OptiCat, LLC.

On Demand 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"

Version 3.5

Updated 05/24/2024

On Demand

Overview

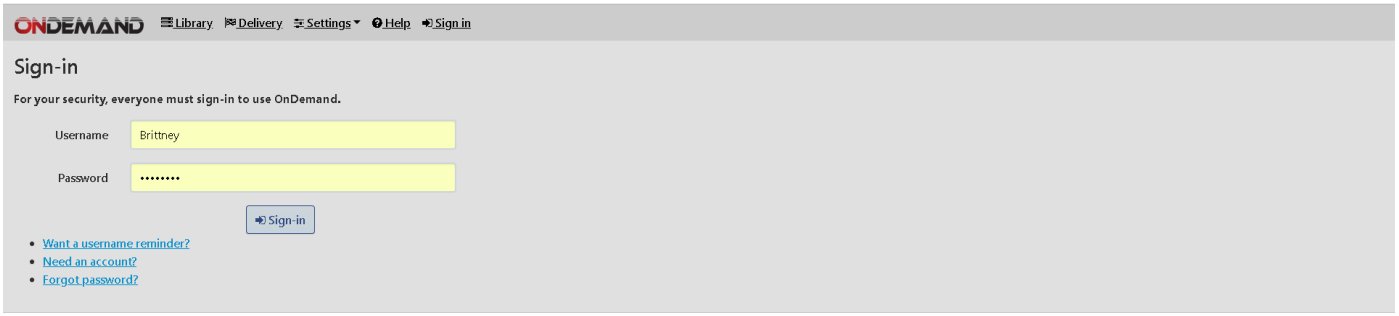
OptiCat's purpose is to provide a turnkey, SaaS (Software as a Service) technology suite that enables automotive aftermarket manufacturers to deliver important product data to their distribution channel partners in a one-step (do-it-once), validated (do-it-right) and pervasive (do-it-everywhere) way. 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/

