

## Searches/Filters/Exporting/Importing

Fuse5 gives you the ability to export and import a multitude of information. You can export sales orders. You can export and import accounts, products, vendors and a variety of other data. This functionality allows you to add / update information in any of these records.

Each set of data that you export/import does have some basic requirements. For example, when exporting/importing products you must always include the line code and product stripped (product number).

Data Set	Required Information
Products	LIN code, product stripped (product number)
Accounts	Account Number, Account Name
Vendors	Vendor Number, Vendor Name

Prior to doing an export / import it is necessary to understand that in addition to seeing a complete list of all of your products, accounts, vendors, etc., you have the ability to use searches and filters to refine the data that you intend to review.

## Searches

Prior to exporting data, you want to ensure that you are prepared with the information that you really want to see. On any of the “LISTINGS” pages for products, accounts, or vendors you will see that there are a few different search options (These search options exist for sales orders, purchase orders, store transfers, etc.).

The first search tool is located in a box across the top of the screen. Towards the top left you will see the words (Search..with *Go To Advanced Search*) underneath it. If you click on Go To Advanced Search, fuse5 will take you to an advanced search and you will see that this prompt has changed to Go To Basic Search. Let's start with the basic search.

The screenshot shows the top search bar of the Fuse5 application. On the left, it says "Search" and "Go to Advanced Search". In the center, there is a "Search for" text box containing the letter "A", followed by a yellow highlight. To the right of the text box is a dropdown menu labeled "In" with "Account Number" selected. Further right are two radio buttons: "Exact match" (which is selected) and "Begins With" (which is highlighted in yellow). To the right of these are two buttons: "Search Now" and "Show All". On the far right is a small "[x]" icon. Below the search bar is a horizontal row of 26 buttons, each labeled with a letter from A to Z, representing an alphabetical index.

In the basic search option you have the ability to pick something for the *Search For* box. The drop

## Fuse5 Training Materials

down box labeled *In* allows you to see what criteria are available for search in this data set. Make sure that you Search For a piece of information that matches the criteria of the In drop down. Not doing so will lead to poor search results.

There are two buttons just to the top right of the screen. One allows you to search for an exact match only, the other allows you to search for data that begins with the leading information in your search box. We recommend the “begins with” button, specifically if you are not 100% sure of a specific spelling or numbering of the data you are searching for. Once you have selected your basic search criteria you can push the “Search Now” button and Fuse5 will show the data that meets this criteria.

Another option on the basic search page is to simply click the *Show All* button, which will pull up all the records in the category you are looking at. Using the “Show All” button will ignore the search criteria.

Now let's look at the advanced search option. Click on *Go to Advanced Search*. Using the drop downs you will see that you can search for a variety of pieces of information. You use the center drop down box to determine the matching standards. Finally, in the third box you determine the piece of information that you are comparing your search data too. You can make your search criteria more stringent by hitting the *More* button at the bottom left of the search box or less stringent by hitting the *Fewer* button. Once you have set your parameters, hit the *search now* button and your results will be displayed.

Search  
Go to Basic Search

☒ Match All of the Following ☐ Match Any of the Following

Sell Price	contains	10
Back Order	is	Yes
Tax Number	contains	12

More Fewer Search Now

## Filters

Filters are available on the same page as searches. Just below the search box, to the right side of the screen you will see two drop down boxes. The first let's you choose how many items per page you want your filter to show, the next allows you to choose from available filters.

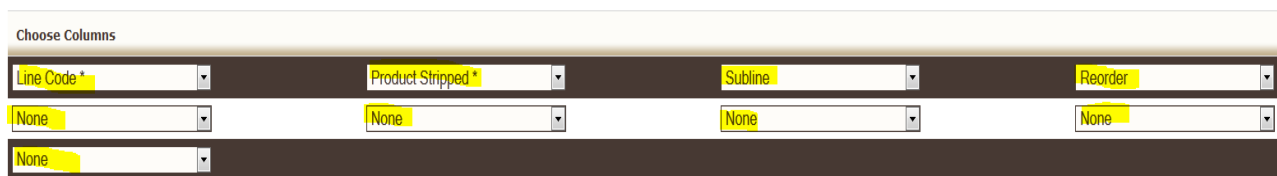
Show per page: 100 Display All Results Filters : Subline New Edit Delete

When new to Fuse5 you will probably only have an “all” filter, but you as the user can create new

