



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"

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OnBoard

Overview

OptiCat's purpose is to provide a turn-key, 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.

*An Important Note: OnBoard and OnDemand will be supported in all platforms except for IE.

Logging In

ONBOARD Product Lines Catalog Dashboard Configure Help Sign in

Sign-in

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

Username

Password

[Sign-in](#)

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

Warning: This Software is made available to authorized OptiCat Suppliers only, as outlined in the OptiCat Supplier Software License & Service Agreement. [X](#)


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[Classic OnBoard](#) Requires one of:

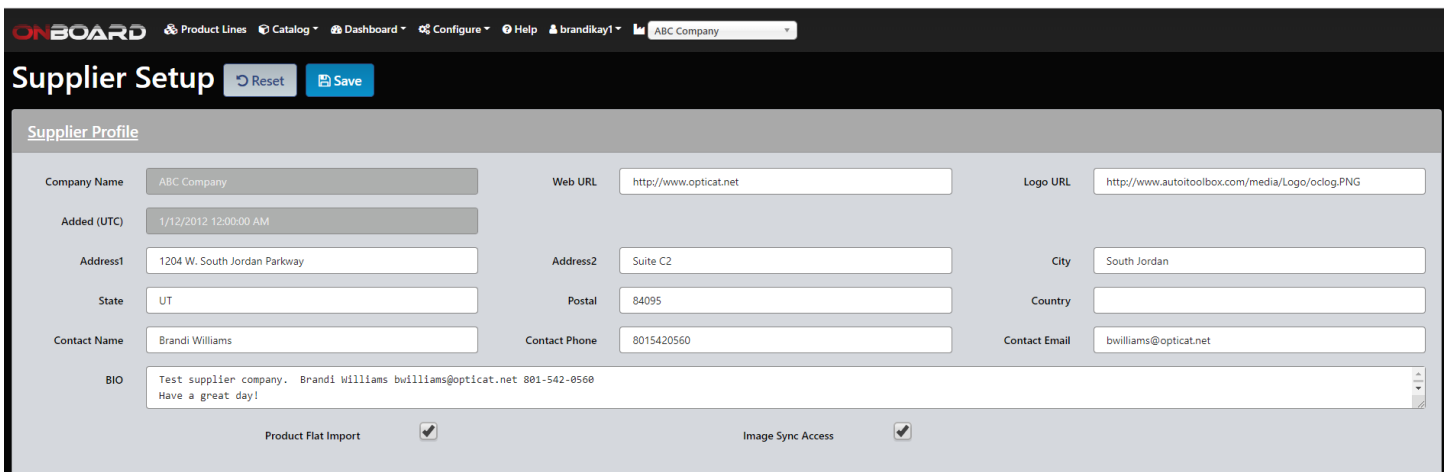
- [Internet Explorer](#)
- [Firefox ESR \(Extended Support Release\)](#) [download ESR for Windows 64-bit](#)

- Sign in from the landing page.
- Enter username and password, provided to you by OptiCat's support team.
- If you forget your username or password, use provided links to enter the email or username originally linked to your account, reset links will then be sent.

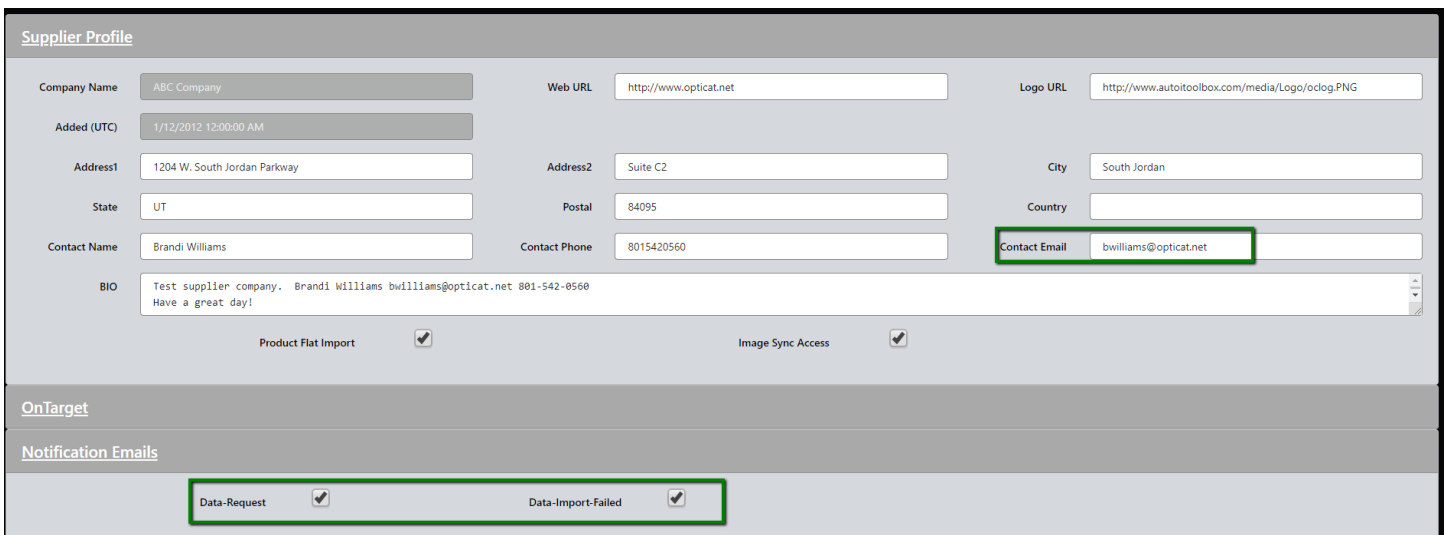
Managing Your Account



- Click on Configure.
- Click on the Supplier drop down.



- In the Supplier Profile dropdown: you can update Contact Info, Web Info, and Company BIO. If the Company Name needs to be modified, please contact OptiCat.
- OnTarget settings: Show what features are available to your account. These setting are adjusted by OptiCat Admin only, please contact us if you have any questions.
- Notification Email settings are for the contact manager.



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

Managing Users

- Click on your username next to your company name
- Click on Manage Account
- Here you can delete users and/or create new users if your role is Manager.
- Managers can email a password reset link here.
- To delete a user, simply select user in the drop-down menu and click **Delete.**
- To create a new user, click the drop down next to your name and click on **Create New.**
- Create a new username, enter the full name & email address. Choose if they will have user or manager rights.
 - Note: the difference between User rights and Manger rights is a “manager” can create, delete, and manage users.
- Choose Email Notification Options. You can be notified when a receiver requests access to your product lines as well as when an import has failed.
- To change your password ‘Click the ‘Email a password reset link’. Once a password reset link has been used, that email will now be verified, and a manager can update password from this screen.
- Click **Save.**

Product Lines

Creating a new product line:

- Click on **Product Lines**
- You do not need to click on ‘Create New’ if this is your 1st Product Line created.
- To create a new Product Line: Click the drop down next to **Product Line**, then (create new...). Enter Product Line name. (i.e. “Manufacturer Brakes ACES”, “Manufacturer Suspension PIES”, or “Manufacturer Filter Images” etc.)
- Do not include any date format in the Product Line name.
- Enter your Brand AAIA ID. This is not required to save Product Line but is **HIGHLY** recommended as it is visible from the OnDemand Portal.
- Manager Name, Phone, & Email will default automatically from the Administrator settings. If you would like a product line to be assigned to a different contact, you can update new contact information that in this screen.
- Channel Partners prefer product line by file type, for example: ACES, PIES, and Images should all be in separate product lines. This way a receiver of your data is not forced to get images and ACES if they are only needing PIES. There is no limit to how many product lines you create.
- **Private Label:** Takes visibility away from all receivers, enabling you to control who sees that this product line is available. This is a great option for receivers who require their own unique files.
- **Auto Publish:** When selected, this automatically sends new data that you upload to receivers that you have previously given permission to, that have your product line ‘In Library’ status.
- **In OnLine Catalog:** This will determine if your data is visible in the OnLine Web Catalog www.opticatonline.com
- **ACES ID Validation:** If this option is set to Mandatory via the drop down, every ACES record will be validated during the import process, even if the record has been set as “Validate = NO”
- **In Web Services:** Makes data available for Channel Partners using Web Services.
- Click **Save** if any changes have been made.

