



# OptiCat

## OptiCat, LLC. Software User's Guide

### Our Mission

*At OptiCat, it is our mission to be “the” go-to-source for industry-wide, high value, data related programs benefiting aftermarket suppliers and their customers .... The Industry Strategic Advantage”*

**Brandi Williams**

South Jordan, Utah.

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## **ONDEMAND**

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# OnBoard

## Overview

OptiCat's purpose is to provide a turnkey, SaaS (Software as a Service) technology suite that enables automotive aftermarket manufacturers to deliver important product data to their distribution channel partners in a one-step (do-it-once), validated (do-it-right) and pervasive (do-it-everywhere) way. OptiCat's primary business strategy is a "self-service" technology model that enables industry partners to share valuable information via OptiCat Technology Suite. OptiCat is exclusively a technology provider.

To gain access to OptiCat OnBoard, browse to this URL:

[www.opticatnetwork.com/OnBoard](http://www.opticatnetwork.com/OnBoard)

Originally, OnBoard was designed based on the plug-in Silverlight. Unfortunately, the most common browsers have now disabled this plug-in. We have redesigned OnBoard to work across all platforms: Firefox, Chrome, Safari & Microsoft Edge.

***\*Important - OnBoard and OnDemand will be supported in all platforms except Internet Explorer.***

## Logging In

**ONBOARD** Product Lines Catalog Configure Help Sign in

# Sign-in

For your security, everyone must sign-in to use OnBoard.

Username

Password

[Sign-in](#)

- [Want a username reminder?](#)
- [Need an account?](#)
- [Forgot password?](#)

⚠ Warning: This Software is made available to authorized OptiCat Suppliers only, as outlined in the OptiCat Supplier Software License & Service Agreement. ✕

© 2022 OptiCat, Inc. OnBoard 2.0.8136.43086. [Privacy Policy](#)

- Sign in from the landing page.
- Enter your username and password, provided to you by OptiCat’s support team.
- If you forget your username or password, use the provided links to enter the email or username originally linked to your account.
  - A reset link will then be sent to your email address connected to your username.
    - **Note:** *Password strength requirements have been implemented.*

## Managing Your Account

**ONBOARD** Product Lines Catalog **Configure** Help chandler ABC Company

# Supplier Setup

[Reset](#) [Test FTP](#) [Save](#)

[Supplier Profile](#)

[OnTarget](#)

[Notification Emails](#)

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[Import](#)

- Click on ‘Configure’ in the top menu bar.
- Click on ‘Supplier Setup’ in the drop-down box under ‘Configure’.

## Supplier Profile

ONBOARD Product Lines Catalog Configure Help samantha@testlab OptiCat Test Supplier

### Supplier Setup

Reset Test FTP Save

#### Supplier Profile

Company Name	OptiCat Test Supplier	Web URL		Logo URL	
Added (UTC)	7/22/2021 12:00:00 AM				
Address1	PO Box 1171	Address2		City	Riverton
State	UT	Postal	84065	Country	United States
Contact Name	Samantha Skidmore	Contact Phone	8015420560	Contact Email	samantha.skidmore@jnpoptocat.com
BIO					

Image Sync Access ☒

OnBoard API Enabled ☒

Load Sheet Enabled ☒

Last Modified

UTC	10/12/2023 6:12:41 PM	Name	Samantha Skidmore	Email	samslife2016@gmail.com	UserID	3975
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- In the 'Supplier Profile' dropdown you can update your company's main profile along with the main point of contact for Channel Partners requesting data. You can update things like contact info, web info, and company BIO.
  - Note:** If the 'Company Name' needs to be modified, please contact OptiCat.
- Notification Email settings are linked to contact manager email. If contact manager has a user account also, email notification should only be turned on in one place.

**Image Sync Access:** OptiCat Admin will set all of this up. It is used for Channel Partners using Image Sync utility.

**OnBoard API Enabled:** Allows for an API connection between your PIM and OptiCat OnBoard.

**Load Sheet Enabled:** These settings are adjusted by OptiCat Admin only, please contact us if you have any questions.

## Security

- Secure Delivery Only:** Export data delivery to secure FTP sites only.
  - Non-secure FTP sites and email exports will not be delivered and will be cancelled.
  - Secure delivery requires one of the following: SFTP, FTPES, FTPS, or FTP (with "use-ssl").

ONBOARD Product Lines Catalog Configure Help sam OptiCat Test Supplier (1370)

### Supplier Setup

Reset Test FTP Save Create Disable

#### Supplier Profile

#### Security

Secure Delivery Only ☐

Mandatory Password Change

Days until Warn	1642	Days until re-Warn	25	Days until Expire	1826
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#### OnTarget

Logon OnTarget	<input checked="" type="checkbox"/>	OnTarget Pro	<input checked="" type="checkbox"/>	PIES™ Validation	<input checked="" type="checkbox"/>
Assessment	<input checked="" type="checkbox"/>	ACES® Generation	<input type="checkbox"/>	VCoB Changes	<input checked="" type="checkbox"/>
Private Label Generation	<input type="checkbox"/>	ACES® Export Year Range Format	<input checked="" type="checkbox"/>		

FileSync Defaults

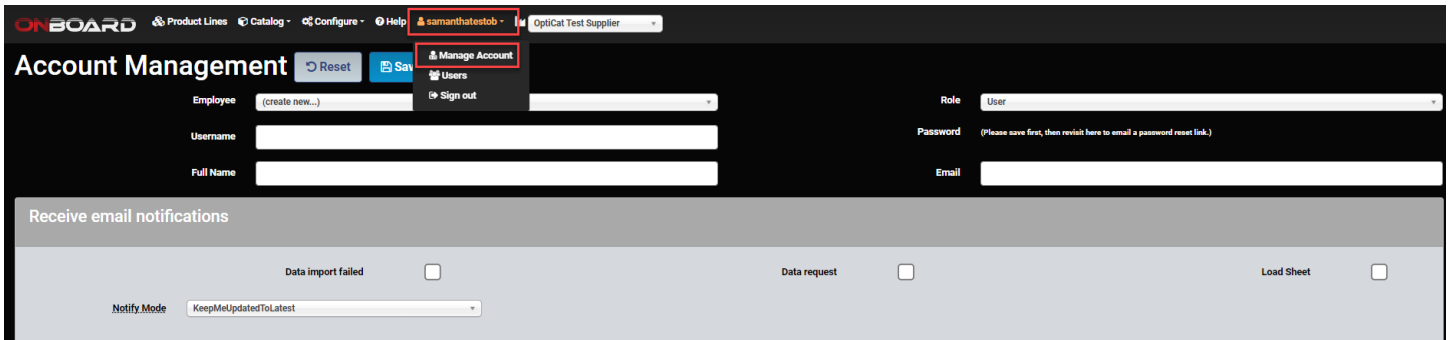
Import

- **Mandatory Password Change:** Allows the account manager to set required password change criteria for users of OnBoard
  - **Days until Warn:**
    - Days until user is warned to change their password, since it was last set. It is recommended to warn users before expiring their account access.
  - **Days until re-Warn:**
    - Days until user is warned again to change their password, since a warning was last sent. Warnings will repeat until expiration.
  - **Days until Expire:**
    - Days until authentication for password expires, since it was last set. User account will require recovery.

**OnTarget:** Shows which features are available to your account. These settings are adjusted by OptiCat Admin only, please contact us if you have any questions.

- There are PIEST<sup>™</sup> validation options which can be selected from Supplier Profile. OnBoard can use OnTarget Validation if it is selected here.

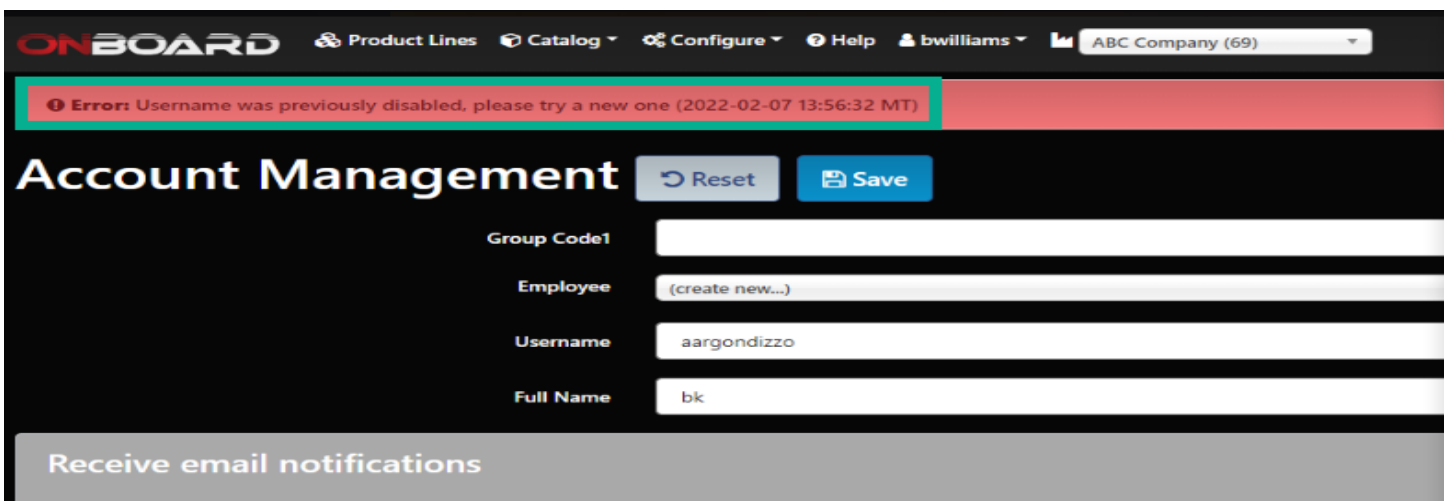
# Managing Users



- In the top menu bar, click on your username which is next to your company name in the drop-down box.
- Click on 'Manage Account'.
- Here you can delete users and/or create new users if your role is set as 'Manager'.
- Managers can email a password reset link to any of the users in their company profile.
- To delete a user, simply choose which user you want to remove in the drop-down menu and click 'Remove'.
- To create a new user, click the drop-down box next to the Employee field and click on 'Create New'.
- To create a new User, enter the full name, the username, and the email address of the new user for each field.
  - Choose which Role the user will have in your organization, by selecting 'User' or 'Manager' next to the Role field.
  - **Note:** The difference between "User" rights and "Manager" rights is a "Manager" can create, delete, and manage the user's login profile in their organization.

## Receive Email Notifications:

- **Data-Import-Failed:** When this box is checked it turns on the notifications, letting the contact manager know a file has failed validation.
- **Data-Request:** When this box is checked it turns on the notification that lets the contact manager know the receiver would like to access to the product line.



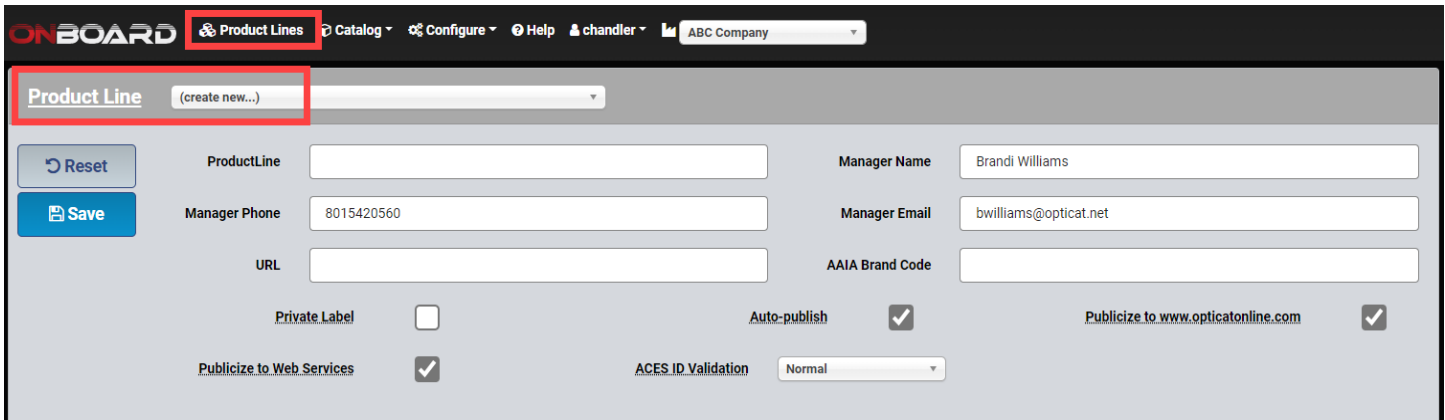
- If you need to make an account for a previously deleted user, the new Username needs to be different than the previously deleted Username.

- If the previously deleted user account is being created again, that user will need to have a different Username or else the above error will be displayed.
  - Simply create a Username that is different than the previous username. It is common to use the same username and add a 1 at the end to make the Username unique.
    - i.e. – Previous Username (as seen in the screenshot above) is ‘aargondizzo’, make the new Username ‘aargondizzo1’.
- Choose which email notifications you want each user to receive by clicking on each of the notification checkboxes, under ‘Receive email notifications’, which each user will receive.
  - You can be notified when: a receiver requests access to your product lines, when a data import has failed, and when a Load Sheet heading has been modified, by checking each desired notification’s checkbox.
- To change the password for a user, choose the user in the Employee field and then click on ‘Email a password reset link’.
  - Once a password reset link has been opened and changed, that email will then be verified.
  - User roles set to ‘Manager’ will allow those users to update the password for each user from their own account user screen.
- Click the ‘**Save**’ button



# Product Lines

## Creating a New Product Line

The screenshot shows the 'ONBOARD' software interface. At the top, there is a navigation bar with 'Product Lines' highlighted in a red box. Below this, a dropdown menu for 'Product Line' is also highlighted in a red box, showing '(create new...)'. The main form area contains several input fields: 'ProductLine' (empty), 'Manager Name' (filled with 'Brandi Williams'), 'Manager Phone' (filled with '8015420560'), 'Manager Email' (filled with 'bwilliams@opticat.net'), and 'URL' (empty). There are also checkboxes for 'Private Label' (unchecked), 'Auto-publish' (checked), 'Publicize to Web Services' (checked), and 'Publicize to www.opticonline.com' (checked). A dropdown for 'ACES ID Validation' is set to 'Normal'. Buttons for 'Reset' and 'Save' are on the left.

- Click on 'Product Lines' from the top menu bar.
- Next, click the drop-down box next to the field 'Product Line' and choose (create new...).
  - **Note:** You do not need to click on 'Create New' if this is your 1<sup>st</sup> Product Line, as it will be the only option.
- Enter the Product Line name in the 'Product Line' field. (i.e. "Manufacturer Brakes ACES®", "Manufacturer Suspension PIEST™", or "Manufacturer Filter Images" etc.).
  - Do not include any date format in the Product Line name.
- Enter your Brand AAIA ID.
  - This is not required to save a Product Line, but it is HIGHLY recommended as it is visible from the OnDemand portal.
- 'Manager Name', 'Manager Phone', and 'Manager Email' will default automatically to the main contact as set in the supplier profile page.
  - If you would like a Product Line to be assigned to a different user, simply update this Product Line's contact information with the desired user's contact information.
- **Note:** There is no limit to how many product lines you can create.
- Most Channel Partners prefer a Product Line by file type, for example: ACES®, PIEST™, and Images. Each file type should be in a separate product line (i.e. ACES® files should be uploaded to your ACES® product line, PIEST™ to a PIEST™ product line and Images to an Images product line). This way a receiver of your data is not forced to get images and ACES® if they are only needing PIEST™.

**Private Label:** When selected, this takes visibility away from all Channel Partners. This enables you to control who sees that this product line is available. This is a great option for Channel Partners that require their own unique files.

**Auto Publish:** When selected, this automatically sends new data that you upload to Channel Partners that you have previously given permission to, that have your product line status as 'In Library'.

**Publicize to www.opticonline.com:** This will determine if your data is visible in the OptiCat's online web catalog at www.opticonline.com.

**Publicize to Web Services:** Still in testing.

**ACES® ID Validation:** If this option is set to Mandatory via the drop-down box, every ACES® record uploaded will be validated during the import process, even if the record has been set as "Validate = NO".

- Click '**Save**' if any changes have been made.

## Importing Data

The screenshot shows the 'ONBOARD' interface with a top navigation bar containing 'Product Lines', 'Catalog', 'Configure', 'Help', 'chandler', and 'ABC Company'. The main form is titled 'Product Line' with a '(create new...)' dropdown. Below this are 'Reset' and 'Save' buttons. The form fields include: 'ProductLine' (containing 'First Product Line Test Data'), 'Manager Name' (Brandi Williams), 'Manager Phone' (8015420560), 'Manager Email' (bwilliams@opticat.net), 'URL', and 'AAIA Brand Code'. At the bottom, there are checkboxes for 'Private Label' (unchecked), 'Publicize to Web Services' (checked), 'Auto-publish' (checked), and 'Publicize to www.opticatonline.com' (checked). A dropdown for 'ACES ID Validation' is set to 'Normal'.

- If you are creating the first Product Line upload, first go to the 'Product Lines' tab in the top menu bar.
- In the Product Line field, add the name of the first Product Line and fill in the rest of the contact information.
  - A URL and AAIA Brand Code, will help Channel Partners search your product easier as well as to have more information about your company.
- Choose the check boxes for how you want your data to be published.
  - **Private Label** – If checked, the visibility of this product line will be turned off in OnDemand to Channel Partners, except where you choose to allow.
  - **Auto-Publish** - When uploading file(s), automatically publishes data to Channel Partners with the status of 'In Library'.
  - **Publicize to www.opticatonline.com** – If checked, the data is allowed to go to opticatonline. If publicize to webservices is unchecked and publicize to opticatonline is checked, AND no product line has been authorized to the receiver no data is available with the API.
  - **Publicize to Web Services** – Still in testing
  - **ACES® ID Validation** - This is a mandatory selection. Every ACES® record will be validated, according to your option here, during the process of importing data.

- Select the 'Upload Files' tab, then click '+ Add File(s)...' or choose 'Browse'.
- Next, select the file you would like to upload.
  - Zipped files are preferred, but they are not required.
  - **Note:** OnBoard will allow a filename (the file you are importing) of up to 255 characters.
- Enter the Product Name in the 'Product Name' field for the uploaded file.
  - If uploading multiple files, it may be easier to use the 'Set by File Name' button above the column, and next to the 'Product Name' field. This will make the Product Name the same as the File Name (without the extension, i.e. - .txt)
    - i.e. – File name = PIEST™\_for\_Test\_.zip then the product name will be PIEST™ for Testing.
    - **Note:** The Product Name should not include any dates, so that when you import an updated file and replace the old file, the new file will use the same name as before by selecting it in the drop-down menu.
- Under the dropdown box labeled 'Type', select on the file type being uploaded. Be sure to select the correlating file type to the file being uploaded.
  - You can also set all files in the 'Product Lines' list to the same file type all at once by clicking on the 'set all here' button and selecting the file type in the dropdown box.
    - **Note:** This will change all the Product Lines file types to the same type, if this auto-populate function is used.
  - The 'Other' option in the 'Type' dropdown box, is for any file that do not need to be validated.
    - i.e. - Word Documents, PDFs, Drawings, Videos, etc.
- In the 'Comment' field, you can add a comment prior to uploading the file.
  - To add a comment, enter the text you want and then when the file is saved, the text will include a .txt file along with the data with your comment.
    - i.e. "This is file 1 of 2 for the 3<sup>rd</sup> quarter update".

- Zip Files may contain additional zipped files and you can upload multiple ACES®, PIEST™ or Image files at the same time.
  - If you load a zip file for ACES® or PIEST™, OnBoard will extract them out from the zip file. You will need to replace or create a new product file name.

**Note:** There is a limit of 142 zipped files uploaded, per upload. There is also a limit of 10 million files uploaded per each product line.

The screenshot shows the ONBOARD web application interface. The top navigation bar includes links for Product Lines, Catalog, Configure, Help, and a user profile for 'chandler'. The main content area is titled 'Product Line' and shows the configuration for 'ABC Company - Test Data (3583)'. The configuration includes fields for Product Line, Manager Name, Manager Phone, Manager Email, Created (UTC), Updated (UTC), URL, AAIA Brand Code, Private Label, Auto-publish, Publish to Web Services, ACES ID Validation, and Publish to www.opticatonline.com. A table at the bottom shows the upload progress for a file named 'PIES For Test.txt'.

Progress	Replace?	Product Name	Type	File Name	MB	Comment
success	(create new...)	PIES For Test	PIES	PIES For Test.txt	4.327	

- **Auto Detect File type:** when the uploaded file name includes the words “ACES®” or “PIEST™”, the file type, under the ‘Type’ field will be detected and auto populated.
  - If you are using a PIEST™ delimited flat file format, be sure to change the file ‘Type’ field to correspond with the uploaded file format. (i.e., delimited ProductFlat).
- Click ‘**Save**’.
  - **Note:** If you leave the upload screen your files will be remembered.
- Once the file(s) are saved and uploaded, select the ‘Imported Files’ tab. If an ACES® or PIEST™ file(s) type was selected, the validation of the file(s) will begin automatically. The upload process copies the file from your local machine into a private workspace on the OptiCat server.

## Uploading Files and File Validation

ONBOARD Product Lines Catalog Configure Help sam ABC Company ( 69 )

### Supplier Setup

Reset Test FTP Save Create Disable

- Supplier Profile
- Security
- OnTarget
- Notification Emails
- FileSync Defaults
- Import

Flatfile Descriptions Html-encoding autocorrection: Keep\_Unaltered, Keep\_Unaltered, HTML\_Decoded, HTML\_Encoded

PIES™ Validation Level: Minimum

Autocorrect Description Sequence: ☒

- For HTML Encoding Options as well as file validation and error checking of files uploaded to OnBoard, make sure your 'HTML Encoding' and your 'PIES™ Validation Level' settings are set to the way you want them for checking your uploaded files.
- To make changes to the 'HTML Encoding' and 'PIES™ Validation Level' click on the 'Configure' option in the top menu row of OnBoard and then click on 'Import' at the bottom of the options menu.
- There are three 'HTML Encoding' choices:
  - **Keep\_Unaltered** – This is the default. The document is saved as imported.
  - **HTML\_Decoded** – HTML Characters (literal text).
  - **HTML\_Encoded** – HTML Named or Numeric Code

ONBOARD Product Lines Catalog Configure Help handler ABC Company

### Supplier Setup

Reset Test FTP Save

- Supplier Profile
- OnTarget
- Notification Emails
- Image Sync Defaults
- Import

Flatfile Descriptions Html-encoding autocorrection: Keep\_Unaltered

PIES Validation Level: OnTarget, Minimum, CodeChecking, OnTarget

Product Flat Import: ☒

Autocorrect Description Sequence: ☐

- There are three PIES™ Validation Levels

- **Minimum** – This only check the length of the characters in each field
- **Code Checking** – This option ensures that your files are PIEST™ compliant, but makes it so you don't have to use the additional OnTarget Validation
- **OnTarget** – This allows you to check your data for PIEST™ validation and the additional OnTarget validations.