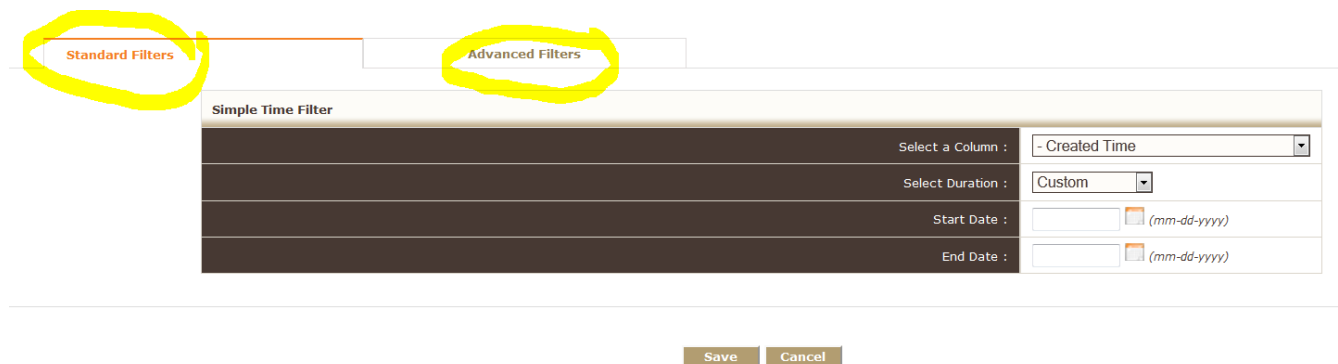
## Fuse5 Training Materials

filters by clicking on the “new” button to the right of the filter drop down. You also have the ability to select a previously created filter from the drop down box and use the “edit” button to alter it. The final option is to use the “delete” button if you wish to eliminate a previously created filter. Our recommendation is that when you are creating new filters you try to use a naming convention that will allow you to quickly recognize what it will show you. For example, if you set up a filter with all of your account names and their mailing address in order to export a mailing list to send Holiday Cards, name the filter appropriately.

When setting up filters you can display a maximum of 9 pieces of information in order to fit it on the screen. You will notice that if you go in to the new or edit feature, there are only 9 drop down boxes available under Choose Columns.



By clicking on any of the drop downs you will see that you have a variety of information available for display. Depending on the type of information you are looking at, whether it's products, accounts, etc. you will see different options in the drop downs. Within the filter page you also have the option to choose additional “Standard Filters” or “Advanced Filters”.



Within the “Standard Filters” you can choose a time filter. This allows you to look at data based on date ranges. For example, you may only want to look at products created in the last 6 months or sales orders in the last 30 days.

**Important – It's important to understand that setting up a filter “trumps” any searching you do with the search capability. When searching, Fuse5 will only search for data that is eligible based on your filter. This is particular important when you start using the “Advanced Filters”.**

In addition to the Standard Filters that we have just covered, you have the option to choose the Advanced Filters by clicking on it near the center of your screen. The advanced filters provide functionality similar to the Advanced Search function described above. You can do a deep dive and

## Fuse5 Training Materials

filter down to very specific information based on the rules that you set.

RULE				
Account Name	starts with	A	And	
Default Location	equals	Bora Bora	And	
Sales MTD	greater than	5000	And	
Todays SO Totals	greater or equal	500	And	
Statement Frequency	equals	Monthly		

Once you have chose your search criteria, regardless of standard or advanced, it is important that you use the “Save” button at the bottom. Once you have done this, the filter will be updated / available from the Listings page.

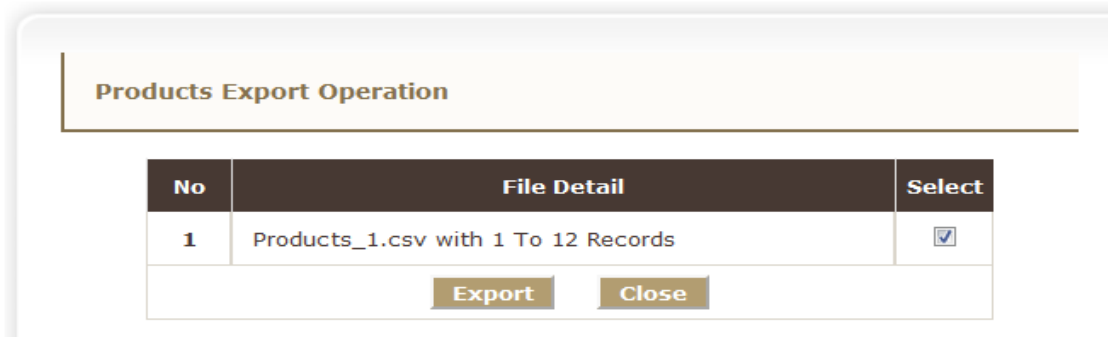
## Exporting

**Prior to exporting or importing it is recommended that you load Open Office on your computer. The Open Office Calc program works best because it gives you the ability to view columns as TEXT, which allows you to avoid the problem of deleting or stripping out leading zeroes on product numbers.**