Importing Data:

ONBOARD Product Lines Catalog Dashboard Configure Help BrittneyOB2 OnBoard Documentation

Reset
Save
Publish
Delete

ProductLine: OptiCat PIES
Manager Phone: 8015420560
Created (MT): 10/31/2018 10:09:38 AM
URL: https://www.opticatonline.com/
Private Label: ☐
Skip validation: ☐
Manager Name: Brittney Christensen
Manager Email: bchristensen@opticat.net
Updated (MT): 1/1/2001 12:00:00 AM
AAIA Brand Code:
Auto-publish: ☒
ACES.ID.Validation: Normal
In catalog: ☐

Upload Files
Imported Files
Receivers
Delivery Log
Image Sync

+ Add file(s)... Browse Cancel/Clear

Remove	Progress	Replace?	Product Name	Type	File Name	MB	Comment
No data available in table							

PCdb Published: 2018-10-26
VCdb Published: 2018-10-26
PAdb Published: 2018-10-26

- Select the 'Upload Files' tab, then click + Add File(s), or Browse.
- Next, select the file you'd like to upload – zipped files are preferred but not required. OnBoard will allow a filename (the file you're importing) of up to 255 characters.
- If this is your first upload for a new product line, you'll need to enter a Product Name, i.e.: OptiCat PIES
 - **NOTE: The Product Name should not include any dates**, so that when you import a new release to that file you can use the same name by selecting it in the drop-down menu.
- Select a Type, such as ACES, PIES, PIES Flat or Other.
- "Other" is for any file that doesn't need to be validated. For example: Images, Word Documents, PDFs, Drawings, Videos, etc.
- Zip Files may not contain additional Zip Files.

ONBOARD Product Lines Catalog Configure Help bwilliams BWOB Supplier

Product Line: BW testing 3730 (6151)

ProductLine: BW testing 3730
 Manager Phone: 5556667777
 Created (UTC): 5/14/2019 7:21:49 PM
 URL:
 Manager Name: BWOB William
 Manager Email: brandikaywillia
 Updated (UTC): 5/31/2019 11:2
 AAIA Brand Code:
 Private Label: ☒
 Auto-publish: ☒
 ACES ID Validation: Normal

Errors must be fixed before saving can complete.

Remove	Progress	Replace?	Product Name	Type	File Name
<input checked="" type="checkbox"/>	(uploaded)	(create new...)	more than 1 file	PIES	test-PIESXML_6_7_05082019_172321.zip

Multiple datafiles in archive.

PCdb Published: 2019-06-14
 VCdb Published: 2019-05-31

- If the zip file contains more than one file you will get this error. We can't validate multiple Aces or Pies zipped together.
- You may upload multiple files at the same time in separate product files:

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

Created (UTC): 2017-04-04
 Updated (UTC): 2020-02-10 20:55:36
 URL:
 AAIA Brand Code:
 Private Label: ☒
 Auto-publish: ☐
 In OnLine Catalog: ☐
 Data-Transfer-Only*: ☐
 ACES ID Validation: Normal

Progress:

	Progress	Replace?	Product Name	Type	File Name	MB	Comment
<input checked="" type="checkbox"/>	success	(create new...)	First	Select an Option	Product File 1 2020.xml	3.801	
<input checked="" type="checkbox"/>	success	(create new...)	Second	Select an Option	Product File 2 2020.xml	86.228	

PCdb Published: 2020-02-14
 VCdb Published: 2020-01-31
 PAdb Published: 2020-01-31

- **Optional:** You can add a Comment prior to upload. There is a comment box, enter text here and then when file is saved, the text will be included with data delivery in a .txt file along with the data – i.e. “This is file 1 of 2 for the 3rd quarter update”.

- **Save**
- Once uploaded, you will be redirected to the 'Imported Files' tab, and if ACES/PIES type was selected validation will begin. The upload process copies the file from your local machine into a private work space on the OptiCat server.

Replacing a file:

- When doing your update for the product line, you will add the file(s) as directed above, but now, in the 'Replace?' box, use the drop down to select the product file you will be replacing. This will overwrite (replace) the old file so that receivers will only have access to the most current data.

The screenshot shows the ONBOARD interface for 'OptiCat Supplier Test (I)'. The 'Product Line' is 'OptiCat PIES (3916)'. The 'Replace?' dropdown is open, showing options: '(create new...)', '(create new...)', and 'OptiCat PIES 3rd quarter ('. The 'File Name' field contains 'OptiCat PIES OnBoard.xml' and the 'MB' field shows '8.345'. The 'Progress' bar is green and labeled 'ready'.

- You can still update the product name. For Example: I am replacing OptiCat PIES 3rd Quarter and have entered a new Product Name of OptiCat PIES 4th Quarter.
- Select Type: ACES, PIES, Other
- Click Save.

Imported Files (Files imported to OnBoard)

ONBOARD Product Lines Catalog Dashboard Configure Help BrittneyOB2 OnBoard Documentation

Product Line OptiCat PIES (3754)

Reset Save Publish Delete

ProductLine OptiCat PIES Manager Name Brittney Christensen
 Manager Phone 8015420560 Manager Email bchristensen@opticat.net
 Created (MT) 10/31/2018 10:09:36 AM Updated (MT) 1/1/2001 12:00:00 AM
 URL https://www.opticatonline.com/ AAIA Brand Code
 Private Label ☐ Auto-publish ☒ In catalog ☐
 Skip validation ☐ ACES ID Validation Normal

Upload Files Imported Files Receivers Delivery Log Image Sync

10 Search... Refresh autorefresh Delete selected Previous 1 Next

Select	Product Name	Date (UTC)	File Name	Type	Status	% Complete	Records Imported	Records Total	Schema Errors	Schema Warnings	Schema Version	MB	Comment
<input checked="" type="checkbox"/>	OptiCat PIES	2018-10-31 18:15:26	OptiCat PIES 20181031.xml	PIES	Complete	100	1248	1248				15.06	

- This is where you'll see the status of the import & validation. After the file has been loaded to the OptiCat server, OnBoard automatically begins the process of validating each record within the file. This validation process is based on the AAIA ACES XSD (VCDB) or the PIES XSD (PCDB) delivery specifications.
- Current XSD Version is posted in OnBoard in the Upload File Tab.