The screenshot shows the ONBOARD application interface. The top navigation bar includes links for Product Lines, Catalog, Configure, Help, and a user profile. The main section is titled 'Product Line' and shows the configuration for 'ABC Company - Test Data (3583)'. The configuration includes fields for Product Line, Manager Name, Manager Phone, Manager Email, Created (UTC), Updated (UTC), URL, AAIA Brand Code, Private Label, Auto-publish, Publicize to Web Services, and ACES ID Validation. Below the configuration fields is a table showing the status of the import process.

Product Name	Date (UTC)	File Name	Type	Status	% Complete	Records Imported	Records Total	Import Errors	Import Warnings	Schema Version	MB
ABC_PIES_MasterFile2	2022-04-08 19:44:49	CL_Pies_MasterFile_20220409.xml	PIES	Complete	100	2640	2640		2		5.57

- This is where you will see the status of the import and see validation of your uploaded product line. After the file has been loaded to the OptiCat server, OnBoard automatically begins the process of validating each record within the file. This validation process is based on the AAIA ACES® XSD (VCDB) or the PIEST™ XSD (PCDB) delivery specifications.
- You can see the progress in the ‘% Complete’ Column.
- Once validation is finished, the status will change to ‘Complete’ or ‘Failed’.
- If ‘Auto-publish’ is checked, the original file will be delivered to Channel Partners, whether the status is ‘Complete’ or ‘Failed’.

Upload Files | Edit Archives | **Imported Files** | Receivers | Delivery Log | File Sync

10 | Filter... | Refresh | autorefresh | Delete selected | (selective publish...) | **Publish Selected** | Mark Selected as Old | Mark Selected as Current | Previous 1 Next

	Product Name	Date (UTC)	Old?	File Name	Type	Status	% Complete	Records Imported	Records Total	Import Errors	Import Warnings	Schema Version	MB	Comment
<input type="checkbox"/>	Sample ACES	2023-03-06 22:13:56	Current	SAMPLE_ACES_2023-03-03.xml	ACES	Complete	100	560	560				0.18	
<input checked="" type="checkbox"/>	Sample PIES	2023-03-06 22:13:56	Current	SAMPLE_PIES_2023-03-03.xml	PIES	Complete	100	3	3		14		0.08	

Import Messages:

Type	Time (UTC)	Message
Info	2023-03-06 22:14:13	New Xml Import Requested: SAMPLE_PIES_2023-03-03.xml
Info	2023-03-06 22:14:13	Opening PIES 7.2 Xml File: E:\OpticatImports\ProductLine_8403\SAMPLE_PIES_2023-03-03.xml...
Info	2023-03-06 22:14:13	Getting Item Count from PIES™ file data!
Info	2023-03-06 22:14:13	Validating PIES™ file data!
ImportWarning	2023-03-06 22:14:13	3 Missing(s) Missing Data Field: B29 VMRS Brand ID BrandAAIAID:ABCD Part Number(s):1234; 1357; 5678
ImportWarning	2023-03-06 22:14:13	3 Missing(s) Missing Data Field: B50 Available Date BrandAAIAID:ABCD Part Number(s):1234; 1357; 5678
ImportWarning	2023-03-06 22:14:13	3 Missing(s) Missing Data Field: H25 PL Merchandising Height Pallet BrandAAIAID:ABCD Part Number(s):1234; 1357; 5678
ImportWarning	2023-03-06 22:14:13	1 Missing(s) Missing Data Field: H25 EA Merchandising Height Each BrandAAIAID:ABCD Part Number(s):1234
ImportWarning	2023-03-06 22:14:13	3 Missing(s) Missing Data Field: H30 PL Merchandising Width Pallet BrandAAIAID:ABCD Part Number(s):1234; 1357; 5678
ImportWarning	2023-03-06 22:14:13	1 Missing(s) Missing Data Field: H30 EA Merchandising Width Each BrandAAIAID:ABCD Part Number(s):1234
ImportWarning	2023-03-06 22:14:13	3 Missing(s) Missing Data Field: H35 PL Merchandising Length Pallet BrandAAIAID:ABCD Part Number(s):1234; 1357; 5678
ImportWarning	2023-03-06 22:14:13	1 Missing(s) Missing Data Field: H35 EA Merchandising Length Each BrandAAIAID:ABCD Part Number(s):1234
ImportWarning	2023-03-06 22:14:13	3 Missing(s) Missing Data Field: H36 PL Shipping Height Pallet BrandAAIAID:ABCD Part Number(s):1234; 1357; 5678
ImportWarning	2023-03-06 22:14:13	1 Missing(s) Missing Data Field: H36 EA Shipping Height Each BrandAAIAID:ABCD Part Number(s):1234
ImportWarning	2023-03-06 22:14:13	3 Missing(s) Missing Data Field: H37 PL Shipping Width Pallet BrandAAIAID:ABCD Part Number(s):1234; 1357; 5678
ImportWarning	2023-03-06 22:14:13	1 Missing(s) Missing Data Field: H37 EA Shipping Width Each BrandAAIAID:ABCD Part Number(s):1234
ImportWarning	2023-03-06 22:14:13	3 Missing(s) Missing Data Field: H38 PL Shipping Length Pallet BrandAAIAID:ABCD Part Number(s):1234; 1357; 5678
ImportWarning	2023-03-06 22:14:13	1 Missing(s) Missing Data Field: H38 EA Shipping Length Each BrandAAIAID:ABCD Part Number(s):1234
Info	2023-03-06 22:14:13	CodeChecking validation completed in 0 hour(s), 0 minute(s), 0 second(s). (validation rate: 9.6 apps/sec)
Info	2023-03-06 22:14:13	Main import completed in 0 hour(s), 0 minute(s), 0 second(s). (Import rate: 12.8 apps/sec)

Previous 1 Next

- Click on the blue circle with the plus sign after the import is completed to view any warnings or errors that may occur:
  - Any Warnings/Errors/Schema Errors would be listed under ‘Import Messages’.
  - Warnings and errors are determined by ACES®/PIES™ delivery specification provided by AAIA.
  - Warnings = Optional Field to fix.
  - Errors = Required Field to fix.
  - Data with warnings will pass through into the OptiCat Web Catalog. **Data with errors will not.**
  - The parts with warnings will not be imported into the OptiCat data repository. However, since OptiCat forwards the exact file submitted by the supplier to the receiver, they will not be modified or dropped by OptiCat.
  - See Appendix A for a list of ASCII characters that are invalid when used in certain PIES™ fields. Other than the characters identified in Appendix A, please note that PIES™ data fields should contain standard ASCII characters only.
- If the ‘Auto-publish’ checkbox is **not** checked:
  - Once the import status changes to ‘Complete’ or ‘Failed’, click either selected line you want to publish and then click the blue ‘Publish Selected’ button above OR to publish all Product Lines, click the blue ‘Publish All’ button in the upper left of the screen.
    - Note:** This should only be done if this is an established product line and you’ve already given permission access to receiver(s).
  - Clicking the blue ‘Publish All’ button delivers all product files to all Channel Partners which you have already approved for access and that have an ‘In Library’ status.
  - Using the blue ‘Publish Selected’ button will only publish the selected Product Line’s product file to all Channel Partners you have already approved that have an ‘In Library’ status.

- The current XSD Version is posted in OnBoard in the ‘Upload Files’ tab.

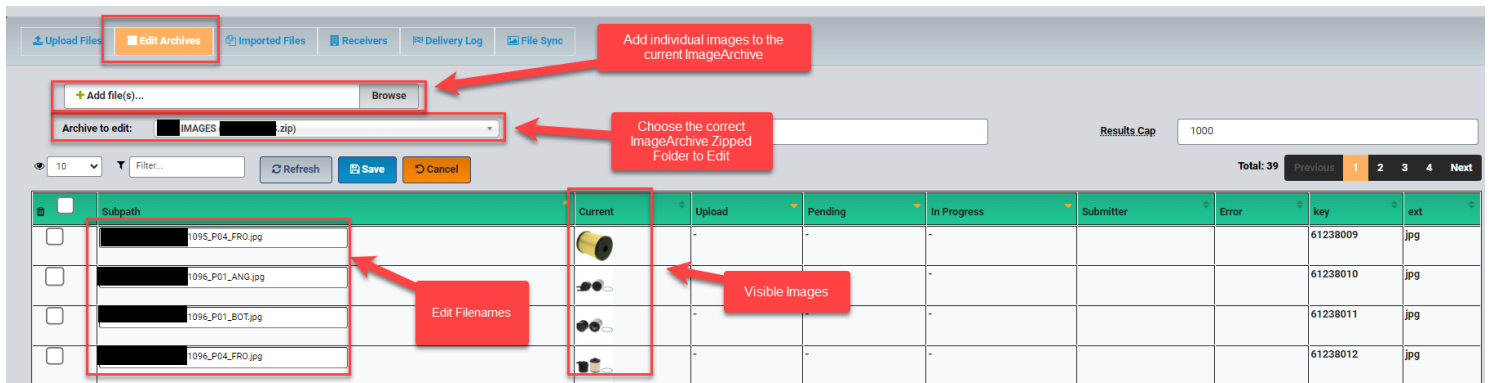
## Import Images

- All images should be placed in a zipped folder before uploading.
- Uploading images follows the same process as specified above. The Type will be “ImageArchive”.
- Remember to add your digital asset mapping to the PIES XML or create a digital asset mapping flat file to add to the image product line that you have created.

## Edit Archives

- Edit Archives allows the supplier to edit the zipped folder of images.
  - Add a new image.
  - Delete an existing image.
  - Change the filename.





## **360 Images / Sub-Archives**

- When uploading 360 images you may want to have all 360's in one zipped folder for each individual part. This is where sub-archives are used.
- Upload each 360 zipped folder and when you go into Edit Archives in the “Archive to edit” dropdown (in screenshot above) is where you will see the multiple zipped folders of sub-archives to edit.

# Publishing Data

## Selective Publish

- This allows the supplier to deliver/push a file to a specific customer/data receiver instead of delivering the file to everyone.
  - Example A: If a supplier has “Auto-publish” unchecked and they import a new file that isn’t going to go to everyone, they can utilize selective publish and publish the file to just one customer/data receiver.
  - Example B: If the supplier needs to push/deliver to a “Supplier Managed” receiver and no one else, they can use “Selective Publish.”

ONBOARD Product Lines Catalog Configure Help sam OptiCat Supplier Test ( 1 )

Product Line: ABC Company Images (6388)

Reset Save Publish All Remove

Product Line: ABC Company Images Manager Name: Manager Phone: Manager Email: Created (UTC): 2021-02-12 Updated (UTC): 2022-03-23 20:29:15 URL: AAIA Brand Code: Import Directory: E:\OptiCatImports\ Private Label: Publicize to Web Services: ACES ID Validation: Normal Auto-publish: Publicize to www.opticatonline.com Data-Transfer-Only\* Privatize Data

Upload Files Edit Archives Imported Files Receivers Delivery Log File Sync

10 Filter... Refresh autorefresh Delete selected (selective publish...) Publish Selected Mark Selected as Old Mark Selected as Current Previous 1 Next

	Product	Date (UTC)	Old?	File Name	Type	Records Total	Import Errors	Import Warnings	Schema Version	MB	Comment	PF	PFI
<input checked="" type="checkbox"/>	SS IMAGE CUSTOM TEST IMAGES	2022-03-28 20:29:15	Current	ACH IMAGES.zip	ImageArchive					249.28		19669	

(selective publish...)  
Lane 19 Nineteen prod master control ( 739 )  
OptiCat Data Management ( 724 )  
OptiCat MKC Receiver ( 654 )

## Product Files (Current vs. Old)

- This allows the supplier to deliver just the Current file to their customers/data receivers but leave the “Old” still in the product line to reference. It is recommended to delete “Old” files when uploading “Current”.

Upload Files Edit Archives Imported Files Receivers Delivery Log File Sync

10 Filter... Refresh autorefresh Delete selected (selective publish...) Publish Selected Mark Selected as Old Mark Selected as Current Previous 1 Next

	Product Name	Date (UTC)	Old?	File Name	Type	Status	% Complete	Records Imported	Records Total	Import Errors	Import Warnings	Schema Version	MB	Comment	PF	PFI
<input checked="" type="checkbox"/>	SAMPLE PIES TO SHOW	2023-04-03 19:25:12	Old	SAMPLE PIES TO SHOW.txt	ProductFlat	Complete	100	185	185		3		0.07		161095	339099
<input type="checkbox"/>	SAMPLE_ACES_2023-03-03	2023-03-03 16:23:53	Current	SAMPLE_ACES_2023-03-03.xml	ACES	Complete	100	560	560				0.18		156400	331683
<input type="checkbox"/>	SAMPLE_PIES_2023-03-03	2023-03-03 16:23:53	Current	SAMPLE_PIES_2023-03-03.xml	PIES	Complete	100	3	3		15		0.08		156401	331684

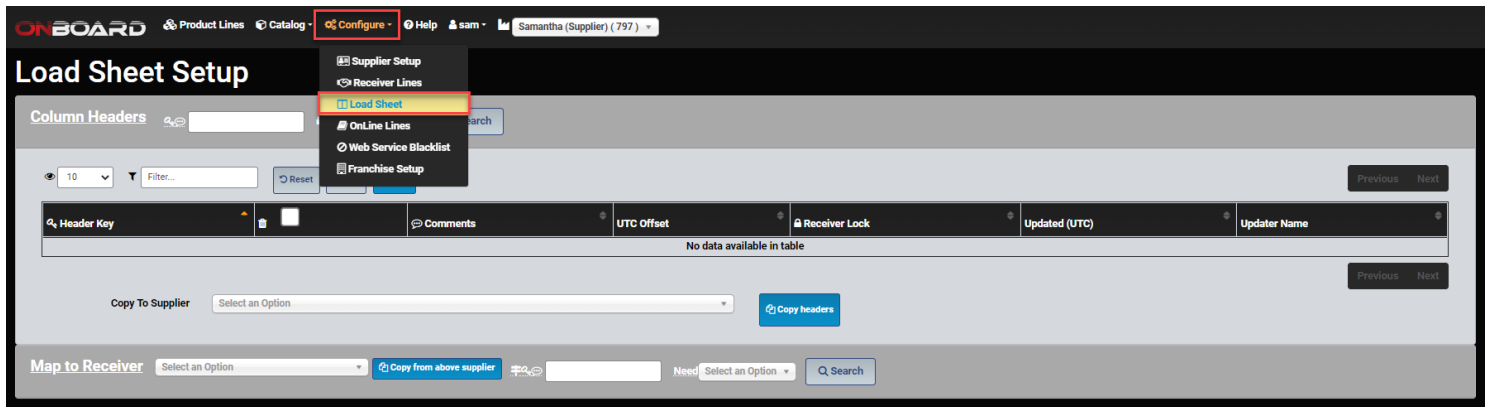
Check the box of the file that you would like to mark as "Old" or "Current".  
Click the appropriate box "Mark Selected as Old" or "Mark Selected as Current".

## Replacing a File

- When you update your product files, you will add the file(s) as directed above in the “Importing Data” section. Next, in the ‘Replace?’ column, use the drop down to select the existing product name that you will be replacing for each new product file that is being uploaded.
  - This will overwrite (replace) the old product file(s) so that Channel Partners will only have access to the most current data.
  - You can also use the ‘Set by Product Name’ button, which will name **All** of the product files being uploaded, to the same name as the ‘Product Name’ field.
    - You must first use the ‘Set by File Name’ autofill button, in order for the ‘Set by Product Name’ button in the ‘Replace?’ field to work.
      - **Note:** If utilized, the ‘Set by Product Name’ autofill button will rename **all** uploaded files you are replacing, to the same as the ‘Product Name’ field, which is the same as the file name (without the extension).
- You are still able to update the product name.
  - (i.e., “I am replacing OptiCat PIES™ 3<sup>rd</sup> Quarter and have entered a new Product Name of OptiCat PIES™ 4<sup>th</sup> Quarter”).
- Select ‘Type’: ACES®, PIES™, Images or Other.
- Click ‘**Save**’
- After uploading/importing new files, best practice would be marking selected files as “Old”, this will allow Online to run more effectively and in a timelier manner. This will also prevent duplicate data online. See screenshot below:

# Load Sheets

- This must first be enabled by OptiCat
- In the main menu dropdown, choose Configure => Load Sheet



- The Load Sheet feature has many uses. One way load sheets are used is when a customer/data receiver is looking for the supplier to provide additional data that is not found in PIES.
  - Example A: Lead Time specific to a customer/data receiver.
  - Example B: This also could be data that is in PIES such as pricing. The supplier may not want pricing available to everyone. If the pricing is specific to each individual customer/data receiver, the supplier can put that information in the load sheet. They can put lead time and pricing for multiple customers/data receivers in the same spreadsheet/load sheet and based on the mapping of the headers, the data will go to the correct customer/data receiver.
- Another option where load sheets can be beneficial is if the customer/data receiver is asking you, as the supplier to complete a spreadsheet of your data to send back to them.
  - If you, as the supplier need a delivery of your PIES data combined with Load Sheet data in a template to import into one of your customers' portals, we can deliver that back to the supplier.
- The customer/data receiver can receive a template back using OptiCat's OnDemand portal.
  - OptiCat will help your customer create a template so that all their deliveries from all suppliers can export to them in the same format.
- We have 30+ receiver templates already created and ready for you to use. We add more all the time.
- If you would like this feature enabled, please contact your account manager with OptiCat.

# Receivers

Once you have imported your file, you can choose Channel Partners whom you want to have visibility or have access to your data under the ‘Visible’ and the ‘Access’ columns.

- **Visible:** By checking this box, next to a desired receiver, you can become visible to Channel Partners in the OptiCat network, which allows them to reach out to you and ask for permission to access your Product Lines.
- **Access:** By checking this box next to a receiver desired receiver, you are granting the specific Channel Partners the ability to access your data at any time.

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link	Web Services	Requires Brand AAIA ID?	Requires GTIN?	Autocorrects Brand Label?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OptiCat Receiver	Need Authorization		Bryan	(801) 542-0560	bthueson@opticat.net			servicing			

Under the ‘Status’ column, you are able to see the status for each Receiver as far as their ability to see or access your data.

## Status Possibilities

**Need Authorization:** The receiver has no access to your data.

**Access Requested:** The receiver has requested access to your data, but you have not yet given them the access.

**Access Authorized:** You have given the receiver access to the data, but the receiver has not yet moved your data to their data library (“In Library status) yet.

**In Library:** You have given the receiver access to this product line and the receiver has moved your data from the DIO repository to their data library. They now have the ability to download the data manually at anytime.

- The receiver will receive any new data you publish to this product line.
- The receiver will be notified by email when you publish new data to this product line.

**On Hold:** The receiver is not ready to move your data to their library or they would like to pause the data deliveries.

**Unwanted:** You have given a receiver access to your data, but they do not want the data at this time.

- This will remove the supplier authorization (your authorization to the receiver) and the access to your data for the receiver and the receiver will need to be given authorization for the data if they want your data in the future.

Upload Files Edit Archives Imported Files **Receivers** Delivery Log File Sync

10 Filter... Reset Copy permissions Select Product Line Reason Rejected/Terminated Save

Previous 1 2 3 4 5 ... 70 Next

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link	Web Services	Requires Brand AAIA ID?	Requires GTIN?	Autocorrects Brand Label?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OptiCat Data Management	In Library	-	Samantha Skidmore	(801) 542-0560	sskidmore@opticat.net			servicing	-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1A Auto, Inc.	Need Authorization	-	Robert Earl	(978) 433-4116	rearl@1aauto.com	view pdf	www.1aauto.com	-	-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	4 Wheel Auto Wholesale Inc.	Need Authorization	-	Janice Kublik	(780) 468-2570	jan@4wheelauto.com	view pdf	www.4wheelauto.com	-	-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	AAA Auto Parts	Need Authorization	-	Pete Anderson	(800) 238-6664	parts@aaaparts.com		www.aaaparts.com	-	-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	AAM USA, Inc.	Need Authorization	-	Paul Schmidt	(423) 282-0211x208	pauls@theaamgroup.com	view pdf		-	requires brand AAIAID	-	autocorrects brand labels
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Aarnes A/S	Need Authorization	-	Lars Christensen	(004) 769-9719x16	lars@arnes.no	view pdf		-	-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	AC Delco - Receiver	Need Authorization	<a href="#">Manage</a>	Brandi	(801) 542-0560	bwilliams@opticat.net			-	-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Action Sales & Marketing	Need Authorization	-	Ian Potere	(540) 589-6004	ian.potere@action-inc.com	view pdf	https://www.action-inc.com	-	-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Advance Auto Parts	Need Authorization	<a href="#">Manage</a>	Brandi Williams	(801) 542-0560	bwilliams@opticat.net			-	-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Advanced Starter Service	Need Authorization	-	Richard Haas	(619) 857-5523	rhaas@advancedstarter.com	view pdf	www.advancedstarter.com	-	-	-	-

Copy CSV TSV PSV Print

Previous 1 2 3 4 5 ... 70 Next

- You can use the Filter bars to search by permissions and product lines at any time.
- You can make changes to receiver access at any time.
- When a receiver requests access to your product line via OnDemand, you will receive an email from the receiver, and you then can decide to give access to the receiver or not.
  - If you uncheck the 'Visible' checkbox for a receiver which has previously had visibility granted to them, it will send an email to the receiver letting them know that you've decided to terminate their access.
- You can Copy, export a CSV, TSV, PSV, or Print the receiver status using the buttons at the bottom left of the 'Receivers' page.
  - This feature is also available in the delivery log tab as well.

Upload Files Edit Archives Imported Files **Receivers** Delivery Log File Sync

10 Filter... In Library x Reset Copy permissions Select Product Line Reason Rejected/Terminated Save

Previous 1 Next

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link	Web Services	Requires Brand AAIA ID?	Requires GTIN?	Autocorrects Brand Label?	BIO
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OptiCat Data Management	In Library	-	Samantha Skidmore	(801) 542-0560	sskidmore@opticat.net				-	-	-	

ProductLine Permissions History:

Changed (UTC)	Status	Company Name	Phone	User ID	Changer Name	Email	Reason
2022-05-20 11:10:19	In Library	ABC Company	(801) 542-0560	3368	Samantha M Skidmore	sskidmore@opticat.net	

Copy CSV TSV PSV Print

Previous 1 Next

- If you click the plus sign in the blue circle to the left of the receiver, it will let you know who has changed the permission status of the product line.