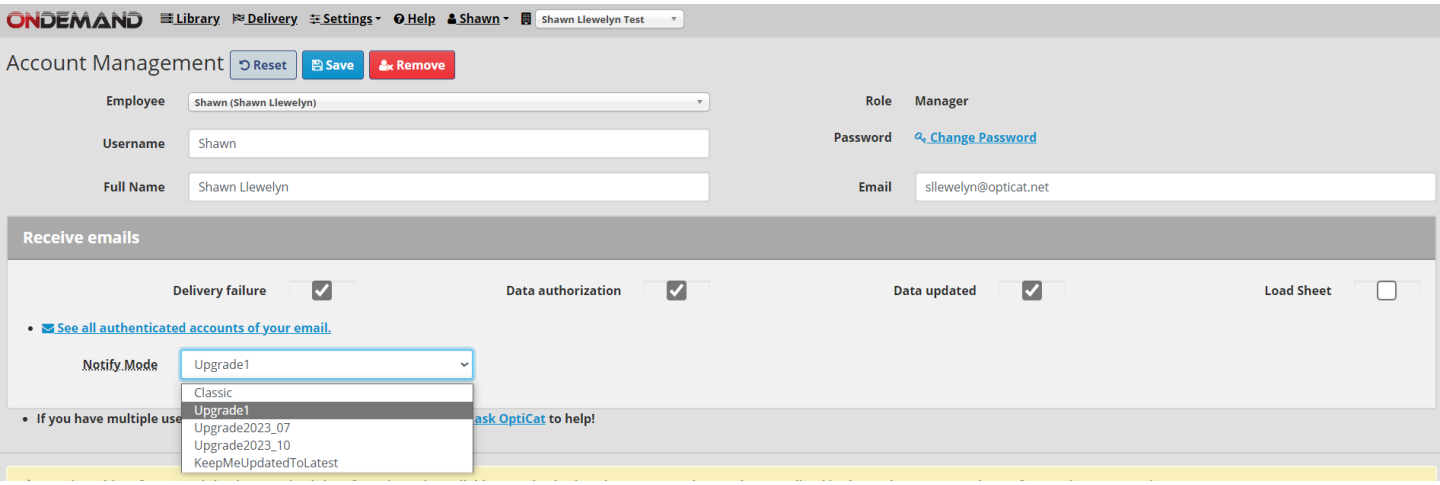
Logging in

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



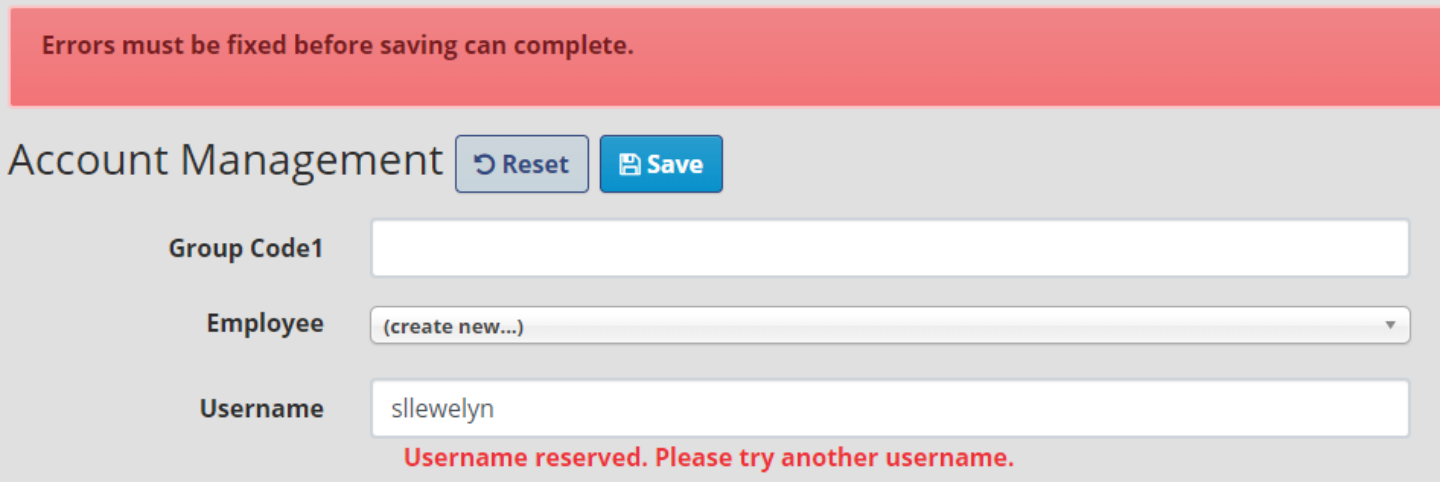
Mandatory Periodic Password Resets are required.