ONBOARD Product Lines Catalog Dashboard Configure Help bcob OptiCat: Supplier Test (1)

Product Line OptiCat PIES (3916)

Upload Files Imported Files Receivers Delivery Log Image Sync

+ Add file(s)... Browse Cancel/Clear

Remove	Progress	Replace?	Product Name	Type	File Name	MB	Comment
No data available in table							

PCdb Published 2018-11-16 VCdb Published 2018-11-16 PADb Published 2018-11-16

- You can see the progress in % Complete Column.
- Once validation is finished, the status will change to Complete or Failed.
- If Auto-publish is checked, the original file will be delivered to receivers 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:

ONBOARD Product Lines Catalog Dashboard Configure Help BrittneyOB2 OnBoard Documentation

Product Line: OptiCat PIES (3754)

Reset Save Publish Delete

ProductLine: OptiCat PIES
 Manager Phone: 8015420560
 Created (MT): 10/31/2018 10:09:36 AM
 URL: https://www.opticatonline.com/

Manager Name: Brittney Christensen
 Manager Email: bchristensen@opticat.net
 Updated (MT): 1/1/2021 12:00:00 AM
 AAIA Brand Code:

Private Label: ☐ Auto-publish: ☒ In catalog: ☐
 Skip validation: ☒ ACES.ID.Validation: Normal

Upload Files Imported Files Receivers Delivery Log Image Sync

10 Search... Refresh autorefresh Delete selected Previous Next

Select	Product Name	Date (UTC)	File Name	Type	Status	% Complete	Records Imported	Records Total	Schema Errors	Schema Warnings	Schema Version	MB	Comment
<input checked="" type="checkbox"/>	OptiCat PIES	2018-10-31 18:15:26	OptiCat PIES 20181031.xml	PIES	Complete	100	1248	1248				15.06	

Import Messages:

Type	Time (UTC)	Message
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- Any Warnings/Errors/Schema Errors would be listed under 'Import Messages'
- Warnings and errors are determined by ACES/PIES Delivery Specification provided by AAIA
- Warnings = Optional Field
- Errors = Required Field
- Data with warnings will pass through into the OptiCat Web Catalog, Data with errors will not.
- The parts with warnings will not be imported into the OptiCat data repository, however, since OptiCat forwards the exact file submitted by the supplier to the receiver, they will not be modified or dropped by OptiCat.
- If Auto-publish is not checked, once the import status changes to Complete or Failed, click the blue Publish button up in the top left. This should only be done if this is an established product line and you've already given permission access to receiver(s).
 - Clicking Publish delivers data to the Receivers you have already approved that have 'In Library' status.

Receivers

Once you've imported your file, you can choose the Receivers whom you want to have visibility or have access to your data.

ONBOARD Product Lines Catalog Dashboard Configure Help Brittny082 OnBoard Documentation

Product Line: OptiCat PIES (3754)

Reset Save Publish Delete

ProductLine: OptiCat PIES Manager Name: Brittny Christensen
 Manager Phone: 8015420560 Manager Email: bchristensen@opticat.net
 Created (MT): 10/31/2018 10:09:36 AM Updated (MT): 1/1/2001 12:00:00 AM
 URL: https://www.opticatonline.com/ AAIA Brand Code:
 Private Label: ☐ Auto-publish: ☒ In catalog: ☐
 Skip validation: ☐ ACES ID Validation: Normal

Upload Files Imported Files Receivers Delivery Log Image Sync

10 Search... Filter... Reset Save Previous 1 2 3 4 5 ... 11 Next

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link	Requires Brand AAIA ID?	Requires GTIN?	Autocorrects Brand Label?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OptiCat Beta Receiver	Need Authorization	Manage	Tracy Quispe	(801) 555-1212	mdouth@opticat.net	view pdf		-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	ABCTestReceiver	Need Authorization	-	Stuart	(801) 555-1212	stuart@opticat.net			-	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Advanced Advancement Advances	Need Authorization	Manage	John Doe	(801) 801-1801	williams@opticat.net			-	-	-

- Status: **“Need Authorization”** means that receiver has no access to data.
- Status: **“Access Requested”** means receiver has requested access to the data, but you have not given it.
- Status: **“Access Authorized”** means that you have given the receiver access, but the receiver has not moved to their data library yet.
- Status: **“In Library”** means that you have given the receiver access to this product line and they have moved it from the DIO Repository to their Data Library. They now have the ability to download manually at anytime. They will also receive new data you publish to this product line. The receiver will be notified by email when you publish new data to this product line.
- Status: **“On Hold”** means that the receiver is not ready to move to their library.
- Status: **“UnWanted”** means you have given a receiver access, but they do not want the data at this time.
- You can use the Filter bar to search by permissions at any time:

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

10 Search... Reset Save Previous 1 2 3 4 5 ... 62 Next

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link	Requires Brand AAIA ID?	Requires GTIN?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OptiCat Receiver	Access Denied	-	bchristensen@opticat.net					-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1A Auto, Inc.	Access Denied	-	1a@auto.com			view pdf	www.1aauto.com	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	A Plus Auto Salvage	Access Denied	-	Kevin Brucher	(626) 466-2211	kevin.br@aplusautosalvage.us	view pdf		-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	A.S.W., Inc.	Access Denied	-	Buster Hollencamp	(502) 376-7415	opticat@clubltd.com	view pdf	https://www.bullyautoparts.com	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	AAM USA, Inc.	Access Denied	-	Paul Schmidt	(423) 282-021x208	pauls@theaamgroup.com	view pdf		requires brand AAIAID	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	AAP, Inc.	Access Denied	-	Fred Pacheco	(401) 331-6894	fredp@actionautoparts.com	view pdf	http://www.actionautoparts.com	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Aarnes A/S	Access Denied	-	Lars Christensen	(476) 997-1916	lars@aarnes.no	view pdf		-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	AC Delco - Receiver	Access Denied	Manage	Brian Peers	(810) 606-2178	brian.peers@gm.com			-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adair Printing	Access Denied	-	Marshall Stall	(734) 426-2822	marshall@adairgraphic.com	view pdf	http://www.adairgraphic.com	-	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Advance Auto Parts	Access Denied	Manage	Brandi Williams	(801) 542-0560	bwilliams@opticat.net			-	-

Copy CSV TSV PSV Print

Previous 1 2 3 4 5 ... 62 Next

- 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 and can decide to give access or not.
 - If you uncheck visibility, this will send an email to the receiver letting them know that you've denied access.
- You can Copy, export a CSV, TSV, PSV, or print the receiver status using the buttons at the bottom of the page.
 - This feature is also available in the delivery log tab.

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:

ProductLine Permissions History:

Changed (MT)	Status	Company Name	Phone	User ID	Changer Name	Email
2018-12-04 20:30:06	In Library	Aaron's Test Supplier	(555) 123-4567	1879	Aaron Turpin	aturpin@opticat.net

- **Manage:** When you see a receiver with the Manage option, this means they do not manage their own account, delivery is managed by you. If you give access and save the status will go to 'In Library'. Then you will click the manage button and enter credentials that were given to you for the delivery, either FTP or email.