## Managed Receivers

Product Line: ABC Company - Test Data (3583)

Upload Files | Edit Archives | Imported Files | **Receivers** | Delivery Log | File Sync

10 | test receiver 2 | Filter... | Reset | Copy permissions | Select Product Line

Reason Rejected/Terminated | Save | Previous | 1 | Next

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link	Requires Brand AAIA ID?	Requires GTIN?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Test Receiver	In Library	<a href="#">Manage</a>	Brandi Williams	(801) 542-0560	bwilliams@opticat.net	<a href="#">view pdf</a>		-	-
<input type="checkbox"/>	<input type="checkbox"/>	Test Receiver 2	Access Denied	-	Aaron Turpin	(801) 542-0560	aturpin@opticat.net	<a href="#">view pdf</a>		-	requires GTIN

Copy | CSV | TSV | PSV | Print | Previous | 1 | Next

- When you see a receiver with the 'Manage' button under the 'Managed?' column, the receiver does not manage their own account and the delivery of the data is managed by the supplier.

Product Line: ABC Company - Test Data (3583)

Reset | Save | Publish All | Remove

ProductLine: ABC Company - Test Data

Manager Name: Brandi Williams

Manager Phone: 8015420560

Manager Email: bwilliams@opticat.net

Created (UTC): 2017-04-04

Updated (UTC): 2022-04-11 15:22:41

URL:

AAIA Brand Code:

Private Label: ☒ Auto-publish: ☐ Publicize to www.opticatonline.com: ☐

Publicize to Web Services: ☐ ACES ID Validation: Normal

Upload Files | Edit Archives | Imported Files | **Receivers** | Delivery Log | File Sync

Data delivery preferences: "Test Receiver" | Reset | receiver defaults | Save | Close

Delivery: Default

10 | test r | Filter... | Reset | Copy permissions | Select Product Line

Reason Rejected/Terminated | Save | Previous | 1 | 2 | Next

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link	Requires Brand AAIA ID?	Requires GTIN?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Test Receiver	In Library	<a href="#">Manage</a>	Brandi Williams	(801) 542-0560	bwilliams@opticat.net	<a href="#">view pdf</a>		-	-
<input type="checkbox"/>	<input type="checkbox"/>	Test Receiver 2	Access Denied	-	Aaron Turpin	(801) 542-0560	aturpin@opticat.net	<a href="#">view pdf</a>		-	requires GTIN

- If the receiver is a Managed Receiver, click '**Save**' and the status will go to 'In Library'.
- Then, click on the 'Manage' button.
  - A pop up saying "Data delivery preferences: *The Supplier's Name*" will appear.
  - In the 'Delivery' dropdown bar, choose the method of delivery for that specific product line for that specific Managed Receiver.
  - Enter the credentials that were given to you for the delivery of the data to the supplier, either by an FTP or an email.

Upload Files Edit Archives Imported Files **Receivers** Delivery Log File Sync

Data delivery preferences: 'Test Receiver' [Reset](#) [receiver defaults](#) [Test FTP](#) Reason (optional):  [Save](#) [Close](#)

Delivery:

FTP Address:

FTP Username:  FTP Password: [Change password](#)

Use SSL: ☐ Use Passive: ☒ Exact Directory: ☐

Success: Saved. (2023-03-06 15:48:22 MT)

10 Test Receiver williams Filter... [Reset](#) [Copy permissions](#) [Select Product Li...](#) [Reason Rejected/Terminated](#) [Save](#)

Previous 1 Next

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link	Web Services	Requires Brand AAIA ID?	Requires GTIN?	Autocorrects Brand Label?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Test Receiver	In Library	<a href="#">Manage</a>	Brandi Williams	(801) 542-0560	<a href="mailto:bwilliams@optical.net">bwilliams@optical.net</a>	<a href="#">view pdf</a>		-	-	-	-

[Copy](#) [CSV](#) [TSV](#) [PSV](#) [Print](#) Previous 1 Next

- To test the FTP connection, enter the credentials given to you by the receiver and **Save**. Then, click 'Test FTP'. This will let you know of any connection issues.



# Franchise Setup

- This must first be enabled by OptiCat.
- In the main menu dropdown, choose Configure => Franchise Setup

**ONBOARD** Product Lines Catalog **Configure** Help sam OptiCat Supplier Test (1)

## Franchise Setup

File Headers

Instructions: Please contact OptiCat to enable Franchise Codes. This makes parts only deliverable as assigned by franchise code. (2023-03-07 11:37:25 MT)

Franchise Enabled ☐ Enabled UTC Data-file Code Header

### Franchise File Upload

Customer Header Code Header String case sensitivity Mixed

Filename + Add file... Browse

### Franchise Codes

10 Filter...     Previous Next

Customer Name	Code	Cust ID	Code ID	FCA ID
No data available in table				

Previous Next

### Franchise Receivers

10 Filter...     Previous Next

OptiCat Receiver	Franchise Customer Name	FRA ID
No data available in table		

- The Franchise Code feature is used when part numbers are assigned a code within a supplier's PIM system. Those codes are assigned to certain customers/data receivers. This allows for a supplier to have all their parts in one PIES file and the export delivers only the data assigned by franchise code to the customer/data receiver. This is a simple way so that the supplier can designate which franchise codes are assigned and delivered to individual customers/data receivers.
- If you would like this feature enabled, please contact your account manager with OptiCat.

## Reports

- In the main menu in the top, click on 'Configure', then in the dropdown options, choose 'Receiver Lines' to access the report showing the status for each of the Channel Partners.

**Receiver Lines**

10 Filter... Filter... Reset Reason Rejected/Terminated Save

Visible	Access	Receiver	Product Line	Status	Requested (UTC)	Private Label	Managed?	City	State	Country
<input type="checkbox"/>	<input type="checkbox"/>	pt/Cat Receiver	ACPN Video	Access Denied	-	private	-	South Jordan	UT	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	pt/Cat Receiver	ISS File Sync	In Library	-	private	-	South Jordan	UT	
<input type="checkbox"/>	<input type="checkbox"/>	pt/Cat Receiver	API Import test	Access Denied	-	private	-	South Jordan	UT	
<input type="checkbox"/>	<input type="checkbox"/>	pt/Cat Receiver	Don Testing	Access Denied	-	private	-	South Jordan	UT	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	pt/Cat Receiver	Les Schwab ACES Testing	Receiver Holding	-	private	-	South Jordan	UT	
<input type="checkbox"/>	<input type="checkbox"/>	pt/Cat Receiver	BW - PIES	Access Denied	-	private	-	South Jordan	UT	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	pt/Cat Receiver	GB Training Product Line	Access Authorized	-	private	-	South Jordan	UT	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	pt/Cat Receiver	inclark Test	Need Authorization	-	private	-	South Jordan	UT	
<input type="checkbox"/>	<input type="checkbox"/>	pt/Cat Receiver	Dacomsa	Access Denied	-	private	-	South Jordan	UT	
<input type="checkbox"/>	<input type="checkbox"/>	pt/Cat Receiver	AT upload test	Access Denied	-	private	-	South Jordan	UT	

Copy CSV TSV PSV Print Previous 1 2 3 4 5 5578 Next

- This report will allow you to see the status of the receiver's visibility and access to data for each Product Line. .
  - You may search by receiver, product line or status.
  - This report allows you to easily see which Channel Partners are 'Supplier-Managed'.
  - You can see the date that each receiver requested access.
  - You can export as a CSV, TSV, PSV, or print directly from this screen.
  - Provides Receiver location.
  - Allows to quickly authorize a receiver to multiple Product lines. Filter by Receiver name, then check the box for that client under 'Visible' as well as 'Access'.
  - Click '**Save**'.

## Delivery Log

- Delivery Logs allows you to see:
  - The Status of the delivery and if its delivery was 'Complete', 'Complete (with Error)' or 'Canceled'.
  - Which company initiated the delivery of the data along with the correlating time stamps throughout the data download process.
- Partial included in the name of a delivery means that there were other product files included in the product line but only one product file was updated and delivered.

# DataLive

- Are you curious to see when your parts become visible on the distribution selling platforms?
- DataLive provides manufacturers with precise information regarding why your products may or may not be selling as projected.
- Better insights for better forecasting and supply chain management.

## Company Setup

- **Step 1 Pricing Quote:**
  - Reach out to your account manager with OptiCat for a pricing quote.
- **Step 2 Agreement and Setup:**
  - After quote and updated agreement is signed, OptiCat will set you up with your “Purchased Searches”.
- **Step 3 DataLive Configuration:**
  - Navigate to Features => DataLive
  - Click “Refresh”
  - Choose your Frequency for how often you want your parts to be searched: Weekly, Monthly, Quarterly, or Yearly – based on your preference
  - Select your Default Web Shops you want to be searched.
  - Click “Save” to apply your settings
- **Note:**
  - You can download a report of all search information.

**ONBOARD** Product Lines Features Configure Help samanthatestob ACME - Demo (Beta)

**DataLive**

Refresh params: (any brand) eCommerce OnLine Web Catalog (any part type) (any web shop) On (any order) Max 100

**Company Setup** Refresh

10 Filter... Reset Save Previous 1 Next

Invoice#	Start Day	Finish Day	Searches Purchased	Searches Used	Searches Left	Search Frequency	Report	Country	Postal	Currency	Last Modified UTC	Last Modified UserID	Last Error
12345	2024-04-06	2024-05-01	500	16	484	Weekly		US	84070	USD	2024-04-29 18:50:32	2447	

Previous 1 Next

**Default Web Shops**

Ace Hardware	<input type="checkbox"/>	Advance Auto Parts	<input checked="" type="checkbox"/>	Amazon	<input checked="" type="checkbox"/>	Autozone	<input checked="" type="checkbox"/>
Carid	<input type="checkbox"/>	Carparts	<input type="checkbox"/>	FinditParts	<input checked="" type="checkbox"/>	FleetPride	<input type="checkbox"/>
HomeDepot	<input checked="" type="checkbox"/>	Jegs	<input type="checkbox"/>	Lowe's	<input type="checkbox"/>	Menards	<input type="checkbox"/>
Mills Fleet and Farm	<input checked="" type="checkbox"/>	NAPA	<input type="checkbox"/>	O'Reilly	<input checked="" type="checkbox"/>	PepBoys	<input checked="" type="checkbox"/>
RockAuto	<input checked="" type="checkbox"/>	Summit Racing	<input type="checkbox"/>	Walmart	<input checked="" type="checkbox"/>	Zoro	<input type="checkbox"/>

**Description Language Requirement**

NoneOrMissing	<input checked="" type="checkbox"/>	English	<input checked="" type="checkbox"/>	Spanish	<input type="checkbox"/>	French	<input type="checkbox"/>	German	<input type="checkbox"/>	Portugese	<input type="checkbox"/>
Italian	<input type="checkbox"/>	Japanese	<input type="checkbox"/>								

**Select Distinct Parts** Refresh (2,781 total)

## Select Distinct Parts

- **Step 1 Filtering and Refreshing Data:**
  - Click “Refresh” to bring up the parts that are in all product lines within OnBoard.
  - Using the Parameter Filter above to narrow down your search. You can filter by:  
**Brand:** Specify a particular Brand.  
**Part Number:** Enter the part number you’re interested in searching.  
**Part Type:** Choose the relevant part type.
  - After choosing a filter parameter click “Refresh”.
  - The data populated matches the parameter you chose.
- **Step 2 Selecting Distinct Parts:**
  - Select the parts that you want to be searched.
  - Click “Save”

## Web Shop Subscriptions

- **Step 1 Refresh and Filter:**
  - Click “Refresh”
  - Using the Parameter Filter above, click the “On” box.
    - This will show you all subscriptions that are currently set to “On”
    - These subscriptions come from the distinct parts selection above.
    - You will see all web shops selected in the Company Setup for each distinct part selected.
  - Choose a filter parameter and then click “Refresh”.
  - The data populated matches the parameter you chose.

ONBOARD Product Lines Features Configure Help samanthatestob ACME - Demo (Beta)

DataLive

Refresh params: (any brand) PN (any part number) (any part type) (any web shop) On (any order) Max 100

Company Setup Refresh

Select Distinct Parts Refresh (2,781 total)

10 Reset Save Note: Showing a maximum of 100. Previous 1 2 3 4 5 10 Next

On	Brand	Part Number	Part Type	Description	Shops Searching	Last Loaded	Last Batched	Last Searched	AAIA	PTID	Category Name	Subcategory Name	Category ID	Subcategory ID
<input type="checkbox"/>	Electronic Test	11022	Oxygen Sensor	OE MFR of Oxygen Sensors	0	2024-05-01	2024-04-29	2024-04-30	CGGR	5132	Emission Control	Sensors	9	202
<input type="checkbox"/>	Electronic Test	11023	Oxygen Sensor	OE MFR of Oxygen Sensors	0	2024-05-01	2024-04-29	2024-04-30	CGGR	5132	Emission Control	Sensors	9	202
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	OE MFR of Oxygen Sensors	11	2024-05-01			CGGR	5132	Emission Control	Sensors	9	202
<input type="checkbox"/>	Electronic Test	11027	Oxygen Sensor	OE MFR of Oxygen Sensors	0	2024-05-01	2024-04-29	2024-04-30	CGGR	5132	Emission Control	Sensors	9	202
<input checked="" type="checkbox"/>	Electronic Test	11032	Oxygen Sensor	OE MFR of Oxygen Sensors	11	2024-05-01			CGGR	5132	Emission Control	Sensors	9	202
<input checked="" type="checkbox"/>	Electronic Test	11051	Oxygen Sensor	OE MFR of Oxygen Sensors	11	2024-05-01			CGGR	5132	Emission Control	Sensors	9	202
<input type="checkbox"/>	Electronic Test	12002	Oxygen Sensor	OE MFR of Oxygen Sensors	0	2024-05-01			CGGR	5132	Emission Control	Sensors	9	202
<input type="checkbox"/>	Electronic Test	12008	Oxygen Sensor	OE MFR of Oxygen Sensors	0	2024-05-01			CGGR	5132	Emission Control	Sensors	9	202
<input type="checkbox"/>	Electronic Test	12009	Oxygen Sensor	OE MFR of Oxygen Sensors	0	2024-05-01			CGGR	5132	Emission Control	Sensors	9	202
<input type="checkbox"/>	Electronic Test	12014	Oxygen Sensor	OE MFR of Oxygen Sensors	0	2024-05-01			CGGR	5132	Emission Control	Sensors	9	202

Previous 1 2 3 4 5 10 Next

Web Shop Subscriptions Refresh

- **Step 2 Deselect Subscriptions (Optional):**
  - If you choose, you can deselect any subscription that you don’t want to be searched.
    - Just uncheck the box of the part number and web shop that you don’t want searched and click “Save”
  - See screenshot on next page.

ONBOARD Product Lines Features Configure Help samanthatestob ACME - Demo (Beta)

DataLive

Refresh params: (any brand) PN (any partnumber) (any part type) (any web shop) On (any order) Max 100

Company Setup Refresh

Select Distinct Parts Refresh (2,781 total)

Web Shop Subscriptions Refresh

10 Reset Save Note: Showing a maximum of 100.

On	Brand	Part Number	Part Type	Web Shop	Page	Image	Last Loaded	Last Batched	Last Searched	Price USD	AAIA	PTID
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	Advance Auto Parts			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	Amazon			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	Autozone			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	Canadian Tire			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	FindItParts			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	HomeDepot			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	Mills Fleet and Farm			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	OReilly			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	PepBoys			2024-05-01				CGGR	5132
<input checked="" type="checkbox"/>	Electronic Test	11024	Oxygen Sensor	RockAuto			2024-05-01				CGGR	5132

Previous 1 2 3 4 5 10 Next

## Subscription Results

- **Step 1 Check Results:**
  - Click “Refresh” to update the data.
  - To see if there are any results, you can choose to sort by the “Page” column. This will show all results that have been found.
    - You’ll see a link to the web shop where you can see your part on their website.
    - If there is an image, the image will show in the “Image” column.
    - When a part has been found, the subscription for that specific part and web shop will be unchecked (turned off).
- **Step 2 View Search History:**
  - To see the history of searches, click the “+” sign to open the dropdown. Click “History”

ONBOARD Product Lines Features Configure Help samanthatestob ACME - Demo (Beta)

DataLive

Refresh params: (any brand) PN (any partnumber) (any part type) (any web shop) On (any order) Max 100

Company Setup Refresh

Select Distinct Parts Refresh (2,781 total)

Web Shop Subscriptions Refresh

10 Reset Save Note: Showing a maximum of 100.

On	Brand	Part Number	Part Type	Web Shop	Page	Image	Last Loaded	Last Batched	Last Searched	Price USD	AAIA	PTID
<input type="checkbox"/>	Electronic Test	11023	Oxygen Sensor	Autozone	... m-11023/570427_0_0?searchText=11023		2024-05-01	2024-04-29	2024-04-30	\$238.99	CGGR	5132
<input type="checkbox"/>	Electronic Test	11022	Oxygen Sensor	Advance Auto Parts	... 11022/11644339-P?selectedStore=6870		2024-05-01	2024-04-29	2024-04-30	\$295.99	CGGR	5132
<input type="checkbox"/>	Electronic Test	11027	Oxygen Sensor	NAPA	... /www.napaonline.com/en/p/DEN2342007		2024-05-01	2024-04-29	2024-04-30	\$37.99	CGGR	5132
<input type="checkbox"/>	Electronic Test	11022	Oxygen Sensor	Ace Hardware			2024-05-01				CGGR	5132
<input type="checkbox"/>	Electronic Test	11022	Oxygen Sensor	Amazon			2024-05-01				CGGR	5132
<input type="checkbox"/>	Electronic Test	11022	Oxygen Sensor	Autozone			2024-05-01				CGGR	5132
<input type="checkbox"/>	Electronic Test	11022	Oxygen Sensor	Canadian Tire			2024-05-01				CGGR	5132
<input type="checkbox"/>	Electronic Test	11022	Oxygen Sensor	Carid			2024-05-01				CGGR	5132
<input type="checkbox"/>	Electronic Test	11022	Oxygen Sensor	Carparts			2024-05-01				CGGR	5132

History: History

- Please reach out to OptiCat Support Staff for more information and/or assistance.

## Data Redistribution

- Data Redistribution allows your customers to distribute your data with your permission through OptiCat Web Services/API.
  - Only your customers will have access to the Raw ACES, PIES and Digital Assets.
    - Their customers (Sub-Channel Partners) will only have access to your data via Web Services/API for their eCommerce Websites.
  - You can choose who you will allow to redistribute your data and what datasets you will allow to be redistributed.
  - As the supplier you can see who is redistributing your datasets and who they are redistributing to.
  - You have the ability to blacklist any Redistributor, Sub-Channel Partner and/or Dataset.
- What are Datasets?
  - Datasets is a grouping of related data (e.g., ACES, PIES and Digital Assets) created by OptiCat Admin.
    - Suppliers can blacklist ~~any~~ specific datasets from being redistributed, giving control over which data is shared.

**Web Service Permissions - Datasets**

Tag	Short Description	Lines	Last Modified UTC	Last Modifier Name	Last Modifier ID
private024_1	Brake Parts	Brake Parts - ACES, Brake Parts - PIES, Brake Parts - Images	2024-04-04 18:00:38	Samantha M Skidmore	2447
private024_2	Lighting	Lighting - ACES, Lighting - PIES, Lighting - Digital Assets	2024-04-04 18:00:38	Samantha M Skidmore	2447
private024_3	Oil Filters	Oil Filters - ACES, Oil Filters - PIES, Oil Filters - Digital Assets	2024-04-04 18:00:38	Samantha M Skidmore	2447

Annotations:   
 - Green box around 'Datasets' tab in sidebar.   
 - Green box around 'Lines' column.   
 - Green box with text: 'Product Lines tied together to create the dataset' pointing to the 'Lines' column.   
 - Green box with text: 'Datasets' pointing to the 'Short Description' column.

- Permission to Redistribute:
  - OptiCat Admins are the only ones who can give permission to a data receiver to be a Redistributor.
  - Only those who have been given permission to redistribute will show up on this list where you (as the supplier) can give permission to redistribute your data.

**Web Service Permissions - Redistributors**

Redistributor	Allow Redistribution	Last Modified UTC	Last Modifier Name	Last Modifier ID
[Redacted]	<input type="checkbox"/>			
[Redacted]	<input type="checkbox"/>			
OptiCat Data Management	<input checked="" type="checkbox"/>	2024-04-05 15:28:19	Samantha M Skidmore	2447
Redistributor (Data Redistribution)	<input checked="" type="checkbox"/>	2024-04-04 23:07:36	Samantha Skidmore	2512
[Redacted]	<input type="checkbox"/>	2024-04-05 19:17:26	Samantha Skidmore	2512

Annotations:   
 - Green box around 'Redistributors' tab in sidebar.   
 - Green box with text: 'List of Redistributors who have been given permission by OptiCat to redistribute supplier data.' pointing to the table.   
 - Green box with text: 'Supplier checks the box to allow the Redistributor to redistribute. Save.' pointing to the 'Allow Redistribution' checkbox.

- **Distribution Activity and Blacklisting:**

- As the supplier, you can see who has redistributed your data, which Sub-Channel Partner was distributed to and which dataset. The Supplier has the ability to decide who can redistribute their datasets.
- You can also choose to blacklist by Redistributor, Sub-Channel Partner and/or Dataset.

The screenshot shows the ONBOARD Web Service Permissions interface. A sidebar on the left contains links for Supplier Setup, Receiver Lines, Web Service Permissions (highlighted), Load Sheet, and Franchise Setup. The main area displays a table titled 'Distribution' with filters for Dataset, Sub-Channel Partner, and Redistributor. The table has columns for Dataset, Sub-Channel Partner, Blacklist (checkbox), Redistributor, In Library, Publicized, Last Modified UTC, Last Modifier Name, and Last Modifier ID. A green callout box points to the 'Blacklist' column, stating: 'Blacklisting can be done by Dataset, Redistributor and/or Sub-Channel Partner.' Another green callout box points to the 'Redistributor' column, stating: 'Distribution Activity. Supplier can see who redistributed the dataset and to which Sub-Channel Partner.'

