

# **MULTI-SEARCH**

# **Tutorial**

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#### **About MULTI-SEARCH**

**MULTI-SEARCH** is a modified version of WarehouseTWO's **SEARCH** feature. It allows you to search for up to twenty (20) part numbers *simultaneously*.

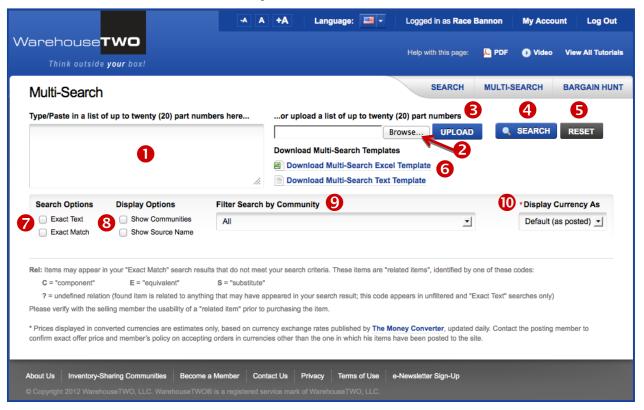
**MULTI-SEARCH** is a premium feature. It is available only to accounts with memberships at level 2 or higher.

WarehouseTWO Menu Bar for Non-Administrators:



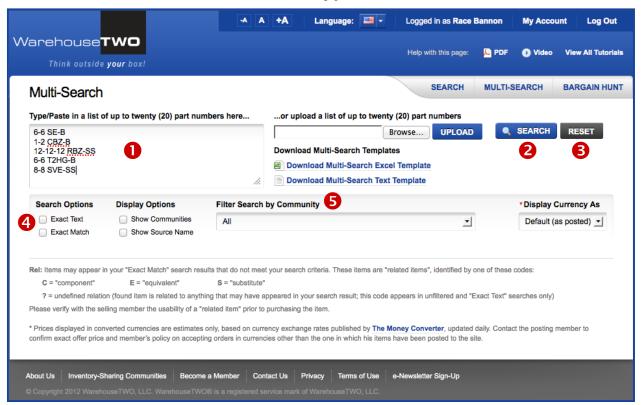
## **MULTI-SEARCH** Functionality Overview

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- Type/Paste in a list of up to twenty (20) part numbers here...: This is the "part number list window". Enter a list of up to twenty (20) partial or complete part numbers. (We recommend that you enter manufacturers' exact part numbers. MULTI-SEARCH is not case-sensitive.
- **Browse**: Click this button to locate a desired file that contains up to twenty (20) part numbers. **MULTI-SEARCH** accepts two types of data files: Excel (.xls or .xlsx) and text (.txt).
- **3 UPLOAD**: Click this button to upload the found file. If processed successfully, the list of items will appear in the part number list window (**1**).
- **SEARCH**: Click on this button to perform a search for all of the items listed in the part number list window (1).
- **SESET**: Click this button to clear the part number list window and all search results, and to reset all options to their default settings.
- Ownload Multi-Search Templates: MULTI-SEARCH accepts two types of data files: Excel (.xls or .xlsx) and text (.txt). Click on either link to download the corresponding upload file format. Each file contains instructions pertaining to the particular file format.
- **Search Options**: Checking either box filters the search results: "Exact Text" finds only items that contain the complete part numbers entered; "Exact Match" finds only exact part numbers entered.
- **3 Display Options**: Checking either box displays the community name and member name for each item that appears in the search results, beneath each item record.
- Filter Search by Community: Selecting an inventory-sharing community in this drop-down list filters search results to items posted to the selected community only. The drop-down list includes only communities for which your account has "authorized" (SEARCH-capable) access.
- Display Currency As: Selecting a currency in this drop-down list converts prices displayed in a search result into the selected currency. Converted prices are estimates only. Contact the posting member to confirm offer price in the selected currency.