Manage Account



Manage Account Error

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

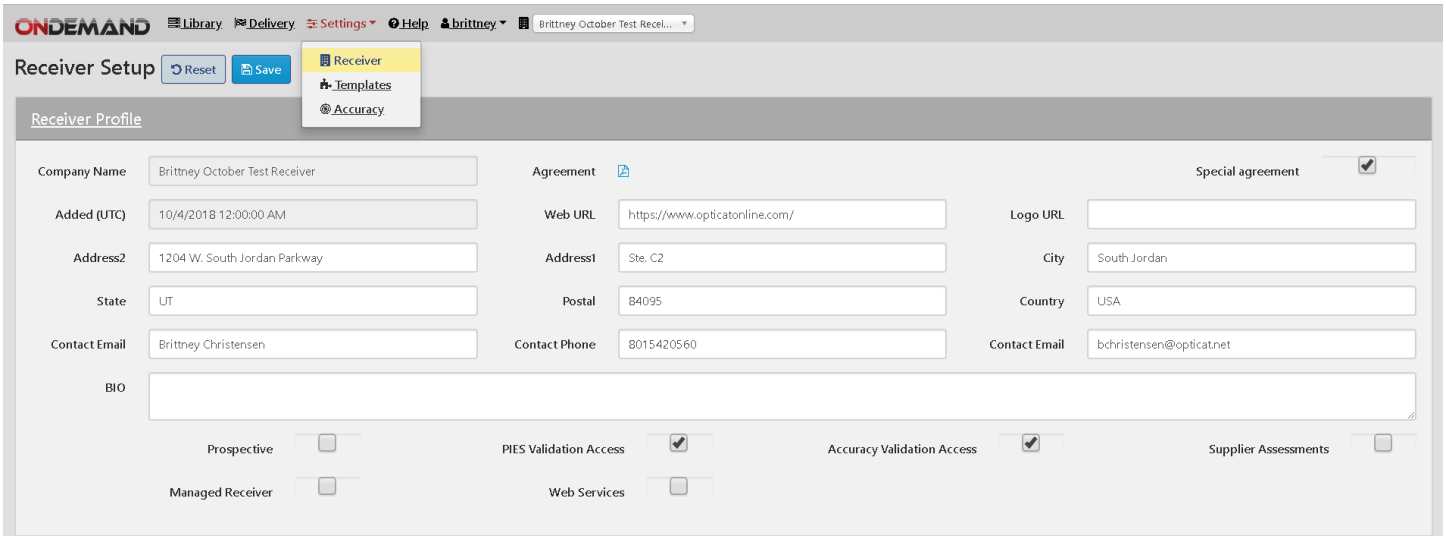


This indicates that the username is not available for use because it has previously been used in the On Demand portal. Please select a different USERNAME to continue.

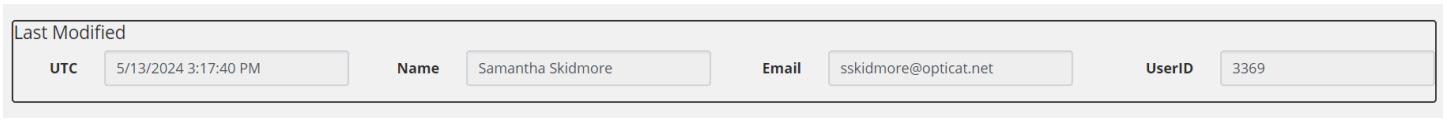
- Click the down arrow next to your username, then select ‘Manage Account’.
- In this screen, managers can create new users and request a reset password link for users, and everyone can update their email preferences:
    - ***“Delivery Failure”*** Will let you know if we are unable to deliver data to 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