Dataset	Sub-Channel Partner	Blacklist	Redistributor	In Library	Publicized	Last Modified UTC	Last Modifier Name	Last Modifier ID
Brake Parts	Sub-Channel Partner (Data Redistribution)	<input type="checkbox"/>	Redistributor (Data Redistribution)	0%	0%	2024-04-05 16:57:06	Samantha Skidmore	2513
Lighting	Sub-Channel Partner (Data Redistribution)	<input type="checkbox"/>	Redistributor (Data Redistribution)	0%	0%	2024-04-05 16:57:06	Samantha Skidmore	2513
Oil Filters	Sub-Channel Partner (Data Redistribution)	<input type="checkbox"/>	Redistributor (Data Redistribution)	0%	0%	2024-04-05 16:57:06	Samantha Skidmore	2513
Brake Parts	Sub-Channel Partner (Data Redistribution)	<input type="checkbox"/>		0%	0%	2024-04-05 18:02:16	Samantha Skidmore	2448
Brake Parts		<input type="checkbox"/>		0%	0%			
Brake Parts		<input type="checkbox"/>		0%	0%			
Brake Parts	OptiCat Data Management	<input type="checkbox"/>		100%	0%			
Brake Parts		<input type="checkbox"/>		0%	0%			
Brake Parts	Redistributor (Data Redistribution)	<input type="checkbox"/>		100%	0%	2024-04-05 16:55:41	Samantha Skidmore	2513

- **Recommendations:**

- We recommend that you organize your product lines so that datasets can be created and easily distributed by you. Separate ACES, PIES and Digital Assets into their own product lines. If you have all your parts in one ACES, PIES and Digital Assets then you just need 3 product lines. If you separate your parts by receiver or part type, you will want three (3) product lines for each one.
- Please reach out to OptiCat Admins when new product lines are created and for questions and assistance with data redistribution.

- **Organizing Product Lines:**

- **Separate by Data Type:**

- To facilitate data distribution, consider creating separate product lines for each data type: ACES, PIES, and Digital Assets. This will allow finer control and will allow Supplier to manage permissions at a more granular level.
- If all your parts are currently combined into a single dataset including ACES, PIES, and Digital Assets, redistributors will have access to all data types collectively.
- If you prefer to organize your parts by receiver or part type, you may want to create three product lines for each combination (e.g., ACES for Receiver A, PIES for Receiver A, Digital Assets for Receiver A; ACES for Receiver B, PIES for Receiver B, Digital Assets for Receiver B, and so on).

- **Communication with OptiCat Admins:**

- Whenever you create new product lines or have questions related to data redistribution, reach out to OptiCat Admins for assistance.
- They can guide you through the process and ensure that your data is organized effectively for distribution.

# Help

- To access OptiCat support click on the ‘Help’ button in the main menu at the top of the screen.
  - Here you will find the contact information for customer service, technical support and general inquiries.
  - You will also find the ‘Software User’s Guide PDF’ which will walk you through each part of the OnBoard sections step-by-step.
- To contact OptiCat:
  - Main office phone number - (801) 542-0560
  - Main office email address - info@opticat.net
- For specific questions regarding OnBoard, contact a member of the OptiCat Support Staff:
  - Brandi Williams (brandi.williams@jnpopticat.com)
  - Samantha Skidmore (samantha.skidmore@jnpopticat.com)
  - Shawn Llewelyn (shawn.llewelyn@jnpopticat.com)
  - You can also call the main OptiCat office number (801) 542-0560, and an account representative will be notified and contact you as quickly as possible.

***This Software is made available to authorized OptiCat Suppliers only, as outlined in the OptiCat Supplier Software License & Service Agreement.***



# APPENDIX A

## Appendix A – Invalid Characters in Element Data

The following table illustrates the various ASCII characters that are invalid when used in certain PIES fields. Other than the characters identified below, please note that PIES data fields should contain standard ASCII characters only.

Character	Description	Part Number Fields	Description Fields	Price Sheet Number Fields	Bar Code Characters
;	Semi-colon	P		P	P
[	Left bracket	P	P	P	P
]	Right bracket	P	P	P	P
{	Left brace	P			P
}	Right brace	P			P
~	Tilde	P	P	P	P
	Bar(Pipe)	P	P	P	P
,	Comma	P			P
""	2 Quotes	P	P	P	P
%	Percentage	P			P
!	Exclamation	P			P
\$	Dollar sign	P			P
*	Asterisk	P	P	P	P
^	Circumflex(Carot)	P	P	P	P
\	Back slash	P	P	P	P
?	Question mark	P			P
'	Apostrophe	P			P
"	Quote	P			P
	Space				P
/	Forward slash				
.	Period				
-	Dash (hyphen)				
P	Character is <b>prohibited</b> from use in that type of field. Example: Commas are not allowed in Part Number Fields.				

## PIES™ Description Codes (as of 2.1.2022)

### C01-Description Segment (DESC)

C10 (ABR)	Product Description - Abbreviated
C10 (ASC)	Associated Comments
C10 (ASM)	Application Summary
C10 (CAP)	Caption
C10 (DEF)	AAIA Part Type Description
C10 (DES)	Product Description - Long
C10 (EXT)	Product Description - Extended
C10 (FAB)	Features and Benefits
C10 (INV)	Product Description - Invoice
C10 (KEY)	Key Search Words
C10 (LAB)	Label Description
C10 (MKT)	Marketing Description
C10 (MTP)	Market Type
C10 (SHO)	Product Description - Short
C10 (SHP)	Shipping Restrictions
C10 (SLA)	Slang Description
C10 (TLE)	Title Description
C10 (TRA)	Transcription
C10 (UNS)	UN/SPSC Description
C10 (VMR)	VMRS Description



New PIES 7.2

### M01-Digital Asset Sub-Segment of Market Copy

M73 (M72)	Asset Description / <a href="#">Description</a> (Asset Description Code / <a href="#">DescriptionCode</a> )
M73 (ABR)	Asset Description Product Description - Abbreviated
M73 (ASC)	Asset Description Associated Comments
M73 (ASM)	Asset Description Application Summary
M73 (CAP)	Asset Description Caption
M73 (DEF)	Asset Description AAIA Part Type Description
M73 (DES)	Asset Description Product Description - Long
M73 (EXT)	Asset Description Product Description - Extended
M73 (FAB)	Asset Description Features and Benefits
M73 (INV)	Asset Description Product Description - Invoice
M73 (KEY)	Asset Description Key Search Words
M73 (LAB)	Asset Description Label Description
M73 (MKT)	Asset Description Marketing Description
M73 (MTP)	Asset Description Market Type ** Invalid Code**
M73 (SHO)	Asset Description Product Description - Short
M73 (SHP)	Asset Description Shipping Restrictions
M73 (SLA)	Asset Description Slang Description
M73 (TLE)	Asset Description Title Description ** Invalid Code**
M73 (TRA)	Asset Description Transcription
M73 (UNS)	Asset Description UN/SPSC Description
M73 (VMR)	Asset Description VMRS Description

### K01-Kits Segment (KITS)

K10 (K09)	Kit Description / <a href="#">Description</a> (Kit Description Code / <a href="#">DescriptionCode</a> )
K10 (ABR)	Kit Description Product Description - Abbreviated
K10 (ASC)	Kit Description Associated Comments
K10 (ASM)	Kit Description Application Summary
K10 (CAP)	Kit Description Caption ** Invalid Code**
K10 (DEF)	Kit Description AAIA Part Type Description
K10 (DES)	Kit Description Product Description - Long
K10 (EXT)	Kit Description Product Description - Extended
K10 (FAB)	Kit Description Features and Benefits ** Invalid Code**
K10 (INV)	Kit Description Product Description - Invoice
K10 (KEY)	Kit Description Key Search Words
K10 (LAB)	Kit Description Label Description
K10 (MKT)	Kit Description Marketing Description
K10 (MTP)	Kit Description Market Type ** Invalid Code**
K10 (SHO)	Kit Description Product Description - Short
K10 (SHP)	Kit Description Shipping Restrictions
K10 (SLA)	Kit Description Slang Description
K10 (TLE)	Kit Description Title Description ** Invalid Code**
K10 (TRA)	Kit Description Transcription ** Invalid Code**
K10 (UNS)	Kit Description UN/SPSC Description
K10 (VMR)	Kit Description VMRS Description

### P01-Digital Asset File Information Segment (ASST)

P73 (P72)	Asset Description / <a href="#">Description</a> (Asset Description Code / <a href="#">DescriptionCode</a> )
P73 (ABR)	Asset Description Product Description - Abbreviated
P73 (ASC)	Asset Description Associated Comments
P73 (ASM)	Asset Description Application Summary
P73 (CAP)	Asset Description Caption
P73 (DEF)	Asset Description AAIA Part Type Description
P73 (DES)	Asset Description Product Description - Long
P73 (EXT)	Asset Description Product Description - Extended
P73 (FAB)	Asset Description Features and Benefits
P73 (INV)	Asset Description Product Description - Invoice
P73 (KEY)	Asset Description Key Search Words
P73 (LAB)	Asset Description Label Description
P73 (MKT)	Asset Description Marketing Description
P73 (MTP)	Asset Description Market Type ** Invalid Code**
P73 (SHO)	Asset Description Product Description - Short
P73 (SHP)	Asset Description Shipping Restrictions
P73 (SLA)	Asset Description Slang Description
P73 (TLE)	Asset Description Title Description ** Invalid Code**
P73 (TRA)	Asset Description Transcription
P73 (UNS)	Asset Description UN/SPSC Description
P73 (VMR)	Asset Description VMRS Description

# OnDemand

## Overview

OptiCat's purpose is to provide a turnkey, SaaS (Software as a Service) technology suite that enables automotive aftermarket manufacturers to deliver important product data to their distribution channel partners in a one-step (do-it-once), validated (do-it-right) and pervasive (do-it-everywhere) way. OptiCat's primary business strategy is a "self-service" technology model that enables industry partners to share valuable information via OptiCat Technology Suite. OptiCat is exclusively a technology provider. To gain access to OptiCat OnDemand, browse to this URL:

<http://www.opticatnetwork.com/OnDemand/>

## LOGGING IN



- Click Sign-In.
- Enter Username & Password, provided to you by OptiCat's support team.

The image shows the 'Sign-in' page of the OnDemand application. It features a header with the 'ONDEMAND' logo and navigation links. Below the header, there is a message: 'For your security, everyone must sign-in to use OnDemand.' This is followed by two input fields: 'Username' (containing 'Brittney') and 'Password' (containing six dots). A 'Sign in' button is located below the password field. To the left of the button, there are three links: 'Want a username reminder?', 'Need an account?', and 'Forgot password?'. The 'Sign in' button is highlighted with a red rectangular box.

## MANAGE ACCOUNT

The image shows the 'Account Management' page of the OnDemand application. It features a header with the 'ONDEMAND' logo and navigation links. Below the header, there is a section for 'Account Management' with buttons for 'Reset', 'Save', and 'Remove'. The 'Employee' dropdown menu is set to 'Shawn (Shawn Llewelyn)'. The 'Username' field contains 'Shawn' and the 'Full Name' field contains 'Shawn Llewelyn'. The 'Role' is 'Manager'. The 'Password' field is empty, and there is a 'Change Password' link. The 'Email' field contains 'sllewelyn@opticat.net'. Below this, there is a 'Receive emails' section with checkboxes for 'Delivery failure', 'Data authorization', 'Data updated', and 'Load Sheet'. The 'Notify Mode' dropdown menu is open, showing options: 'Upgrade1', 'Classic', 'Upgrade2023\_07', 'Upgrade2023\_10', and 'KeepMeUpdatedToLatest'. The 'Upgrade1' option is selected. The 'Notify Mode' dropdown menu is highlighted with a red rectangular box.

## MANAGE ACCOUNT ERROR

During creation of a new user, you may see the following Error message:

Errors must be fixed before saving can complete.

## Account Management

[Reset](#) [Save](#)

Group Code1

Employee

Username

Username reserved. Please try another username.

This indicates that the username is not available for use because it has previously been used in the On Demand portal. Please select a different USERNAME to continue.

- Click the down arrow next to your username, then select 'Manage Account'.
- In this screen, managers can create new users and request a reset password link for users, and everyone can update their email preferences:
  - **"Delivery Failure"** Will let you know if we are unable to deliver data to you for any reason
  - **"Data Authorization"** Will let you know that a supplier has given you access to their product lines, and it is now time to move it to 'In Library'
  - **"Data Updated"** Will let you know that a supplier has updated their data. This is recommended if you are receiving data via FTP as it will notify you that new data is waiting for you.

## UPDATING RECEIVER PROFILE

ONDEMAND Library Delivery Settings Help brittney Brittney October Test Recei...

Receiver Setup [Reset](#) [Save](#) [Receiver](#) [Templates](#) [Accuracy](#)

### Receiver Profile

Company Name	Brittney October Test Receiver			Agreement	<a href="#">[i]</a>			Special agreement	<input checked="" type="checkbox"/>
Added (UTC)	10/4/2018 12:00:00 AM			Web URL	<a href="https://www.opticonline.com/">https://www.opticonline.com/</a>			Logo URL	<input type="text"/>
Address2	1204 W. South Jordan Parkway			Address1	Ste. C2			City	South Jordan
State	UT			Postal	84095			Country	USA
Contact Email	Brittney Christensen			Contact Phone	8015420560			Contact Email	bchristensen@opticat.net
BIO	<input type="text"/>								
Prospective	<input type="checkbox"/>	PIES Validation Access	<input checked="" type="checkbox"/>	Accuracy Validation Access	<input checked="" type="checkbox"/>	Supplier Assessments	<input type="checkbox"/>		
Managed Receiver	<input type="checkbox"/>	Web Services	<input type="checkbox"/>						

- Click the down arrow next to Settings, then click 'Receiver Setup'.
- You can update your company information here at any time.
- If the company name needs to be changed, please contact OptiCat.
- BIO located near the bottom of the page is very important. The text here will be included in Automated Data Request emails that are sent to suppliers. This is also what the supplier will see under your company name in their

Receivers Tab. It's a good idea to include information about your company and what you are doing with the supplier's data.

- Always click the blue 'Save' button next to Receiver Setup.

## FTP SETTINGS:

- Click on the 'FTP Defaults' drop down:

The screenshot shows the ONDEMAND interface with the 'Receiver Setup' tab selected. The 'FTP Defaults' section is active, displaying the following fields and options:

- FTP Address:** sftp://opticat5.net
- FTP Username:** ocftpsl
- FTP Password:** [Change password button] with a green message: "Password strength seems strong!"
- Use SSL:** ☐
- Use Passive:** ☒
- FTP.Exact.Directory.Mode:** ☒

- This for a default or general FTP that all product lines direct to. If you have subfolders that you want to direct certain product lines data to, we will address that later in the documentation.
- Enter FTP host address and make sure to include Ftp://
- Enter the FTP Username
- Enter the FTP Password (password may not begin or end with spaces)
- Always click the blue 'Save' button next to Receiver Setup.
  - You can test the ftp connection by clicking 'Test FTP' after saving credentials. This will immediately let you know if there are any issues.

The screenshot shows the ONDEMAND interface with the 'Receiver Setup' tab selected. The 'FTP Defaults' section is active, displaying the following fields and options:

- FTP Address:** ftp://OptiCatNetwork/BrittneyFTP
- FTP Username:** BrittneyFTP
- FTP Password:** [Change password button] with a green message: "Password strength seems strong!"
- Use SSL:** ☐
- Use Passive:** ☐
- FTP.Exact.Directory.Mode:** ☐

The 'Test FTP' button is highlighted with a red box.

## EXPORT OPTIONS:

The screenshot displays the 'Export' configuration window. At the top, there are global settings: 'Zip Mode' set to 'Non-archives in one zip (fast)', 'No DTO disclaimer' checked, 'Email Delivery MB' set to 25, 'Flat File(s) Descriptions Export' set to 'Keep\_Unaltered', 'XML Character Encoding' set to 'AutoCare\_ASCII', and 'Flat Files Exported as.txt' checked. Below these are two main sections for 'ACES' and 'PIES'. The 'ACES' section includes options for 'Originals' (checked), 'Require BrandAAIAID' (unchecked), 'Fitment Flat file by Product File' (unchecked), 'Fitment Flat File Delimiter' set to 'Tab', 'XML by Product File' set to 'None', and 'Deliver Years Beyond Xsd' (unchecked). The 'PIES' section includes 'Originals' (checked), 'XML by Product File' set to 'None', 'Classic Product Flat file by Product Line' (unchecked), 'Classic Product Flat File Delimiter' set to 'Tab', 'Custom Templates Available' set to 10, and checkboxes for XML versions 6.5 through 7.0 by product line (all unchecked). It also has checkboxes for 'GTIN parts only' (unchecked), 'Autocorrect Brand Labels' (unchecked), and 'GTIN Uniformity' set to 'original'. At the bottom, 'Missing Kits Sold Separately' is set to 'autopopulate\_yes'.

- Here you will find all options that you can select when receiving data via OptiCat.
  - **Files Unzipped** Files will be delivered unzipped.
  - **ACES® or PIES™ Originals** Files will be delivered in original supplier provided format.
  - **Require BrandAAIAID** If the ACES® file does not include the BrandAAIAID then the file will not be delivered.
  - **Fitment Flat file by Product File** will convert the XML to a .txt file that you may open in Excel as Tab Delimited. Please note that Flat Files exclude Attributes, Interchanges, Digital Assets, etc. To get all PIES™ segments, please use a Custom Template. Note that when receiving exported PIES™ Flat Files users will have the option to change the delimiter to either TAB or PIPE.
  - **Custom Templates Enabled** Allows you to create your own custom PIES™ template that you will be shown later in this guide.
  - **XML 6.5 by product line** exports PIES™ version 6.5.
  - XML 6.6 by product line exports PIES™ version 6.6.
  - XML 6.7 by product line exports PIES™ version 6.7.
  - XML 7.0 by product line exports PIES™ version 7.0.
  - **GTIN parts only** Will only deliver parts with GTIN; it will delete parts without GTIN in the custom file delivered. GTIN Options in PIES™ exports are Originals, and Length 8, 12, 13, or 14, When exporting Original XML version the GTIN is not and should not be changed.
  - **Autocorrect Brand Labels** Adds Brand Label to the item in PIES™ from the B20 field.
  - AWDA 6.3 by files
  - AWDA 6.3 by product line
  - AWDA 6.4 by files
  - AWDA 6.4 by product line
  - AWDA 6.5 by files
  - AWDA 6.5 by product line
  - **AWDA include Header** the export will include the header
  - **Other Originals** Images, Videos, PDFS and unvalidated data will be delivered in the original supplier provided format.
- If you choose any of the options above, you will receive the data in this format until you change it back.
- Always click the blue 'Save' button next to Receiver Setup.
- Please remember that when a Supplier is setup as a receiver, the PIES™ delivery must be set to "AutoCare\_ASCII" only.

No DTO disclaimer

☒

Email Delivery MB


25

XML Character Encoding

AutoCare\_ASCII

**SELECT ACES® VERSION:**

Receivers do have the ability to select and receive different versions of XML formats depending on the needs of the receiver. ACES® versions include the ones listed below.



ACES

AFTERMARKET CATALOG  
EXCHANGE STANDARD

Originals

☒

Require BrandAAIAID

☐

Flat file by Product File

☐

Flat File Delimiter

Tab

XML by Product File

Aces\_4\_0

Deliver Years Beyond Xsd

☐

Navistar Aces Flat File Export

☐

XML by Product File

None

Tab

Aces\_4\_0

None

Aces\_3\_0

Aces\_3\_0\_1

Aces\_3\_1

Aces\_3\_2

Aces\_4\_0

Aces\_4\_1

Aces\_4\_2

## ONTARGET:

- These settings will allow you to get reports from OnTarget, if the supplier is providing them.

## NOTIFICATION EMAILS:

- **“Data Authorization”** Will let the company manager know that a supplier has given you access to their product lines, and it is now time to move it to ‘In Library’
- **“Data Updated”** Will let the company manager know that a supplier has updated their data. This is recommended if you are receiving data via FTP as it will notify you that new data is waiting for you.
- If the Profile contact is also a user they should only turn on notifications in either User Management or Receiver Settings or they will receive duplicate emails.

## IMAGE SYNC OPTIONS:

Image Sync

Have Access ☒

Updated 10/4/2018 8:14:45 AM

**File**

Format

**Image Resizing**

Image aspect ratio will be maintained with every setting.

Resizing

Pixels Height

Pixels Width

**Image Renaming**

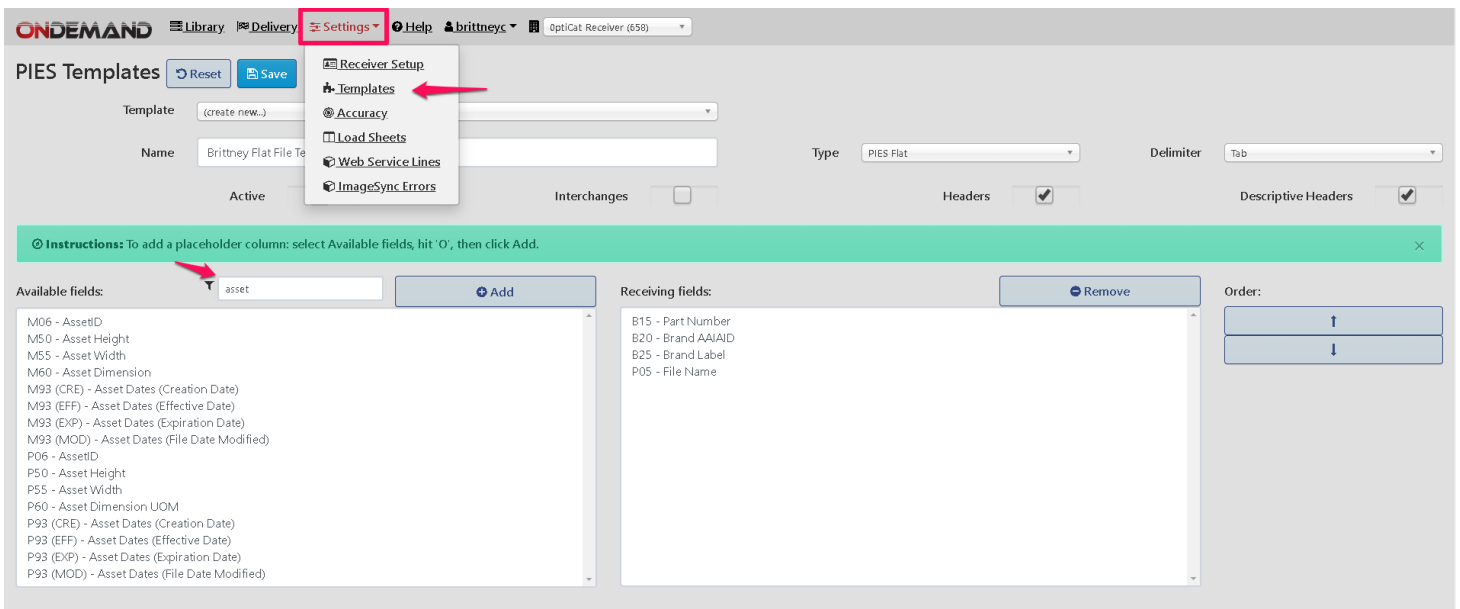
Enabled ☐

- Here you can set your format preferences for Image Sync:
  - We currently offer conversions to: .png, .jpg, .jpeg, .tif, .tiff, .eps, .gif, .bmp
  - You can set image sizing requirements to a specific height and width
  - Image renaming allows you to have images renamed by one of the following: File Name, Part Number, BrandAAIAID, or UPC.
  - New to File Renaming is the option to now include a Custom String with the other options.
- Always click the blue ‘Save’ button next to Receiver Setup.

