

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"

TABLE OF CONTENTS

ONBOARD

OVERVIEW

LOGGING IN

MANAGING YOUR ACCOUNT

MANAGING USERS

PRODUCT LINES

IMPORTING DATA

ON HOLD

PUBLISHING DATA

REPLACING A FILE

LOAD SHEETS

RECEIVERS

FRANCHISE SETUP

REPORTS

DATA LIVE

DATA REDISTRIBUTION

HELP

APPENDIX A

DESCRIPTION CODES

ONDEMAND

OVERVIEW

LOGGING IN

MANAGING YOUR ACCOUNT

RECEIVER PROFILE

FTP

EXPORT SETTINGS

TEMPLATES

MANAGING ACES REQUIREMENTS

DELIVERY REPORT

DATA LIBRARY

CONNECTION PROFILES - SSH KEY

LOAD SHEETS/TEMPLATES

DATA REDISTRIBUTION

IMAGE SYNC

PIES APPENDIX A

ONTARGET

OVERVIEW

LOGGING IN

SELECT FILE

FILE COMPARISON

RESEARCH

ASSESSMENTS

PRIVATE LABEL GENERATION

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.

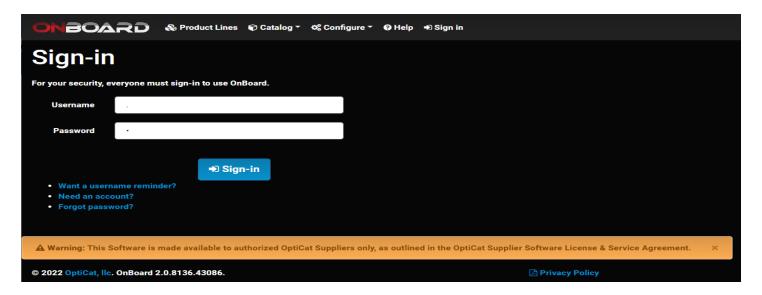
To gain access to OptiCat OnBoard, browse to this URL:

www.opticatnetwork.com/OnBoard

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



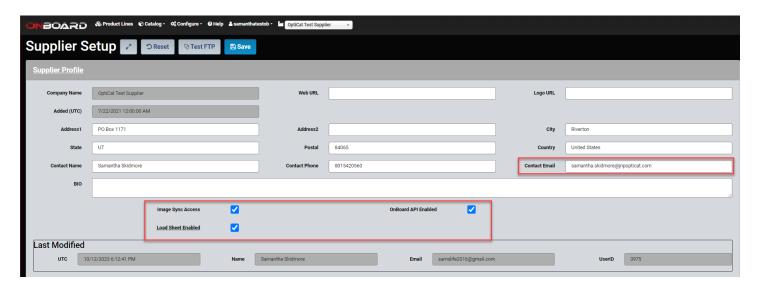
- Sign in from the landing page.
- Enter your username and password provided to you by OptiCat's support team.
- If you forget your username or password, use the provided links to enter the email or username originally linked to your account.
 - o A reset link will then be sent to your email address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

Managing Your Account



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

Supplier Profile



- 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.

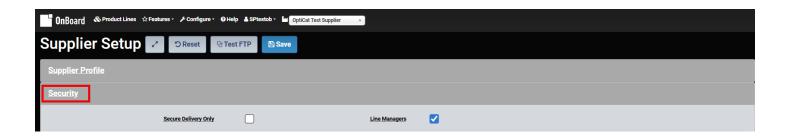
Image Sync Access: OptiCat Admin will set all of this up. It is used for Channel Partners using Image Sync utility.

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

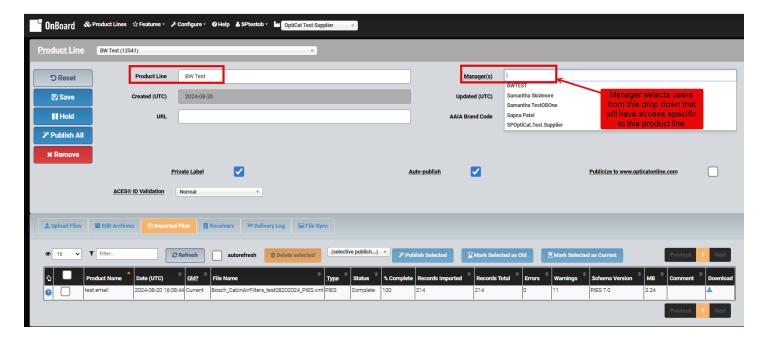
Load Sheet Enabled: These settings are adjusted by OptiCat Admin only, please contact us if you have any questions.

Security

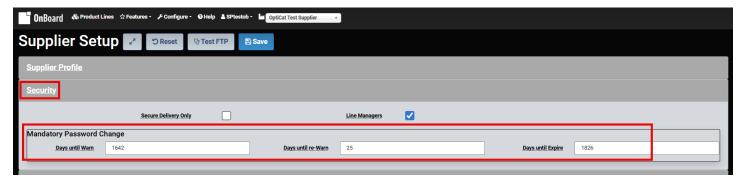
- Secure Delivery Only: Export data delivery to secure FTP sites only.
 - Non-secure FTP sites and email exports will not be delivered and will be cancelled.
 - o Secure delivery requires one of the following: SFTP, FTPES, FTPS, or FTP (with "use-ssl").



- Line Managers: Contact OptiCat to set up Line Manager functionality.
 - Once Line Manager functionality is set up, User set up with Manager role will be able to set up user access specific to the product lines. Users can only access certain product line(s) when Line Manager is set up.



- 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-Warns
 - 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 PIES™ validation options which can be selected from Supplier Profile. OnBoard can use OnTarget Validation if it is selected here.

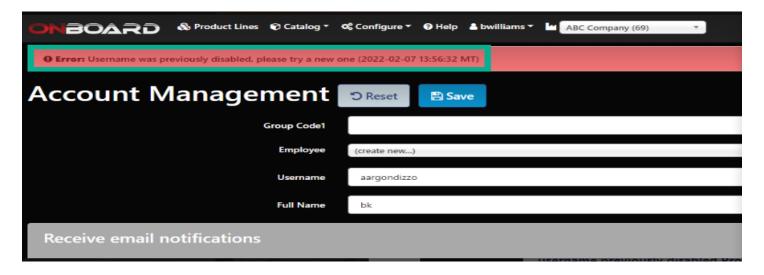
Managing Users



- 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.
 - <u>Note</u>: The difference between "User' rights and 'Manger' rights is a 'Manager' can create, delete, and manage the user's login profile in their organization.

Receive Email Notifications:

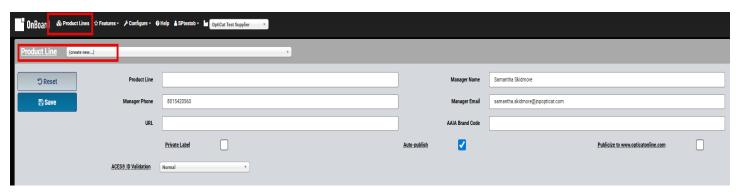
- **Data-Import-Failed:** When this box is checked it turns on the notifications, letting the contact manager know a file has failed validation.
- **Data-Request:** When this box is checked it turns on the notification that lets the contact manager know the receiver would like to access the product line.
- Archive Edits Failed: When this box is checked it turns on the notifications, letting the contact manager know an image archive file has failed.
- **Archive Edits Succeeded:** When this box is checked it turns on the notifications, letting the contact manager know an image archive file has succeeded.
- **Delivery Failure:** When this box is checked it turns on the notifications, letting the contact manager know about delivery failure.



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



- 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 1st 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 PIESTM", or "Manufacturer Filter Images" etc.).
 - o Do not include any <u>date</u> format in the Product Line name.
- Enter your Brand AAIA ID.
 - OnDemand portal.
- 'Manager Name', 'Manager Phone', and 'Manager Email' will default automatically to the main contact as set in the supplier profile page.
 - o 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®, PIESTM, and Images. Each file type should be in a separate product line (i.e. ACES® files should be uploaded to your ACES® product line, PIESTM to a PIESTM 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 PIESTM.

<u>Private Label</u>: 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.

<u>Auto Publish</u>: 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'.

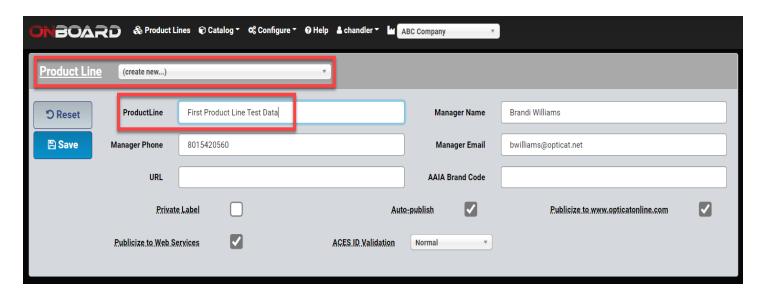
<u>Publicize to www.opticatonline.com</u>: This will determine if your data is visible in the OptiCat's online web catalog at www.opticatonline.com.

Share into TA-MX Collection: Contact OptiCat to set up Share into TA-MX Collection functionality. This will determine if your data is visible in the Central America's web catalog.

<u>ACES® ID Validation</u>: 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 has been set as "Validate = NO".

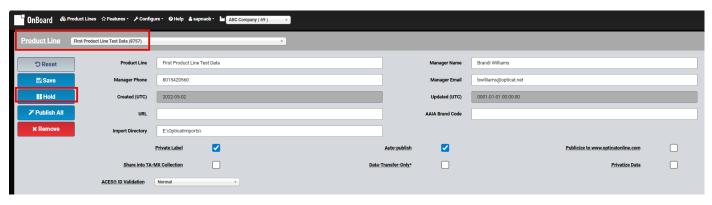
• Click 'Save' if any changes have been made.

Importing Data

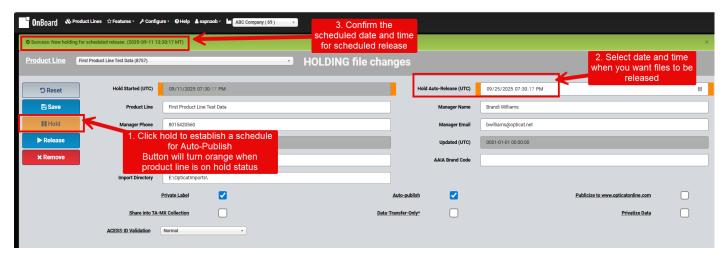


- If you are creating the first Product Line upload, first go to the 'Product Lines' tab in the top menu bar.
- In the Product Line field, add the name of the first Product Line and fill in the rest of the contact information.
 - A URL and AAIA Brand Code, will help Channel Partners search your product easier as well as to have more information about your company.
- Choose the check boxes for how you want your data to be published.
 - <u>Private Label</u> 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.
 - Share into TA-MX Collection If checked, the data is allowed to publicize to Central America's catalog.
 - o <u>ACES® ID Validation</u> This is a mandatory selection. Every ACES® record will be validated, according to your option here, during the process of importing data.

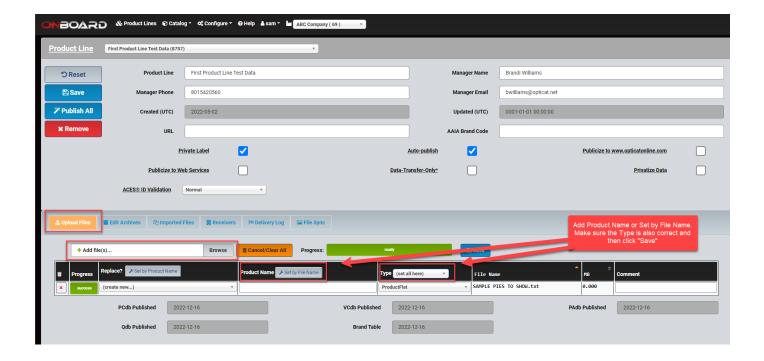
On Hold



Hold: This button allows users to establish a schedule for Auto-Publish.