Receivers Table:

Visible	Access	Receiver	Status	Managed?	Manager	Phone	Email	Agreement	Company Link
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OptiCat Receiver	Access Authorized	-	Brittney Christensen	(801) 542-0560	bchristensen@opticat.net		
<input type="checkbox"/>	<input type="checkbox"/>	Perfection HyTest-Data Receiver	Access Denied	-	Bob Sterling	(843) 513-1330x334	bsterling@perft.com	view pdf	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Test Receiver - OptiCat	In Library	Manage	Brandi Williams	(801) 542-0560	bchristensen@opticat.net	view pdf	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Test Receiver 2	In Library	-	Aaron Turpin	(801) 542-0560	aturpin@opticat.net	view pdf	

Reports:

- Go to Configure > Receiver Lines Report

ONBOARD Product Lines Catalog Configure Help bcbob Brittny Beta Supplier (684)

Receiver Lines Report

Supplier Setup
Receiver Lines Report
OnLine Lines
Web Service Blacklist

10 Search...

Receiver	Product Line	Status	Managed?	Private Label	RCVR	PL	PLP
Aaron's Test Receiver	Images	In Library	-	-	624	6106	171748
Brittny Beta	Images	In Library	-	-	683	6106	171720
BWOD Receiver	Images	In Library	-	-	636	6106	171749
Melissa Test Receiver	Images	Access Authorized	-	-	677	6106	171750
Melissa Test Receiver2	Images	Access Authorized	-	-	679	6106	171751
Opticat MIC Receiver	Images	Access Authorized	-	-	654	6106	171752

Copy CSV TSV PSV Print

Previous Next

- This will allow you to see the status of every product line for every receiver.
 - You can expand the view using the drop down
 - You may search by receiver, product line or status
 - Easily see which receivers are supplier managed
 - You can export as a CSV, TSV, PSV, or print directly from this screen

Product Center:

ONBOARD Product Lines Catalog Dashboard Configure Help bwilliams ABC Company (69)

Product Center

UNDER CONSTRUCTION

<https://trello.com/c/HgCQNLIn/2738-onboard-product-center-completion-ob1-not-displaying-all-available-product-fields>

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

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Classic OnBoard Requires one of:

- Internet Explorer

Overview

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

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

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



Logging in

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

Manage Account:

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

- **“Data Updated”** Will let you know that a supplier has updated their data. This is recommended if you are receiving data via FTP; as it will notify you that new data is waiting for you.

Updating Receiver Profile:

The screenshot shows the ONDEMAND interface with the 'Receiver Setup' page. A dropdown menu is open under 'Settings', showing 'Receiver' (highlighted), 'Templates', and 'Accuracy'. The 'Receiver Profile' tab is active, displaying a form for 'Brittney October Test Receiver'. The form includes fields for Company Name, Added (UTC), Address2, State, Contact Email, BIO, Agreement, Web URL, Address1, Postal, Contact Phone, Logo URL, City, Country, and Contact Email. There are also checkboxes for Special agreement, Prospective, Managed Receiver, PIES Validation Access, Accuracy Validation Access, Web Services, and Supplier Assessments.

- Click the down arrow next to Settings, then click ‘Receiver’.
- You can update your company information here at any time.
- If The company name needs to be changed, please contact OptiCat.
- BIO located near the bottom of the page is very important. The text here will be included in Automated Data Request emails that are sent to suppliers. This is also what the supplier will see under your company name in their Receivers Tab. It’s a good idea to include information about your company and what you are doing with the supplier’s data.
- Always click the blue ‘Save’ button next to Receiver Setup.

FTP Settings:

- Click on the ‘FTP Defaults’ drop down:

The screenshot shows the ONDEMAND interface with the 'Receiver Setup' page. The 'FTP Defaults' tab is active, displaying a form for FTP settings. The form includes fields for FTPAddress (with a dropdown menu), FTPUsername, FTPPassword (with a 'Change password' button), Use SSL, Use Active, and FTP Exact Directory Mode.

- This for a default or general FTP that all product lines direct to. If you have subfolders that you want to direct certain product lines data to, we will address that later in the documentation.
- Enter FTP host address and make sure to include Ftp://

- Enter the FTP Username
- Enter the FTP Password
- Always click the blue 'Save' button next to Receiver Setup.

Export Options:

Standard	Options	Status
ACES AFTERMARKET CATALOG EXCHANGE STANDARD	Files Unzipped	<input type="checkbox"/>
	No DTD disclaimer	<input checked="" type="checkbox"/>
	Require BrandAAIAID	<input type="checkbox"/>
PIES PRODUCT INFORMATION EXCHANGE STANDARD	Originals	<input checked="" type="checkbox"/>
	Flat files	<input type="checkbox"/>
	Custom Templates Available	2
	XML 6.5 by product line	<input type="checkbox"/>
	XML 6.6 by product line	<input type="checkbox"/>
	XML 6.7 by product line	<input type="checkbox"/>
	XML 7.0 by product line	<input type="checkbox"/>
	GTIN parts only	<input type="checkbox"/>
AWDA WAREHOUSE DISTRIBUTORS	6.3 per file	<input type="checkbox"/>
	6.3 combined-line	<input type="checkbox"/>
	6.4 per file	<input type="checkbox"/>
	6.4 combined-line	<input type="checkbox"/>
Other	Originals	<input checked="" type="checkbox"/>

- Here you will find all options that you can select when receiving data via OptiCat.
 - **Files Unzipped** Files will be delivered unzipped.
 - **ACES or PIES Originals** Files will be delivered in original supplier provided format.
 - **Require BrandAAIAID** If the ACES file does not include the BrandAAIAID then the file will not be delivered.
 - **Flats by files** 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.
 - **Custom Templates Enabled** Allows you to create your own custom PIES template that you'll be shown later in this guide.
 - **XML 6.5 by product line** exports PIES version 6.5.
 - **XML 6.6 by product line** exports PIES version 6.6.
 - **XML 6.7 by product line** exports PIES version 6.7.
 - **XML 7.0 by product line** exports PIES version 7.0.
 - **Require GTIN** Will only deliver parts with GTIN; it will delete parts without GTIN in the custom file delivered.
 - **Fix Brand Labels by BrandAAIAID** Adds Brand Label to the item in PIES from the B20 field.
 - **AWDA 6.3 by files**
 - **AWDA 6.3 by product line**
 - **AWDA 6.4 by files**

- **AWDA 6.4 by product line**
- **AWDA 6.5 by files**
- **AWDA 6.5 by product line**
- **AWDA include Header** *the export will include the header*
- **Other Originals** *Images, Videos, PDFS and unvalidated data will be delivered in the original supplier provided format.*
- If you choose any of the options above, you will receive the data in this format until you change it back.
- Always click the blue 'Save' button next to Receiver Setup.

OnTarget:

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

Notification Emails:

- **"Data Authorization"** Will let the company manager know that a supplier has given you access to their product lines and it is now time to move it to 'In Library'
- **"Data Updated"** Will let the company manager know that a supplier has updated their data. This is recommended if you are receiving data via FTP; as it will notify you that new data is waiting for you.

Image Sync Options:

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

Custom PIES Templates:

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

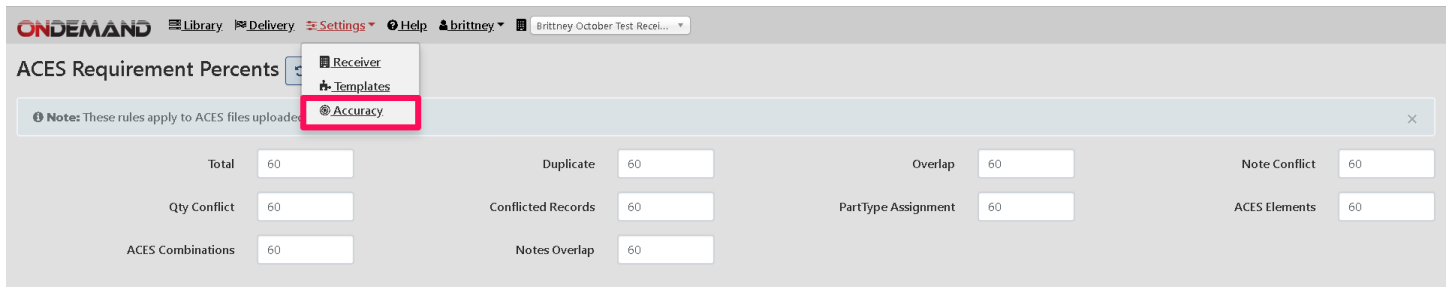
- This is a great option if you don't need an entire PIES file and are only looking for certain fields.
 - If you select all available fields for a flat file, we will export the following with Digital Assets:

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

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

Managing ACES Requirements:

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

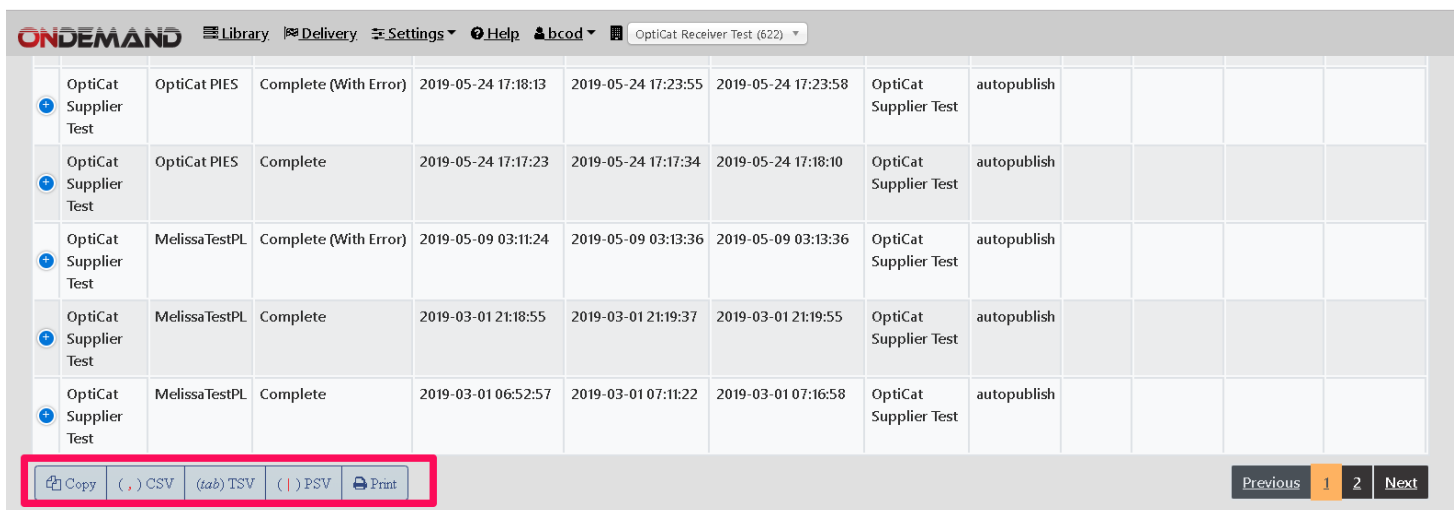


Setting	Value
Total	60
Duplicate	60
Overlap	60
Note Conflict	60
Qty Conflict	60
Conflicted Records	60
PartType Assignment	60
ACES Elements	60
ACES Combinations	60
Notes Overlap	60

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

Delivery Report:

- Click on the Delivery tab:



	Product Line	Status	Requested Date	Start Date	Completion Date	Product Line	Status	Requested Date	Start Date	Completion Date
+	OptiCat Supplier Test	Complete (With Error)	2019-05-24 17:18:13	2019-05-24 17:23:55	2019-05-24 17:23:58	OptiCat Supplier Test	autopublish			
+	OptiCat Supplier Test	Complete	2019-05-24 17:17:23	2019-05-24 17:17:34	2019-05-24 17:18:10	OptiCat Supplier Test	autopublish			
+	OptiCat Supplier Test	Complete (With Error)	2019-05-09 03:11:24	2019-05-09 03:13:36	2019-05-09 03:13:36	OptiCat Supplier Test	autopublish			
+	OptiCat Supplier Test	Complete	2019-03-01 21:18:55	2019-03-01 21:19:37	2019-03-01 21:19:55	OptiCat Supplier Test	autopublish			
+	OptiCat Supplier Test	Complete	2019-03-01 06:52:57	2019-03-01 07:11:22	2019-03-01 07:16:58	OptiCat Supplier Test	autopublish			

Copy (,) CSV (tab) TSV (|) PSV Print Previous 1 2 Next

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

Your Data Library:

- Click on Library.

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

- This section will always filter by the product lines that have already been moved to ‘In Library’ status.
 - These are the product lines that are ready to be downloaded at any time.
 - You can remove In Library filter to view all by clicking the X next to In Library.
- If you select a product line then click deliver, the data will go to your dedicated ftp site you have set up in the admin section.
 - Note: if there is not an FTP set up, it will attempt to transfer via email; however, it may not be able to be delivered via email if the file size is too large.
 - If or when a Supplier sets a product line up as “Auto Publish”, and they have already given you access to that product line & you’ve moved it to ‘In Library’, when they import any new data it will automatically push through to your default delivery destination and if it is pushed to an FTP you will receive an automated email notification from OptiCat letting you know it’s waiting for you.

- Click on the Filter bar:

Supplier	Product Line	Status	Publish	Destination	Created (MT)	Updated (MT)	Validation	AAIA	Manager	Phone	Email
Opticat OB2	Large PIES file	In Library			2018-10-09 13:55:12	-	OnTarget		Brittney Christensen	(800) 542-0560	bchristensen@opticat.net
Opticat OB2	Second Product Line	Receiver Unwanted			2017-09-22 20:32:47	2018-10-04 08:57:48	OnTarget		Tracy Quispe	(800) 717-8405	tracy.quispe@gmail.com

- You can filter by the following:
 - **Need Authorization-** This means you have not requested to access this product line.
 - **Access Requested-** This means you have requested access to the product line, but the supplier has not yet given you permission.

- **Note:** The Supplier Manager's contact information is provided so that you can reach out to them with questions or if you are waiting on them to grant permission. If you do not see all the contact information, click on the blue plus sign to view.
- **Access Authorized-** *This means that the supplier has given you permission to access the data and you need to move it to 'In Library' in order to download.*
- **In Library-** *This means you can download the data and will receive any future updates from the supplier, if they use auto-publish or manually publish.*
- **Receiver Holding-** *This means that you do not want data to be automatically delivered to you at this time.*
 - You may deliver data to yourself while it is in 'Receiver Holding' status. Just highlight the product line by clicking, then select the 'deliver' box.
- **Receiver Unwanted-** *This means that you no longer want the data.*
- You may also search by Supplier Name, Product Line Name, Validation, Manager Name, Phone or Email:

Supplier	Product Line	Status	Publish	Destination	Created (MT)	Updated (MT)	Validation	AA/A	Manager	Phone	Email
Wowza Test Supplier	Wowza ACES	Need Authorization	auto-deliver	default	2017-07-03 20:09:20	2017-07-05 13:42:23	-		Brittney Christensen	(800) 542-9500	bchristensen@opticalnet
TestSupplier	test_AWDA	Need Authorization	auto-deliver	default	2018-03-20 14:58:45	2018-04-26 18:10:36	OnTarget	1	Jimbob Jones	(111) 111-1111	awong@opticalnet
TestSupplier	test_brakeabsid	Need Authorization	auto-deliver	default	2018-05-30 17:31:09	2018-05-30 17:31:39	OnTarget		Jimbob Jones	(111) 111-1111	awong@opticalnet
TestSupplier	test_DAM	Need Authorization	auto-deliver	default	2018-04-27 18:15:48	2018-06-18 19:20:28	OnTarget		Jimbob Jones	(111) 111-1111	awong@opticalnet

- 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 name, you can see Files with product name and product line permission history:

ONDEMAND Library Delivery Settings Help brittneyc Test Receiver (119)

Please select the Product Line(s) for options.