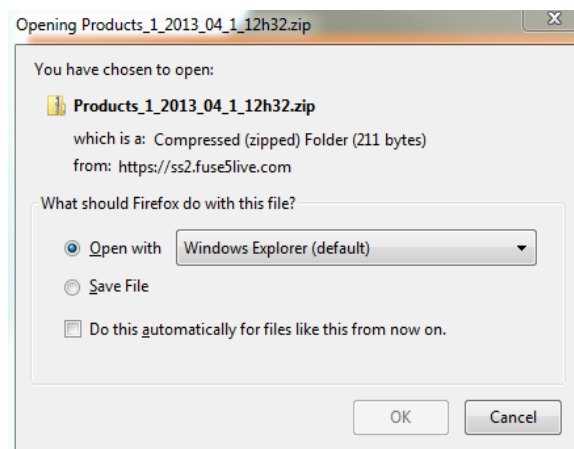
1. Go to the appropriate record type that you would like to export (accounts, products, vendors, etc).
2. If you are looking to export specific information, set your filters and searches.
3. Click on the export button at the top right of your screen.
4. Choose your Export Search Criteria Records: a. Export with search records will only export the data based on the search / filter that you have set up. b. Export without search records will export all data. If you have a search/filter in place you will receive a pop up box asking if you want to export all or try again with only the search/filter data.
5. Choose your Export Records Type: a. Export all data and b. Export data in current page will export the data you have selected. c. Export selected records (old functionality that is not currently used)
6. Click the Export Accounts button
7. A pop up window comes up titled XXXXX EXPORT OPERATION. (If you don't see this

## Fuse5 Training Materials

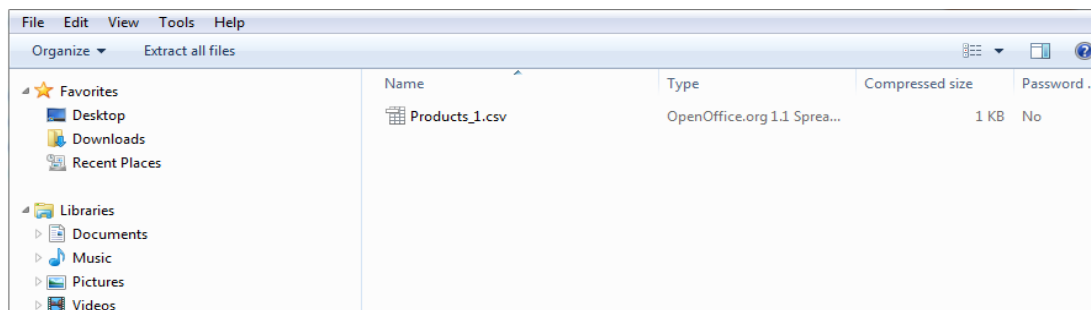
ensure that your web browser is not blocking pop ups). You need to check the select box. Each file can hold 100,000 records so if you have more than 100,000 you will have to check each select button. Once you have chosen the files to export hit the Export button.



8. You will be prompted and asked to open the file. Typically you will open the file with the defaulted method, or with Open Office Calc if possible. Click OK once you decide.

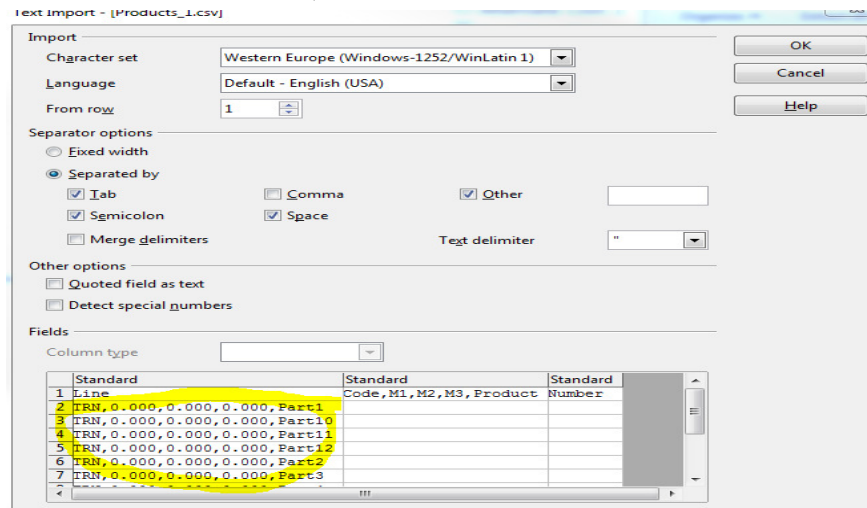


9. At this point you should see an account file, for example it may be titled "Accounts\_1". Double click to open it and then review the trouble shooting suggestions that follow.