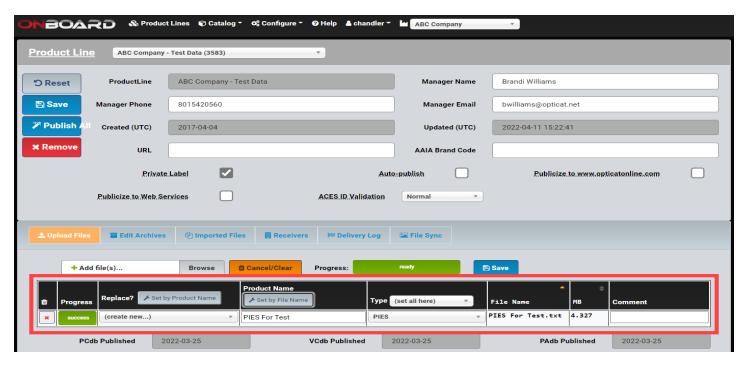
- Click on hold button to establish a schedule for auto-release
- Select date and time for files to be released
- Confirm the scheduled release date/time
- Any files uploaded after setting up product line on hold will follow the schedule release



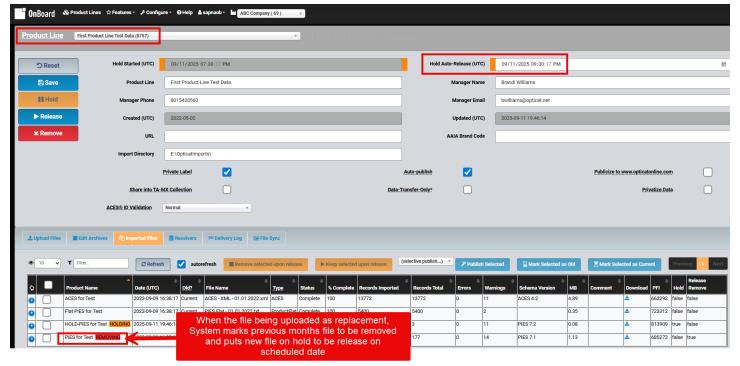
- Select the 'Upload Files' tab, then click '+ Add File(s)...' or choose 'Browse'.
- Next, select the file you would like to upload.
 - O Zipped files are preferred, but they are not required.
 - Note: OnBoard will allow a filename (the file you are importing) of up to 255 characters.
- Enter the Product Name in the 'Product Name' field for the uploaded file.
 - o 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 = PIESTM for Test .zip then the product name will be PIESTM 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 dropdown 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.
 - O 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.
 - <u>Note</u>: 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.
 - O 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 3rd quarter update".

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

<u>Note</u>: There is a limit of 142 zipped files uploaded, per upload. There is also a limit of $\underline{10}$ million files uploaded per each product line.

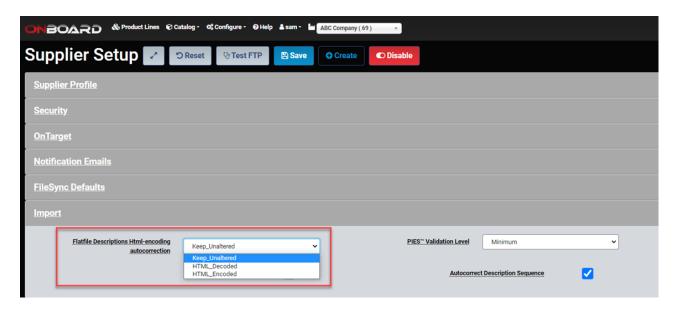


- **Auto Detect File type:** when the uploaded file name includes the words "ACES®" or "PIESTM", the file type, under the 'Type' field will be detected and auto populated.
 - o If you are using a PIESTM delimited flat file format, be sure to change the file 'Type' field to correspond with the uploaded file format. (i.e., delimited ProductFlat).
- Click 'Save'.
 - o 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 PIESTM 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.



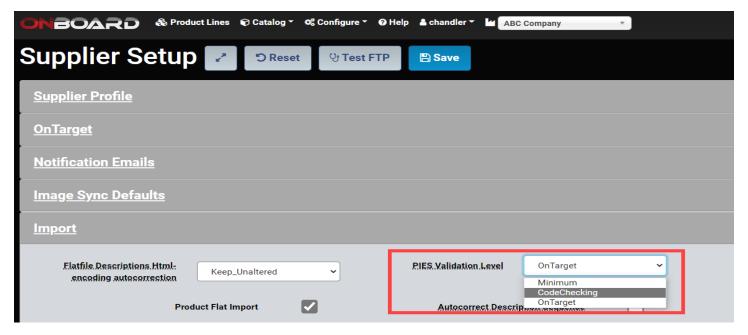
- When replacing the file, with "Hold Auto-Release" functionality, system will automatically mark previous months file as "Removing"
- o If user wants to keep the previous month's file, user can check the box and click on "Keep selected upon release"
- O Users can also select the files that they want to remove upon scheduled release by selecting the check box for each of the files to be removed and then click on "Remove selected upon release"

Uploading Files and File Validation

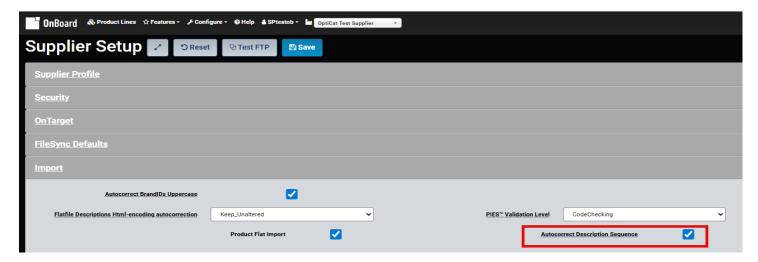


• For HTML Encoding Options as well as file validation and error checking of files uploaded to OnBoard, make sure your 'HTML Encoding' and your 'PIESTM Validation Level' settings are set to the way you want them for checking your uploaded files.

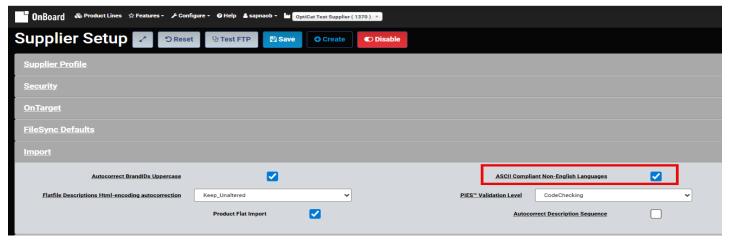
- To make changes to the 'HTML Encoding' and 'PIESTM Validation Level' click on the 'Configure' option in the top menu row of OnBoard and then click on 'Import' at the bottom of the options menu.
- There are three 'HTML Encoding' choices:
 - o Keep Unaltered This is the default. The document is saved as imported.
 - o <u>HTML Decoded</u> HTML Characters (literal text).
 - O HTML Encoded HTML Named or Numeric Code



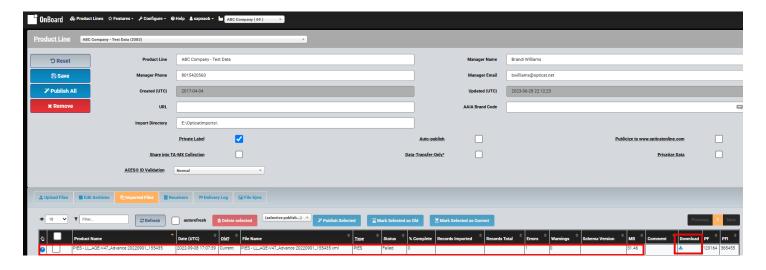
- There are three PIESTM Validation Levels
 - o Minimum This only check the length of the characters in each field
 - Code Checking This option ensures that your files are PIES™ compliant, but makes it so you don't
 have to use the additional OnTarget Validation
 - o <u>OnTarget</u> This allows you to check your data for PIES™ validation and the additional OnTarget validations.



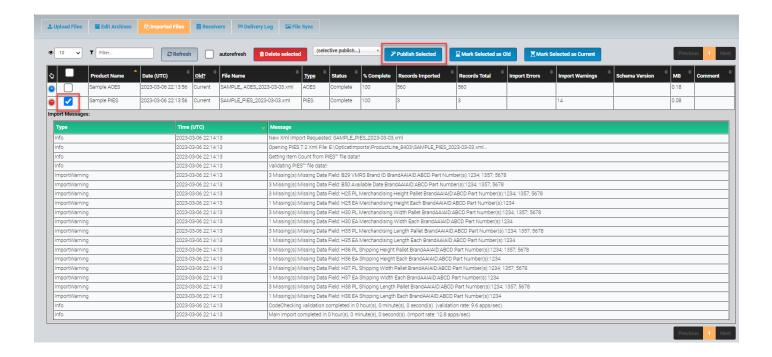
• Delivers "Description Segment" data in sequence provided by supplier in their PIES file



- When "ASCII Compliant Non-English Languages" option is Checked, all languages filters are checked for invalid and ASCII characters.
- When "ASCII Compliant Non-English Languages" option is Unchecked, it only checks for invalid and ASCII character if language filter is none or missing or English. All other language filters would not check for invalid or ASCII Characters.



- 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, QDB) or the PIESTM XSD (PCDB/PADB) delivery specifications.
- You can see the progress in the '% Complete' Column.
- Once validation is finished, the status will change to 'Complete' or 'Failed'.
- This is where you will be able to download the file that was uploaded to the product line. If you don't see the download column, resize your screen or click on the "+" sign to expand the selection to see the download option.
- If 'Auto-publish' is checked, the original file <u>will be</u> delivered to Channel Partners, whether the status is 'Complete' or 'Failed'.



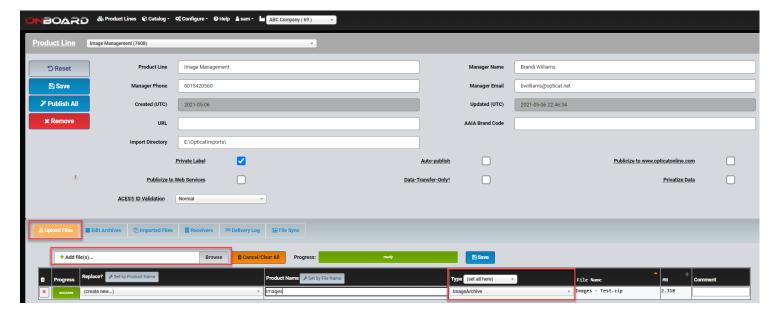
- Click on the blue circle with the plus sign after the import is completed to view any warnings or errors that may occur:
 - o Any Warnings/Errors/Schema Errors would be listed under 'Import Messages'.
 - o First 12-part numbers will be displayed for warnings/errors as an example.
 - o Warnings and errors are determined by ACES®/PIES™ delivery specification provided by AAIA.
 - Warnings = Optional Field to fix.
 - Errors = Required Field to fix. Data is dropped for the records with errors; it will not get delivered.
 - Data with warnings will pass through into the OptiCat Web Catalog. Data with errors will not.
 - The parts with warnings will 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 PIESTM fields. Other
 than the characters identified in Appendix A, please note that PIESTM 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 <u>OR</u> to publish all Product Lines, click the blue 'Publish All' button in the upper left of the screen.
 - <u>Note</u>: This should only be done if this is an established product line and you've already given permission access to receiver(s).
 - O 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

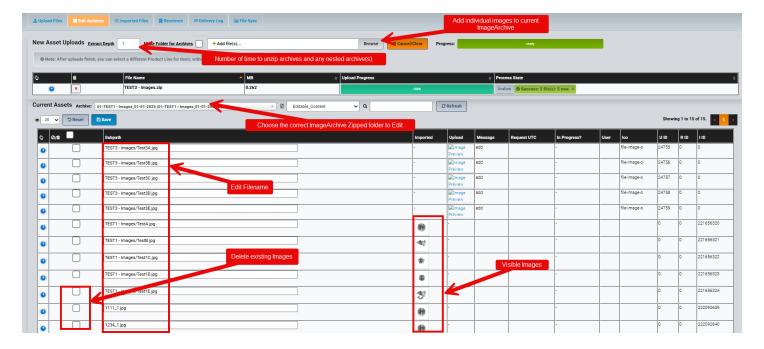
- All images should be placed in a zipped folder before uploading.
- Uploading images follows the same process as specified above. The Type will be "ImageArchive".
- Remember to add your digital asset mapping to the PIES XML or create a digital asset mapping flat file to add to the image product line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

Make sure to enable "Archive Edits Failed" and "Archive Edits Succeeded" notifications in Account Management screen for your profile if you wish to receive notifications for Edit Archives.