## CUSTOM PIEST<sup>TM</sup> TEMPLATES:

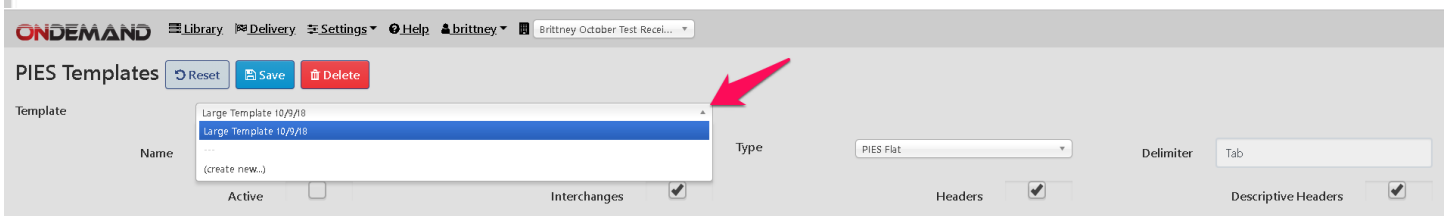
- Click the down arrow next to Settings, then click ‘Templates’:





- This is a great option if you don't need an entire PIEST™ file and are only looking for certain fields.
  - If you select all available fields for a flat file, we will export the following with Digital Assets:

Name	Date modified	Type	Size
OptiCat Example - PIES-PIESCustomFlat-PIES Flat with Digital Assets_10162019_150422.txt	2/18/2020 8:34 AM	Text Document	34 KB
OptiCat Example - PIES-PIESCustomFlat-PIES Flat with Digital Assets_DigitalAssets_10162019_150422....	2/18/2020 8:34 AM	Text Document	2 KB
OptiCat Example - PIES-PIESCustomFlat-PIES Flat with Digital Assets_Interchange_10162019_150422.txt	2/18/2020 8:34 AM	Text Document	1 KB
OptiCat Example - PIES-PIESCustomFlat-PIES Flat with Digital Assets_MarketCopy_10162019_150422.txt	2/18/2020 8:34 AM	Text Document	2 KB
OptiCat Example - PIES-PIESCustomFlat-PIES Flat with Digital Assets_ProductAttributes_10162019_15...	2/18/2020 8:34 AM	Text Document	4 KB
OptiCat Example - PIES-PIESCustomFlat-PIES Flat with Digital Assets_ProductDescriptions_10162019_...	2/18/2020 8:34 AM	Text Document	8 KB
OptiCat Example - PIES-PIESCustomFlat-PIES Flat with Digital Assets_ProductKits_10162019_150422.txt	2/18/2020 8:34 AM	Text Document	1 KB



- Use the drop down and select 'create new...'.
- Name your template.
- Choose the Type of file you would like to receive:
  - Can be PIEST™ Flat (.txt file) that you can open in excel as tab delimited.
  - Can be PIEST™ xml versions 6.5, 6.6, 6.7, 7.0, or 7.1.
- Check 'Active'.
  - Note, this will remain active until you uncheck it.
- Select Interchanges, Headers, or Descriptive Headers if you would like to receive them.
- Scroll through and select which available fields you would like to include.
  - You may select many fields at once by holding the Ctrl key + clicking on them.
  - Once they are in the Receiving fields section, you can change the order by clicking the up and down arrows under 'Order'.
  - You can use the search bar to find specific fields.
- Always click the blue 'Save' button at the top of the page.

## MANAGING ACES® REQUIREMENTS:

- Click the down arrow next to Settings, then click 'Accuracy'.

ONDEMAND Library Delivery Settings Help brittney | Brittney October Test Rece...

ACES Requirement Percents

Note: These rules apply to ACES files uploaded

Receiver  
Templates  
**Accuracy**

Total	60	Duplicate	60	Overlap	60	Note Conflict	60
Qty Conflict	60	Conflicted Records	60	PartType Assignment	60	ACES Elements	60
ACES Combinations	60	Notes Overlap	60				

- Specify the accuracy of ACES® files that will be delivered to you. This will only apply if the Supplier is using OnTarget to validate and deliver the data to you.
- This will be applied to ACES® files only.
  - This defaults to 60% accuracy

## DELIVERY REPORT:

- Click on the Delivery tab:

ONDEMAND Library Delivery Settings Help bcod | OptiCat Receiver Test (622)

OptiCat Supplier Test	OptiCat PIES	Complete (With Error)	2019-05-24 17:18:13	2019-05-24 17:23:55	2019-05-24 17:23:58	OptiCat Supplier Test	autopublish				
OptiCat Supplier Test	OptiCat PIES	Complete	2019-05-24 17:17:23	2019-05-24 17:17:34	2019-05-24 17:18:10	OptiCat Supplier Test	autopublish				
OptiCat Supplier Test	MelissaTestPL	Complete (With Error)	2019-05-09 03:11:24	2019-05-09 03:13:36	2019-05-09 03:13:36	OptiCat Supplier Test	autopublish				
OptiCat Supplier Test	MelissaTestPL	Complete	2019-03-01 21:18:55	2019-03-01 21:19:37	2019-03-01 21:19:55	OptiCat Supplier Test	autopublish				
OptiCat Supplier Test	MelissaTestPL	Complete	2019-03-01 06:52:57	2019-03-01 07:11:22	2019-03-01 07:16:58	OptiCat Supplier Test	autopublish				

Copy (,) CSV (tab) TSV (|) PSV Print

Previous 1 2 Next

- This section will always give you the status of your exports and let you know if we ever have any issues delivering data. This section will let you know which company initiated the download, the delivery status, requested date, start date, and completion date.
  - If you encounter a complete (With Error) status, click the blue circle with a + sign next to the product line and you'll see details as to why the error was thrown.
  - You can copy, export a CSV, TSV, PSV, or print this page using the buttons at the bottom of the screen.
- Clicking on the blue + button will show what files and exports types are delivered, as well as Export and Import messages.

## YOUR DATA LIBRARY:

- Click on Library.

ONDEMAND **Library** Delivery Settings Help brittney Brittney October Test Rece...

Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

10 Search... In Library X Previous 1 Next

Supplier	Product Line	Status	Publish	Destination	Created (MT)	Updated (MT)	Validation	AAIA	Manager	Phone	Email
Opticat OB2	Large PIES file	In Library	auto-deliver	default	2018-10-09 13:55:12	-	OnTarget		Brittney Christensen	(800) 542-0560	bchristensen@opticat.net
A Parts Supplier	3/30 Testing Product Center	In Library	on-demand	default	2017-03-30 15:51:55	2017-03-30 15:51:55	OnTarget		Opticat Administrator	(919) 406-8840	bthueson@opticat.net
Aaron ATC 1	AA PIES 1	In Library	on-demand	default	2018-09-27 10:51:39	2018-10-26 13:47:25	-		Aaron Turpin	(555) 000-1234	aturpin@opticat.net
Aaronic Supplier	t2654 productextended cleanup	In Library	auto-deliver	default	2018-04-02 21:17:37	2018-04-02 22:43:13	-		Aaron Turpin	(555) 123-6786	aturpin@opticat.net
ABC Company Beta	ABC PIES	In Library	on-demand	ftp://162.221.202.74/BrittneyFTP/OD2	2017-06-22 15:04:24	2018-10-04 12:45:52	OnTarget		Brittney Christensen	(800) 542-0560	bchristensen@opticat.net

- This section will always filter by the product lines that have already been moved to 'In Library' status.
  - These are the product lines that are ready to be downloaded at any time.
  - You can remove In Library filter to view all by clicking the X next to In Library.
- If you select a product line then click deliver, the data will go to your dedicated ftp site you have set up in the admin section.
  - Note: if there is not an FTP set up, it will attempt to transfer via email; however, it may not be able to be delivered via email if the file size is too large.
  - If or when a Supplier sets a product line up as "Auto Publish", and they have already given you access to that product line & you've moved it to 'In Library', when they import any new data it will automatically push through to your default delivery destination and if it is pushed to an FTP you will receive an automated email notification from OptiCat letting you know it's waiting for you.
- Click the product line and then deliver all the data in the product line will be deliverer. In some cases a product line could contain numerous files. By clicking the blue + they can select the desired files individually by choosing the product line and the selected file(s) needed.
- The publish column will define if the supplier has set to Auto Publish, it will read Auto Deliver. If not it will read Click Deliver, meaning they will need to download the data as needed.
- Click on the Filter bar:

ONDEMAND **Library** Delivery Settings Help Shawn Shawn Llewelyn Test

Library (DIO Data Repository) Refresh

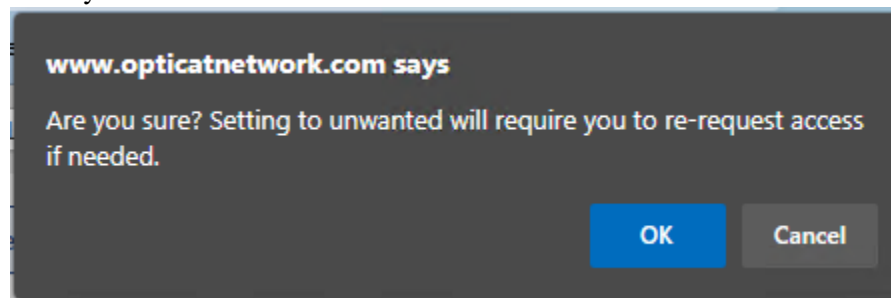
Please select the Product Line(s) for options.

10 Filter... Select All

Supplier	Product Line	Status	Method	Im Syn
ABC Company	OptiCat OnDemand Documentation	In Library	Default	Un
ABC	Pies 7.2 Rev 3	Need	click- OnLine web services only	Default

- You can filter by the following:

- **Need Authorization-** This means you have not requested to access this product line.
- **Access Requested-** This means you have requested access to the product line, but the supplier has not yet given you permission.
  - **Note:** The Supplier Manager's contact information is provided so that you can reach out to them with questions or if you are waiting on them to grant permission. If you do not see all the contact information, click on the blue plus sign to view.
- **Access Authorized-** This means that the supplier has given you permission to access the data and you need to move it to 'In Library' in order to download.
- **In Library-** This means you can download the data and will receive any future updates from the supplier if they use auto-publish or manually publish.
- **Receiver Holding-** This means that you do not want data to be automatically delivered to you at this time.
  - You may deliver data to yourself while it is in 'Receiver Holding' status. Just highlight the product line by clicking, then select the 'deliver' box.
- **Receiver Unwanted-** This means that you no longer want the data.
  - This will remove supplier authorization and access; you will need to re-request the data if needed in the future. You will be prompted to verify that you would like to delete this line from your Library.



- You may also search by Supplier Name, Product Line Name, Validation, Manager Name, Phone or Email:

ONDEMAND Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

10 Test Supplier Filter...

Supplier	Product Line	Status	Publish	Destination	Created (MT)	Updated (MT)	Validation	AAIA	Manager	Phone	Email
Wowza Test Supplier	Wowza ACES	Need Authorization	auto-deliver	default	2017-07-03 20:09:20	2017-07-05 13:42:23	-		Brittney Christensen	(801) 542-8560	bchristensen@opticat.net
TestSupplier	test_AWDA	Need Authorization	auto-deliver	default	2018-03-20 14:58:45	2018-04-26 18:10:36	OnTarget	1	Jimbo Jones	(111) 111-1111	awong@opticat.net
TestSupplier	test_brakeabsid	Need Authorization	auto-deliver	default	2018-05-30 17:31:09	2018-05-30 17:31:39	OnTarget		Jimbo Jones	(111) 111-1111	awong@opticat.net
TestSupplier	test_DAM	Need Authorization	auto-deliver	default	2018-04-27 18:15:48	2018-06-18 19:20:28	OnTarget		Jimbo Jones	(111) 111-1111	awong@opticat.net

Previous 1 2 3 Next

- You can use the arrows next to Supplier to filter from A-Z or Z-A.
- By clicking on the blue circle with the + next to the supplier's name, you can see Files with product name and product line permission history:

ONDEMAND Library Delivery Settings Help brittneyc Test Receiver (119)

Please select the Product Line(s) for options.

10 Search... In Library X

Previous 1 2 3 4 5 Next

Supplier	Product Line	Status	Publish	Destination	Created (UTC)	Updated (UTC)	Validation	AAIA	Manager	Phone
ABC Company	ABC Company - Pies	In Library	on-demand	ftp://162.221.202.74/BrittneyFTP/OD2	2017-04-04 22:58:01	2019-03-04 14:29:59	OnTarget		Brandi Williams	(801) 542-0560
ABC Company	AJT import test	In Library	on-demand	default	2018-03-12 05:56:39	2018-11-27 01:33:36	OnTarget		Brandi Williams	(801) 542-0560
ABC Company	AJT t1416 fixbrandlabel	In Library	on-demand	default	2018-03-21 00:47:28	2018-03-21 00:49:39	OnTarget		Brandi Williams	(801) 542-0560
ABC Company	AW-1	In Library	auto-deliver	default	2018-06-07 07:22:27	2019-02-26 03:09:29	OnTarget		Brandi Williams	(801) 542-0560
ABC Company	BC ISS Test	In Library	on-demand	imagesync	2019-02-19 17:44:00	2019-02-19 18:22:23	OnTarget		Brittney Christensen	(801) 542-0560

Email: [bchristensen@opticat.net](mailto:bchristensen@opticat.net) PL: 6033

Files:

Product Name	Type	MB	Updated (UTC)	File Name	Comment	PF
BC	Other	0.3	2019-02-19 18:22:23	OD ISS Test.zip		26511

Permission History:

Changed (UTC)	Status	Company Name	Phone	User ID	Changer Name	Email
2019-02-19 10:48:42	In Library	ABC Company	(801) 542-0560	1792	Brittney Christensen	<a href="mailto:bchristensen@opticat.net">bchristensen@opticat.net</a>

- In order to request access to a product line, simply click on the product line(s), and click Request Access:

ONDEMAND Library Delivery Settings Help brittneyc Test Receiver 2 (680)

Library (DIO Data Repository) Refresh Request access Set unwanted

You have selected 1 Product Line(s).

10 OnTarget TestLine Need Authorization X

Previous 1 Next

Supplier	Product Line	Status	Publish	Destination	Created (UTC)	Updated (UTC)	Validation	AAIA	Manager	Phone	Email	PL
Opticat Administrator	OnTargetTestLine	Need Authorization	auto-deliver	default	2014-06-06 19:51:53	2016-11-29 16:48:47	OnTarget		Opticat Administrator	(919) 406-8840	<a href="mailto:bthueson@opticat.net">bthueson@opticat.net</a>	1417

- This will send an email to the supplier letting them know that you have initiated the handshake.
- If the supplier agrees to grant access, you will receive an email notification (as long as that preference is set) letting you know you now have access to the product line- completing the handshake.
- Once authorization is granted, the status changes to 'Access Authorized'. From there you will need to move the product line to your data library:
- If you have not heard back from a supplier and are still waiting on access to their product lines, you may re-request the data by clicking on the product line and then selecting the request access button again.

ONDEMAND Library Delivery Settings Help brittneyc OptiCat Receiver (658)

Library (DIO Data Repository) Refresh Put in Library (Subscribe) Put on hold Set unwanted Configure delivery

You have selected 1 Product Line(s).

10 Search... Access Authorized X Previous 1 2 3 4 5 ... 10 Next

Supplier	Product Line	Status	Publish	Destination	Created (UTC)	Updated (UTC)	Validation	AAIA	Manager
ABC Company	AJT Flatfile Test 07-31	Access Authorized	auto-deliver	default	2017-08-01 00:05:21	2019-02-20 01:30:38	OnTarget	FJVT	Brandi Williams
ABC Company	Brittney PL ACES	Access Authorized	auto-deliver	default	2018-11-05 22:22:17	2019-02-20 14:38:12	OnTarget		Brittney Christensen

- Filter by 'Access Authorized'.
- Select product lines.
- Click 'Put in Library (Subscribe)'.
- You may now filter by 'In Library':

ONDEMAND Library Delivery Settings Help brittneyc OptiCat Receiver (658)

Library (DIO Data Repository) Refresh Put on hold Set unwanted Deliver Configure delivery

You have selected 1 Product Line(s).

10 Brittney In Library X Previous 1 Next

Supplier	Product Line	Status	Publish	Destination	Created (UTC)	Updated (UTC)	Validation	AAIA
ABC Company	Brittney PL ACES	In Library	auto-deliver	default	2018-11-05 22:22:17	2019-02-20 14:38:12	OnTarget	

- Click on the product lines you want to download, then click Deliver.
  - **Note:** this will deliver to your default FTP or email destination. If you want it to be directed elsewhere, click on a single product line, then click 'Configure Delivery':

ONDEMAND Library Delivery Settings Help brittney Brittney October Test Recl...

Library (DIO Data Repository) Refresh Put on hold Set unwanted Deliver Configure delivery

You have selected 1 Product Line(s).

10 Search... In Library X Previous 1 Next

Supplier	Product Line	Status	Publish	Destination	Created (MT)	Updated (MT)	Validation	AAIA	Manager	Phone	Email
Opticat OB2	Large PIES file	In Library	auto-deliver	default	2018-10-09 13:55:12	-	OnTarget		Brittney Christensen	(801) 542-0560	bchristensen@opticat.net
A Parts Supplier	3/30 Testing Product Center	In Library	on-demand	default	2017-03-30 15:51:55	2017-03-30 15:51:55	OnTarget		Opticat Administrator	(919) 406-8840	bthueson@opticat.net

- This will allow you to update the delivery preferences for the selected product line(s) only.
  - **Note:** this is where you would enter subfolder information.
  - **Example:** <ftp://opticat5.net>

ONDEMAND Library Delivery Settings Help brittney OptiCat Receiver (858)

Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

Data delivery preferences: "Brittney PL ACES, BC ISS Test" Reset company default Save Close

Success: Saved. (2020-02-18 11:23:21 MT)

Delivery Method: FTP

FTP Address: ftp://fakeftp/BrittneyFTP/images

FTP Username: BrittneyFTP

FTP Password: Change password Password strength seems strong!

Use SSL: ☐ Use Passive: ☐ FTP Exact Directory Mode: ☐

Receive Supplier ACES/PIES Assessment: ☐ Receive Supplier ACES/PIES Net Changes: ☐ Receive Supplier ACES Subset: ☐

- After you have entered the destination, always click the blue 'Save' button at the top of the page.
  - You can test the ftp connection here as well.
- This is also where you set up your Image Sync destination for applicable Image Sync lines:
- Choose your desired frequency, this will be displayed in Library Publish column

ONDEMAND Library Delivery Settings Help brittney Brittney October Test Recei...

Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

Data delivery preferences: "Large PIES file" Reset Save Close

Delivery Method: Image Sync Only

Frequency: Select an Option

FTP Address: FTP Address must be a dedicated url for images only.

FTP Username:

ISS Password: Change password

Use SSL: ☐ Use Passive: ☐

Enabled: ☐ Is ISS Lite: ☐

Last Sync Date:

Last Error Message:

- You can copy, export a CSV, TSV, PSV, or print your library and product line status's using the buttons at the bottom of the page:

ONDEMAND

Library
Delivery
Settings
Help
bcd
OptiCat Receiver Test (622)

Library (DIO Data Repository)
Refresh

Please select the Product Line(s) for options.

10

Search...

In Library

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Supplier	Product Line	Status	Publish	Destination	Image Sync	Created (UTC)	Updated (UTC)	Validation	AAIA	Manager	Phone
OptiCat Supplier Test	Brittney ISS Test	In Library	auto-deliver	default	active	2019-06-05 13:56:03	2019-06-05 14:19:11	OnTarget		Aaron Turpin	(800) 631-1775
OptiCat Supplier Test	MelissaTestPL	In Library	auto-deliver	imagesync	active	2019-01-25 11:35:09	2019-06-06 22:02:20	OnTarget		Melissa Douthit	(800) 631-1775
OptiCat Supplier Test	No AutoPublish Test	In Library	click-deliver	default	-	2019-06-05 14:50:09	2019-06-05 14:51:35	OnTarget		Aaron Turpin	(800) 631-1775
OptiCat Supplier Test	OptiCat PIES	In Library	auto-deliver	bchristensen@opticat.net	-	2018-12-06 20:54:38	2019-05-24 17:18:13	OnTarget		Brittney Christensen	(800) 542-0560

Copy
CSV
TSV
PSV
Print

Previous1Next

## CONNECTION PROFILES – SSH KEY FILES

Connection Profiles are an easy way for receivers to create and utilize specific profiles for delivery methods. Available methods of delivery using a Connection Profile are SFTP and Email.

To create a new profile, click the Profile dropdown link and select Create New. Complete the required fields including a name for your profile, your choice of Delivery Method, Enter your email information or FTP credentials.

Connection Profile
Reset
Test FTP
Save

Profile
(create new...)

Name

Method
FTP

FTP Address

FTP Username

FTP Password
Change password
Please make a strong password!

FTP Exact Directory Mode

Use Key File

Use SSL

Use Passive

You also have the option to authenticate to your FTP server using an SSH key instead of password.

Connection Profile
Reset
Test FTP
Save
Delete

Profile
Connection\_Profile\_Example (78)

Name
Connection\_Profile\_Example

Method
FTP

FTP Address
sftp://opticat5.net

FTP Username
sllewelyn

FTP Exact Directory Mode

Use Key File
Download Key File

Instructions: After downloading, install this public half of the key at the destination server.