10. Trouble Shoot: When the Text Export pop up displays, look at your data. If it doesn't look the way you want it use the Separated By options to make changes. Push buttons tab, comma, semi-colon, space, etc. to find the best combination for displaying your data appropriately.

**BAD EXPORT:** Data is all in one column, the “COMMA” box is not checked.



**GOOD EXPORT:** Data shows in separate columns, the “COMMA” box is checked.

## Fuse5 Training Materials

Text Import - [Products\_1.csv]

Import

Character set: Western Europe (Windows-1252/WinLatin 1)

Language: Default - English (USA)

From row: 1

Separator options

☐ Fixed width

☒ Separated by

☐ Tab ☒ Comma ☐ Other

☒ Semicolon ☐ Space

☐ Merge delimiters

Text delimiter: "

Other options

☐ Quoted field as text

☐ Detect special numbers

Fields

Column type: Standard

	Standard	Standard	Standard	Standard	Standard
1	Line Code	M1	M2	M3	Product Number
2	TRN	0.000	0.000	0.000	Part1
3	TRN	0.000	0.000	0.000	Part10
4	TRN	0.000	0.000	0.000	Part11
5	TRN	0.000	0.000	0.000	Part12
6	TRN	0.000	0.000	0.000	Part2
7	TRN	0.000	0.000	0.000	Part3

11. Trouble Shoot: If any of your columns of data include numbers that DO or MAY have leading zeroes, click the word STANDARD at the top of the column. You can now either right click and select TEXT or use the Column Type drop down to select TEXT. This should ensure that leading zeroes are not removed from the data.

## Fuse5 Training Materials

Import

Character set: Western Europe (Windows-1252/WinLatin 1)

Language: Default - English (USA)

From row: 1

Separator options

☐ Fixed width

☒ Separated by

☐ Tab ☒ Comma ☐ Other

☒ Semicolon ☐ Space

☐ Merge delimiters

Text delimiter: "

Other options

☐ Quoted field as text

☐ Detect special numbers

Fields

Column type: Text

	Standard	Standard	Standard	Standard	Text
1	Line Code	M1	M2	M3	Product Number
2	TRN	0.000	0.000	0.000	Part1
3	TRN	0.000	0.000	0.000	Part10
4	TRN	0.000	0.000	0.000	Part11
5	TRN	0.000	0.000	0.000	Part12
6	TRN	0.000	0.000	0.000	Part2
7	TRN	0.000	0.000	0.000	Part3

12. Click OK to open your spreadsheet.

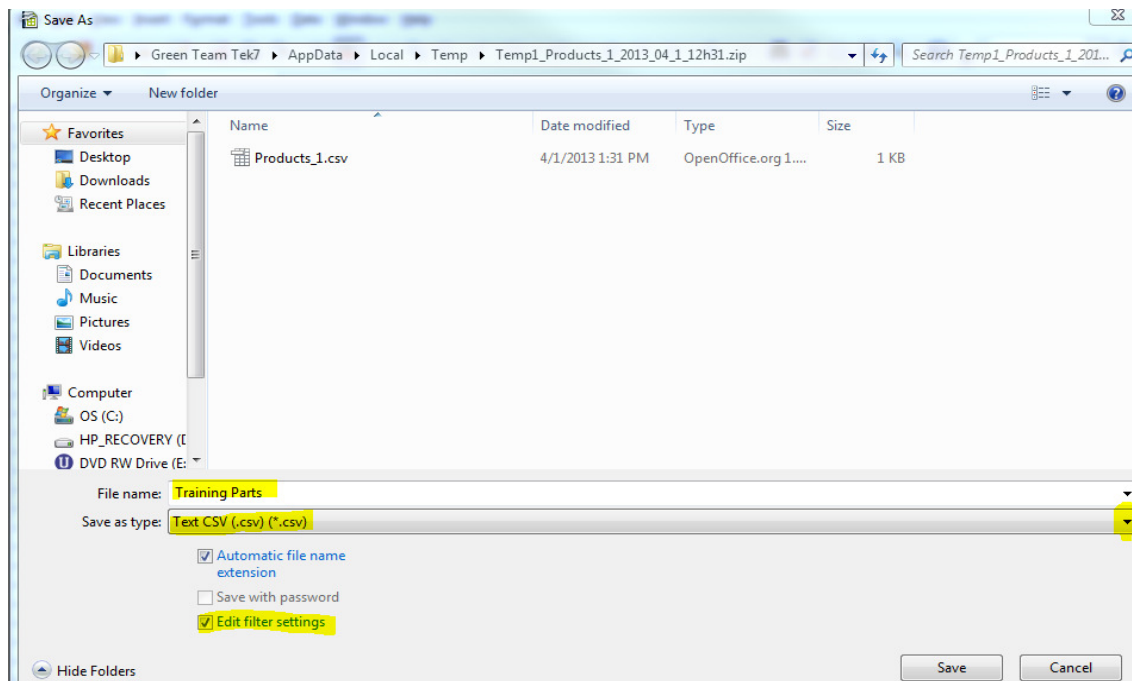
13. The spreadsheet may be in (read-only) mode when it is first opened. If that's the case, you will need to save the file prior to manipulating it using steps 15 thru 17 below.