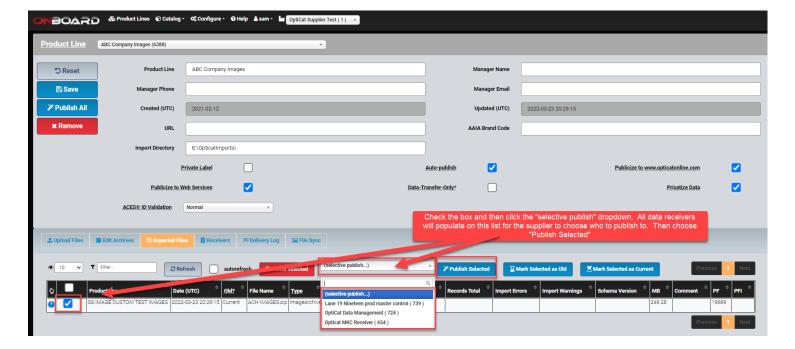
360 Images / Sub-Archives

- When uploading 360 images you may want to have all 360's in one zipped folder for each individual part.
- Recommendation is to put 360 images in their own product line and grant access to the receivers that can process 360's.
- To view the zipped file of each individual part, go into Edit Archives, select the 360 zipped folder from "Current Assets Archive" drop down, this is where you will see the multiple zipped folders of sub-archives to edit.
 - o Editable Content shows the zipped file of each part. You can change the file name, delete the zipped file.
 - View_Extracted_Subarchives shows all images from the zipped file of each part. You will not be able to make any changes in this view.
 - When a single image of a part is updated, you will need to replace the entire zipped file of that individual part.

Publishing Data

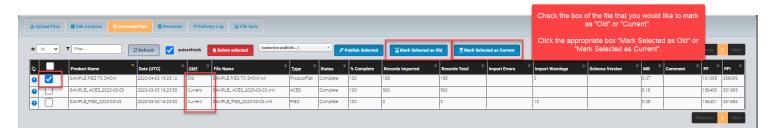
Selective Publish

- 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.

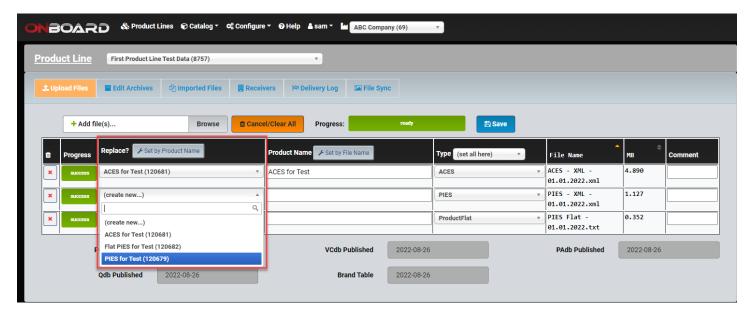


Product Files (Current vs. Old)

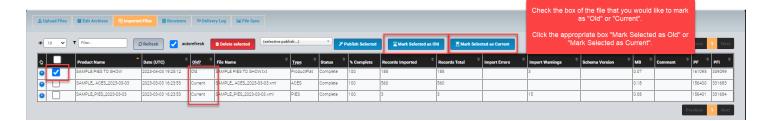
• This allows the supplier to deliver just the Current file to their customers/data receivers but leave the "Old" still in the product line to reference. It is recommended to delete "Old" files when uploading "Current".



Replacing a File

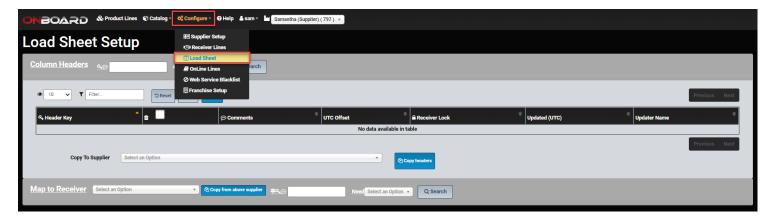


- When you update your product files, you will add the file(s) as directed above in the "Importing Data" section. Next, in the 'Replace?' column, use the drop down to select the existing product name that you will be replacing for each new product file that is being uploaded.
 - This will overwrite (replace) the old product file(s) so that Channel Partners will only have access to the most current data.
 - O You can also use the 'Set by Product Name' button, which will name <u>All</u> 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.
 - o (i.e., "I am replacing OptiCat PIESTM 3rd Quarter and have entered a new Product Name of OptiCat PIESTM 4th Quarter").
- Select 'Type': ACES®, PIESTM, 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

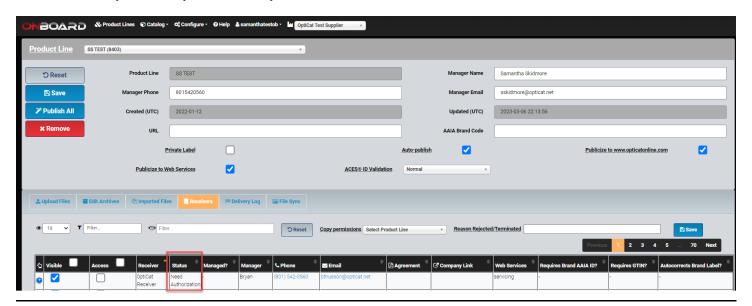


- The Load Sheet feature has many uses. One way load sheets are used is when a customer/data receiver is looking for the supplier to provide additional data that is not found in PIES.
 - o Example A: Lead Time specific to a customer/data receiver.
 - Example B: This also could be data that is in PIES 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.
 - o 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.

- O 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.



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.

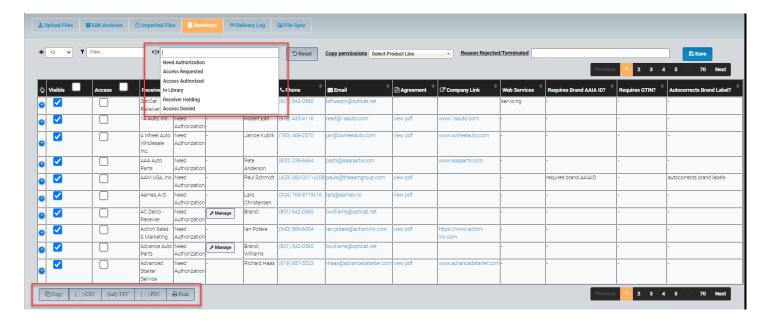
<u>In Library</u>: You have given the receiver access to this product line and the receiver has moved your data from the DIO repository to their data library. They now have the ability to download the data manually at anytime.

- 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.

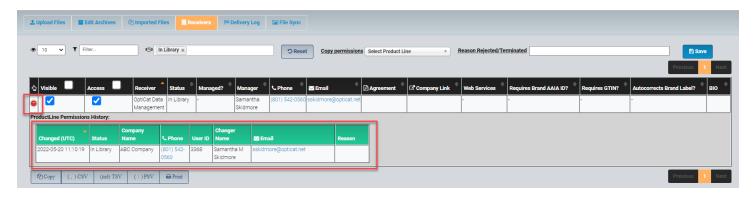
On Hold: The receiver is not ready to move your data to their library or they would like to pause the data deliveries.

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.

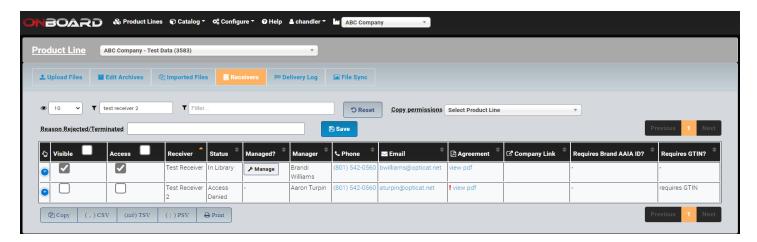


- You can use the Filter bars to search by permissions and product lines at any time.
- You can make changes to receiver access at any time.
- When a receiver requests access to your product line via OnDemand, you will receive an email from the receiver, and you then can decide to give access to the receiver or not.
 - o 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.

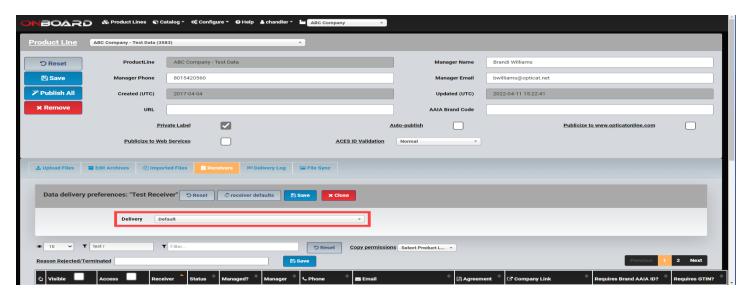


• If you click the plus sign in the blue circle to the left of the receiver, it will let you know who has changed the permission status of the product line.

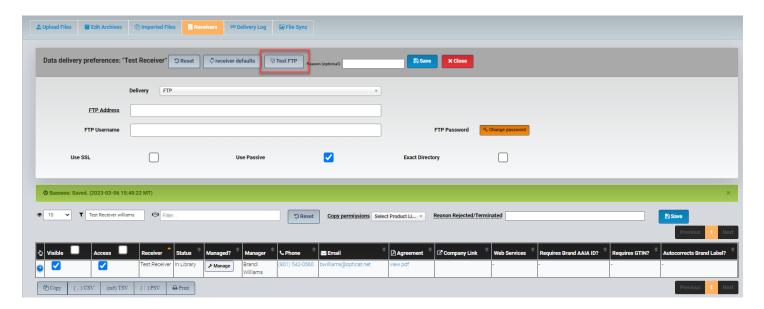
Managed Receivers



• 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.



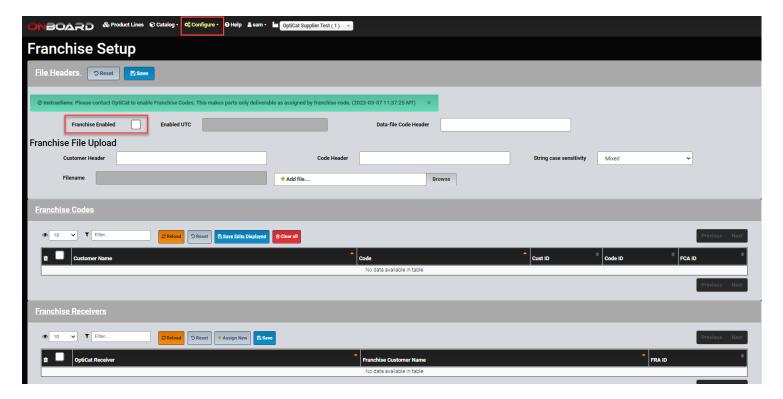
- If the receiver is a Managed Receiver, click 'Save' and the status will go to 'In Library'.
- Then, click on the 'Manage' button.
 - O A pop up saying "Data delivery preferences: "*The Supplier's Name*" will appear.
 - o In the 'Delivery dropdown bar, choose the method of delivery for that specific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



• 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

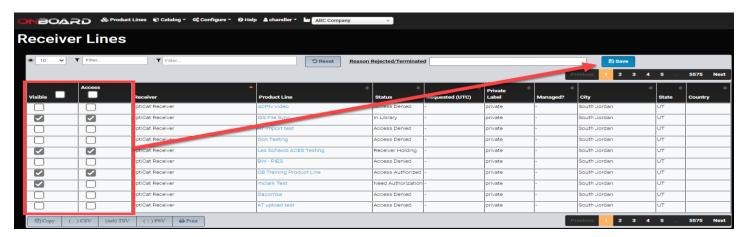
- This must first be enabled by OptiCat.
- In the main menu dropdown, choose Configure => Franchise Setup



- 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.

