

## Products Overview

Robert

I'm trying to check the inventory count for a product from one of our suppliers, but I don't remember the full product code... Any suggestions on where to start looking?

Andrew

I'd use the Products Search function under Views. This allows you to search our records in a variety of ways to find the one you're looking for... Here, I'll show you how to use it.

Pick a topic to get started!

### Topics

- Search Criteria
- Options
- Explorer

### Search Criteria

The Find Products option located in the Views pane opens the Products view.

Use the top section of the window to enter your search criteria.

Your search results display in the main body of the window.

You can see a list of product types by opening the Look in drop down menu or you can choose All Products to look for any product regardless of type.

BisTrack uses the Home branch setting in multi-branch environments.

The default is to search for products in the current logged-in branch.

Use the drop-down menu to search for a product by branch or any branch.

Use the Find field to enter your search criteria.

When you enter a quantity in the last field, you're telling the system that you want it to search for a product's available stock whose quantity either matches or exceeds the amount you entered.

If you want the search to return results that are equal to or less than the product's available stock, enter a less-than sign after the quantity.

You can also use the Find field to enter text. This causes the system to treat the words you enter as a logical AND operation. In this example, we entered the words step ladder.

To proceed, choose GO or press Enter on your keyboard.

BisTrack requires both words to find a match and returns all search results that include the words step and ladder.

You can also use wild card characters in product searches.

An Asterisk Wildcard represents any number of characters and a Question Mark any single character.

You can also use these characters in customer and supplier searches.

In this example, we entered 24\*pt in the find field. The search results include products matching 24 followed by any number of characters and then the letters pt.

Because the question mark wild card character stands for a single character, you'll need to add a question mark for each character you want it to represent.

In this example, we're searching for products whose code starts with 24, followed by two characters, and finishes with the letters pt.

## Options

Your store assigns product codes that follow a logic and scheme specific to your store.

In this example, we enter product code 2612cc in the Find field and then open the Options drop-down menu.

We'll examine three options for searching on the Product Code or Barcode field.

Exact Match on Product Code or Barcode, Match on Begins with, and Exact Match First, Full Search if No Match.

These 3 options listed perform searches on the Product Code or Barcode field.

Choose Exact Match on Product Code or Barcode.

One product matches to the Product Code or Barcode exactly.

The next Option, Match on Begins with produces a list of Products with a product code beginning with the characters 2612c.

Add an "x" to the search text in the Find box.

Now choose Exact Match First, Full Search if No Match. This is the Best Practice setting.

No exact match is found but additional matches do occur listing products that have 2612cx in a searchable field.

To stop using any of the matching options, open the Options menu then remove the check from alongside the current method selected.

## Explorer

Products are assigned to a Product Group allowing similar types of inventory to be arranged together.

Product Groups can be used to search using the Product Explorer option.

When selected, a side pane is added to the left of the Results area.

Product Explorer allows you to search by All Product Groups or by Stock Suppliers.

Clicking on the + beside All Product Groups [pause] opens the first level of Product Group names.

Each defined Product Group has a plus sign beside it indicating another drill down level.

From here you can choose the product or products to work with.

Clicking on the + sign alongside Stock Suppliers displays alphabet letter ranges.

These represent the first letter in a supplier's name.

Clicking on the name of a supplier, displays all products where it is the default supplier.

The search fields can also be used to further refine the search. Close this pane from the Options menu by unselecting the Check Box.

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