Products\_1.csv (read-only) - OpenOffice.org Calc

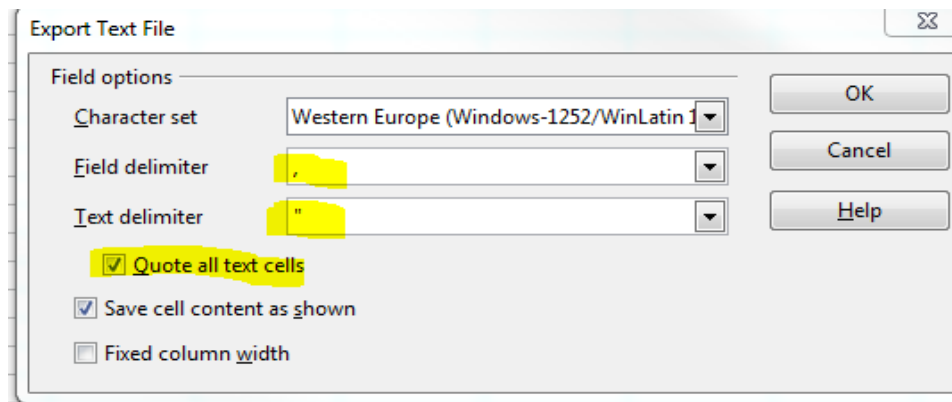
	A	B	C	D	E
4	TRN	0	0	0	Part11
5	TRN	0	0	0	Part12
6	TRN	0	0	0	Part2
7	TRN	0	0	0	Part3
8	TRN	0	0	0	Part4
9	TRN	0	0	0	Part5
10	TRN	0	0	0	Part6
11	TRN	0	0	0	Part7
12	TRN	0	0	0	Part8
13	TRN	0	0	0	Part9
14					



14. At this point you can manipulate the data in any way you need, just remember that there are mandatory fields that must remain when ready to import. (see chart above)
15. When you are done manipulating the data.....go ahead and save it. If you saved it when you first opened it you should be able to just use the save option. If you haven't previously saved use the following trouble shooting suggestions which may be helpful, but may not be necessary.
16. Trouble Shoot: When saving your file for imports, clean the file up to only the information you need for the import. Save As the document and name it something you will remember. When the Save As box pops up and you are deciding where to save the file and what to name it, you will see a check box that let's you Edit Filter Settings (bottom left of the pop up). Check that and it will lead you to an Export Text File pop up AFTER you hit save. Also, ensure that you use the "Save as type:" drop down and select a .csv version to save it as.



17. Trouble Shoot: When export text box pops up, set the Field Delimiter to a comma (,) and the Text Delimiter to a quote ("). Check the box for Quote All Text Cells and ensure that the Save Cell Content as Shown Above is checked. Click OK when finished.