Receiver Lines

• 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.



- This report will allow you to see the status of the receiver's visibility and access to data for each Product Line. .
 - O You may search by receiver, product line or status.
 - o This report allows you to easily see which Channel Partners are 'Supplier-Managed'.
 - O You can see the date that each receiver requested access.
 - O You can export as a CSV, TSV, PSV, or print directly from this screen.
 - o Provides Receiver location.
 - o 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'.
 - o Click 'Save'.

Delivery Log

- Delivery Logs allows you to see:
 - O The Status of the delivery and if its delivery was 'Complete', 'Complete (with Error)' or 'Canceled'.
 - O 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:

o Reach out to your account manager with OptiCat for a pricing quote.

• Step 2 Agreement and Setup:

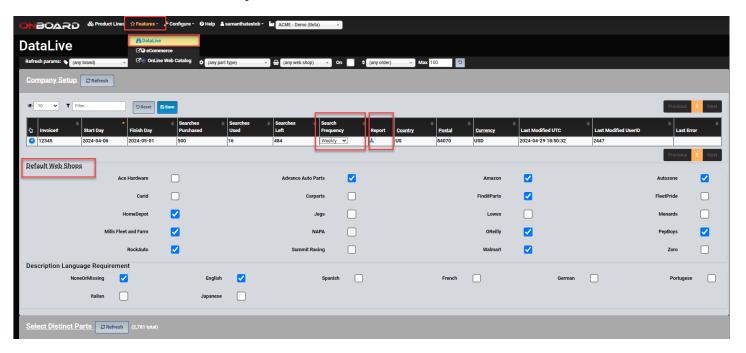
After quote and updated agreement is signed, OptiCat will set you up with your "Purchased Searches".

• Step 3 DataLive Configuration:

- Navigate to Features => DataLive
- o Click "Refresh"
- Choose your Frequency for how often you want your parts to be searched: Weekly, Monthly, Quarterly, or Yearly based on your preference
- o Select your Default Web Shops you want to be searched.
- o Click "Save" to apply your settings

Note:

• You can download a report of all search information.

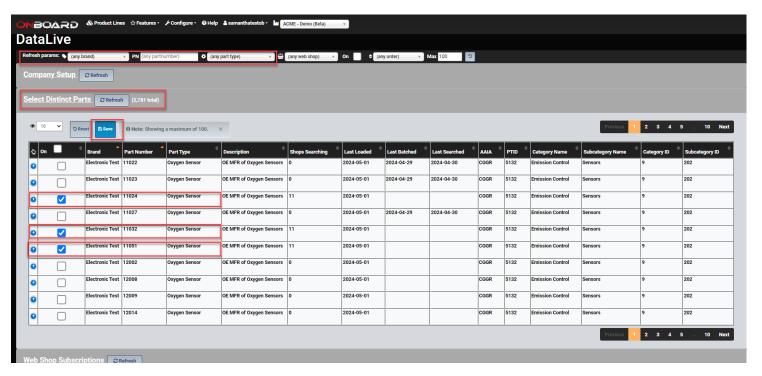


Select Distinct Parts

- Step 1 Filtering and Refreshing Data:
 - o Click "Refresh" to bring up the parts that are in all product lines within OnBoard.
 - O 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".
 - o The data populated matches the parameter you chose.
- Step 2 Selecting Distinct Parts:
 - Select the parts that you want to be searched.
 - o Click "Save"

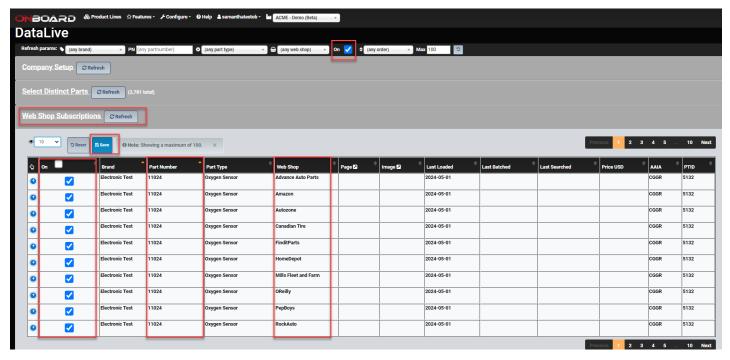
Web Shop Subscriptions

- Step 1 Refresh and Filter:
 - o Click "Refresh"
 - O 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".
 - o The data populated matches the parameter you chose.



• Step 2 Deselect Subscriptions (Optional):

- o 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.



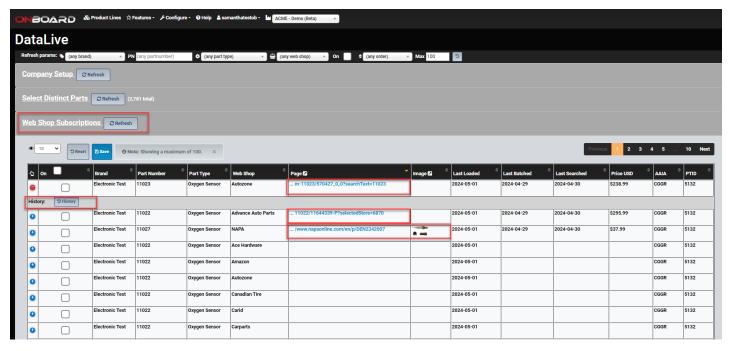
Subscription Results

• Step 1 Check Results:

- Click "Refresh" to update the data.
- o 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:

o To see the history of searches, click the "+" sign to open the dropdown. Click "History"



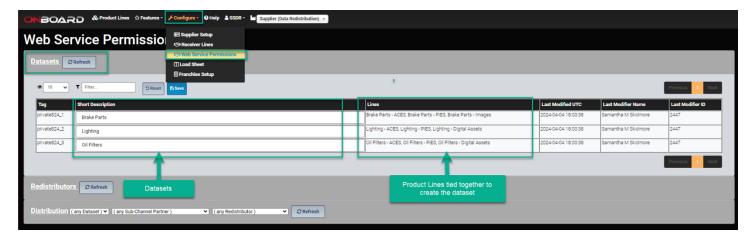
Please reach out to OptiCat Support Staff for more information and/or assistance.

Data Redistribution

- Data Redistribution allows your customers to distribute your data with your permission through OptiCat Web Services/API.
 - o 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.
 - O 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.

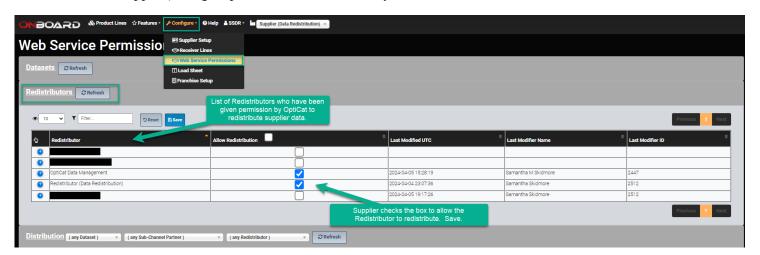
What are Datasets?

- o 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.



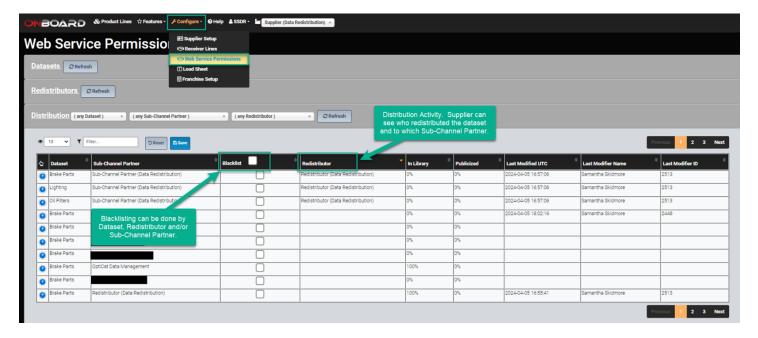
• Permission to Redistribute:

- 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.



• Distribution Activity and Blacklisting:

- O 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.
- O You can also choose to blacklist by Redistributor, Sub-Channel Partner and/or Dataset.



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.
- Please mark any previously loaded files as "old" or delete the old files. Leave most recent updated file as current.

• Organizing Product Lines:

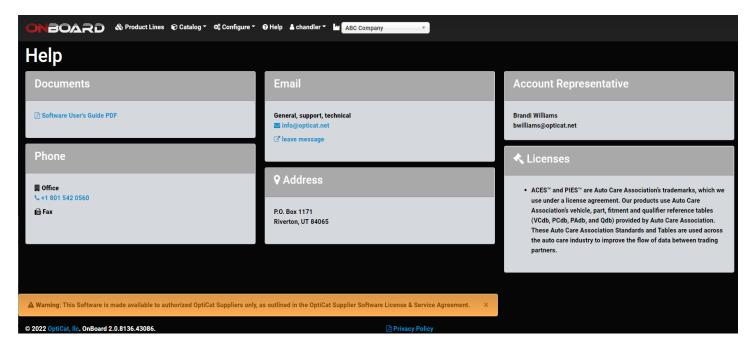
Separate by Data Type:

- 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.
 - o 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:
 - o Main office phone number (801) 542-0560
 - o Main office email address info@opticat.net
- For specific questions regarding OnBoard, contact OptiCat Support Staff:
 - O Email: support@inpopticat.freshdesk.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	Description	Price Sheet	Bar Code
		Fields	Fields	Number Fields	Characters
;	Semi-colon	Р		Р	Р
[Left bracket	Р	Р	Р	Р
1	Right bracket	Р	Р	Р	Р
{	Left brace	Р			Р
}	Right brace	Р			Р
~	Tilde	Р	Р	Р	Р
I	Bar(Pipe)	Р	Р	Р	Р
,	Comma	Р			Р
***	2 Quotes	Р	Р	Р	Р
%	Percentage	Р			Р
!	Exclamation	Р			Р
\$	Dollar sign	Р			Р
*	Asterisk	Р	Р	Р	Р
۸	Circumflex(Carot)	Р	Р	Р	Р
١	Back slash	Р	Р	Р	Р
?	Question mark	Р			Р
•	Apostrophe	Р			Р
•	Quote	Р			Р
	Space				Р
1	Forward slash				
	Period				
-	Dash (hyphen)				
P	Character is prohibited from use in that type of field. Example: Commas are not allowed in				
	Part Number Fields	3.			

On Demand

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



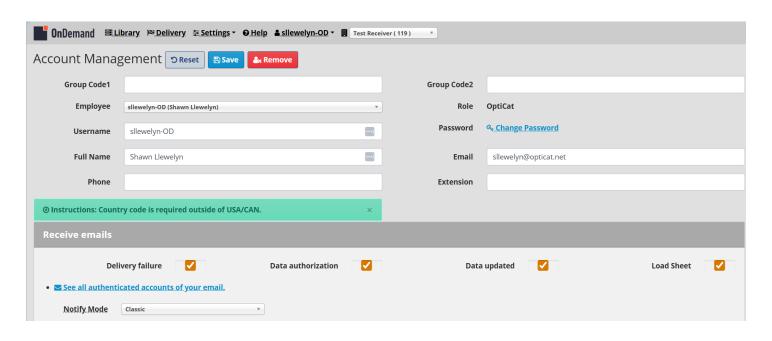
Mandatory Periodic Password Resets are required.

