

## **A Guide to Using Search Attributes (For FastSite Gold Customers Only)**

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## **Using Search Attributes to Define Territories**

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Search attributes can be used in two ways. The first way is to define regional sales or distribution territories. The second way is to use attributes of a location to further narrow the geographic search. (For information on the latter method, refer to the section *Using Search Attributes to Narrow the Search*.)

Using search attributes to define territories allows you to direct your customers to the nearest distributor or sales representative. For U.S. locations, you accomplish this by entering the state and/or counties within states and/or the area codes (i.e., the territories) into the Attribute Codes field for each dealer. Then, when a customer enters a zip code or city/state into the locator, the dealer record containing that attribute will be displayed.

For example, if Dealer4 covers the state of NY and one county in Massachusetts, the attributes for his record are: `ny , ma :middlesex`

Then, if a customer enters a zip code in Middlesex county of Massachusetts or any zip code in New York, the information for Dealer4 is displayed. This directs the customer to the appropriate dealer in his territory.

In Canada, if DealerCN4 covers the provinces of Ontario (ON) and British Columbia (BC), then the attributes for his record are: `on , bc`

In Boston, if DealerBOSTON5 covers Boston and all suburbs, then the attributes for his record, when using area codes to define his territory, are: `617 , 781 , 978 , 508`

**IMPORTANT:** if you decide to use territories, you must either define a dealer for all possible territories (ideally) or you can define some dealers with territories and a single dealer, perhaps with company information, with no attributes. Then, if a customer enters a zip code that doesn't appear in a defined territory, the default record (the one with no attributes) is displayed. If you do not create a default record and you omit a territory (a single county or state or province or area code) and a customer enters a zip code in that omitted territory, then an error message will be displayed to your customer. FastSite provides a complete list of states and corresponding county names as well as province names and area codes at: <http://fastsite.com/help/countyList.txt> to help you.

To use attributes for defining territories, you must specify attributes for each dealer's record. You do not need to define Attribute Codes and Attribute Names like you must do when using search attributes for narrowing searches.

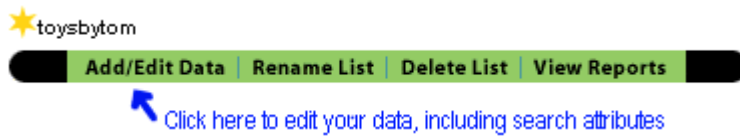
## Specifying Search Attributes In Your Data

You will need to include search attribute codes in your data so that FastSite can correctly direct your customers to the appropriate dealer. Like any other data, you can either enter it manually or you can import it.

### Manually Entering Search Attributes

To manually add search attributes to your data records, do as follows:

1. Go to **Your Lists** on the navigator bar at the top of the page.
2. Click on the list you intend to add search attributes for. This makes the list active, as indicated by the star beside the list name and the toolbar appearing in color.
3. Click on **Add/Edit Data** in the list's toolbar as shown below.



4. On the page that appears, you can either choose **Add Entry** from the toolbar to add a new entry to your list. Or, you can click **Edit** in the **Action** column of a record in an existing list. In either case, you will be taken to a page where you can manually edit an individual record. A sample from Toys By Tom Inc. is shown below.

#### Record 1 of 2

Name	<input type="text" value="Toys By Tom, Exclusive NewEngland Distributor"/>	?
Address	<input type="text" value="245 Massachusetts Avenue"/>	?
Address	<input type="text"/>	?
City, State/Province	<input type="text" value="Cambridge, MA"/>	?
Zip or Postal Code	<input type="text" value="02139"/>	?
Phone	<input type="text" value="617-264-9530"/>	?
Notes	<input type="text" value="Fax: 617-264-9531&lt;br/&gt;Mon-Fri: 8am-7pm&lt;br/&gt;Sat: 8am-Noon"/>	?
Web Page	<input type="text" value="http://www.tbt.com/newengland"/>	?
Image	<input type="text"/>	?
Attribute Codes (click to edit)	<input type="text" value="ct,ma,vt,nh,ri,me"/>	?
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

5. Enter or edit the **Attribute Codes** for this record. The **Attribute Codes** are states and/or county names and/or area codes that define the territory for this particular dealer. In the example above, this dealer handles all inquiries in Connecticut, Massachusetts, Vermont, New Hampshire, Rhode Island, and Maine.