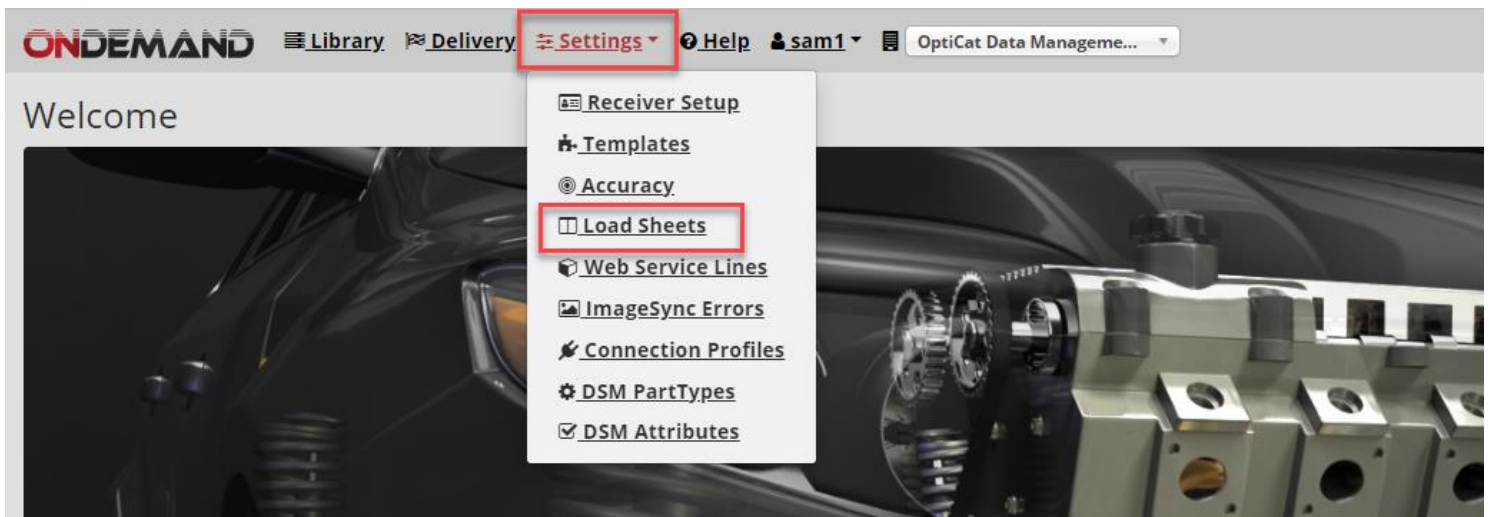
Key Algorithm
Rsa
Key Size
Size2048
Key Type
OpenSsh

Key Fingerprint
07:f4:44:96:ce:92:eb:7e:78:04:34:e7:8c:74:87:e9

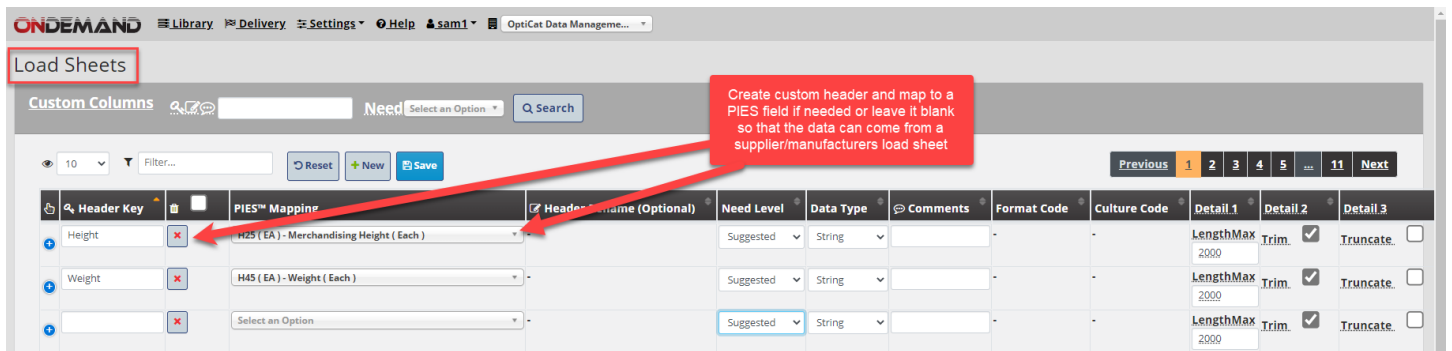


## Load Sheets

- This must first be enabled by OptiCat.
- In the main menu dropdown, choose Settings => Load Sheet
  - This is where the customer/data receiver will create all their load sheet headers.

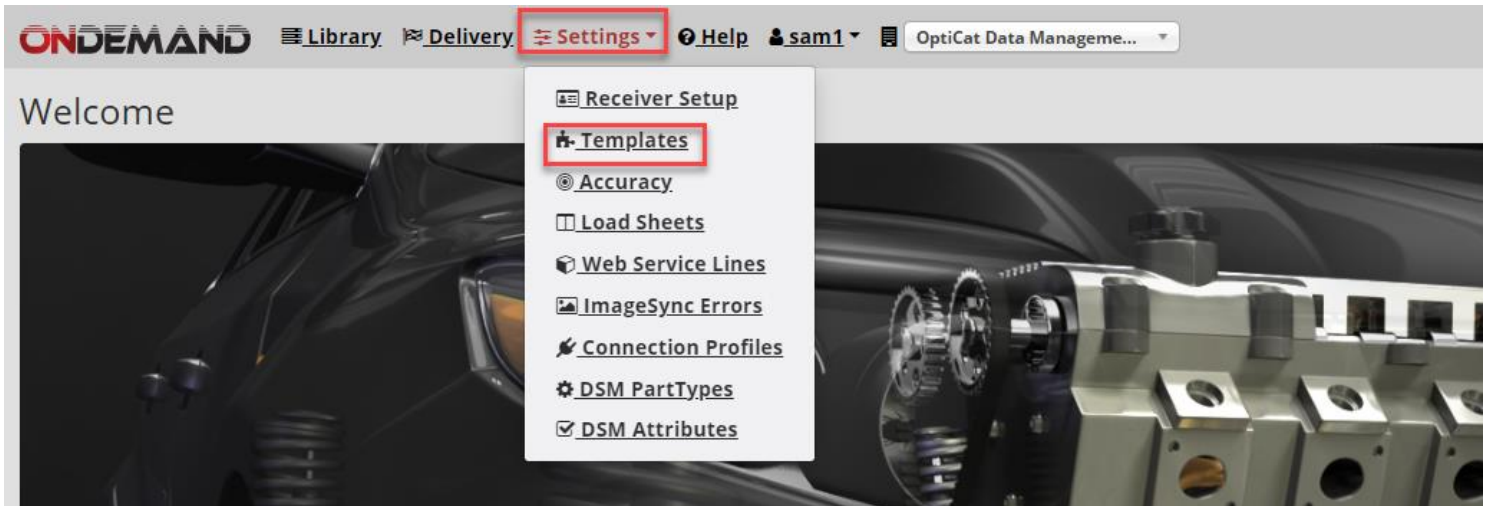


- Load Sheet Headers are all headings that need to be delivered to the customer/data receiver in a Flat Load Sheet File
  - These headers are used in place of PIES Field Header Names
  - Those headers can be mapped to a PIES field on this screen.
- The remaining headers that aren't mapped to a PIES field will still be placed in the template for the customer/data receiver.

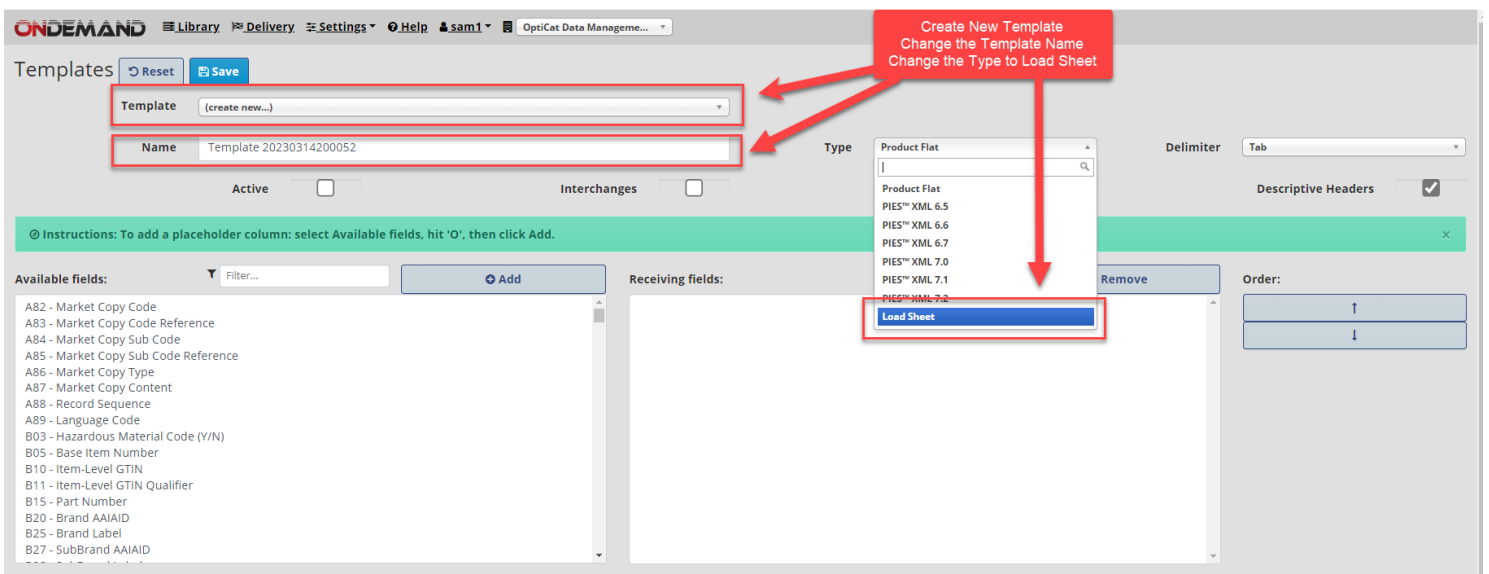


## Load Sheets/Templates

- Templates can also be used with Load Sheets. This is how OptiCat can deliver the data in the order that the customer/data receiver needs.
- Please reach out to OptiCat to verify the number of available templates before creating a new template.
- In the main menu dropdown, choose Settings => Templates



- Choose the option to Create a New Template
  - Change the Template Name
  - Choose the Type: Load Sheet



- Filter “Available Fields” to add:
  - B15 (Part Number)
  - B20 (Brand AAIID)
  - Note: You can change the display header name (see image below)
- Uncheck “Descriptive Headers” (Recommended)
- Check “Use PIES Mapping”
- SAVE

**ONDEMAND** Library Delivery Settings Help sam1 OptiCat Data Manage...

**Templates** [Reset] [Save] After everything is complete, then click "Save"

Template: (create new...)

Name: New Load Sheet

Active: ☐

Descriptive Headers: ☐

Type: Load Sheet

Delimiter: Tab

Use Ples Mapping: ☒

Include Product Attribute Columns: ☐ To add all attribute columns at the end of your load sheet template, click this box.

B15-Part Number Optional Display Header Column Name: Part Number

B20-Brand AAIA ID Optional Display Header Column Name: Brand

Instructions: To add a placeholder column: select Available fields, hit 'O', then click Add.

Available fields: b20 [Add] Before Saving you will need to add B15 and B20 from the left (Available Fields) to the right (Receiving Fields). Filter the Field then click on it. Choose "Add" and it will move over to the right.

Receiving fields: B15 - Part Number

Remove

Order: ↑ ↓

- For more detailed Loadsheet training please reach out to a member of the OptiCat Customer Service Team

## Data Redistribution

- **Redistributors:**

- Data Redistribution allows you to distribute supplier data to your customers through OptiCat Web Services/API.
- You have access to the Raw ACES, PIES and Digital Assets through your library in OnDemand.
- With data redistribution permission from the supplier, your customers (Sub-Channel Partners) can receive the supplier data that you have in your library via Web Services/API only. This will allow your customers (Sub-Channel Partners) to have the supplier data on their websites to sell the parts.
- Easily grant distribution permission to your sub-channel partners:

Web Service Datasets

Refresh param: (any Supplier)

OptiCat Setup

Datasets Refresh

Redistribution Sub-Channel Partner (Data Redistribution) Refresh

10 Filter... Reset Save

Sub-Channel Partners	Supplier	Dataset	Redistribute	Other Redistributor	Last Modified UTC	Last Modifier Name	Last Modifier ID	Blacklist to Sub-Channel Partner	Blacklist to me	Permit to Redistribute	Tag
Sub-Channel Partner (Data Redistribution)	Supplier (Data Redistribution)	Brake Parts	<input checked="" type="checkbox"/>	False	2024-04-05 16:57:06	Samantha Skidmore	2513	False	False	True	private824_1
Sub-Channel Partner (Data Redistribution)	Supplier (Data Redistribution)	Lighting	<input checked="" type="checkbox"/>	False	2024-04-05 16:57:06	Samantha Skidmore	2513	False	False	True	private824_2
Sub-Channel Partner (Data Redistribution)	Supplier (Data Redistribution)	Oil Filters	<input checked="" type="checkbox"/>	False	2024-04-05 16:57:06	Samantha Skidmore	2513	False	False	True	private824_3

Previous 1 Next

- **Sub-Channel Partners**

- As the Sub-Channel Partner, you can easily accept the offering from the Redistributor of supplier data.
- After accepting the offer, this data will be available in your API Key and will feed the backend of your eCommerce website.

Web Service Datasets

Refresh param: (any Supplier)

OptiCat Setup

Datasets Refresh

Redistribution (any Sub-Channel Partner) Refresh

10 Filter... Reset Save

Supplier	Dataset	In Library Lines	Additional Lines Not In Library	Offering Redistributor	Accept Redistributor Offer	WS Blacklist	Can Redistribute	WS Publicized	Last Modified UTC	Last Modifier Name	Last Modifier ID
Supplier (Data Redistribution)	Brake Parts		Brake_Parts__ACES, Brake_Parts__PIES, Brake_Parts__Images	Redistributor (Data Redistribution)	<input checked="" type="checkbox"/>	False	False	False	2024-04-05 16:57:06	Samantha Skidmore	2513
Supplier (Data Redistribution)	Lighting		Lighting__ACES, Lighting__PIES, Lighting__Digital_Assets	Redistributor (Data Redistribution)	<input checked="" type="checkbox"/>	False	False	False	2024-04-05 16:57:06	Samantha Skidmore	2513
Supplier (Data Redistribution)	Oil Filters		Oil_Filters__ACES, Oil_Filters__PIES, Oil_Filters__Digital_Assets	Redistributor (Data Redistribution)	<input checked="" type="checkbox"/>	False	False	False	2024-04-05 16:57:06	Samantha Skidmore	2513

Previous 1 Next

- Please reach out to OptiCat Support Staff for more information and/or assistance.

# IMAGE SYNC

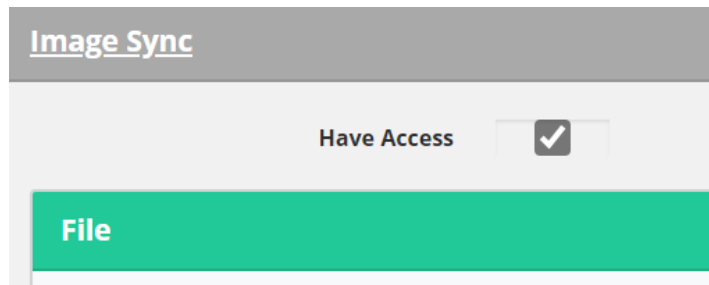
Image Sync is a feature of OnDemand that allows receivers to set specifications and specific file names to image files and digital assets that are being delivered. This includes file format, image dimensions, and file renaming. Net Changes is also another feature that can be used in the setup of Image Sync.

## Prerequisites:

- Image Sync must be enabled by the Supplier for the images and digital assets data packages.
- Image Sync needs to be enabled in OnDemand for the Receiver.
- Receiver must have an FTP delivery storage repository to deliver images to.
- Each Product Line that is set up for Image Sync requires a unique, separate directory.
- Each Image Product Line must be configured to use Image Sync as its method of delivery.

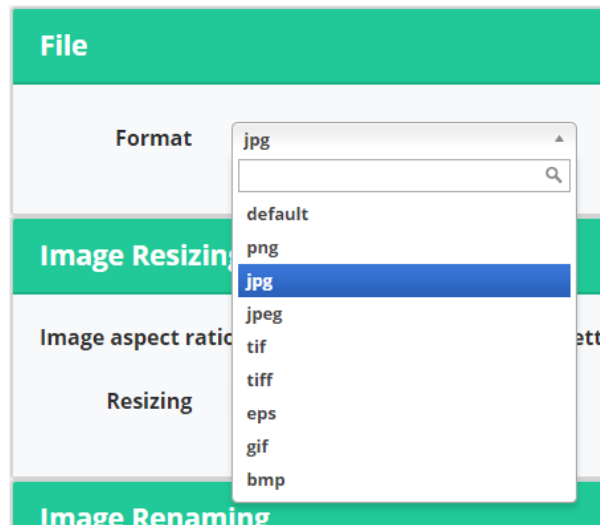
## Settings:

In OnDemand, Image Sync needs to be enabled and set up under Settings => Image Sync



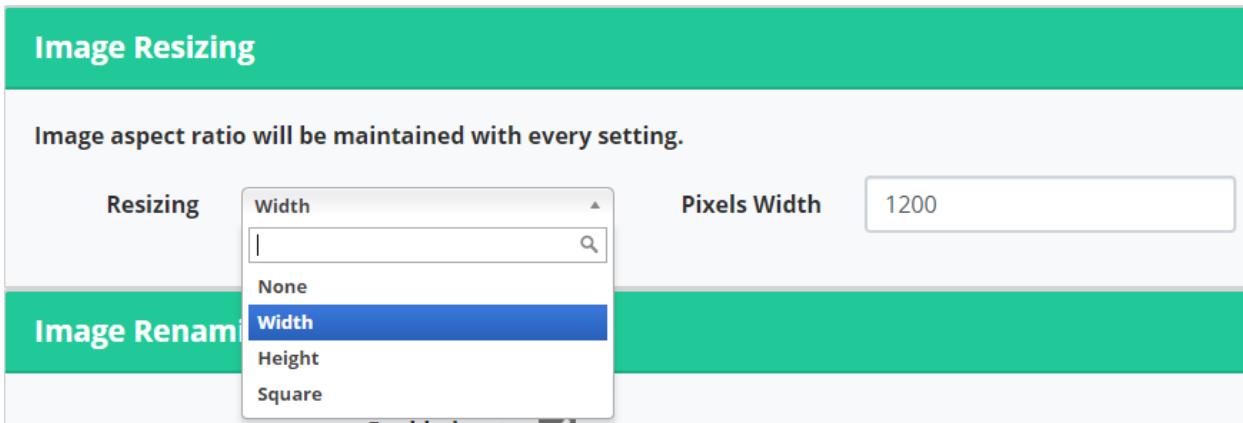
## Go to File => Format

- This enables the receiver to specify specific file formats for the delivered files. The images are converted to the desired format prior to delivery to the receiver's FTP repository.



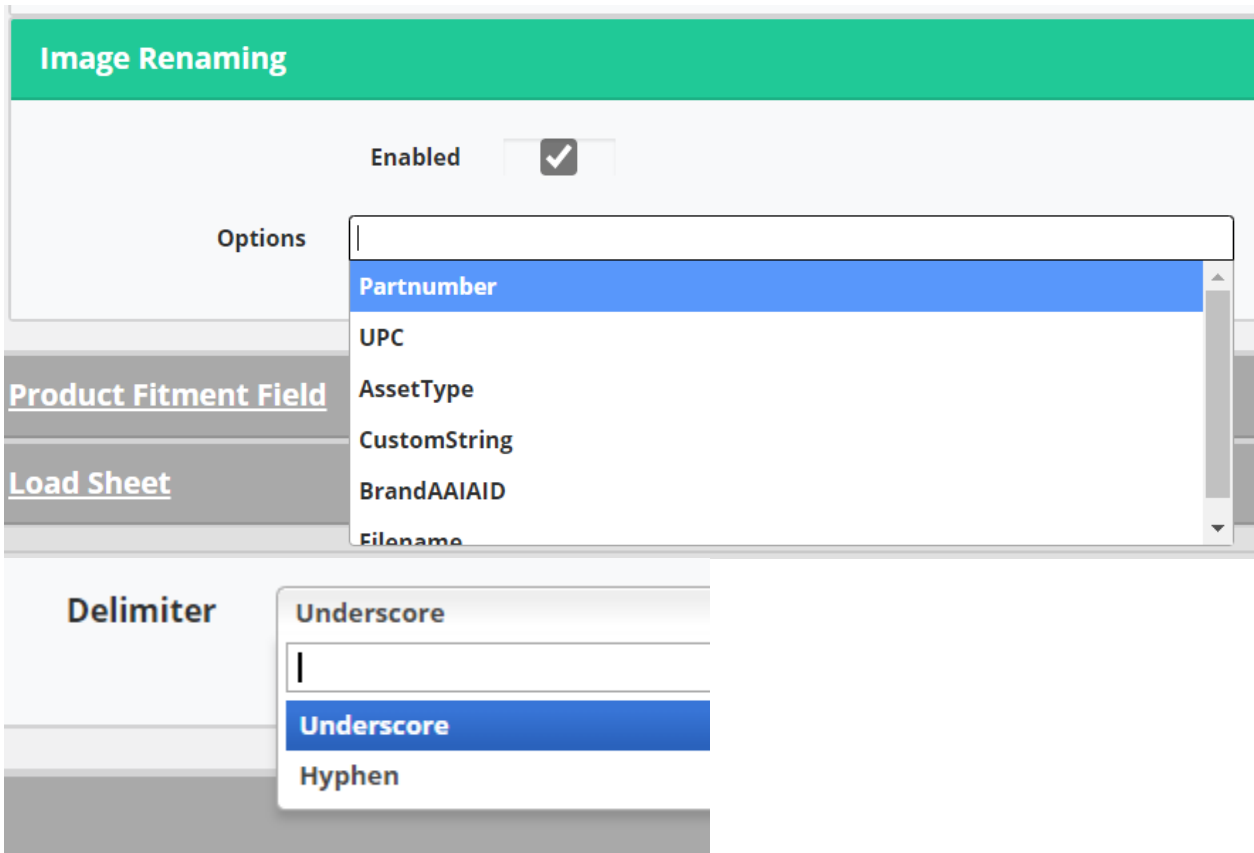
## Image Resizing:

- This option provides the receiver a way to set required image sizes prior to data delivery.
- The width and height options will automatically adjust the width or height to match the chosen specification to preserve the aspect ratio of the Images.
- A third option is to have images converted into square images by adding white space horizontally or vertically to the image.