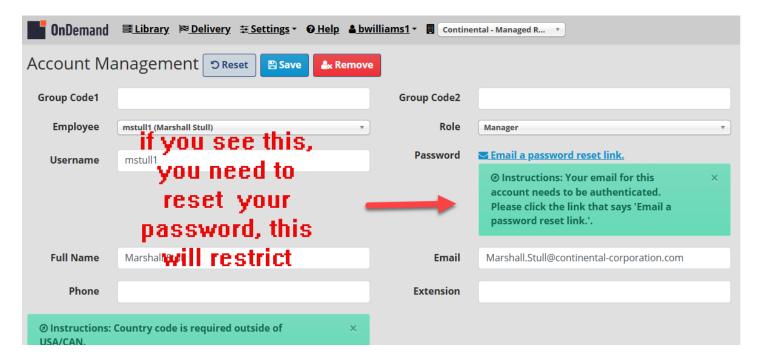
• Want a username reminder?

Need an account?Forgot password?

→ Sign-in

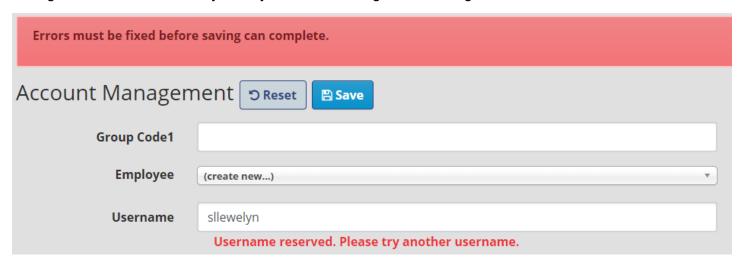
Manage Account





Manage Account Error

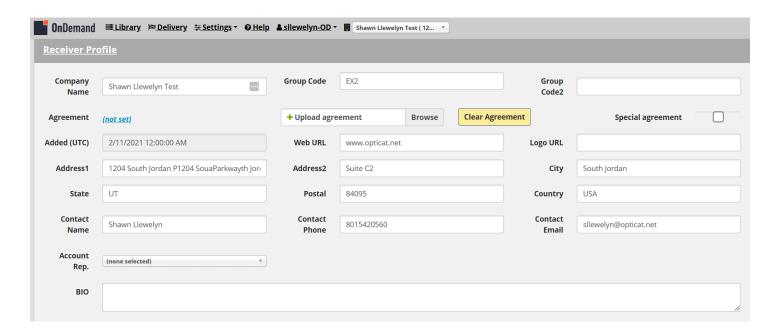
During creation of a new user, you may see the following Error message:



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:
 - o "Delivery Failure" Will let you know if we are unable to deliver data to you for any reason
 - o "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

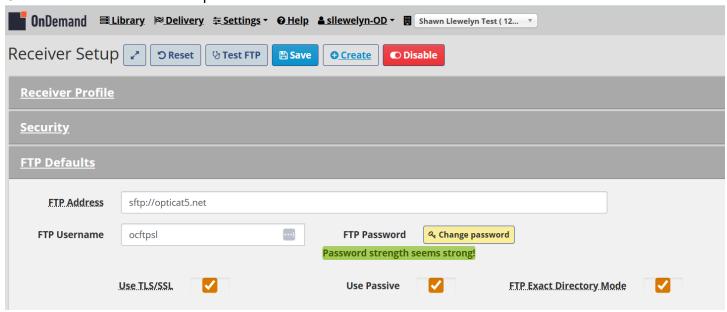


- Click the down arrow next to Settings, then click 'Receiver Setup'.
- You can update your company information here at any time.
- If the company name needs to be changed, please contact OptiCat.
- BIO located near the bottom of the page is very important. The text here will be included in Automated 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.
- Changes made by an individual are shown at the bottom of the screen.

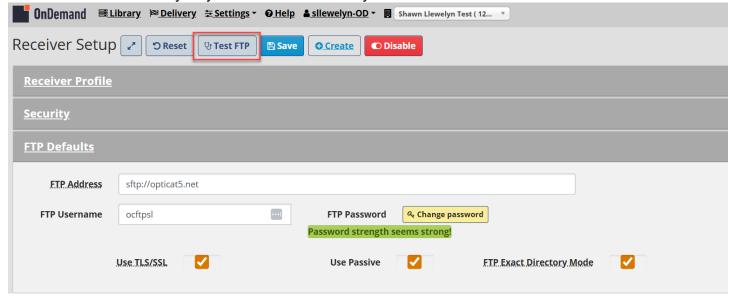


FTP Settings:

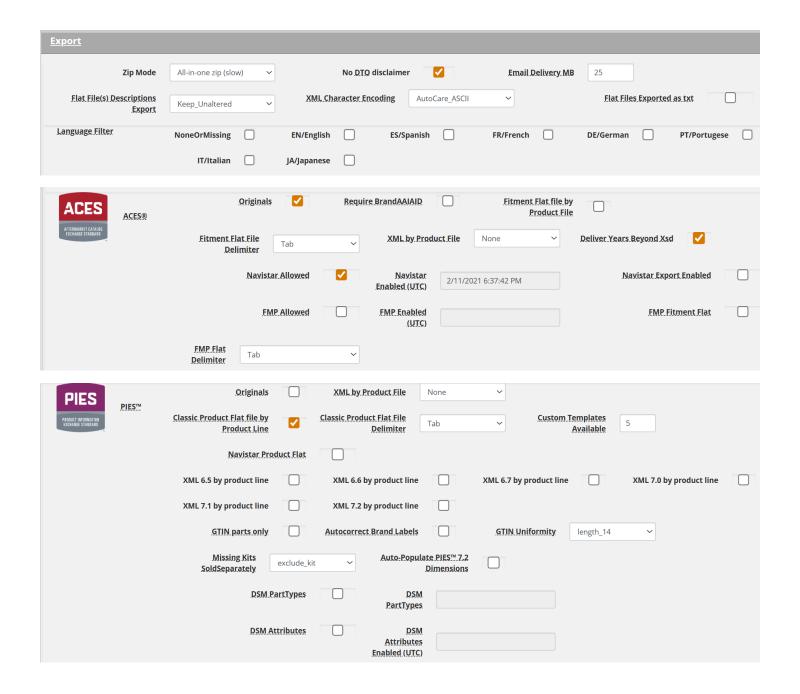
Click on the 'FTP Defaults' drop down:

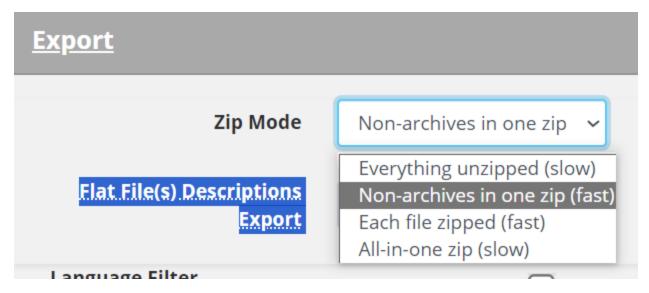


- This for a default or general FTP that all product lines direct to. If you have subfolders that you want to direct certain product lines data to, we will address that later in the documentation.
- Secure FTP is preferred. Secure protocols include SFTP, FTPES, and FTPS
- Secure FTP transmissions using TLS/SSL encryption are recommended if available.
- 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.



Export Options:





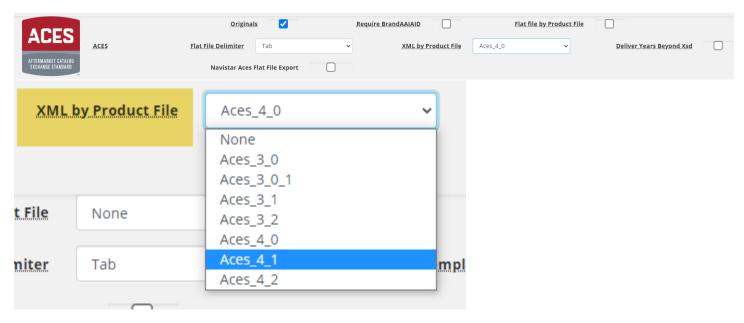
- Here you will find all options that you can select when receiving data via OptiCat.
 - o ZIP Methods available:
 - Everything unzipped. This is the most time intensive and slowest method. All files are delivered as originally created.
 - **Non-achives in one zip:** All files in Product Line are delivered in one zip file. Files that are not currently zipped.
 - Each file zipped: Files are delivered separately but archived.
 - All-in one zip: Data is delivered in one zip file.
 - 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.
 - o <u>Fitment Flat file by Product File</u> 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.
 - o **Language Filters:** Data can be filtered by Language if available.
 - Custom Templates Enabled Allows you to create your own custom PIES™ template that you
 will be shown later in this guide.
 - o **Custom PIES** exports will include ALL files contained within the Product Line.
 - XML 6.5 by product line exports PIES™ version 6.5.
 - o 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.
 - o Autocorrect Brand Labels Adds Brand Label to the item in PIES™ from the B20 field.
 - o AWDA 6.3 by files
 - o AWDA 6.3 by product line
 - AWDA 6.4 by files
 - o AWDA 6.4 by product line
 - AWDA 6.5 by files

- o 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.



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.



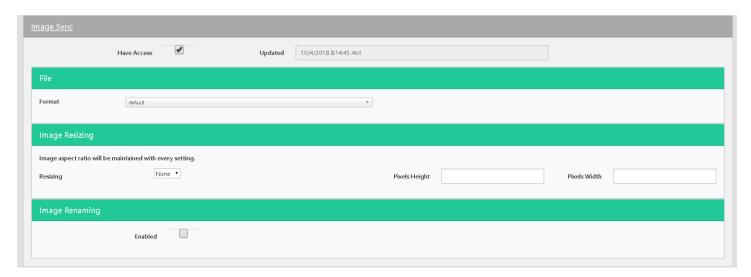
OnTarget:

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

Notification Emails:

- o "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.

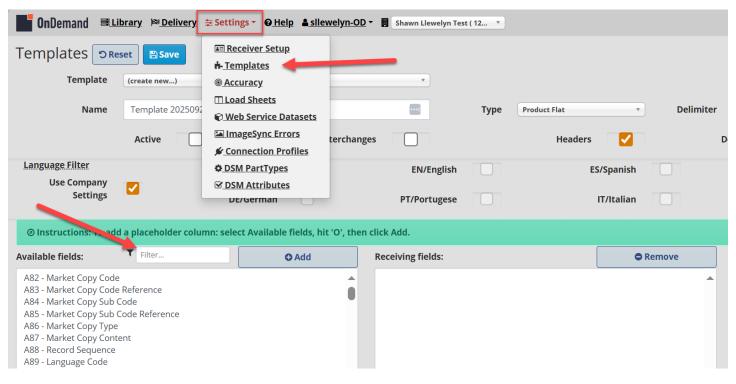
Image Sync Options:



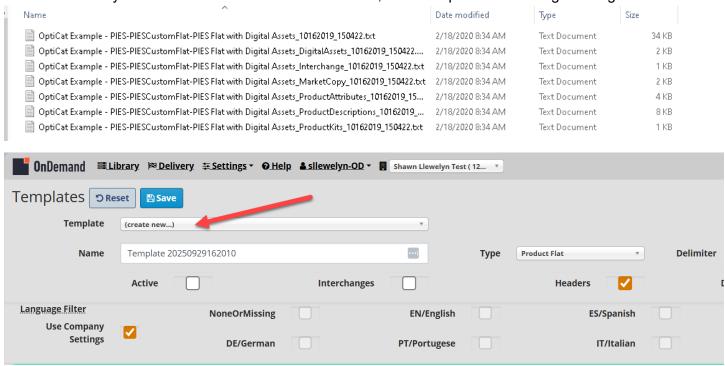
- Here you can set your format preferences for Image Sync:
 - o We currently offer conversions to: .png, .jpg, .jpeg, .tif, .tiff, .eps, .gif, .bmp
 - You can set image sizing requirements to a specific height and width
 - Image renaming allows you to have images renamed by one of the following: File 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 PIES™ Templates:

Click the down arrow next to Settings, then click 'Templates':



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

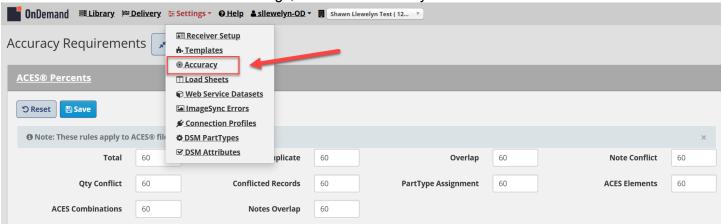


- Use the drop down and select 'create new...'.
- Name your template.
- Choose the Type of file you would like to receive:
 - o Can be PIES™ Flat (.txt file) that you can open in excel as tab delimited.
 - Can be PIES[™] xml versions 6.5, 6.6, 6.7, 7.0, 7.1, or 7.2.
- Check 'Active'.