10 Search... In Library X

Previous 1 2 3 4 5 Next

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

Email: bchristensen@opticat.net PL: 6033

Files:

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

Permission History:

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

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

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

Library (DIO Data Repository) Refresh Request access Set unwanted

You have selected 1 Product Line(s).

10 OnTargetTestLine Need Authorization X

Previous 1 Next

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

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

ONDEMAND Library Delivery Settings Help brittneyc OptiCat Receiver (658)

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

You have selected 1 Product Line(s).

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

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

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

ONDEMAND Library Delivery Settings Help brittneyc OptiCat Receiver (658)

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

You have selected 1 Product Line(s).

10 Brittney In Library X Previous 1 Next

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

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

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

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

You have selected 1 Product Line(s).

10 Search... In Library X Previous 1 Next

Supplier	Product Line	Status	Publish	Destination	Created (MT)	Updated (MT)	Validation	AAIA	Manager	Phone	Email
Opticat OB2	Large PIES file	In Library	auto-deliver	default	2018-10-09 13:55:12	-	OnTarget		Brittney Christensen	(800) 542-0560	bchristensen@opticat.net
A Parts Supplier	3/30 Testing Product Center	In Library	on-demand	default	2017-03-30 15:51:55	2017-03-30 15:51:55	OnTarget		Opticat Administrator	(919) 406-8840	bthueson@opticat.net

- 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:** <http://brittneyFTP/PIES>

ONDEMAND Library Delivery Settings Help brittney OptiCat Receiver (858)

Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

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

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

Delivery Method: FTP

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

FTP Username: BrittneyFTP

FTP Password: [Masked] Change password

Password strength seems strong!

Use SSL: [] Use Passive: [] FTP Exact Directory Mode: []

Receive Supplier ACES/PIES Assessment: [] Receive Supplier ACES/PIES Net Changes: [] Receive Supplier ACES Subset: []

- After you've entered the destination, always click the blue 'Save' button at the top of the page.
- This is also where you set up your Image Sync destination for applicable Image Sync lines:

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

Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

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

Delivery Method: Image Sync Only

Frequency: Select an Option

FTP Address: [Empty]

FTP Username: [Empty]

ISS Password: [Masked] Change password

FTP Address must be a dedicated url for images only.

Use SSL: [] Use Passive: []

Last Sync Date: [Empty]

Last Error Message: [Empty]

Enabled: [] Is ISS Lite: []

- 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:

Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

10 Search... In Library

Previous 1 Next

	Supplier	Product Line	Status	Publish	Destination	Image Sync	Created (UTC)	Updated (UTC)	Validation	AAIA	Manager	Phone
+	OptiCat Supplier Test	Brittney ISS Test	In Library	auto-deliver	default	active	2019-06-05 13:56:03	2019-06-05 14:19:11	OnTarget		Aaron Turpin	(801) 631-1775
+	OptiCat Supplier Test	MelissaTestPL	In Library	auto-deliver	imagesync	active	2019-01-25 11:35:09	2019-06-06 22:02:20	OnTarget		Melissa Douthit	(801) 631-1775
+	OptiCat Supplier Test	No AutoPublish Test	In Library	click-deliver	default	-	2019-06-05 14:50:09	2019-06-05 14:51:35	OnTarget		Aaron Turpin	(801) 631-1775
+	OptiCat Supplier Test	OptiCat PIES	In Library	auto-deliver	bchristensen@opticat.net	-	2018-12-06 20:54:38	2019-05-24 17:18:13	OnTarget		Brittney Christensen	(801) 542-0560

Previous 1 Next

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

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 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 of the images to your designated FTP folder. The syncs from then on will vary on how many changes were done to that original master file.
- File conversion takes about 1 second per file (per our latest testing).
- ISS allows resizing of the images. The desired width or height can be selected, and the original aspect ratio will be preserved. We recommend a selection of width: 1500 in accordance with the Autocare best practices.
- ISS allows file renaming; this is limited to the data included in the PIES file. All of these settings can be accessed by going to OnDemand>Admin>Manage Image Sync Settings.
- If destination folder does not exist on your FTP server then our system can only create it for you if permissions are allowed.

ISS Setup:

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

ONDEMAND Library Delivery Settings Help brittney OptiCat Receiver (558)

Library (DIO Data Repository) Refresh

Please select the Product Line(s) for options.

10 Filter... In Library X Previous 1 Next

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

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

Full Refresh:

Please contact OptiCat for a full refresh of images.

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>

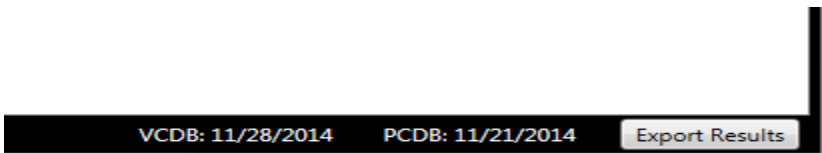
You may have to allow access for the download. If your firewall prevents this, please contact OptiCat support.

Logging in

You will log in with your current OnBoard credentials.



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



Select File:



OnBoard Product Line: OnTarget Test

OnBoard Product File:

VCDB Version: ☒ Current VCDB ☐ File VCDB

PCDB Version: ☒ Current PCDB ☐ File PCDB

Find Discrepancy Types:

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

Previous File:

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

Utilities:

- ☒ Build Part-Type/Position List

Cancel Continue

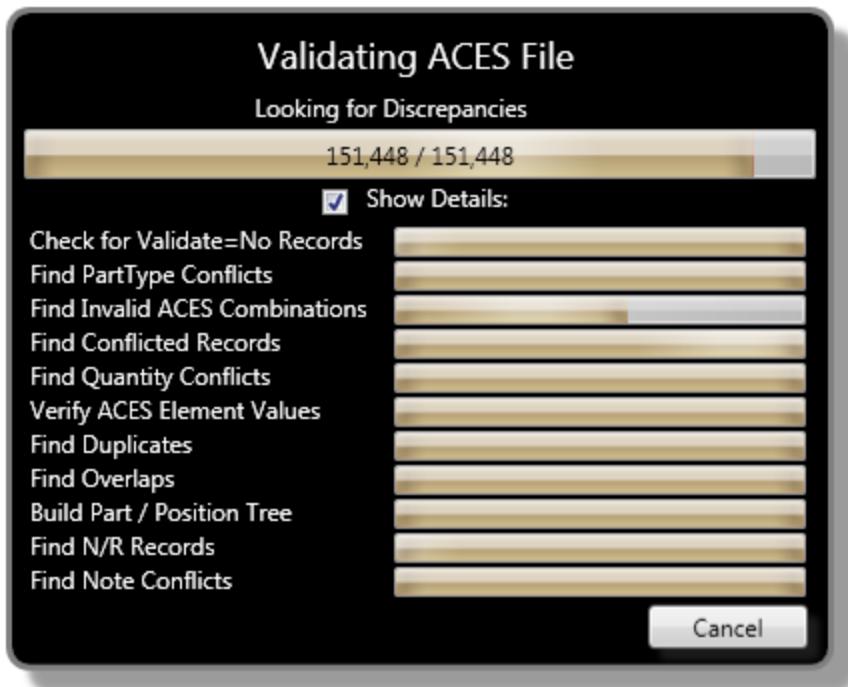
If you will be uploading the file to OnBoard, you will need to select the Product Line and the Product File Name. If the Product line is new you will need to first import the file into OnBoard

You can choose to run the file against the current VCDB/PCDB or use the File VCDB/PCDB date.