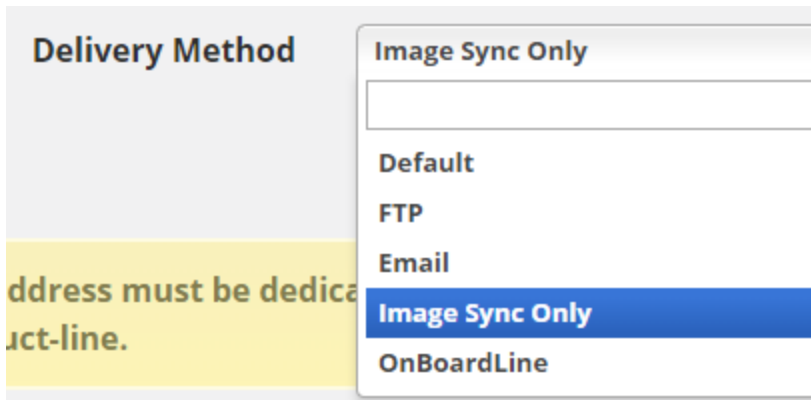
### Image Renaming

- Image Renaming allows the receiver to manipulate and change the filenames of images that are subscribed to prior to delivery.
- Values for the specific options are pulled from the Supplier PIES file accordingly.
- The options can be selected from the Options drop down menu and the delimiter can be selected from the Delimiter drop down menu.
- To use Image Renaming please make sure that the Enabled option is checked.

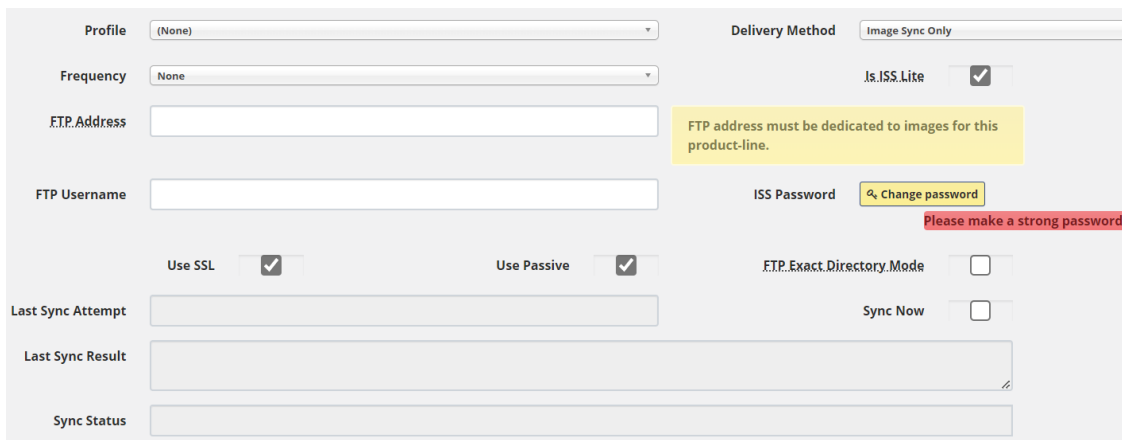


### Setting up a Product Line for Image Sync:

- Image/Digital Assets Product Lines need to be setup to deliver via Image Sync to function correctly.
- Highlight the Image Product Line and select the Configure Delivery Option at the top of the window.
- Once in the configuration screen you will select Image Sync from the Delivery Method drop down menu.



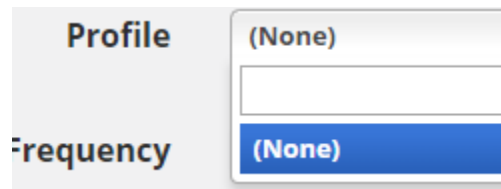
- Note: The window will change to the Image Sync delivery options window.
- The receiver will enter the information required and save accordingly.



#### Options:

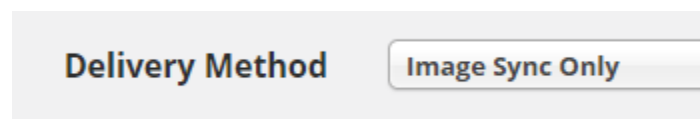
##### Profile:

- This option is used to apply specific Connection Profiles to a Product Line delivery.



##### Delivery Method:

- This needs to be set to Image Sync Only



##### Frequency:

- The frequency or the Image Sync delivery is set here.

Frequency

None

None

Monthly

Quarterly

Annually

FTP Address

FTP Username

#### FTP Address:

- This path needs to be your FTP server hostname along with a specific folder for the images to be delivered to.
- The FTP Exact Directory Mode needs to be checked.
- The FTP Username and Password need to be entered here as well.

FTP Address: sftp://opticat5.net/Example/ImageSyncFolder

FTP Username: acme

ISS Password: [Empty]

FTP address must be dedicated to images for this product-line.

Please make a strong password!

#### Net Changes:

##### ISS Lite:

- The ISS Lite option enables the feature where only changes to the original file are delivered.
- This will result in more efficient deliveries from the Supplier.
- Please note that for ISS Lite to work properly, the original full image file will need to remain in the specified FTP folder location entered in the FTP Address field.

Is ISS Lite ☒

##### Sync Now:

- The Sync Now option provides the receiver an option to manually deliver the Image Product Line at any time regardless of any scheduled frequencies specified above.
- To deliver manually check the Sync Now option and click the Save button above.

Sync Now ☒

#### Status Windows:

- At the bottom of the Image Sync setup window there will be Status fields that provide information in the last submitted Image Sync request.
- The fields include Last Sync Attempt, Last Sync Results, and Sync Status.
  - Last Sync Attempt will show the last Image Sync attempt date and time regardless of outcome.
  - Last Sync Result provides results of last sync attempt either Success or Failure.
  - Sync Status shows the current stage that the last request is in whether “Pending” or “Completed”.



<b>Last Sync Attempt</b>	<input type="text"/>
<b>Last Sync Result</b>	<input type="text"/>
<b>Sync Status</b>	<input type="text"/>

## ISS LITE (IMAGE SYNC SERVICE)

OptiCat saw the need to simplify how to send and receive images in a more efficient way. Previously a supplier would upload a “.zip” file with all images. Then, if there were any changes made to that file, a new “.zip” file needed to be reloaded, even if the file had only changed by 1 image. Image Sync Service (ISS) simplifies how this works. OptiCat takes the supplier’s image folder and unzips the images that are then hosted in our FTP. Receivers then set up individual subfolders on their ftp that are dedicated to each line that they want to set up for Image Sync. Receivers then do an initial sync to their subfolder to receive all images unzipped. The next time there is an update in accordance with the receiver’s sync preferences, we only add the net changes. The receiver is notified of any images that the supplier removed.

ISS Lite vs ISS Regular:

### ISS Regular

- You store the images on your ftp and OptiCat will add/subtract net changes
- This requires a large ftp storage space

### ISS Lite

- You remove the images from your ftp after a sync and store them elsewhere.
- OptiCat only adds new images and emails you about any deletes.

### Features & Facts:

The initial sync typically takes a longer time than updates, depending on how big the file is. Our ISS feature will save all the images to your designated FTP folder. The syncs from then on will vary on how many changes were done to that original master file.

File conversion takes about 1 second per file (per our latest testing).

ISS allows resizing of the images. The desired width or height can be selected, and the original aspect ratio will be preserved. We recommend a selection of width: 1500 in accordance with the Autocare best practices.

ISS allows file renaming; this is limited to the data included in the PIES™ file. All of these settings can be accessed by going to OnDemand>Admin>Manage Image Sync Settings.

If destination folder does not exist on your FTP server, then our system can only create it for you if permissions are allowed.

### ISS Setup:

To determine if a product line is available for Image Sync, you will want to look for the ‘Available’ status:

ONDEMAND Library Delivery Settings Help brittney OptiCat Receiver (558)

Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

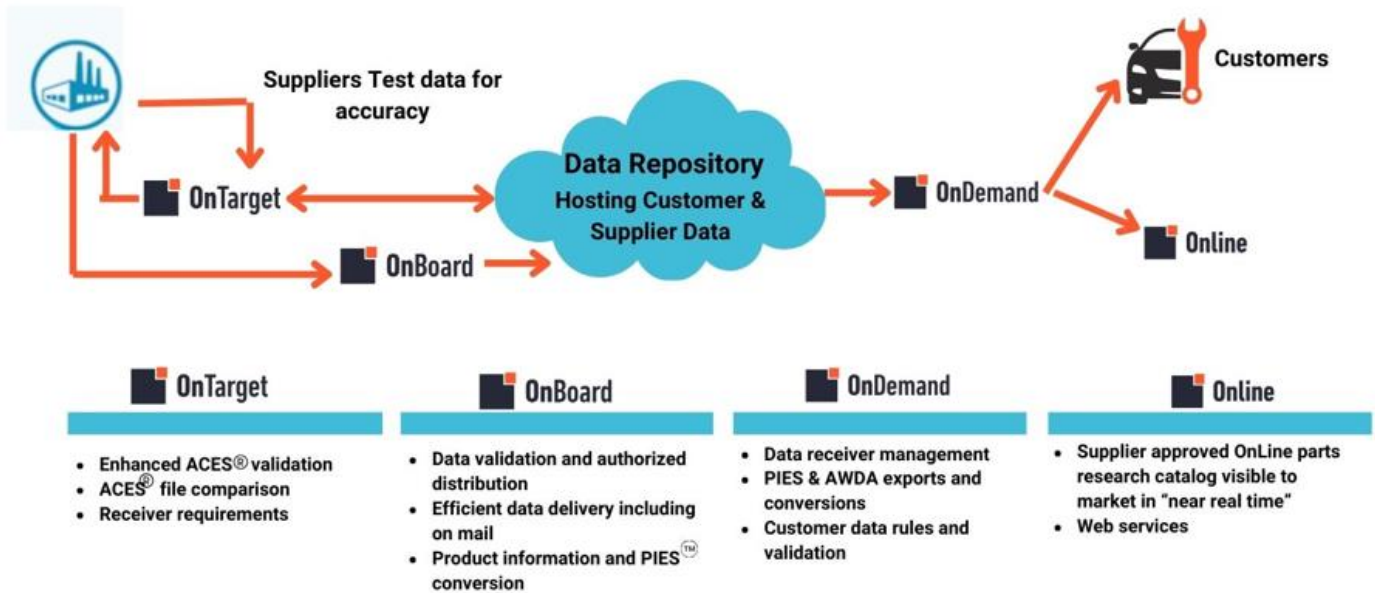
10 Filter... In Library

Supplier	Product Line	Status	Publish	Destination	Method	Image Sync	Created (UTC)	Updated (UTC)	Validation	AAIA	Manager	Phone	Email	PL
ABC Company	BC ISS Test	In Library	auto-deliver	default	Default	Available	2019-02-19 17:44:00	2019-06-12 20:08:21	OnTarget		Brittney Christensen	(801) 542-0560	bchristensen@opticat.net	6033
ABC Company	Brittney PL ACES	In Library	auto-deliver	default	Default	Unavailable	2018-11-05 22:22:17	2019-02-20 14:38:12	OnTarget		Brittney Christensen	(801) 542-0560	bchristensen@opticat.net	5724
ABC Company	ISS File Sync	In Library	auto-deliver	default	Default	Available	2017-08-18 17:04:10	2019-06-24 17:19:31	OnTarget		Brandi Williams	(801) 542-0560	bwilliams@opticat.net	4123

1. Click on the product line so that it is highlighted orange, then click 'configure delivery'.
2. This will bring you to the 'Data Delivery Preferences' screen
  - a. Select 'Image Sync Only' in the Delivery Method dropdown.
  - b. Check 'Enabled'.
3. Select a frequency that the sync will run.
  - a. Monthly, Quarterly, or Annually.
4. Input your FTP Address, username, and password.
  - a. Check applicable box(es) that your ftp requires
    - i. Use SSL, Use Passive, FTP Exact Directory
5. Check 'Sync Now'. The initial sync will begin.

Full Refresh:

Please contact OptiCat for a full refresh of images.



#### AUTOCARE.ORG DISCLAIMER

ACES® TM and PIES™ TM are Auto Care Association's trademarks, which we use under a license agreement. Our products use Auto Care Association's vehicle, part, fitment, and qualifier reference tables (VCdb, PCdb, PAdb, and Qdb) provided by Auto Care Association. These Auto Care Association Standards and Tables are used across the auto care industry to improve the flow of data between trading partners.

## Appendix A – Invalid Characters in Element Data

The following table illustrates the various ASCII characters that are invalid when used in certain PIES fields. Other than the characters identified below, please note that PIES data fields should contain standard ASCII characters only.

Character	Description	Part Number Fields	Description Fields	Price Sheet Number Fields	Bar Code Characters
;	Semi-colon	P		P	P
[	Left bracket	P	P	P	P
]	Right bracket	P	P	P	P
{	Left brace	P			P
}	Right brace	P			P
~	Tilde	P	P	P	P
	Bar(Pipe)	P	P	P	P
,	Comma	P			P
""	2 Quotes	P	P	P	P
%	Percentage	P			P
!	Exclamation	P			P
\$	Dollar sign	P			P
*	Asterisk	P	P	P	P
^	Circumflex(Carot)	P	P	P	P
\	Back slash	P	P	P	P
?	Question mark	P			P
'	Apostrophe	P			P
"	Quote	P			P
	Space				P
/	Forward slash				
.	Period				
-	Dash (hyphen)				
P	Character is <b>prohibited</b> from use in that type of field. Example: Commas are not allowed in Part Number Fields.				

# OnTarget

## **Overview**

OptiCat's purpose is to provide a turn-keyed, SaaS (Software as a Service) technology suite that enables automotive aftermarket manufacturers to deliver important product data to its distribution channel partners in a one-step (do-it-once), validated (do-it-right) and pervasive (do-it-everywhere) way. OptiCat's primary business strategy is a "self-service" technology model that enables industry partners to share valuable information, via OptiCat Technology Suite. OptiCat is exclusively a technology provider.

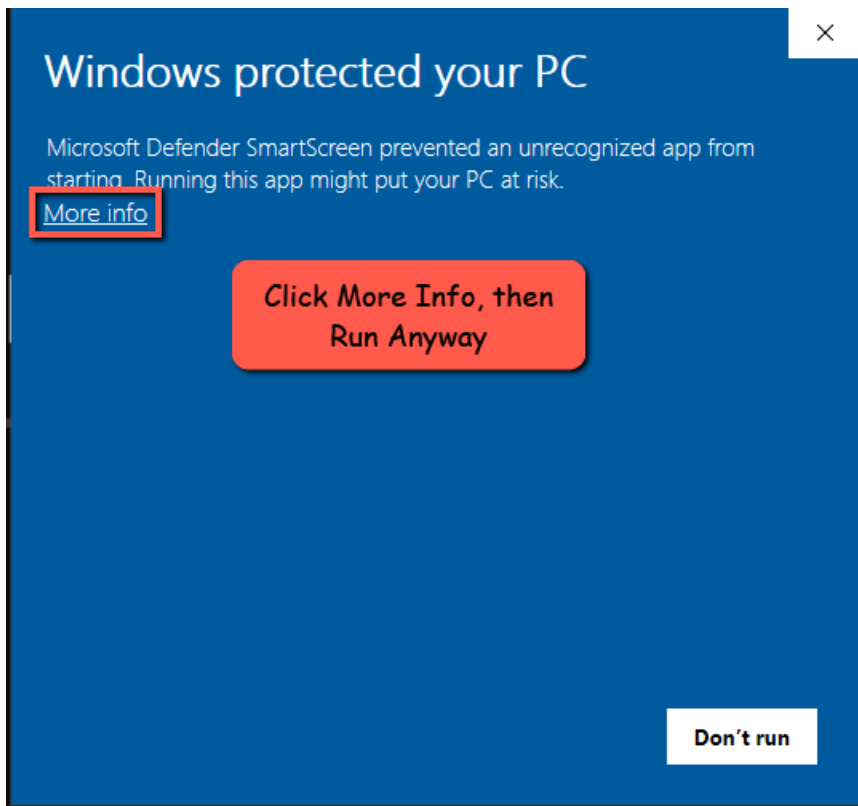
To gain access to OnTarget, browse to this URL:

<http://www.opticatnetwork.com/OnTarget>

You may have to allow access for the download. If your firewall prevents this, please contact OptiCat support.

## **Installation Instructions**

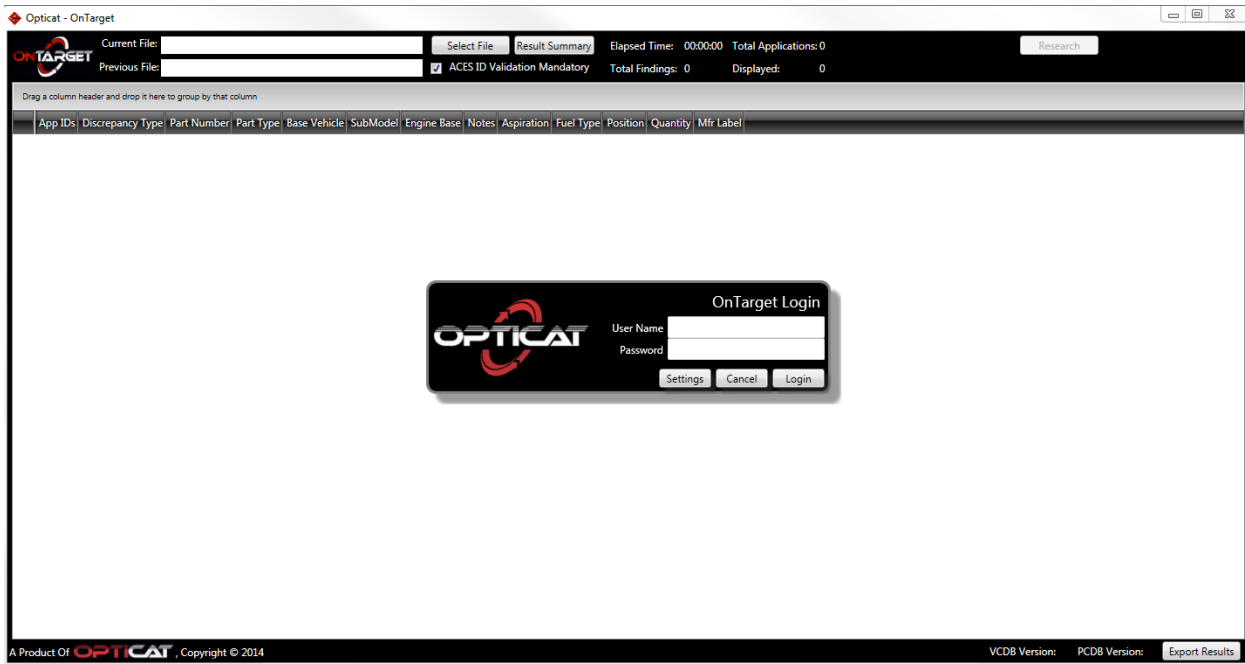
- Click Install
- Setup will download.
- Open
- Windows protection warning may pop up
- Click on More Info and Run Anyway



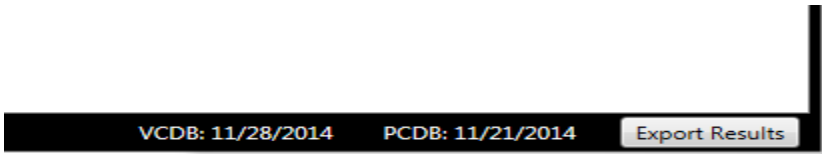
- 
- Install
- Windows protection will pop up again, proceed with the same steps
- More Info and Run Anyway.

### **Logging in**

You will log in with your current OnBoard credentials.



Upon installation, current VCDB/PCDB tables will be loaded. VCDB/PCDB dates are displayed in the lower left hand corner, next to Export Results.



### Select File:



**OnBoard Product Line:** OnTarget Test ▼

**OnBoard Product File:** ▼

**VCDB Version:** ☒ Current VCDB ☐ File VCDB

**PCDB Version:** ☒ Current PCDB ☐ File PCDB

**Find Discrepancy Types:**

- ☒ Duplicates
- ☒ Overlaps
- ☒ Overlaps w/Notes
- ☒ Note Conflicts
- ☒ Quantity Conflicts
- ☒ Conflicted Records
- ☒ Part-Type Assignments
- ☒ Verify ACES Element Values
- ☒ Verify ACES Combinations
- ☒ Validate = No
- ☒ N/R Records

**Previous File:** ▼

- ☒ Find New/Deleted Apps
- ☒ Find New/Deleted BaseVehicles
- ☒ Find New/Deleted Parts
- ☒ Find New/Deleted Part Types
- ☒ Find New/Deleted Part/Type Combinations
- ☒ Find Potential Changes

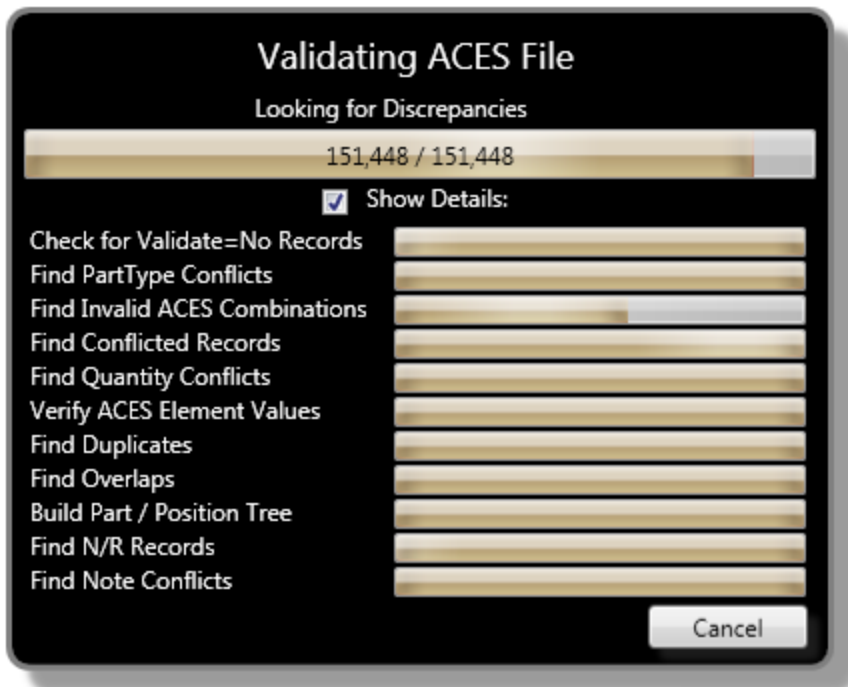
**Utilities:**

- ☒ Build Part-Type/Position List

Cancel Continue

If you will be uploading the file to OnBoard, you will need to select the Product Line and the Product File Name. If the Product line is new you will need to first import the file into OnBoard. You can choose to run the file against the current VCDB/PCDB or use the File VCDB/PCDB date. Select discrepancy types you would like. The first time you run a file, you can skip adding the previous file, and just select continue. Browse to the file you would like to run. Validation will run, click show details to see progress.