- o 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'.
 - o 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'.



- 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:

DA Truck	A					Friction		
ride - OC upport	Accuride - Product Flat	Complete (No Data)	2025-09-16 17:23:21	2025-09-16 17:25:29	2025-09-16 17:25:30	HDA Truck Pride - OC Support	autopublish	JFVG
ride - OC	Manufacturing	Complete	2025-09-16 17:23:07	2025-09-16 17:23:19	2025-09-16 17:23:22	HDA Truck Pride - OC Support	autopublish	
		Complete	2025-09-16 14:11:01	2025-09-16 14:13:38	2025-09-16 14:26:35	TRW Automotive - US	autopublish	DJVT
		Complete	2025-09-15 16:01:01	2025-09-15 16:02:44	2025-09-15 16:13:00	TRW Automotive - US	autopublish	DJVT
.	_	Complete	2025-09-12 18:45:29	2025-09-12 18:45:42	2025-09-12 18:45:45	Dynamic Friction	autopublish	HBHR
ri i R u J Y i	DA Truck ide - OC pport W itomotive S W itomotive S rnamic ction	DA Truck ACE ide - OC Manufacturing pport - PIES W Friction itomotive Images W Chassis itomotive Images S Plantic DFC Product Images	DA Truck ACE Complete dide - OC Manufacturing pport - PIES W Friction Complete dtomotive Images SW Chassis Complete dtomotive Images SUM Chassis Complete dtomotive Images	ACE Complete 2025-09-16 17:23:07 Manufacturing - PIES W Friction Complete 2025-09-16 14:11:01 Itomotive Images W Chassis Complete 2025-09-15 16:01:01 Itomotive Images S DFC Product Complete 2025-09-12 18:45:29	ACE Complete 2025-09-16 17:23:07 2025-09-16 17:23:19 ACE Manufacturing - PIES W Friction Complete 2025-09-16 14:11:01 2025-09-16 14:13:38 W Chassis Complete 2025-09-15 16:01:01 2025-09-15 16:02:44 Itomotive Images S DFC Product Complete 2025-09-12 18:45:29 2025-09-12 18:45:42	ACE Complete 2025-09-16 17:23:07 2025-09-16 17:23:19 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:22 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-16 17:23:29 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-09-12 18:45:45 2025-	ACE Complete 2025-09-16 17:23:07 2025-09-16 17:23:19 2025-09-16 17:23:22 HDA Truck Pride - OC Support	ACE Complete 2025-09-16 17:23:07 2025-09-16 17:23:19 2025-09-16 17:23:22 HDA Truck Pride - OC Support Support - PIES W Friction Images Is Complete 2025-09-16 14:11:01 2025-09-16 14:13:38 2025-09-16 14:26:35 TRW Automotive - US W Chassis Complete 2025-09-15 16:01:01 2025-09-15 16:02:44 2025-09-15 16:13:00 TRW Automotive - US Images Im

- 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.
 - o 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

OHelp

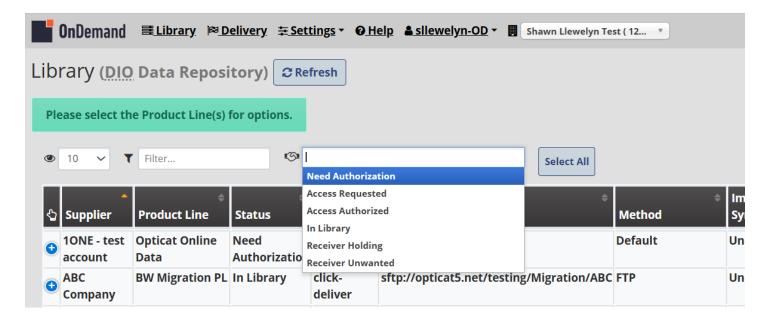
Slewelyn-OD

Howard Shawn Llewelyn Test (12...

The state of the sta Please select the Product Line(s) for options. ▼ Filter. Access Authorized × In Library × 2 3 4 5 ... 1<u>16</u> Select All Receiver Holding × **Product Line** Publish Destination Method Created (UTC) Status Unavailable 2024-08-25 02:21:56 2025-05-13 15:14:26 OnTarget ABC BW Migration PL In Library clicksftp://opticat5.net/testing/Migration/ABC FTP Company deliver ABC OptiCat In Library clickcompany default FTP Default Unavailable 2012-01-12 20:16:08 2024-02-01 20:24:11 OnTarget Company OnDemand deliver Documentation Samantha In Library Monthly sftp://opticat5.net/testing/Migration 2021-07-14 13:45:56 2025-07-16 21:37:49 OnTarget ABC ImageSync Active Company ImageSync Testing ⊕ ABC SL - ATRO Test In Library autocompany default FTP Default Available 2025-03-28 15:15:55 2025-03-28 15:18:21 OnTarget Company **Images Filesync** ABC SL Test Receiver sftp://opticat5.net Profile_opticat5.net Available 2021-02-24 21:37:53 2021-02-24 21:44:54 OnTarget auto-Company Imagesync with Holding video file Accuride Accuride Images In Library autosftn://onticat5.net/Accuride/Images Available 2021-02-16 17:08:27 2025-01-24 18:53:37 OnTarget

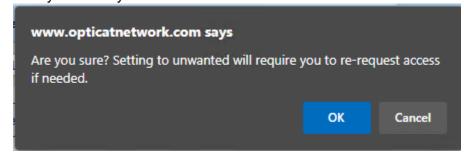
When you select the Library Section, the three filters are applied automatically. The filters are In Library, Access Authorized, and Receiver Holding. Clear these filters to see the entire catalog.

- 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.
 - o 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:

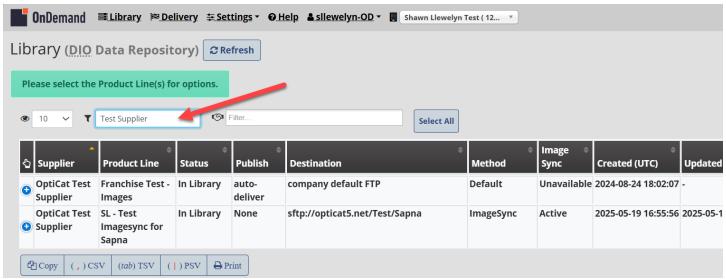


- You can filter by the following:
 - Need Authorization- This means you have not requested to access this product line.
 - Access Requested-This means you have requested access to the product line, but the supplier has not yet given you permission.
 - Note: The Supplier Manager's contact information 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.
 - o **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.

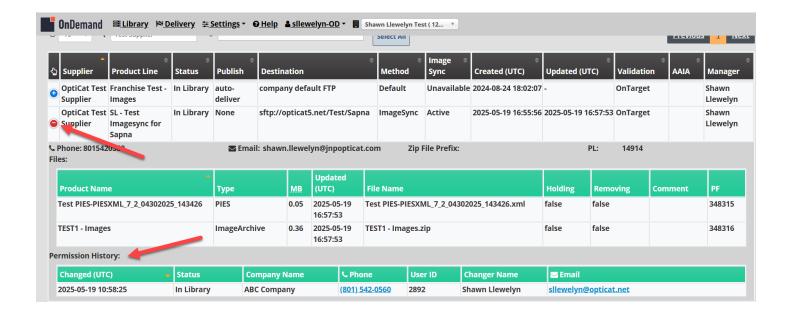
- You may deliver data to yourself while it is in 'Receiver Holding' status. Just highlight the product line by clicking, then select the 'deliver' box.
- Receiver Unwanted-This means that you no longer want the data.
 - This will remove supplier authorization and access; you will need to re-request the data if needed in the future. You will be prompted to verify that you would like to delete this line from your Library.



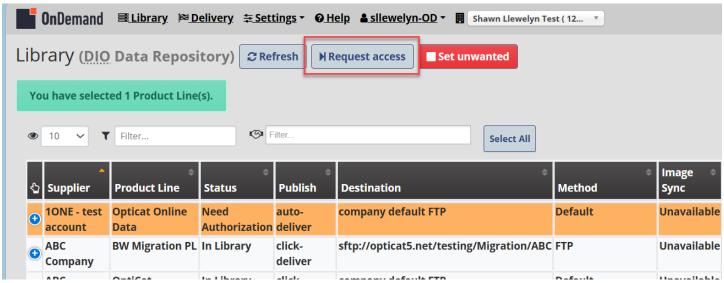
 You may also search by Supplier Name, Product Line Name, Validation, Manager Name, Phone or Email:



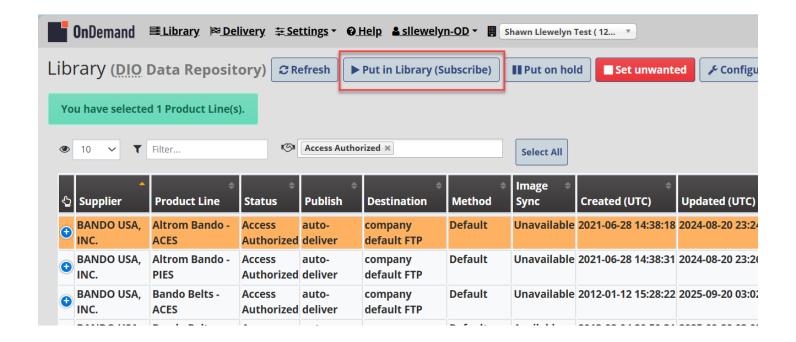
- You can use the arrows next to Supplier to filter from A-Z or Z-A.
- By clicking on the blue circle with the + next to the supplier's name, you can see Files with product name and product line permission history:



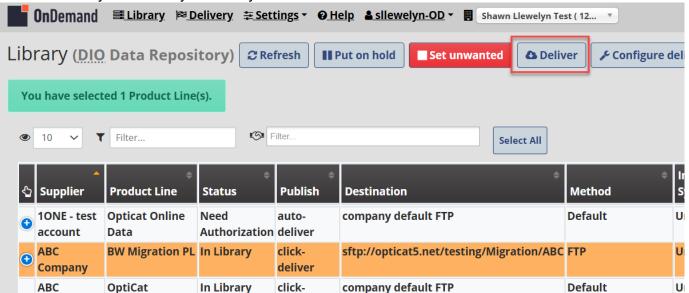
 In order to request access to a product line, simply click on the product line(s), and click Request Access:



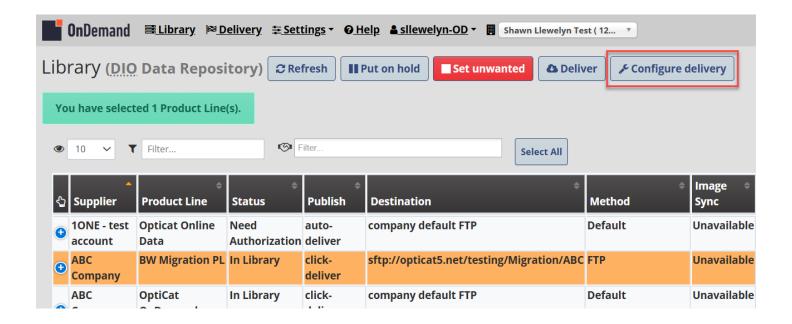
- o This will send an email to the supplier letting them know that you have initiated the handshake.
- If the supplier agrees to grant access, you will receive an email notification (as long as that preference is set) letting you know you now have access to the product line- completing the handshake.
- 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.