Select discrepancy types you would like.

The first time you run a file, you can skip adding the previous file, and just select continue. Browse to the file you would like to run.

Validation will run, click show details to see progress.



When Validation is complete, click on View results.

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

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

Export To OnBoard
Parts/Positions
File Comparison
Exit

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

Duplicates: Apps that contain entirely duplicate elements.

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

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

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

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

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

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

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

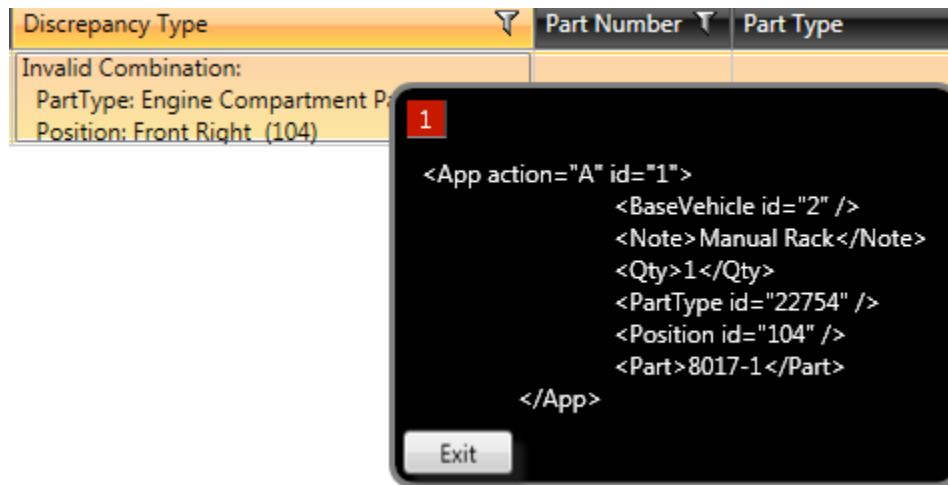
Invalid Combinations: Apps with an element value that does not appear in the VCDB.

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

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

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

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



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

File Comparison:

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

OnBoard Product Line: OnTarget Test

OnBoard Product File:

VCDB Version: ☒ Current VCDB ☐ File VCDB

PCDB Version: ☒ Current PCDB ☐ File PCDB

Find Discrepancy Types:

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

Previous File: OnTarget_FileCompare_One.xml

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

Utilities:

- ☒ Build Part-Type/Position List

Cancel Continue

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

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

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

Click File Comparison

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

Discrepancy View Export List Exit

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

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

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

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

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

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

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

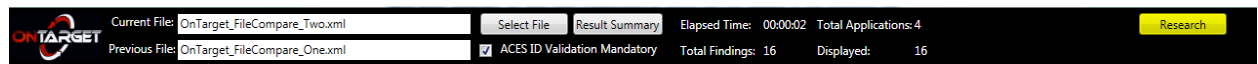
Deleted Part Types: An App with a part type which appeared in the previous file, but not in this one.

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

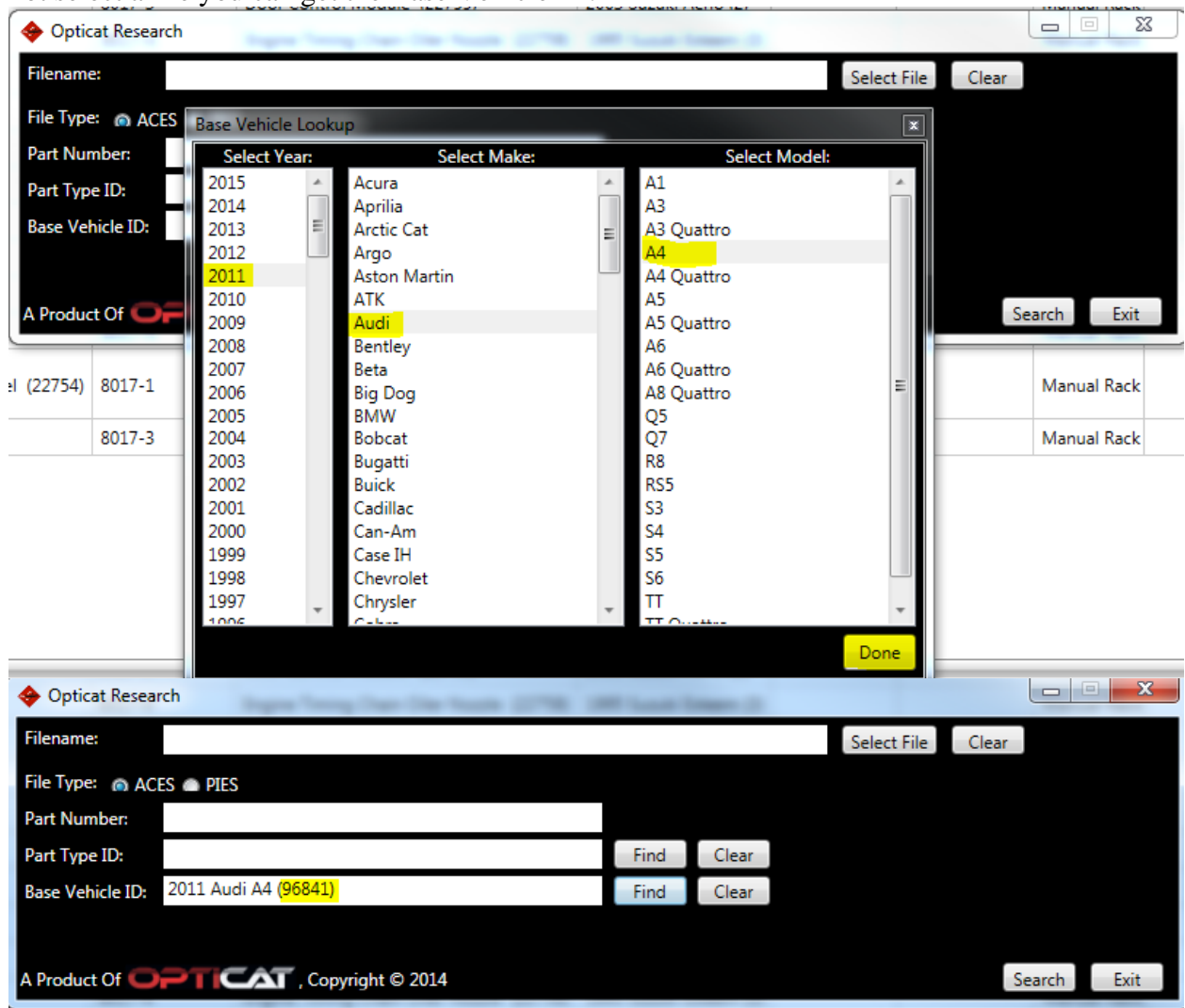
Deleted Part/Type Combos: An App with a Part/PartType combination which appeared in the previous file, but not this one.