If more than one attribute code applies to this record, then the list of **Attribute Codes** must be separated by commas. Attributes used to define territories must be a comma separated list (without spaces after the comma) in either of the following formats:

**state abbreviation** (specifies the entire state) such as MS

or

**state abbreviation:county name** (specifies a county within the state) such as MS:ADAMS

or

**province abbreviation** (for Canadian locations)

or

**area code** such as 617

Note that you can mix individual counties and whole states (and have multiple provinces for Canadian locations) when defining territories, as shown in another example below:

MA:MIDDLESEX,MA:SUFFOLK,CT

In this example, the territory includes two counties in Massachusetts and the entire state of Connecticut. An example of the attribute codes for a Canadian dealer that covers multiple provinces (of Ontario and British Columbia) is as follows:

ON,BC

An example of a dealer whose territories include the Boston area may choose area codes to define the territory as follows:

617,781,978,508

6. Click **OK** to save your changes once you have specified the appropriate territory using attributes.

### **Importing Your Data with Search Attributes**

In many cases, it is easier to import your data than it is to manually enter the data. This is especially true if you have large lists. For detailed information, see FastSite's *Guide to Working With Your Data*.

If you are using a spreadsheet or database, **Attribute Codes** may appear in one or more cells or fields of your database *only if* you intend to save the file in .CSV format. Otherwise, the **Attribute Codes** must all be within a single field or cell.

If you preface the **Attribute Codes** with an 'a:' or 'A:', then FastSite's automatic import tool will correctly identify the data as **Attribute Codes**. If however you are unable to add the preface, the automatic import tool gives you a feedback page where you can identify fields explicitly to the importer. An example of a valid entry with search **Attribute Codes** is:

Toys By Tom SouthEast Distributor  
865 Peachtree St NE  
Atlanta, GA 30308  
Phone: (404)876-5214

Http://www.tbt.com/se  
A:ga,sc,al:montgomery,al:pickens

In a .CSV (comma separated format) file, this same record would appear on a single line as:

Toys By Tom SouthEast Distributor,865 Peachtree St NE,Atlanta, GA  
30308,Phone:(404)876-5214,Http://www.tbt.com/se,"A:ga,sc,al:montgomery,  
al:pickens"

## Using Search Attributes to Further Narrow the Search

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Search attributes may be used to specify properties or designations for each of your locations. Your customers can use these attributes to further restrict their geographic search to the location that best meets their needs.

For example, if you had a series of home decorating stores, you might use product categories, like *paint*, *wallpaper*, and *stain*, as a way of differentiating the stores. This would give your customers a way to search for the store nearest to them that carries, for example, *wallpaper*. These attributes would be presented to your customer as options (either in a multi-click menu or as check boxes as shown in the following example) when they use the FastSite locator. An example is shown below.



### Store Locator

To find the nearest store  
enter your **City, State**  
or **Zip** and hit Go!

Narrow your search by  
checking one or more:

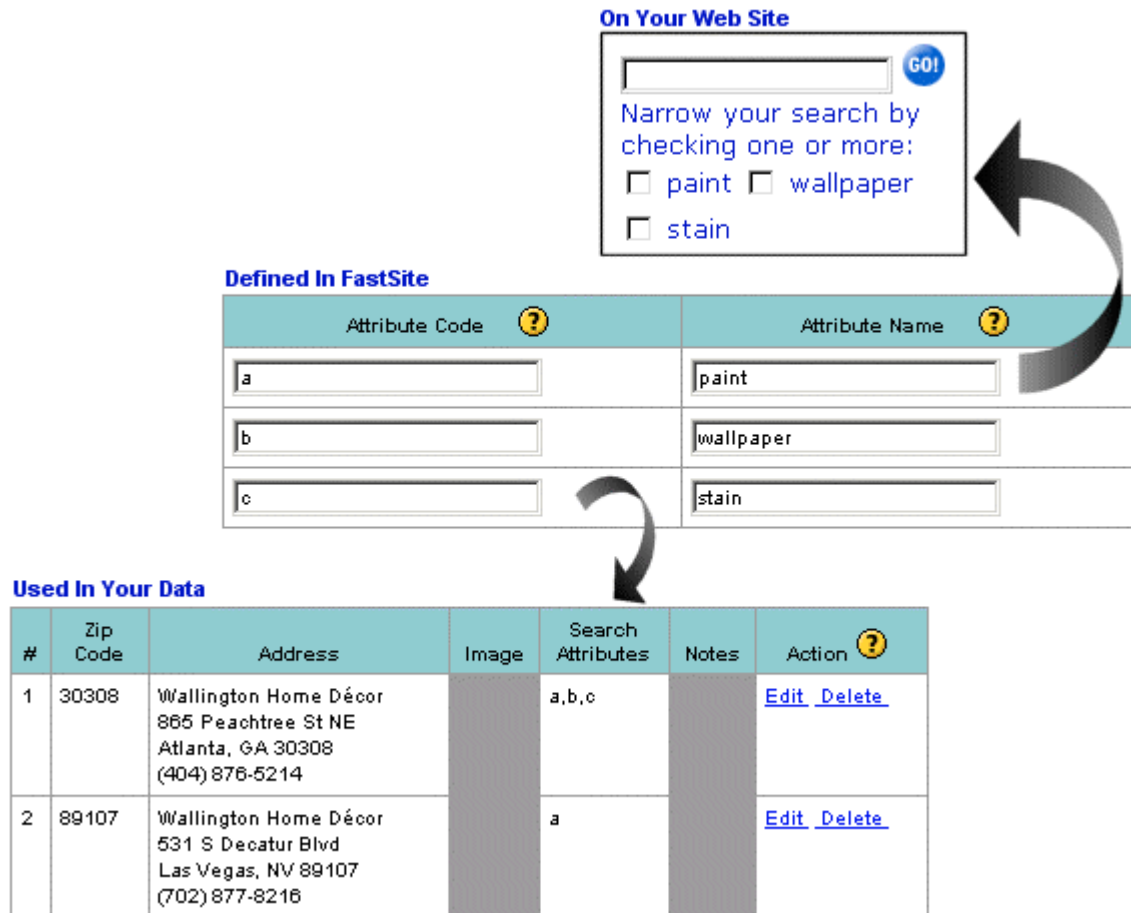
- paint  wallpaper  
 stain



To find the nearest store selling any of the products, the customer would simply enter their zip code and hit the **GO** button. However, if the customer wished to find the nearest store guaranteed to carry *wallpaper*, then the customer would check the *wallpaper* box in addition to entering their zip code.

## An Overview of Search Attributes (The Big Picture)

In order to use search attributes, you will need to both define them in FastSite and then use them within your data. Defining search attributes in FastSite consists of two parts: defining a short internal name, called an **Attribute Code**, and defining an associated more descriptive term called an **Attribute Name** that is displayed to your customer. The diagram below gives a visual overview of the components required for using search attributes.

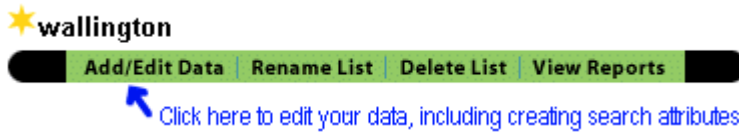


## Creating Search Attributes In FastSite

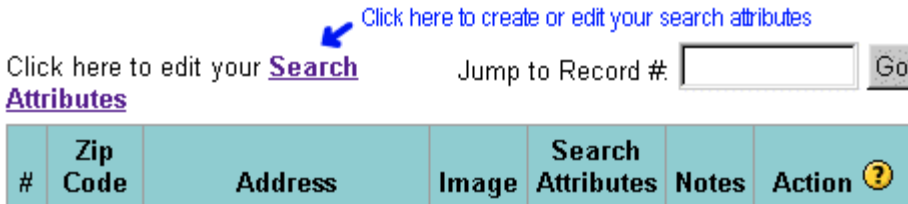
In order for FastSite to add search attributes to your locator, you must first define the attributes, including both the short, internal **Attribute Codes** and the descriptive **Attribute Names**. You will create search attributes using the data editing tools as follows:

1. Go to **Your Lists** on the navigator bar at the top of the page.
2. Click on the list you intend to add search attributes for. This makes the list active, as indicated by the star beside the list name and the toolbar appearing in color.

- Click on **Add/Edit Data** in the list's toolbar as shown below.



- On the page that appears, click on the **Search Attributes** link located immediately above your list data, as shown in the excerpt below.



The **Edit Search Attributes** page will appear. The remaining steps will all be done using the table that appears on **the Edit Search Attributes** page. An example of this table used for the Wallington Home Décor stores is shown below.

Match all selected attributes
  Match any selected attribute
 ?