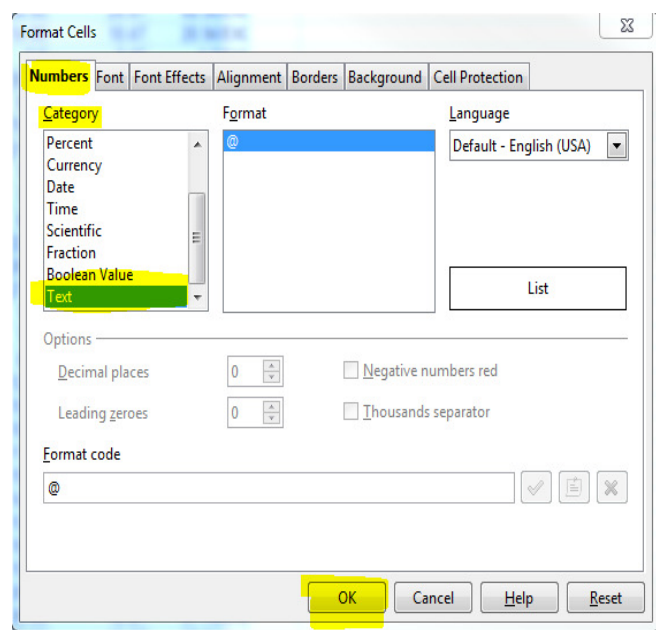


## Importing

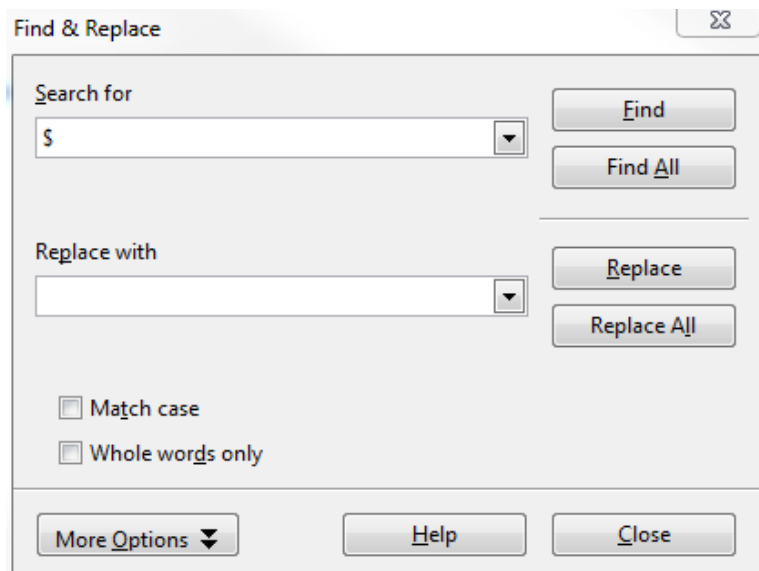
Setting up the spreadsheet for import:

1. Recommend using Open Office Calc, but you can use Excel.
2. Ensure you have the mandatory columns based on the import you are going to do.
3. Add any additional columns that you want to import that is not on the spreadsheet already. (ex. List Price)
4. Change any price columns to text format. Do this by highlighting the columns, then right click and select **FORMAT CELLS**. You will get the following pop up which allows you to format the cells. Under the **NUMBERS** tab, use the drop down under **CATEGORY** to select **TEXT**. Then click the **OK** button.

C	D	E	
Retail Price	Your Cost	List	Li
19.7	13.79	27.58	E
34.95	24.47	48.94	E
14.95	10.47	20.94	E
3.5	2.45	4.9	E
39.95	27.97	55.94	E
9.95	6.97	13.94	E
79.95	55.97	111.94	E
21.95	15.37	30.74	E
7.95	5.56	11.12	E
7.95	5.56	11.12	E
8.95	6.26	12.52	E
22.95	16.07	32.14	E
26.95	18.87	37.74	E
27.95	19.57	39.14	E

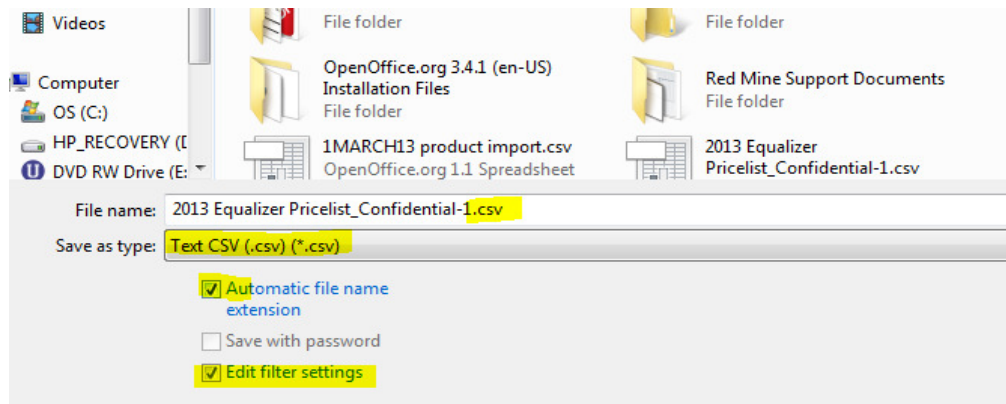


5. Find and replace any unusual symbols. These symbols can occasionally cause import problems, so it's best to try to get rid of them if possible. You can import first and come back to the step if you have issues. Some symbols known to cause problems can be \$, %, <sup>TM</sup>, '®. To to this step use the CONTROL F function which gives the pop up below. If the symbol isn't available on your computer, you may need to copy it from the spreadsheet. Do a REPLACE ALL, leaving the Replace with line item blank.