## MULTI-SEARCH for Part Numbers Typed/Pasted in \_\_\_\_\_ Back to Contents



- Type/Paste in a list of up to twenty (20) part numbers here...: A list of part numbers can be entered into this window by typing them in (separated by a carriage return or "Enter" key) or by pasting in a list from another file, such as an MS Excel or MS Word document. Once, pasted in, the list can be edited. MULTI-SEARCH is not case-sensitive.
- 2 SEARCH: Click on this button to perform a search for all of the items listed in the part number list window (1).
- **8 RESET**: Click this button to clear the contents of the part number list window and all search results, and to reset all options to their default settings.
- Search Options: The default search is performed when neither of these boxes is checked. In this case, the search result will include all items whose part number includes every character in any of the part numbers listed in the MULTI-SEARCH part number list field, in sequence, including those items whose part numbers contain additional characters before, in between or after any of the characters in any of the part numbers listed in the MULTI-SEARCH part number list field.

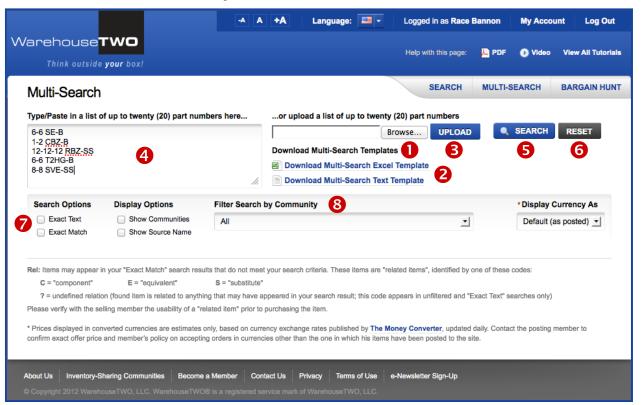
Checking either box filters the search results:

When the **Exact Text** box is checked, the search will filter the search result to include only those part numbers that contain the complete string of characters that was entered as a part number in the part number list window, without any characters in between the characters that were entered. Checking this box will automatically uncheck the **Exact Match** box, if it was already checked. One cannot perform both types of search options at the same time.

When the **Exact Match** box is checked, the search will filter the search result to include only those part numbers that exactly match any string of characters that was entered as a part number in the part number list window. Checking this box will automatically uncheck the **Exact Text** box, if it was already checked. One cannot perform both types of search options at the same time.

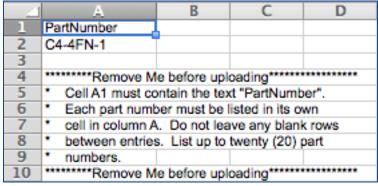
**5 Filter Search by Community**: Selecting an inventory-sharing community in this drop-down list filters search results to items posted to the selected community only. The drop-down list includes only communities for which your account has "authorized" (SEARCH-capable) access.

## MULTI-SEARCH for an Uploaded List of Part Numbers \_\_\_\_ Back to Contents



- Browse: By clicking on this button, a list of part numbers can be entered into the part number list window (4). In the pop-up navigation window that appears, find your upload file on your computer, and then click on the Open button in the bottom right-hand corner of the pop-up window.
- **Download Multi-Search Templates**: The **MULTI-SEARCH** upload function accepts two types of files:

A completely <u>unformatted MS Excel file (.xls or .xlsx)</u>. The file must contain only one list of up to twenty part numbers entered into column "A", starting at cell "A2". Cell "A1" must contain the column header label, "PartNumber" (without quotations). Click on the MS Excel template link to download the MS Excel template file shown below:



A properly unformatted MS Excel file suitable for uploading looks like this:

	Α	В
1	PartNumber	
2	6-6 SE-B	
3	1-2 CBZ-B	
4	12-12-12 RBZ-SS	
5	6-6 T2HG-B	
6	8-8 SVE-SS	

A simple text file (.txt). The file must contain only a list of up to twenty part numbers, each part number separated by a carriage return. A simple text file can be created using any number of applications, including "Notepad" (Windows), "TextEdit" (Mac OS), MS Excel (saved as a tabdelimited text file, ".txt") or MS Word (saved as a text file, ".txt"). Click on the text template link to download the text template file shown below:

A properly formatted text file suitable for uploading to the **MULTI-SEARCH** function looks like this:

```
6-6 SE-B
1-2 CBZ-B
12-12-12 RBZ-SS
6-6 T2HG-B
8-8 SVE-SS
```

- ❸ UPLOAD: Click this button to upload the file found in the pop-up navigation window that appeared after clicking on the Browse button (♠). If processed successfully, the list of items will appear in the part number list window (♠). Once, uploaded, the list can be edited.
- **SEARCH**: Click on this button to perform a search for all of the items listed in the part number list window (4).
- **6 RESET**: Click this button to clear the contents of the part number list window and all search results, and to reset all options to their default settings.
- Search Options: The default search is performed when neither of these boxes is checked. In this case, the search result will include all items whose part number includes every character in any of the part numbers listed in the MULTI-SEARCH part number list field, in sequence, including those items whose part numbers contain additional characters before, in between or after any of the characters in any of the part numbers listed in the MULTI-SEARCH part number list field.

Checking either box filters the search results:

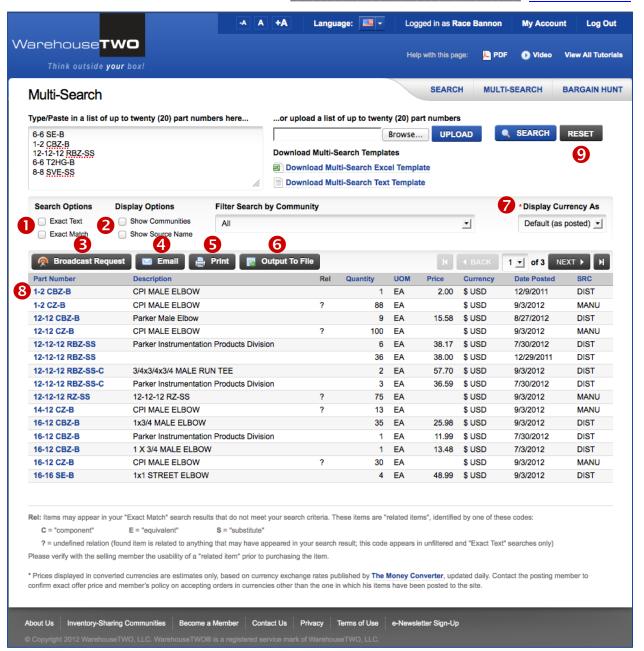
When the **Exact Text** box is checked, the search will filter the search result to include only those part numbers that contain the complete string of characters that was entered as a part number in the part number list window, without any characters in between the characters that were entered. Checking this box will automatically uncheck the **Exact Match** box, if it was already checked. One cannot perform both types of search options at the same time.

When the **Exact Match** box is checked, the search will filter the search result to include only those part numbers that exactly match any string of characters that was entered as a part number in the part number list window. Checking this box will automatically uncheck the **Exact Text** box, if it was already checked. One cannot perform both types of search options at the same time.

**§** Filter Search by Community: Selecting an inventory-sharing community in this drop-down list filters search results to items posted to the selected community only. The drop-down list includes only communities for which your account has "authorized" (SEARCH-capable) access.

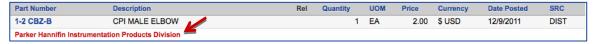
#### **MULTI-SEARCH Search Results**

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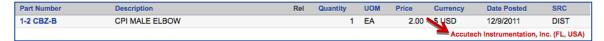


All search results are sorted by "Part Number" (increasing), then by "Date Posted" (decreasing) and then by "Price" (increasing). Thus, for a given item, the most recently posted records with the lowest price appear at the top of search results. Search results can be re-sorted by clicking on any column label shown in blue font. Click once for an increasing sort, again for a decreasing sort. To reset the sort to the default setting, click on the **SEARCH** button again.