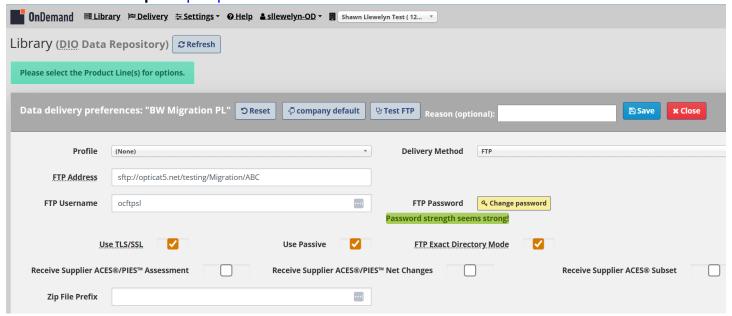
- Filter by 'Access Authorized.
- · Select product lines.
- Click 'Put in Library (Subscribe)'.
- You may now filter by 'In Library':



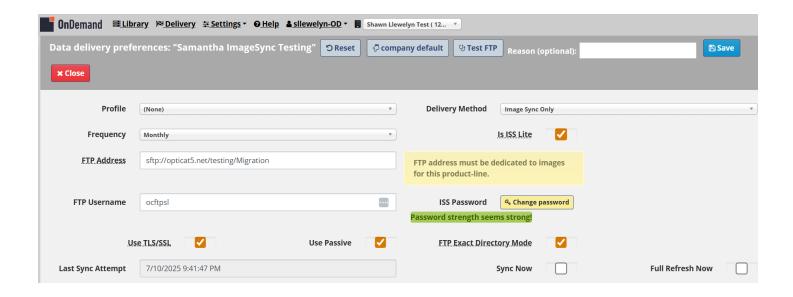
- Click on the product lines you want to download, then click Deliver.
 - Note: this will deliver to your default FTP or email destination. If you want it to be directed elsewhere, click on a single product line, then click 'Configure Delivery':



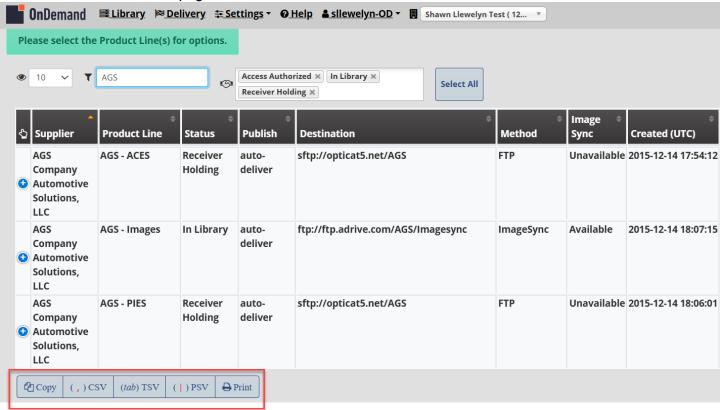
- This will allow you to update the delivery preferences for the selected product line(s) only.
 - Note: this is where you would enter subfolder information.
 - Example: ftp://opticat5.net



- After you have entered the destination, always click the blue 'Save' button at the top of the page.
 - o 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



• 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:



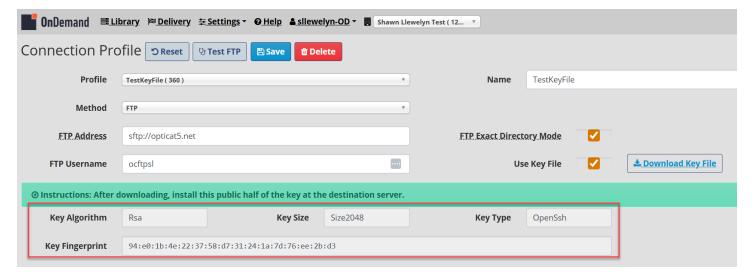
Connection Profiles – SSH Key Files

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.

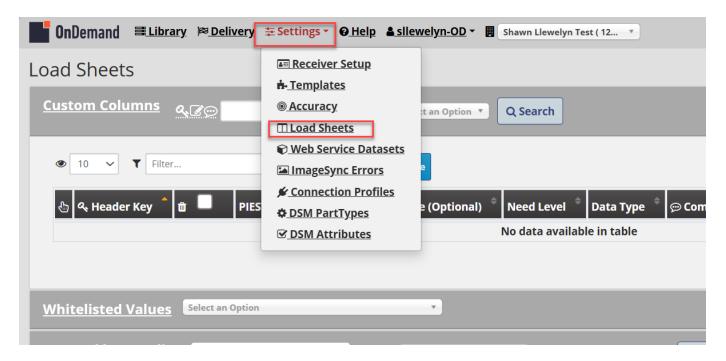


You also have the option to authenticate to your FTP server using an SSH key instead of password.

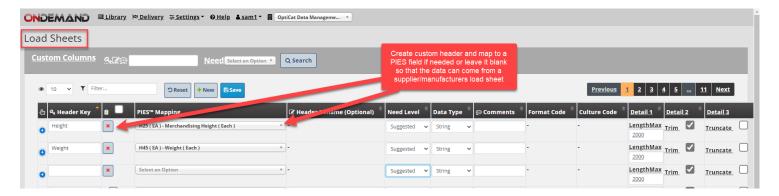


Load Sheets

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



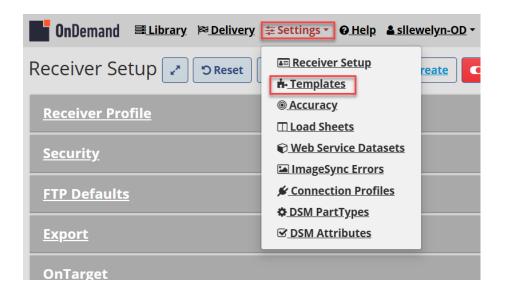
This is where the customer/data receiver will create all their load sheet headers.



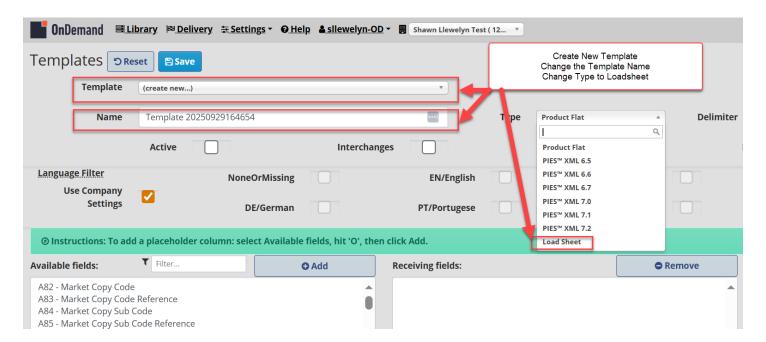
- Load Sheet Headers are all headings that need to be delivered to the customer/data receiver in a Flat Load Sheet File
 - These headers are used in place of PIES Field Header Names
 - Those headers can be mapped to a PIES field on this screen.
- The remaining headers that aren't mapped to a PIES field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

Load Sheets/Templates

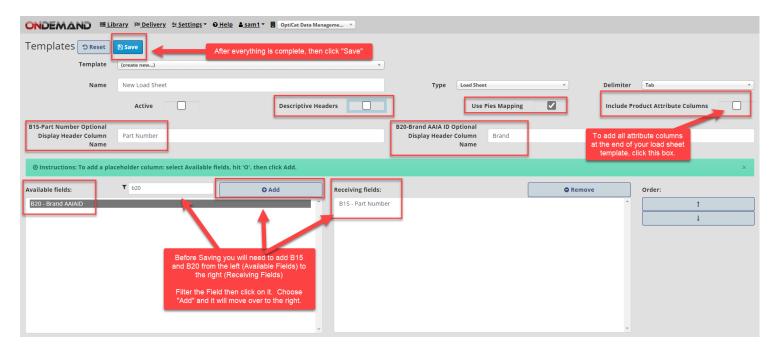
- Templates can also be used with Load Sheets. This is how OptiCat can deliver the data in the order that the customer/data receiver needs.
- Please reach out to OptiCat to verify the number of available templates before creating a new template.
- In the main menu dropdown, choose Settings => Templates



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



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



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

IMAGE SYNC

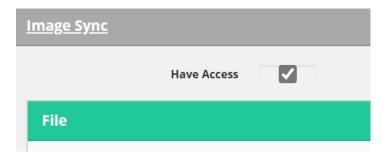
Image Sync is a feature of OnDemand that allows receivers to set specifications and specific file names to image files and digital assets that are being delivered. This includes file format, image dimensions, and file renaming. Net Changes is also another feature that can be used in the setup of Image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

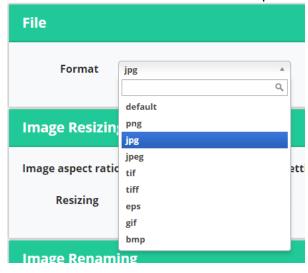


Image Resizing:

- 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.

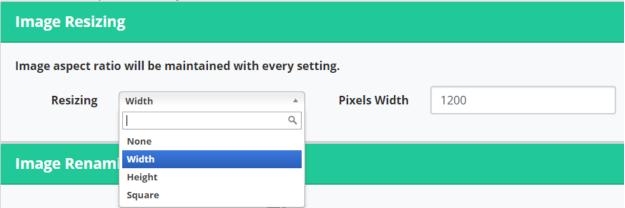
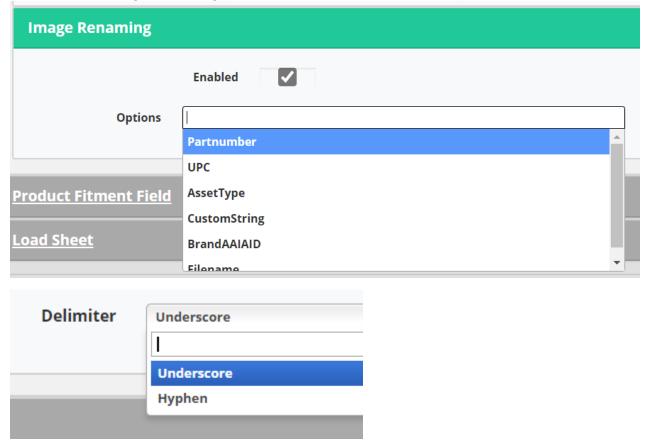


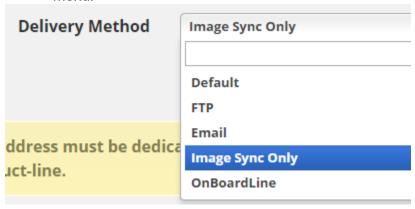
Image Renaming

- 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.