When Validation is complete, click on View results.

If there was a previous file loaded then you can choose File Comparison Now. If this is the first time then click exit to view results.

File Results				
Discrepancy Type	Count	Accuracy		
Total Applications:	4			
Current File Discrepancies:	0	100 %		
Duplicates:	-	-		
Overlaps:	-	-		
Overlap w/Notes:	-	-		
Note Conflicts:	-	-		
Quantity Conflicts:	-	-		
Conflicted Records:	-	-		
PartType Assignments:	-	-		
Invalid ACES Elements:	-	-		
Invalid Combinations:	-	-		
Validate = No:	-	-		
N/R Records:	-	-		

Export To OnBoard
Parts/Positions
File Comparison
Exit

In the screen above when you hover over a discrepancy type, a brief definition will appear.

**Duplicates:** Apps that contain entirely duplicate elements.

**Overlaps:** Apps with the same part type that both cover the same vehicles in the VCDB and have the same or NO notes.

**Overlap w/Notes:** Apps with the same part type that both cover the same vehicles in the VCDB but have DIFFERENT notes

**Note Conflicts:** Apps which hare all elements,but have different notes.

**Quantity Conflicts:** Apps which share all elements,but have different quantities.

**Conflicted Records:** Apps that share all elements but have different part numbers.

**PartType Assignments:** Apps with the same part number, but different part types.

**Invalid ACES® Elements:** Apps which cover No vehicle in the VCDB.

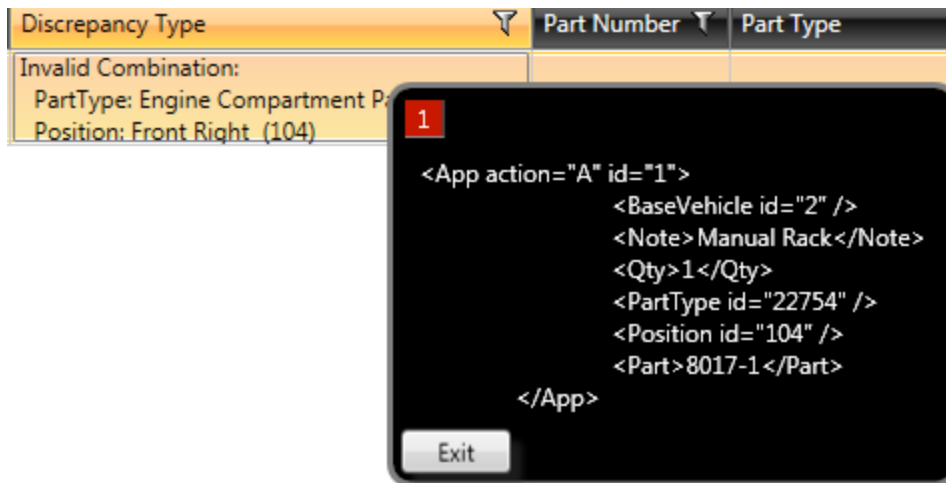
**Invalid Combinations:** Apps with an element value that does not appear in the VCDB.

**N/R Records:** Apps that contain an element with an ID of N/R.

When done viewing click exit to go to the actual results.

You can view the app from this page by clicking in the field for Discrepancy Type.

If there was a comparison, app from both files would be shown here.



If you would like to export these results in .csv format, you can by selecting export results in the lower right-hand corner.

### **File Comparison:**

Select File. Again, if you are importing this file to OnBoard Select the Product Line and Product File. Select VCDB/PCDB Version. Choose Discrepancies. Then in Previous file select the file you would like to compare to the new one being imported & then choose the additional discrepancies. Continue, to browse to new file.

**OnBoard Product Line:** OnTarget Test

**OnBoard Product File:**

**VCDB Version:** ☒ Current VCDB ☐ File VCDB

**PCDB Version:** ☒ Current PCDB ☐ File PCDB

**Find Discrepancy Types:**

- ☒ Duplicates
- ☒ Overlaps
- ☒ Overlaps w/Notes
- ☒ Note Conflicts
- ☒ Quantity Conflicts
- ☒ Conflicted Records
- ☒ Part-Type Assignments
- ☒ Verify ACES Element Values
- ☒ Verify ACES Combinations
- ☒ Validate = No
- ☒ N/R Records

**Previous File:** OnTarget\_FileCompare\_One.xml

- ☒ Find New/Deleted Apps
- ☒ Find New/Deleted BaseVehicles
- ☒ Find New/Deleted Parts
- ☒ Find New/Deleted Part Types
- ☒ Find New/Deleted Part/Type Combinations
- ☒ Find Potential Changes

**Utilities:**

- ☒ Build Part-Type/Position List

Cancel Continue

After file is selected, validation will begin. You can then view the results for the now current file.

File Results			
Discrepancy Type	Count	Accuracy	
Total Applications:	4		
Current File Discrepancies:	1	75 %	
Duplicates:	0	100 %	
Overlaps:	0	100 %	
Overlap w/Notes:	0	100 %	
Note Conflicts:	0	100 %	
Quantity Conflicts:	0	100 %	
Conflicted Records:	0	100 %	
PartType Assignments:	0	100 %	
Invalid ACES Elements:	0	100 %	
Invalid Combinations:	1	75 %	
Validate = No:	0	100 %	
N/R Records:	0	100 %	

Export To OnBoard   Parts/Positions   **File Comparison**   Exit

Click File Comparison

File Results

	Count	% Change
Total Applications:	4	-
Comparison Differences:	15	-
New Apps:	3	75 %
Deleted Apps:	3	75 %
<input checked="" type="radio"/> New BaseVehicles:	0	0 %
<input type="radio"/> Deleted BaseVehicles:	0	0 %
<input type="radio"/> New Parts:	1	25 %
<input type="radio"/> Deleted Parts:	1	25 %
<input type="radio"/> New Part Types:	1	25 %
<input type="radio"/> Deleted Part Types:	1	25 %
<input type="radio"/> New Part/Type Combos:	2	50 %
<input type="radio"/> Deleted Part/Type Combos:	2	50 %
<input type="radio"/> Potential Changes:	1	25 %

Distinct List

BaseVehicle	BaseVehicle ID	Count
-------------	----------------	-------

Discrepancy View

Export List

Exit

**New Apps:** An app that did not appear in the previous file.

**Deleted Apps:** An app that appeared in the previous file, but not in this one.

**New Base Vehicles:** An App with a BaseVehicle which did not appear in the previous file.

**Deleted Base Vehicles:** An App with a BaseVehicle which appeared in the previous file, but not in this one.

**New Parts:** An App for a part which did not appear in the previous file.

**Deleted Parts:** An App for a part which appeared in the previous file, but not this one.

**New Part Types:** An App with a part type which did not appear in the previous file.

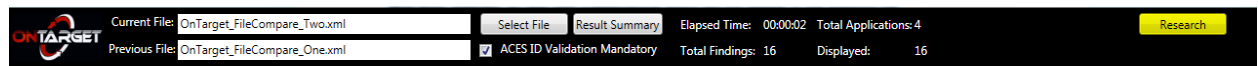
**Deleted Part Types:** An App with a part type which appeared in the previous file, but not in this one.

**New Part/Type Combos:** An App with a Part/PartType combination which did not appear in the previous file.

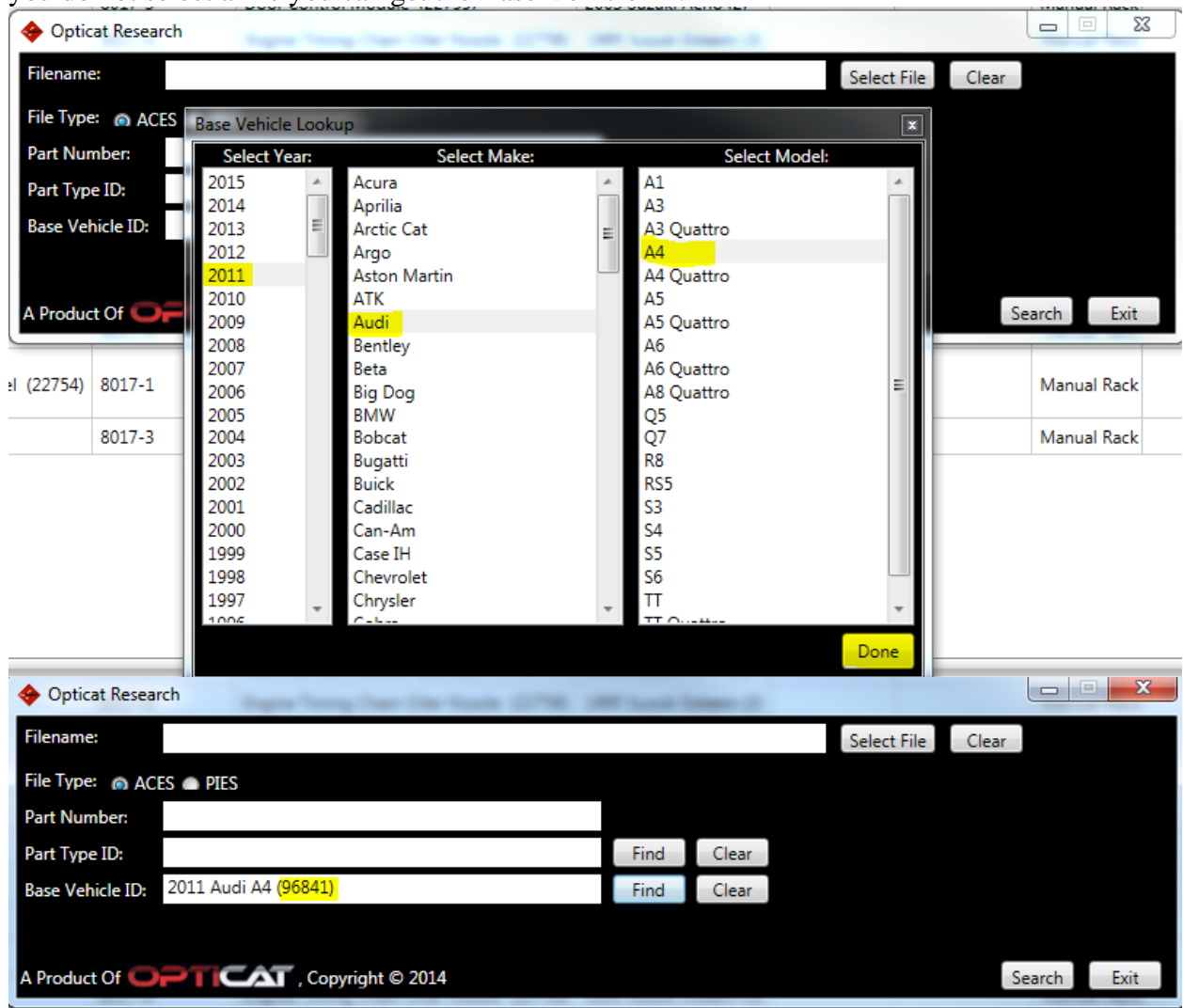
**Deleted Part/Type Combos:** An App with a Part/PartType combination which appeared in the previous file, but not this one.

**Potential Changes:** Build a list of Apps that appear to be changes.

## Research:



With the research tool you have the ability to select an ACES® or PIESTM file & search with in the file or, if you do not select a file you can get the Base Vehicle ID.



## Assessments:

To deliver Assessments & Net Changes you will need to click on Export to OnBoard.

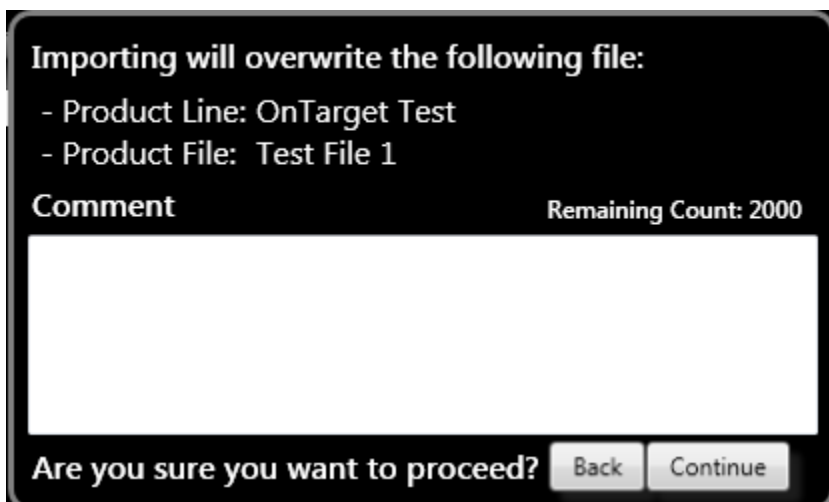


The 'Assessment Approval' dialog box features a sidebar with radio buttons for selecting assessment types: 'New Base Vehicles' (selected), 'Deleted Base Vehicles', 'New Parts', 'Deleted Parts', 'New Part Types', and 'Deleted Part Types'. The main area displays a table with columns: ID, Result, Count, Accept, and Comments. At the top, it shows 'Accepted: 0', 'Remaining: 0', 'Total: 0', and 'Total Remaining: 4'. At the bottom right are 'Continue' and 'Cancel' buttons.

ID	Result	Count	Accept	Comments
----	--------	-------	--------	----------

### Approve Each Assessment

- Accept and make a comment if you would like.
- If you do not accept the assessment note, it will show False in the report instead of True.
- Right click to save comments all the way down, also you can right click in the accept column to select all the way down the list.
- When you select continue, be sure the Product Line & Product File are the correct location you want the file to be uploaded to in OnBoard.
- Feel free to add comments (sent as a text document)



The 'Importing will overwrite the following file:' dialog box lists '- Product Line: OnTarget Test' and '- Product File: Test File 1'. It includes a 'Comment' field and a 'Remaining Count: 2000'. At the bottom, it asks 'Are you sure you want to proceed?' with 'Back' and 'Continue' buttons.

- Continue.

Your file will now be loaded into OnBoard.

If your product line is marked Auto-Publish it will automatically be sent to Channel Partners with the In Library status.

## **Private Label Generation:**

The feature was implemented to help clients sell parts under their own code/part number. This feature is in OnTarget, when you choose a PIES™ file and export it to OnBoard OnTarget will give you the option to include a mapping file.

Steps to follow:

1. Load Master ACES®/PIES™ file to OnBoard, note Product Line
2. Create a new PRIVATE Product Line (use name in mapping file)
3. Open OnTarget, select master file to noted Product Line
4. Validate
5. Export to OnBoard
6. Provide Private Label Map

The screenshot shows a software window with a dark background. At the top, it says "Importing will overwrite the following file:" followed by two lines: "- Product Line: ABC COMPANY - ACES" and "- Product File: PIES TEST". Below this is a text input field and a button labeled "Provide Private Label Map". Underneath is a section labeled "Comment" with a large text area and a "Remaining Count: 2000" indicator. At the bottom, it asks "Are you sure you want to proceed?" with "Back" and "Continue" buttons.

You may select to change your header values for new generated file.

7. Save & Continue, this will export it to OnBoard

You can create your private label or mapping file in Excel. The process to generate private labels are simple but rules do apply.

### **Current Private Label Generation rules:**

1. The following header values will be considered part columns:
  - a. Part
  - b. Part number
  - c. Part #



2. SpACES® and case are disregarded, so “Part Number”, “part number”, and “Partnumber” would all work.
3. One column containing JUST one of the values from point 1 must be present and will be considered the “source” part number.
4. Any other column will be parsed using the following format “<company name> part number”
  - a. Example: TestCompany part number
5. A file will be created for each of the columns from point 4.
6. When uploading the file, we will look for a product line with the name of the company and the term “ACES®” or “PIESTM” in it.
  - a. Example: A product line named “TestCompany – ACES®” would match the item from example 4
7. When a product line is found, we will look for the following product file:
  - a. A product file of type ACES®
  - b. A product file of type OTHER, and with ACES® in its name.
8. If multiple matches are made for either product line or product file, a match will not be made.

	A	B	C	D	E
1	PartNumber	TestCompany partnumber			
2	1340000	BW102			
3	1340001	BW105			
4	1330001	BW106			
5	1340004	BW111			
6	1340005	BW112			
7					
8					

#### On Target Header determination:

For example, let’s say these are the headers:

*“MM Part, Part number, bowers part#”*

	A	B	C	D	E
1	MM Part	Part Number	Bowers part#		
2	MM102	1340000	BW102		
3	MM105	1340001	BW105		
4	MM106	1330001	BW106		
5	MM111	1340004	BW111		
6	MM112	1340005	BW112		
7					
8					

OnTarget will determine the following:

1. Column 2 (Part Number) is the source column and has part numbers matching the source ACES®/PIES™ file (original xml).
2. We need 2 generate 2 documents, one for the receiver “MM”, and one for the receiver “bowers”
3. Upon uploading the files, the following would happen:
  - a. OnTarget will look for a product line with a name containing MM and ACES®/PIES™, depending on the file.
    - i. Upon finding it, it will look for 1 product file of type ACES® or of type Other with ACES® in its name.
  - b. OnTarget will look for a product line with a name containing bowers and ACES®/PIES™
    - i. Upon finding it, it will look for 1 product file of type ACES® or of type Other with ACES® in its name.
4. OnTarget will then report back what determinations were made.

### New Features:

We have added the ability to change BrandAAIAID, Brand and BrandID as of now, we will add more eventually or if requested by clients.

	A	B	C	D	E
1	MM Part	Part Number	Bowers part#	MM brandaaiaid	
2	MM102	1340000	BW102	GL505	
3	MM105	1340001	BW105	GL506	
4	MM106	1330001	BW106	GL507	
5	MM111	1340004	BW111	GL508	
6	MM112	1340005	BW112	GL509	
7					
8					

The same rules apply to the new columns; you can revisit these rules [here](#).

### Subsets:

Not Published yet.

### **PIES™ Enhanced Validation in OnTarget**

- PIES™ ENHANCED VALIDATION
  - Performs schema validation
  - Validates the PIES™ filename
- ITEM SEGMENT
  - Validates part number length
  - Validates part number characters

- Validates Hazardous Material Code
  - Validates Part Terminology in relation to zeros
  - Validates Quantity Per Application Qualifier
- DESCRIPTION SEGMENT
  - Validates mandatory description codes
  - Checks for invalid description codes
  - Checks for invalid description data
- EXPI, DIGITAL ASSETS AND PRICING SEGMENT
  - Validates MSR and MSD in EXPI when Hazardous Material Code is Y
  - Validates mandatory EXPI codes
  - Validates Non-palletized codes
  - Checks for invalid EXPI codes
  - Checks for core in EXPI with CRG and ZZ1 price types
  - Validates price UOMs
  - Validates price types
  - Checks for mandatory price types
  - Validates digital asset filenames
  - Checks for mandatory digital asset fields
  - Validates digital asset data
  - Validates primary digital asset type fields
  - Validates front orientation view
  - Validates asset dimensions
  - Validates orientation view if file is non-image
  - Validates file extension
- PRODUCT ATTRIBUTE SEGMENT
  - Validates mandatory attribute ids
  - Validates AAP\_UDA\_33 data.
  - Checks for invalid product attribute values
- PACKAGE SEGMENT
  - Check valid UOM codes
  - Verifies package level GTIN for EA
  - Verifies package GTIN or bar code characters
  - Validates GTIN characters
  - Validates dimensions UOM
  - Validates weight UOM
  - Validates mandatory and unique EA
  - Validates inner pack and case
  - Validates cubic volume and cubic weight against EA
- PART INTERCHANGE SEGMENT
  - Validates maintenance type
- TRAILER SEGMENT
  - Verifies correct item count

## Common Warnings

- The 'Transfer Date' element is invalid or the 'Effective Date' element is in valid. The proper format is yyyy-mm-dd (a dash not slashes).
- The element 'Header' has invalid child element 'PcdbVersionDate'. List of possible elements expected: 'QdbVersionDate'. Anytime you see the word “Child” it is indicating that the items are not in the proper sequence. Swap the pcdbVersionDate with the QdbVersionDate. Also, even if you do not use the QdbVersion date it should be populated with something.

## Assessments:



## OnTarget Pro Assessment

Net Change  
Data Optional



### Adds XML

```
</App>
<App action="A" id="2">
  <BaseVehicle id="3803"/>
  <FuelType id="6"/>
  <BedLength id="16"/>
  <Note>25 Gallon</Note>
  <Qty>1</Qty>
  <PartType id="6268"/>
  <Part>FLGM23B</Part>
</App>
```



### Deletes XML

```
<App action="D" id="1">
  <BaseVehicle id="3046"/>
  <FuelType id="6"/>
  <BedLength id="15"/>
  <Note>25 Gallon</Note>
  <Qty>1</Qty>
  <PartType id="6268"/>
  <Part>FLGM23B</Part>
</App>
```

This feature is now available.



## OnTarget Pro ACES File Comparison

- Supplier's are be able to avoid the risk of accidentally delivering data where hundreds of applications have been mistakenly dropped
- Designed to build trust between you and your receivers

File Results			Distinct List		
	Count	% Change			
Total Applications:	141,020	-			
Total Differences:	1,744	-			
New Apps:	1,384	0 %			
Deleted Apps:	215	0 %			
New BaseVehicles:	111	0 %			
Deleted BaseVehicles:	6	0 %			
New Parts:	4	0 %			
Deleted Parts:	0	0 %			
New Part Types:	0	0 %			
Deleted Part Types:	0	0 %			
New Part/Type Combos:	5	0 %			
Deleted Part/Type Combos:	0	0 %			
Potential Changes:	19	0 %			

BaseVehicle	BaseVehicle ID	Count
1974 Chevrolet C30 Pickup	14019	128
1972 Chevrolet C30 Pickup	14017	80
1971 Chevrolet C30 Pickup	14016	71
1973 Chevrolet C30 Pickup	14018	70
1970 Chevrolet C30 Pickup	14015	54
1969 Chevrolet C30 Pickup	14014	49
1968 Chevrolet C30 Pickup	14013	46
2015 Ford Fusion	130047	24
1965 Chevrolet C30 Pickup	14010	20
1962 Chevrolet C30 Pickup	14007	19
1964 Chevrolet C30 Pickup	14009	19
1966 Chevrolet C30 Pickup	14011	19
2015 Ford Taurus	129946	15
2015 Lincoln MKZ	130057	14
1963 Chevrolet C30 Pickup	14008	11
2015 Acura ILX	130060	11
1967 Chevrolet C30 Pickup	14012	8
2015 Chevrolet Camaro	129966	8
1961 Chevrolet C30 Pickup	14006	7
2015 Nissan Altima	130045	7

Discrepancy View   Export List   Exit