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

Research:



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



Assessments:

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

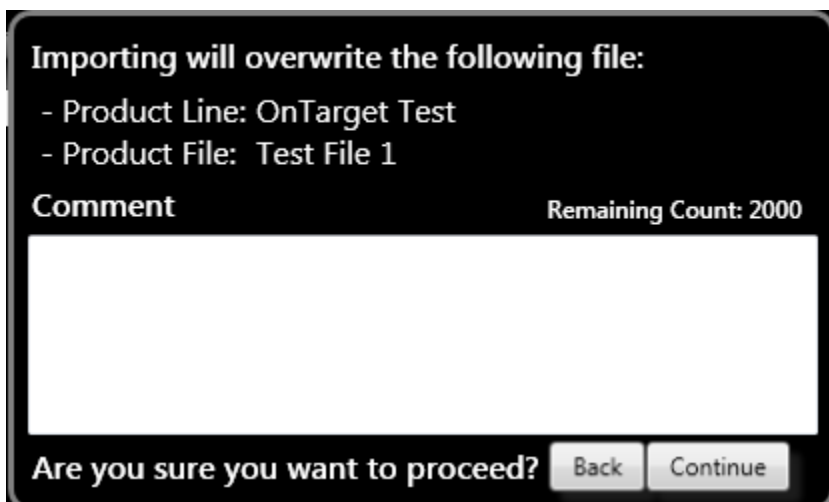


The 'Assessment Approval' dialog box features a sidebar on the left with radio buttons for selecting assessment types: 'New Base Vehicles' (selected), 'Deleted Base Vehicles', 'New Parts', 'Deleted Parts', 'New Part Types', and 'Deleted Part Types'. The main area displays a table with columns: ID, Result,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

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

Approve Each Assessment

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



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

- Continue.

Your file will now be loaded into OnBoard.

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

Private Label Generation:

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

Steps to follow:

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

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

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

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

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

Current Private Label Generation rules:

1. The following header values will be considered part columns:
 - a. Part
 - b. Part number
 - c. Part #
2. Spaces and case are disregarded, so "Part Number", "part number", and "Partnumber" would all work.

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

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

On Target Header determination:

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

“MM Part, Part number, bowers part#”

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

OnTarget will determine the following:

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

New Features:

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

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

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

Subsets:

Not Published yet.

PIES Enhanced Validation in OnTarget

- PIES ENHANCED VALIDATION
 - Performs schema validation
 - Validates the PIES filename
- ITEM SEGMENT
 - Validates part number length
 - Validates part number characters
 - Validates Hazardous Material Code
 - Validates Part Terminology in relation to zeros
 - Validates Quantity Per Application Qualifier

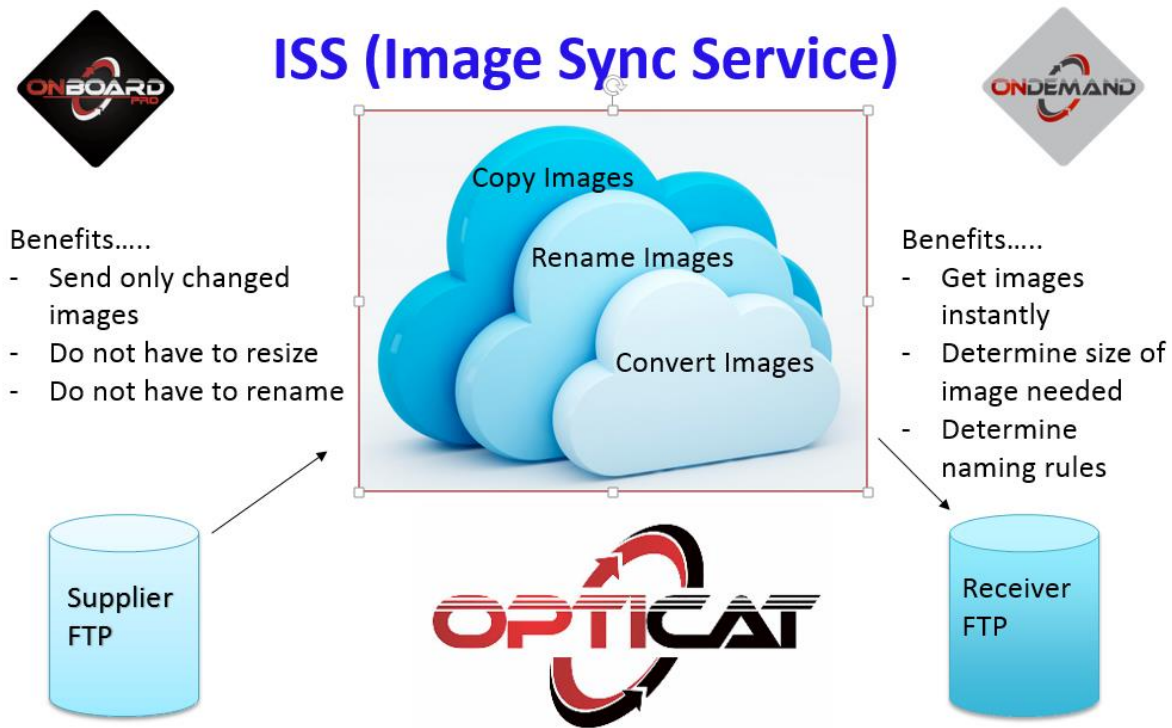
- DESCRIPTION SEGMENT
 - Validates mandatory description codes
 - Checks for invalid description codes
 - Checks for invalid description data
- EXPI, DIGITAL ASSETS AND PRICING SEGMENT
 - Validates MSR and MSD in EXPI when Hazardous Material Code is Y
 - Validates mandatory EXPI codes
 - Validates Non-palletized codes
 - Checks for invalid EXPI codes
 - Checks for core in EXPI with CRG and ZZ1 price types
 - Validates price UOMs
 - Validates price types
 - Checks for mandatory price types
 - Validates digital asset filenames
 - Checks for mandatory digital asset fields
 - Validates digital asset data
 - Validates primary digital asset type fields
 - Validates front orientation view
 - Validates asset dimensions
 - Validates orientation view if file is non-image
 - Validates file extension
- PRODUCT ATTRIBUTE SEGMENT
 - Validates mandatory attribute ids
 - Validates AAP_UDA_33 data.
 - Checks for invalid product attribute values
- PACKAGE SEGMENT
 - Check valid UOM codes
 - Verifies package level GTIN for EA
 - Verifies package GTIN or bar code characters
 - Validates GTIN characters
 - Validates dimensions UOM
 - Validates weight UOM
 - Validates mandatory and unique EA
 - Validates inner pack and case
 - Validates cubic volume and cubic weight against EA
- PART INTERCHANGE SEGMENT
 - Validates maintenance type
- TRAILER SEGMENT
 - Verifies correct item count

Common Warnings

- The 'Transfer Date' element is invalid or the 'Effective Date' element is in valid. The proper format is yyyy-mm-dd (a dash not slashes).
- The element 'Header' has invalid child element 'PcdbVersionDate'. List of possible elements expected: 'QdbVersionDate'. Anytime you see the word “Child” it is indicating that the items are not in the proper

sequence. Swap the pcdBVersionDate with the QdbVersionDate. Also, even if you do not use the QdbVersion date it should be populated with something.

ISS – Image Sync Service:



Assessments:



OnTarget Pro Assessment

Net Change
Data Optional



Adds XML

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



Deletes XML

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

This feature is now available.

ACES File Comparison:



OnTarget Pro ACES File Comparison

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

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

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

Discrepancy View Export List Exit

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