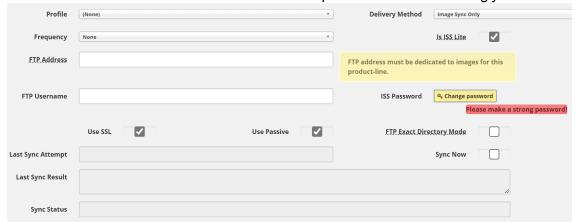


Setting up a Product Line for Image Sync:

- 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.



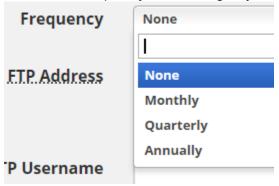
Delivery Method:

• This needs to be set to Image Sync Only



Frequency:

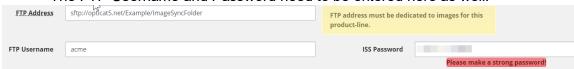
• The frequency or the Image Sync delivery is set here.



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.



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.



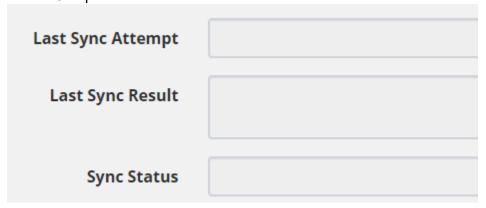
Sync Now:

- 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.



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.
 - o 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".



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).

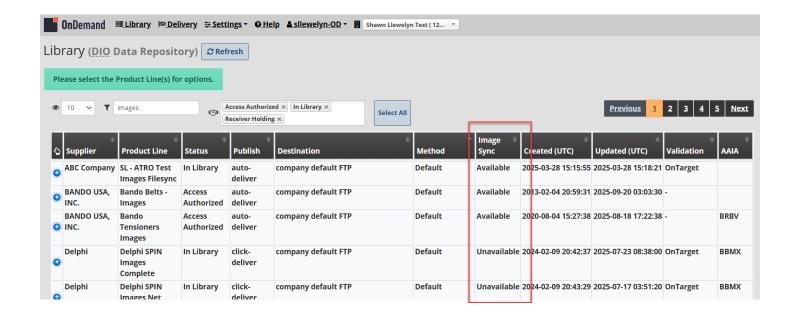
ISS allows resizing of the images. The desired width or height can be selected, and the original aspect ratio will be preserved. We recommend a selection of width: 1500 in accordance with the Autocare best practices.

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:



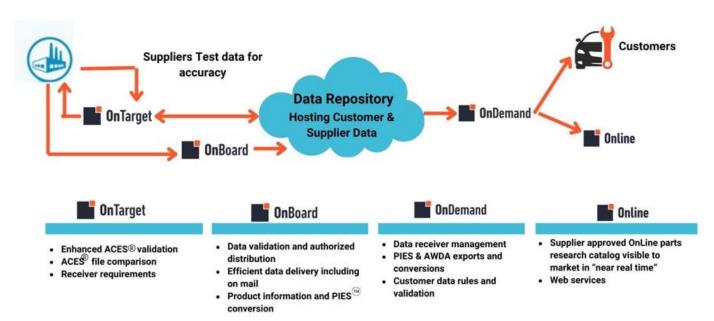
- 1. Click on the product line so that it is highlighted orange, then click 'configure delivery'.
- 2. This will bring you to the 'Data Delivery Preferences' screen
 - a. Select 'Image Sync Only' in the Delivery Method dropdown.
 - b. Check 'Enabled'.
- 3. Select a frequency that the sync will run.
 - 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.

PIES™ 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	Description	Price Sheet	Bar Code
		Fields	Fields	Number Fields	Characters
;	Semi-colon	Р		Р	Р
[Left bracket	Р	Р	Р	Р
1	Right bracket	Р	Р	Р	Р
{	Left brace	Р			Р
}	Right brace	Р			Р
~	Tilde	Р	Р	Р	Р
I	Bar(Pipe)	Р	Р	Р	Р
,	Comma	Р			Р
•••	2 Quotes	Р	Р	Р	Р
%	Percentage	Р			Р
!	Exclamation	Р			Р
\$	Dollar sign	Р			Р
*	Asterisk	Р	Р	Р	Р
۸	Circumflex(Carot)	Р	Р	Р	Р
١	Back slash	Р	Р	Р	Р
?	Question mark	Р			Р
•	Apostrophe	Р			Р
	Quote	Р			Р
	Space				Р
1	Forward slash				
	Period				
-	Dash (hyphen)				
Р	Character is prohib	ited from use in t	hat type of field. E	xample: Commas are	not allowed in
	Part Number Fields	s.			

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

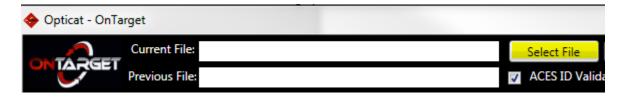
You will log in with your current OnBoard credentials.



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:





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 detais to see progress.

	ng ACES File Discrepancies
151,44	48 / 151,448
▽ Sh	ow Details:
Check for Validate=No Records	
Find PartType Conflicts	
Find Invalid ACES Combinations	
Find Conflicted Records	
Find Quantity Conflicts	
Verify ACES Element Values	
Find Duplicates	
Find Overlaps	
Build Part / Position Tree	
Find N/R Records	
Find Note Conflicts	
	Cancel

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 Resul	ts			
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/P	ositions	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.

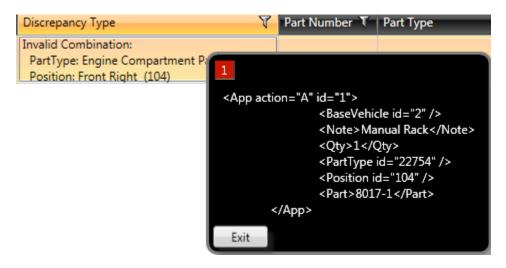
Invalid ACES® Elements: Apps which cover No vehicle in the VCDB.

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.

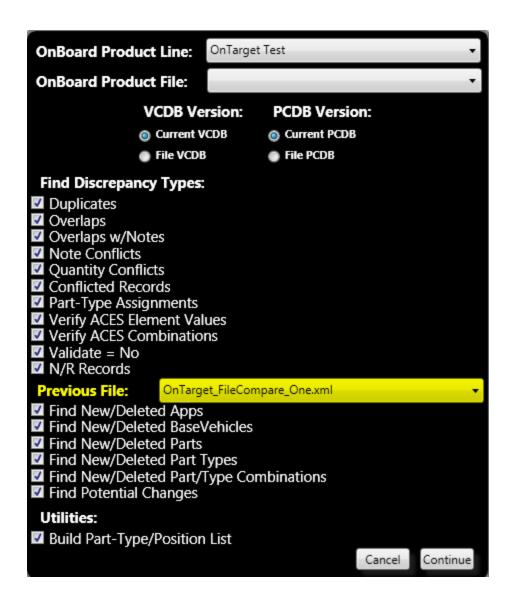
You can view the app from this page by clicking in the field for Discrepancy Type. If there was a comparison, app from both files would be shown here.



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:

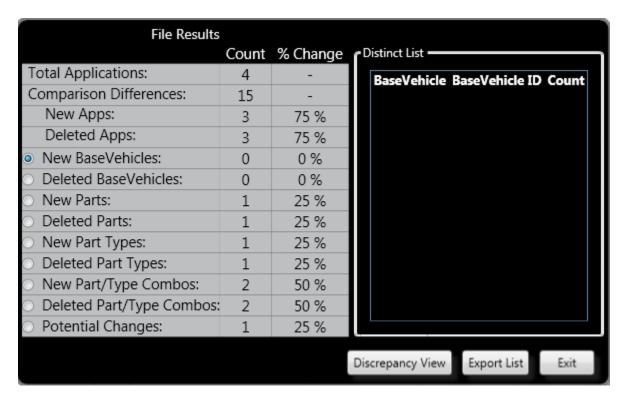
Select File. Again, if you are importing this file to OnBoard Select the Product Line and Product File. Select VCDB/PCDB Version. Choose Discrepancies. Then in Previous file select the file you would like to compare to the new one being imported & then choose the additional discrepancies. Continue, to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



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

File Resul	ts			
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/P	ositions	File Comparison	Exit

Click File Comparison



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.

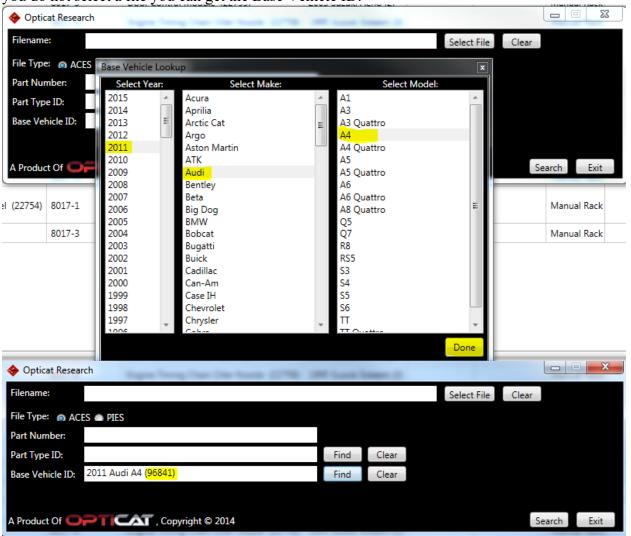
Potential Changes: Build a list of Apps that appear to be changes.

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.



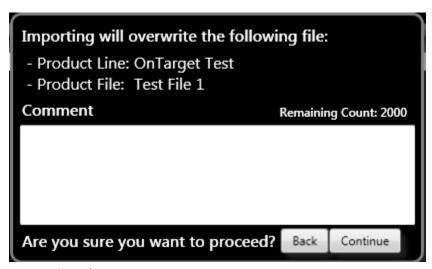
Assessments:

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



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)



Continue.

Your file will now be loaded into OnBoard.

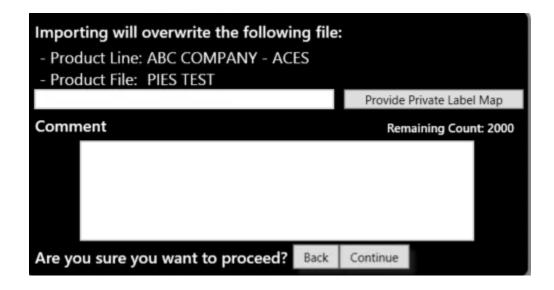
If your product line is marked Auto-Publish it will automatically be sent to Channel Partners with the In Library status.

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 PIESTM file and export it to OnBoard OnTarget will give you the option to include a mapping file.

Steps to follow:

- 1. Load Master ACES®/PIESTM 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



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.

Δ	Α	В	С	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#"

4	Α	В	С	D	Е
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®/PIESTM 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. On Target will look for a product line with a name containing MM and ACES®/PIESTM, 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. On Target will look for a product line with a name containing bowers and ACES®/PIESTM
 - i. Upon finding it, it will look for 1 product file of type ACES® or of type Other with ACES® in its name.
- 4. On Target 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.

1	Α	В	C	D	E
1	MM Part	Part Number	Bowers part#	MM branda	aaiaid
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 <u>here</u>.

Subsets:

Not Published yet.

PIESTM Enhanced Validation in OnTarget

- PIES™ ENHANCED VALIDATION
 - o Performs schema validation
 - Validates the PIESTM 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
- o Checks for invalid description data

• EXPI, DIGITAL ASSETS AND PRICING SEGMENT

- o 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
- o 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
- o Checks for mandatory digital asset fields
- Validates digital asset data
- Validates primary digital asset type fields
- Validates front orientation view
- Validates asset dimensions
- o 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
- o 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
- O 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:



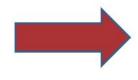
OnTarget Pro Assessment

Adds XML </App> </App action="A" id="2">

Net Change Data Optional



Deletes XML



This feature is now available.

ACES® File Comparison:



OnTarget Pro ACES File Comparison

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