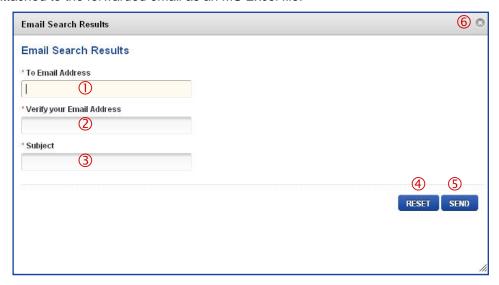
- **Search Options**: You can change the search results by clicking on either of these boxes. Refer to page 3 or 5 of this tutorial for an explanation of what these options are.
- Display Options: Check the "Show Communities" box to display the name of the inventory-sharing community to which each item was posted:



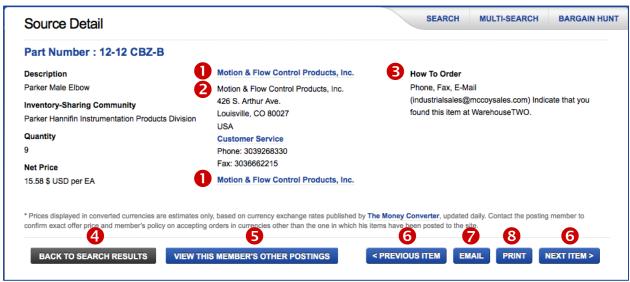
Check the "Show Source Name" box to display the name of the WarehouseTWO member offering each item:



- Click the Broadcast Request button to send out an email inquiry to a select group of WarehouseTWO members. This will increase the chances of finding the items that you need, because many WarehouseTWO members do not upload their inventory data to the WarehouseTWO web site. (Refer to the BROADCAST REQUEST tutorial for details about this feature.) Broadcast Request is a premium feature, and is available only to users with a membership level of 2 or higher.
- 4 Click the Email button to forward the search results to a single email address. The results will be attached to the forwarded email as an MS Excel file.



- ① Enter a valid email address
- 2 Re-enter the valid email address
- 3 Enter a subject for the email.
- 4 Click on the **RESET** button to clear both entry fields.
- © Click on the **SEND** button to send the email. The search results will be attached as an Excel file. This window will close automatically when the email has been sent.
- 6 Click on the "X" to close this window, whether or not you have already clicked on the SEND button.
- Solick the Print button to print the search results. A new browser window will appear that displays the print-out format. A print dialog box will appear. Close the second browser window to return to the search results screen.
- 6 Click the Output To File button to export the search results. Follow the instructions in the "File Download" dialog box that appears. The exported data will be in the format of an MS Excel file.
- **Display Currency As:** Prices shown for all items in a search result default to the currency selected by the member who posted each item. Click on the drop-down list of currencies to convert all prices to a specific currency. Converted prices are identified by an asterisk after the currency label for each item. Converted currencies are estimates only. Contact the posting member to verify the exact price and currency of any transaction between you and the posting member.
- 3 Click on any part number to reveal detailed information about each item. (Refer to the **Source Detail** section, below, for more information on this functionality.)
- Olick the RESET button to clear all search results and to reset all options to their default settings.



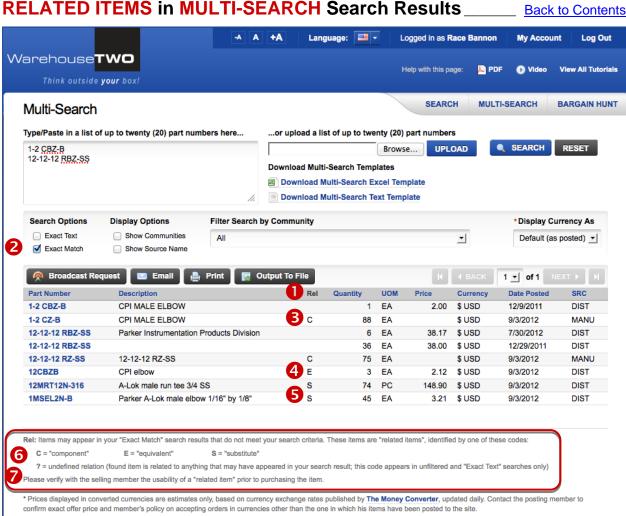
- If the member's company name or location name appears as a hyperlink, click on either link to open a new browser window to the member's web site.
- The member's address and contact information are displayed here.
- 3 The member's specific instructions on how to place an order are displayed here.
- Olick the BACK TO SEARCH RESULTS button to return to the search result screen.
- Click the VIEW THIS MEMBER'S OTHER POSTINGS to view a list of all other items posted by this member to communities for which your company has "authorized" access. The screen will automatically return to a SEARCH search result screen. The search result screen will include a new sub-header, such as this example:

Inventory Postings By Member: Motion & Flow Control Products, Inc.

The result will include all items posted by the selected member. You can **EMAIL**, **PRINT** or **OUTPUT TO FILE** this list of items. This information can help you select additional items to buy from this member, perhaps to meet the member's minimum purchase order value requirement.

The VIEW THIS MEMBER'S OTHER POSTINGS feature is a premium feature, and is available only to users with a membership level of 3 or higher.

- 6 Click on either navigation button to move between items in the search result.
- Click the **EMAIL** button to forward the **Source Detail** contents to a single email address. The information on this screen will be included in the body of the email. No attachment is included with this email.
- 8 Click the **PRINT** button to print the search results. A print dialog box will appear.



RELATED ITEMS, identified by a single character in the "Rel" column, may appear in MULTI-SEARCH search results. While these items may not meet your search criteria, they have been posted by another member who has also uploaded a specific relationship between what you may be searching for and what that member has available. Related items are labeled as such only when an "Exact Match" (❷) search is performed. For other search methods, related items are identified by a question mark ("?"). A code key is displayed beneath the search results, for reference (6).

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- The letter "C" stands for "component". A related item identified as such can be used to assemble the item that was searched for. In this example, "1-2 CZ-B" is the part number of the tube fitting body that is used to assemble the complete tube fitting "1-2 CBZ-B".
- The letter "E" stands for "equivalent". A related item identified as such is the same item as was searched for, but the part number may have been entered differently. In this example, the posting member removes spaces and dashes from all part numbers in his ERP system. So his part number "12CBZB" is his representation of the item "1-2 CBZ-B".
- 5 The letter "S" stands for "substitute". A related item identified as such may not be an exact match to the item searched for, but may be a functional equivalent. In this example, "1MSEL2N-B" is similar to part number "1-2 CBZ-B". When considering a substitute item, verify that it is acceptable to your customer before buying it. Or, modify it to meet your customer's requirement.
- "Please verify with the selling member the usability of a "related item" prior to purchasing the item."

# Tips and Tricks \_\_\_\_\_\_ Back to Contents

To get the best results with the **MULTI-SEARCH** feature:

- 1. Search by manufacturer's part numbers, not by any internal part numbering system that your company may use.
- 2. Begin a search by performing an unfiltered search. Do not check either "Search Options" box, and do not filter by inventory-sharing community. If your search result includes too many items, then filter your search.
- 3. For long part numbers, remove spaces and hyphens, and perform an unfiltered search. This method will catch more items, including items that may have been posted under an improperly formatted part number.
- 4. Filtering your search by a specific inventory-sharing community may exclude items that you need, but that were posted to the wrong community. Therefore filter by community only if your previous search result includes too many items.
- 5. Always confirm that the item that you intend to buy is still available from the WarehouseTWO member who posted the item. Also confirm offer price and any other transaction fees.
- 6. If you did not find everything that you were looking for in your **MULTI-SEARCH** search, always send out a **BROADCAST REQUEST** inquiry email to one or more select groups of WarehouseTWO members. Many WarehouseTWO members do not post their company's inventory data to their accounts. Find hidden inventory with the **BROADCAST REQUEST** feature.

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Got a question about this feature? Let us help:

- a) Email us.
- b) Call us at 650.329.1592.
- c) Post your question to our LinkedIn group, WarehouseTWO Users Forum.
- d) Post your question to our Facebook group, WarehouseTWO Users Forum.