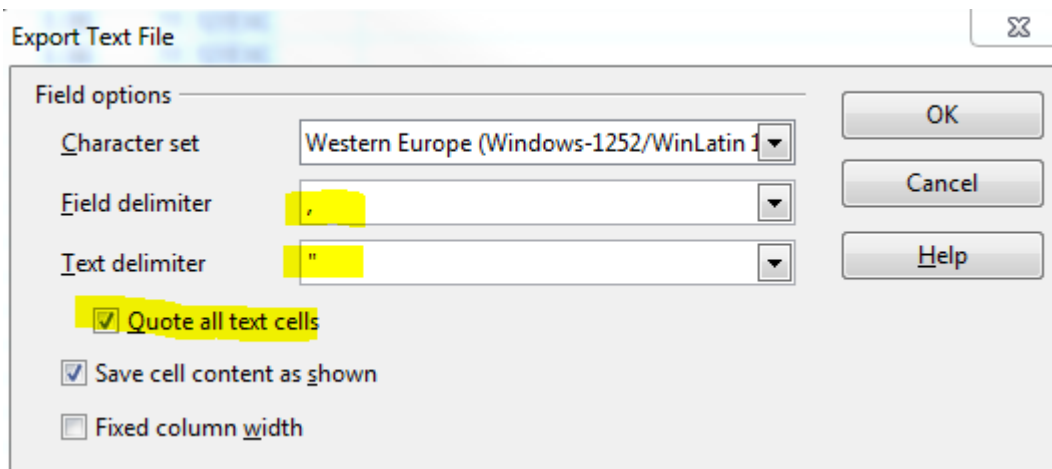


6. When saving your file for imports, clean the file up to only the information you need for the import. "Save As" the document and name it something you will remember. When the Save As box pops up and you are deciding where to save the file and what to name it, you will see a check box that let's you Edit Filter Settings (bottom left of the pop up). Check that and it will lead you to an Export Text File pop up AFTER you hit save.

## Fuse5 Training Materials



7. When export text box pops up, set the Field Delimiter to a comma (,) and the Text Delimiter to a quote ("). Check the box for Quote All Text Cells and ensure that the Save Cell Content as Shown Above is checked. Click OK when finished.



### Importing in to Fuse5:

1. Go to the appropriate record type that you would like to import (accounts, products, vendors, etc).
2. Click on the import button at the top right of your screen.



## Fuse5 Training Materials

3. Click the “Browse” button. Identify your file from your computer. Click on the file and hit “Open”. The file should now show in the FILE LOCATION box.

**Import Products**

**Step 1 of 3 : Select the .CSV File**

Import system supports importing records from .csv ( **Comma Separated Values** ) files. To start import, browse to locate (comma)

File Location : Z:\Training\Subscriber Training\Training Se  ☒ Has Header

File must have a 'Location' column as the last column in the File for import, or the system will update/inse

4. Click the NEXT button.

alues ) files. To start import, browse to locate the .CSV file and click on the Next button to Continue. **Field Delimiter should be ,**

ng\Training Se  ☒ Has Header

or import, or the system will update/insert a 'Location' field for each product during import.

5. At this point, you should see Headers, Row 1, and Row 2 containing only one piece of data, should be the data you intend to import.

6. Assuming your columns match up the next step is to use the mapping column to ensure the appropriate categories in fuse5 are updated by the spreadsheet. The mapping refers to fuse5 and should be matched up to the headers which are on the spreadsheet. You do NOT need to check the box to the left of the mapping column. (If you have cleaned up your spreadsheet to import only the data you are concerned with prior to importing you should only have a few items in each column. If you have imported an ENTIRE record you may have a bunch of rows available for import. You do NOT need to match them all up, just the ones you want to import)

## Fuse5 Training Materials

Select Location for Importing Data: ☐ Bora Bora ☐ Fiji ☐ Tahiti  
☐ Easter Island ☐ Cook Islands ☐ Solomon Islands

Mapping	Headers :	Row 1	Row 2
<input type="checkbox"/> -- Do not map this field --	Product #	1971 Training	1972 Training
<input type="checkbox"/> -- Do not map this field --	Line Code	DCC	DCC
<input type="checkbox"/> -- Do not map this field --	Product Name	Wheely Bar	Tailgate
<input type="checkbox"/> -- Do not map this field --	Min	5	5
<input type="checkbox"/> -- Do not map this field --	Order Point	10	10
<input type="checkbox"/> -- Do not map this field --	Max	15	15
<input type="checkbox"/> -- Do not map this field --	Reorder	Yes	Yes
<input type="checkbox"/> -- Do not map this field --	Current Cost	100	154

7. Pick the location/locations you want to import the new data too. This is done with the check box next to the locations right above the mapping section.

100

154

Compare Price Field

or "H" in Product.)

