** – This list box displays the names of the fields that are available to be displayed in the search results table but that are not currently selected to be displayed.
  - **Displayed** – This list box displays the names of the fields that have been selected to be displayed in the search results table.
- Ticking the “Display All Fields” underneath the results table overrides all selections on this page.

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### To Search with the Search Engine

- Set the parameters on one or more of the tab pages and select either ‘Use stock table’ or ‘Use item table’. ‘Use stock table’ will search all currently active items whereas ‘Use item table’ will search all currently active stock as well as items that have been deleted.
- Click the [Find Now] button or press the <Enter> key.
- As you complete each search, the search results grid will appear and will display the matches that have been made. The parameters of the search will be displayed above the table. However, if there are no matches the table will be empty.
- To do a further search on the results of the previous search and further narrow down the results, enter the new parameters and click the [Find Now] button or press the <Enter> key.
- To return to the previous search click the [Back] button. Reset the parameters and search again.
- To clear all previous searches and start a completely new one click the [New Search] button.
- When the item that you are searching for is found, you can select them by clicking the [OK] button or by highlighting them on the table and pressing the <Enter> key. This item
  - will now be the selected client in the *ChreosClient* screen that you are currently working in.
- If you tick the ‘Display All Fields’ checkbox that is underneath the search results table, all of the ‘Display Settings’ fields will be displayed on the table. To then reverse this and only view the display fields from the ‘Displayed’ list box from the ‘Display Settings’ tab page, un-tick the checkbox.

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