Searching Inventory and Customers in RetailEdge

POS Operations · https://retailedge.com/docs/searching-inventory-and-customers-in-retailedge

The Combo Search

On the Sales Screens, Inventory Manager and Customer Manager screens, when performing a search by pressing the Find button, pressing F4 or Ctrl-F, you have the Find By option to use **Combo Search** .

How the Combo Search Works

When you perform a Combo Search on Inventory in the Inventory Manager, RetailEdge will search on the following inventory fields:

- Stock Number
- Item ID
- Description
- UPC1
- UPC2
- Manufacturer Part Number
- Vendor Part Number
- Alias

When you perform a Combo Search in the Customer Manager, RetailEdge will search on the following customer fields:

- Customer ID
- Last Name (Billing and Shipping)
- First Name (Billing and Shipping)

- Company (Billing and Shipping)
- Phone (Billing and Shipping)
- Mobile (Billing and Shipping)
- Street 1 (Billing and Shipping)
- Email Addresses

The result of the Combo Search will display the column with the most results first and will show the found values in red. The exception is if a match in the Inventory Alias field is found, this will not be displayed.

Search Types

Two Search Types that are important to know about are Find ALL and Find ANY of the Search Words. Each of these options will give you entirely different results.

Find ALL of the Search Words. Find ALL of the words will find all of the search words within any field. This effectively narrows your search and will return a smaller result set (e.g., search on Dress Shoe, will only show fields that contain both Dress and Shoe, in any order).

Find ANY of the Search Words. Find ANY of the words will find any of the words in any field. This effectively expands your search and will return a larger result set. (e.g., search on Dress and Shoe, will show fields with Dress OR Shoe in them)

Interior, From the Beginning and Exact Pattern Matches. The Search Types can also be set to find the items from the beginning of the word, perform an Interior Pattern Match, and find partial matches that are not the first part of the text for which you are searching. Interior Pattern Match searches will be slower on larger data sets.

Sales Screen Searches

If you are searching on the Sales Screen, we are first doing a sales screen lookup with exact pattern matches on the following fields:

Inventory

1. Item ID (RetailEdge price label barcode).

2. Stock Number.
3. Current Find By Criteria as listed in the Find By box (except when using Combo Searches).
4. List ID
5. UPC1
6. UPC2
7. Alias ID
8. Package ID

Customer

1. Cust ID
2. Billing First Name
3. Billing Last Name
4. Billing Company
5. Billing Phone Number

If an exact match is found in any of the above listed fields, then RetailEdge will stop the search and add the item to the Sales Screen. If an exact match is not found or multiple items match, RetailEdge will go to open the Find By Search box and will search based on the selected criteria.

The sales screen exact pattern matches were created with an order of precedence to accommodate scanning of barcodes and to speed up entering product into the sales screen. **It is important to note it is a two-step process**. The sales screen exact pattern matches preclude the Item Search procedure. For example, if one item has a manufacturer's part number of ABC and the other item has an Alias ID of ABC, and you type ABC in the sales screen box, the sales screen search will go through the above criteria, and finding one item with Alias ID, will put that item on the sales screen. If we did not find any, or we found more than one match, then RetailEdge would bring up the Find Window and display both items.

One way to bypass the sales screen exact pattern match is to press **F4** on the sales screen and go right to the Find Item procedure if you want to use a combo search to find information from multiple fields.

The sales screen **Find By** is changed is by finding an item and then pressing the Enter or **Ok** button. An effective way to determine how this works is by opening the traditional sales Screen (Register | Sales). This will show you the **Find By** criteria on the sales screen and you can see how the criterion changes after a search operation is performed.

Non Combo Searches

Sometimes users don’t want to use the Combo Search option. If you have the Default to Combo Search Option unchecked, RetailEdge will search on the column that is highlighted in the grid.

1. Highlight the column that you want to search by.
2. Press the **F4** function key or **Ctrl-F** keys.
3. Check the Interior Pattern Match checkbox if you want to perform a partial match based on any part of the word searched for. Uncheck it if you want to search from the beginning of the word.
4. Type in all or part of what you are searching for in the Look For box.
5. Press the Enter key or the **Ok** button.
6. If only one item appears in the list and it is the item you are searching for, press the Enter key to select the item.
7. If more than one item appears in the search list, press the up and down arrow keys to select the item you want and then press the Enter key.
8. RetailEdge will then find the item by the Look For criteria and sort the Manager list by the column chosen.

Incremental Searches

RetailEdge is an on-premise/cloud hybrid software. Local data means you have access to all your data all the time. It also means you can run searches on thousands of items that return large result sets quickly (not twenty items/page). Incremental searches can bog down as your database gets larger and for this reason, we do not perform incremental searches. Think about a database with 30,000 items and you type in the letter A. The system starts searching on A and the result set is 20,000 items. This is not going to be especially useful, and it will be slow. Especially when you are running these searches across a slower wi-fi connection.

We do incremental searches in a few places in RetailEdge. For instance searching the Action List or Reports is an incremental search. The incremental search is effective here since the amount of data is more or less finite and small.