< Back
Import Now >

8. Hit the Import Now button.

9. The next page will show your mapping results. Once reviewing the success of your import, hit the finished button.

Import Products

**Step 3 of 3 : Mapping Results**

**Success!**

No. of Records Imported : 11

No. of Records Successfully Updated : 12    [» List of Updated Records](#)

No. of Records Skipped as they were missing one or more required fields : 2

Code 'em now
Finished
Import More

Code 'em now
Finished
Import More

## Fuse5 Training Materials

The "code 'em" function pertains to updating the price code in product lines based on the "product to PCB" mapping, and the corresponding pricecode book. The default way to run "code em" in fuse5 is from the price code books page. after you update a price code book, or assign a new line to a PCB, you would recode the book, which updates all the price codes in the products assigned to that PCB based on the dollar tiers and corresponding selected price field (based on the price field in the PCB). Since coding parts is based on the cost value in the appropriate price field, we added a code em button during product import, so after you import new costs, you could immediately one-click update price codes

### Import Products

#### Step 3 of 3 : Mapping Results

##### Success!

No. of Records Imported : 23

No. of Records Successfully Updated : 12 » **List of Updated Records**

No. of Records Not Updated : 10 » **List of Not Updated Records**

No. of Records Skipped as they were missing one or more required fields : 2

1. No. of Records Imported: the number of records on the spreadsheet.  
correct
2. No. of Records Successfully Updated: >> is based on what returns as the number of affected rows in the previous import operation.
3. No. of Records Not Updated: >> is based on what returns as the number of not affected rows in the previous import operation.
4. No. of Records Successfully Inserted: (for account import only) >> This is a list of new added accounts i.e Inserted ACC# but not a updated ACC#
5. No. of Records Skipped as they were missing one or more required fields: >>

Fuse5 Training Materials

List of Updated Records from Import Operation – this will generally be equal to the number of records successfully updated times the number of locations.

List of Updated Records from Import Operation		
Showing 1 - 50 of 96		
Line Code	Product Number	Vendor Order (PUOM) Type
TRN	Part1	Case
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part2	EACH
TRN	Part2	EACH
TRN	Part2	EACH



## Fuse5 Training Materials

List of Not Updated Records from Import Operation – this will generally be equal to the number of records not successfully updated times the number of locations.

List of Not Updated Records from Import Operation

Showing 1 - 50 of 80

Line Code	Product Number	Vendor Order (PUOM) Type
TRN	Part1	Case
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part1	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part10	EACH
TRN	Part2	EACH
TRN	Part2	EACH
TRN	Part2	EACH
TRN	Part2	EACH

10. Your import is now successful. Check a few of your updated records to ensure it worked.
11. If you want to compare changes to any of your Mfield pricing prior to importing you can select to Export Product Price Field Comparison CSV. If you do that, once you have clicked the import now button you will have the ability to create the CSV.

Compare Price Field

Compare Price Field

☒ Export Product Price Field Comparison CSV
 

E=Equals L=Lower H=Higher

M1: ☒
M2: ☐
M3: ☐
M4: ☐
M5: ☐
M6: ☐
M7: ☐
M8: ☐
M9: ☐
M10: ☐

(Select Price field to Update Report Codes in Products. Report codes first position will be updated with "E,L or "H" in Product.)

If you don't want to export, but want to see the price field changes, click the Compare Price Field button. This will allow you a quick image of changes to pricing.

Compare Price Field		
Line Code	Product Number	M1
TRN	Part1	E
TRN	Part10	E
TRN	Part2	E
TRN	Part3	E
TRN	Part4	E
TRN	Part5	E
TRN	Part6	E
TRN	Part7	E
TRN	Part8	E
TRN	Part9	E
TRN	Part11	E
TRN	Part12	E

### Importing Options for Accounts:

**Advanced Account Import :**

Ignore new accounts

Account Key Field to Match :

Account Name

Account Number

Both

(NOT case sensitive)

(Default)

1. **Ignore New Accounts** - Choosing 'Ignore new account' will only update existing Fuse5 accounts with information found in the import file without adding any new accounts the import file may have. The 'Account key field to match' indicates what Fuse5 looks at in the account to declare a match between an import record and an existing account record. The match is not case sensitive, so 'Bills Auto' will match 'BILLS AUTO'
2. **Account Key Field to Match** – choose either account name, account number, or both. If you choose to match on Account Number only, and you also map the account name, be aware that the account name will be updated if it is different. If you do not wish to change the account name, then we suggest you do not map it if you are only matching on account number. "Account # is the unique identifier in Fuse5" If you attempt to import a duplicate account # with a different account name than what's in Fuse5 we'll create a new record, and auto-assign a new account #. However, duplicate account names with different numbers are allowed."