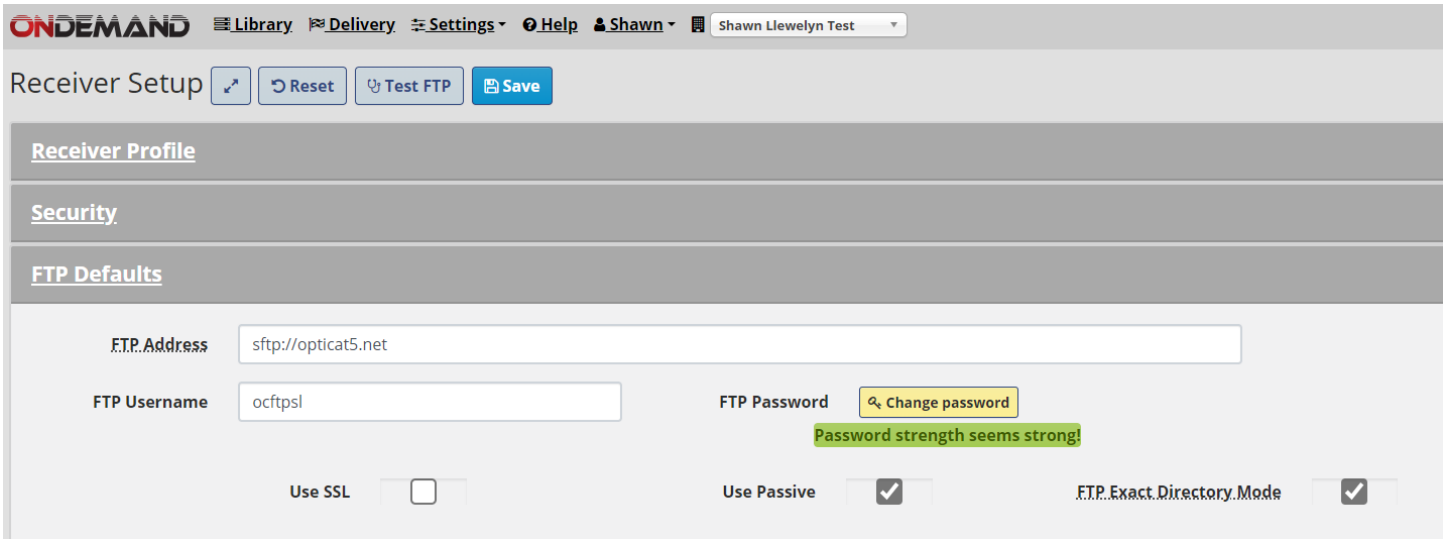


- Click the down arrow next to Settings, then click 'Receiver Setup'.
- You can update your company information here at any time.
- If the company name needs to be changed, please contact OptiCat.
- BIO located near the bottom of the page is very important. The text here will be included in Automated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

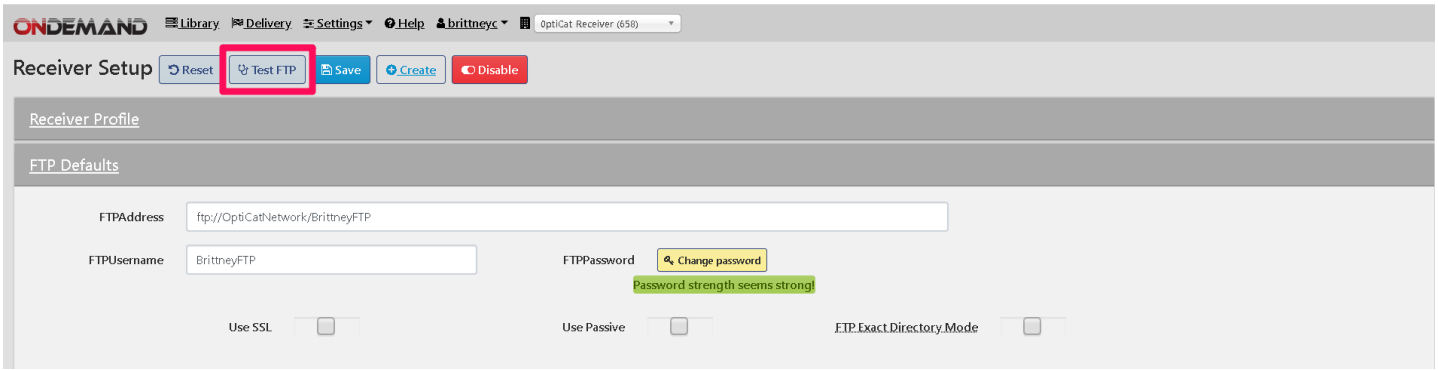


FTP Settings:

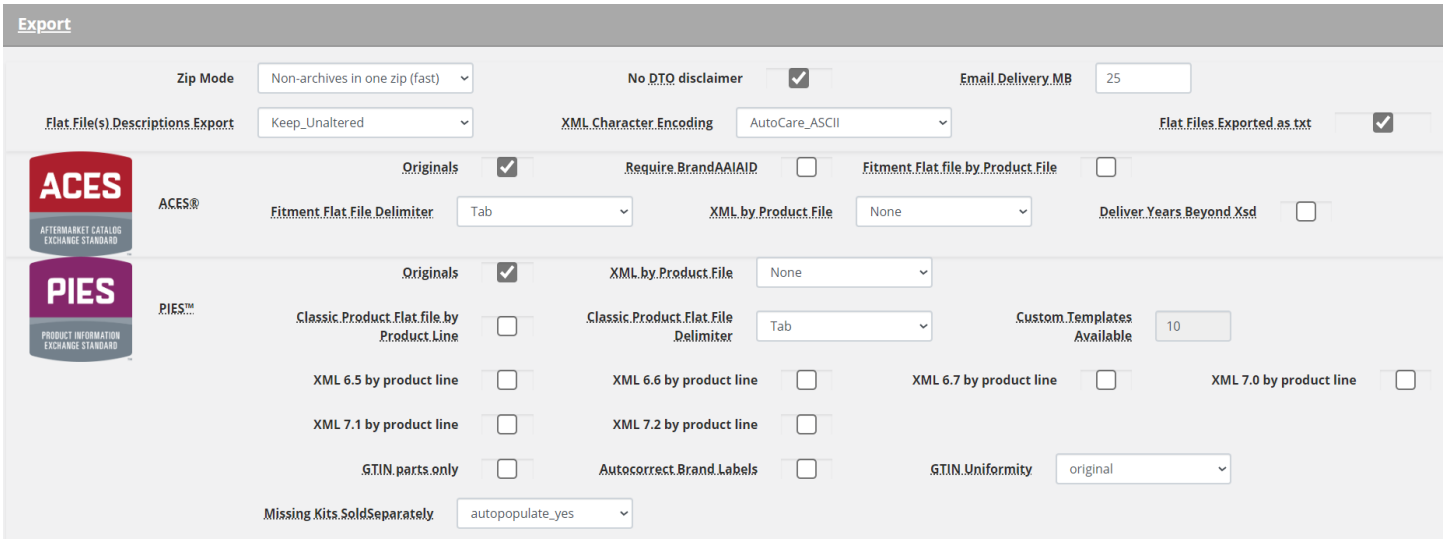
- Click on the 'FTP Defaults' drop down:

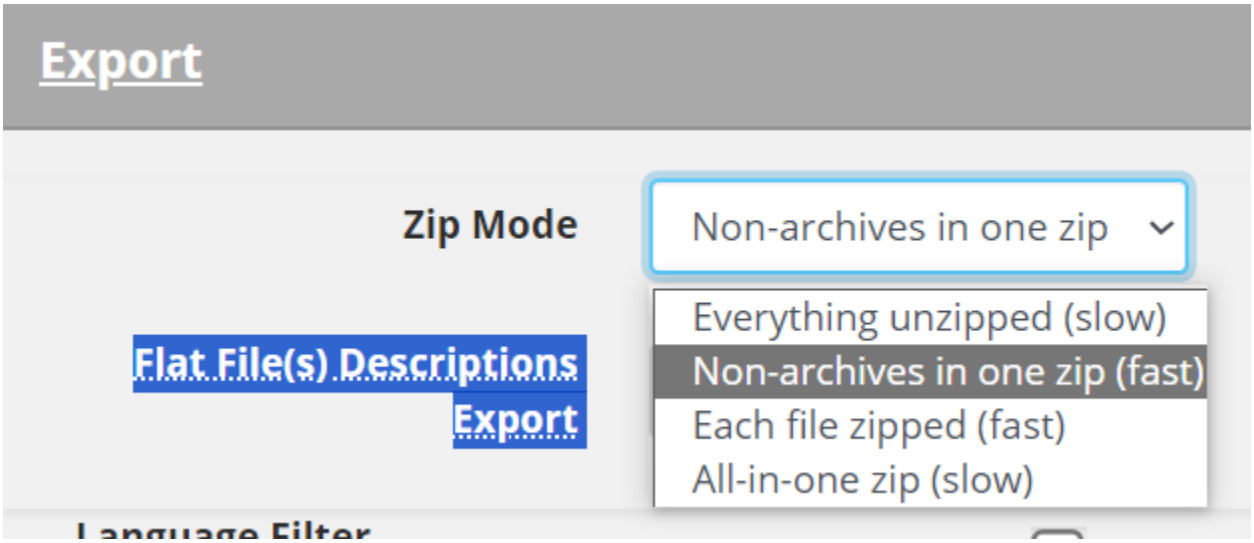


- This for a default or general FTP that all product lines direct to. If you have subfolders that you want to direct certain product lines data to, we will address that later in the documentation.
- Enter FTP host address and make sure to include Ftp://
- Enter the FTP Username
- Enter the FTP Password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