Attribute Code <span style="float: right;">?</span>	Attribute Name <span style="float: right;">?</span>
<input type="text" value="a"/>	<input type="text" value="paint"/>
<input type="text" value="b"/>	<input type="text" value="wallpaper"/>
<input type="text" value="c"/>	<input type="text" value="stain"/>

- In the **Attribute Code** column, enter a short internal name that will be used to refer to the **Attribute Name** specified for each data record. Common examples include *a, b, c* or *1, 2, 3* and so on. Your customer will never see the **Attribute Code**; your customer will only see the **Attribute Name**.
- In the **Attribute Name** column, enter the corresponding descriptive terms that will ultimately be displayed to your customers in either a pull down, multi-click menu or in a series of check boxes along with the locator. While the **Attribute Names** should be descriptive, they shouldn't be overly long. This will ensure a nice layout when they are presented as check boxes or in a menu
- Choose the desired behavior of the attributes for your customer by clicking either of the radio buttons that appear above the table:

**Match any selected attribute** - Click on this radio button if you want your customers to see those resulting locations that contain one or more of the attributes your customer has selected. This is the least restrictive option. For example, if a customer has selected three attributes, *paint, stain, and wallpaper*, clicking the **Match any selected attribute** button would instruct FastSite to display the nearest location carrying any of the three products. The nearest location only needs to have one of the attributes in order to be displayed as a result. This option is selected by default.

**Match all selected attributes** - Click on this radio button if you want your customers to see only those resulting locations that contain all of the attributes that your customer selected. This is the most restrictive option. For example, if a customer has selected three attributes, *paint, stain, and wallpaper*,

clicking the **Match all selected attributes** button would instruct FastSite to display the nearest store that sells all three products. If there were a closer store, but it only sells two of the products, it would not be displayed as a result.

8. Click the **Done** button at the bottom of the page when you are finished defining your attributes. You can also choose to click the **Update** button to save the settings and continue editing.

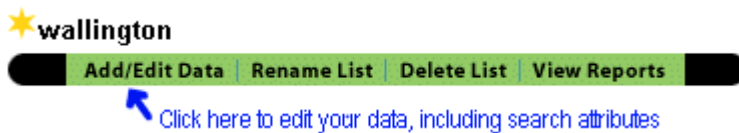
### Specifying Search Attributes In Your Data

You will need to include search attribute codes in your data so that FastSite can correctly modify the searching parameters for the nearest location. Like any other data, you can either enter it manually or you can import it.

### Manually Entering Search Attributes

To manually add search attributes to your data records, do as follows:

1. Go to **Your Lists** on the navigator bar at the top of the page.
2. Click on the list you intend to add search attributes for. This makes the list active, as indicated by the star beside the list name and the toolbar appearing in color.
3. Click on **Add/Edit Data** in the list's toolbar as shown below.



4. On the page that appears, you can either choose **Add Entry** from the toolbar to add a new entry to your list. Or, you can click **Edit** in the **Action** column of a record in an existing list. In either case, you will be taken to a page where you can manually edit an individual record. A sample from the Wallington Home Décor is shown below.

#### Record 1 of 8

Name	<input type="text" value="Wallington Home Décor"/>	?
Address	<input type="text" value="865 Peachtree St NE"/>	?
Address	<input type="text"/>	?
City, State/Province	<input type="text" value="Atlanta, GA"/>	?
Zip or Postal Code	<input type="text" value="30308"/>	?
Phone	<input type="text" value="(404) 876-5214"/>	?
Notes	<input type="text"/>	?
Web Page	<input type="text" value="http://www.wallington.com/atl"/>	?
Image	<input type="text"/>	?
Attribute Codes <a href="#">(click to edit)</a>	<input type="text" value="a,b,c"/>	?

5. Enter or edit the **Attribute Codes** for this record. The **Attribute Codes** are the very short internal names that are associated with the more descriptive **Attribute Names** that appear to your customers. If more than one attribute code applies to this record, then the list of **Attribute Codes** must be separated by commas.
6. Click **OK** to save your changes.

### **Importing Your Data with Search Attributes**

In many cases, it is easier to import your data than it is to manually enter the data. This is especially true if you have large lists. For detailed information, see FastSite's *Guide to Working With Your Data*.

If you are using a spreadsheet or database, **Attribute Codes** may appear in one or more cells or fields of your database *only if* you intend to save the file in .CSV format. Otherwise, the **Attribute Codes** must all be within a single field or cell.

If you preface the **Attribute Codes** with an 'a:' or 'A:', then FastSite's automatic import tool will correctly identify the data as **Attribute Codes**. If however you are unable to add the preface, the automatic import tool gives you a feedback page where you can identify fields explicitly to the importer. An example of a valid entry with search **Attribute Codes** is:

```
Wallington Home Décor  
865 Peachtree St NE  
Atlanta, GA 30308  
Phone:(404)876-5214  
Http://www.wallington.com/atl  
A:a,b,c
```

In a .CSV (comma separated format) file, this same record would appear on a single line as:

```
Wallington Home Décor,865 Peachtree St NE,Atlanta, GA 30308,Phone:  
(404)876-5214,Http://www.wallington.com/atl,"A:a,b,c"
```