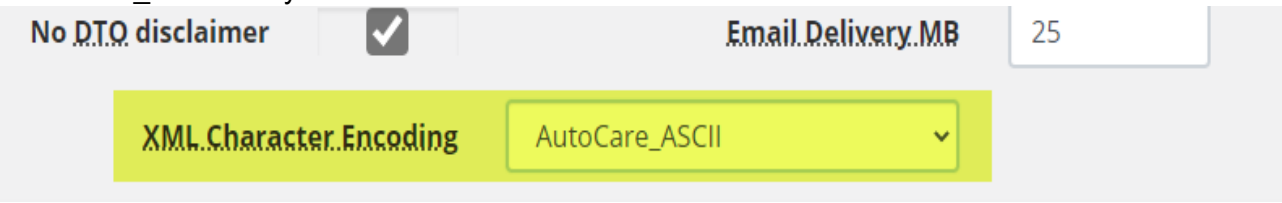




- Here you will find all options that you can select when receiving data via OptiCat.
    - **ZIP Methods available:**
        - **Everything unzipped.** This is the most time intensive and slowest method. All files are delivered as originally created.
        - **Non-achives in one zip:** All files 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.
    - **Fitment Flat file by Product File** will convert the XML to a .txt file that you may open in Excel as Tab Delimited. Please note that Flat Files exclude Attributes, Interchanges, Digital Assets,

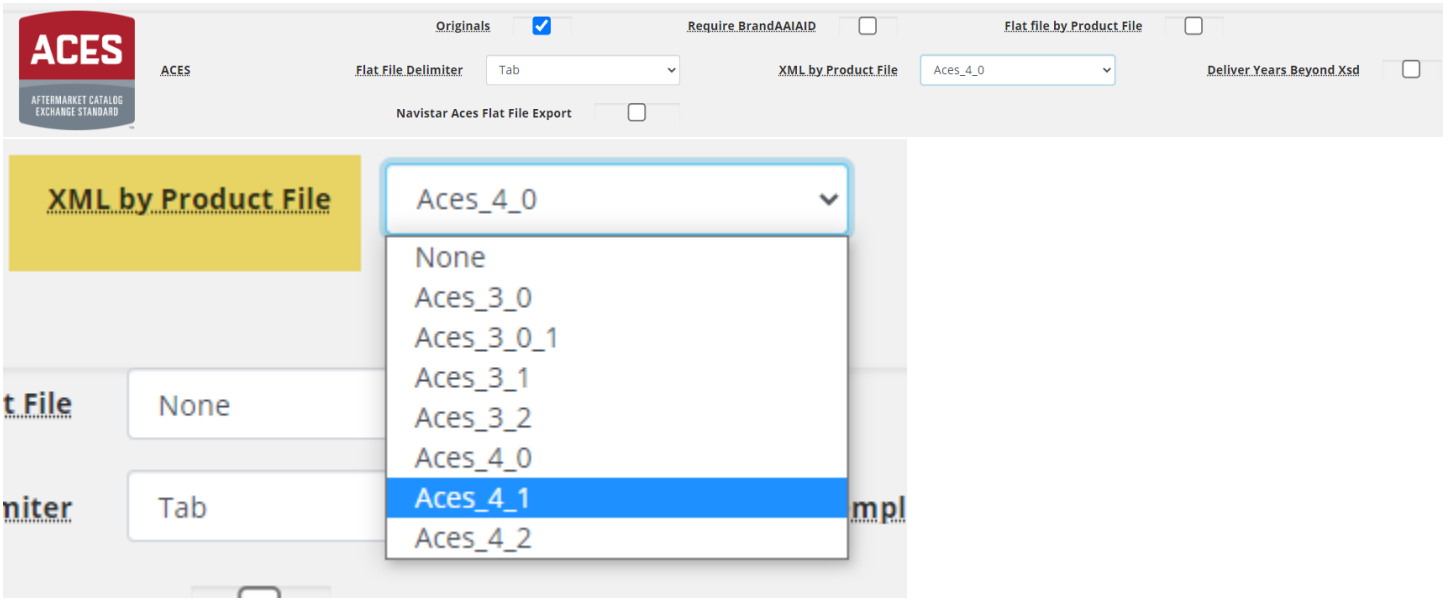
etc. To get all PIES™ segments, please use a Custom Template. Note that when receiving exported PIES™ Flat Files users will have the option to change the delimiter to either TAB or PIPE.

- **Custom Templates Enabled** Allows you to create your own custom PIES™ template that you will be shown later in this guide.
- **Custom PIES** exports will include ALL files contained within the Product Line.
- **XML 6.5 by product line** exports PIES™ version 6.5.
- XML 6.6 by product line exports PIES™ version 6.6.
- XML 6.7 by product line exports PIES™ version 6.7.
- XML 7.0 by product line exports PIES™ version 7.0.
- **GTIN parts only** Will only deliver parts with GTIN; it will delete parts without GTIN in the custom file delivered. GTIN Options in PIES™ exports are Originals, and Length 8, 12, 13, or 14, When exporting Original XML version the GTIN is not and should not be changed.
- **Autocorrect Brand Labels** Adds Brand Label to the item in PIES™ from the B20 field.
- AWDA 6.3 by files
- AWDA 6.3 by product line
- AWDA 6.4 by files
- AWDA 6.4 by product line
- AWDA 6.5 by files
- AWDA 6.5 by product line
- **AWDA include Header** the export will include the header
- **Other Originals** Images, Videos, PDFS and unvalidated data will be delivered in the original supplier provided format.

- If you choose any of the options above, you will receive the data in this format until you change it back.
- Always click the blue 'Save' button next to Receiver Setup.
- Please remember that when a Supplier is setup as a receiver, the PIES™ delivery must be set to "AutoCare_ASCII" only.
- 

Select ACES® Version:

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


ACES
AFTERMARKET CATALOG EXCHANGE STANDARD
Originals
Require BrandAAIAID
Flat file by Product File
ACES
Flat File Delimiter
Tab
XML by Product File
Aces_4_0
Deliver Years Beyond Xsd
Navistar Aces Flat File Export
XML by Product File
Aces_4_0
None
Aces_3_0
Aces_3_0_1
Aces_3_1
Aces_3_2
Aces_4_0
Aces_4_1
Aces_4_2
t File
None
niter
Tab
mpl

OnTarget:

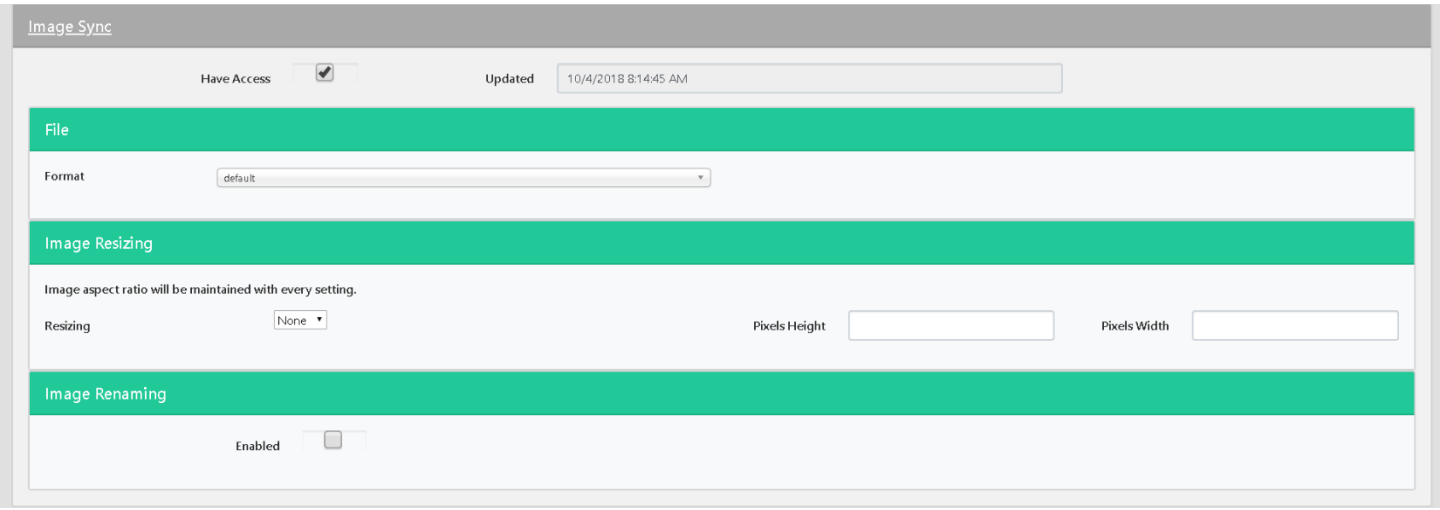
- These settings will allow you to get reports from OnTarget, if the supplier is providing them.

Notification Emails:

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

- If the Profile contact is also a user they should only turn on notifications in either User Management or Receiver Settings or they will receive duplicate emails.

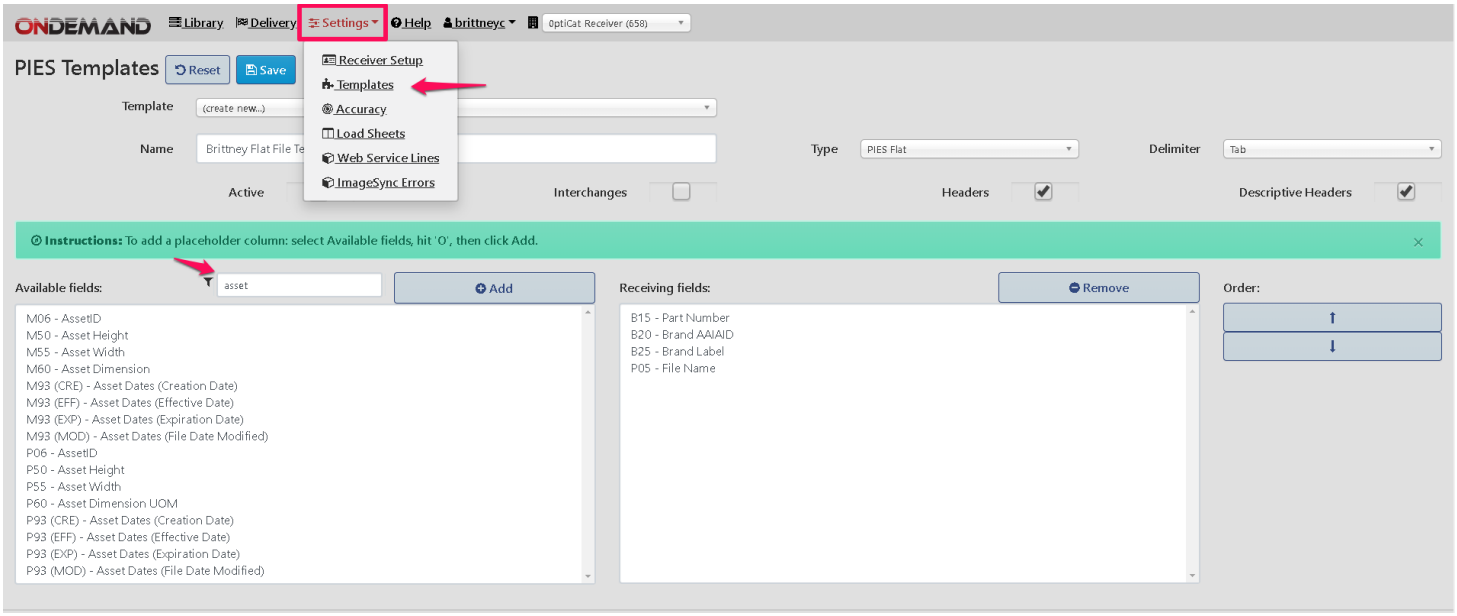
Image Sync Options:



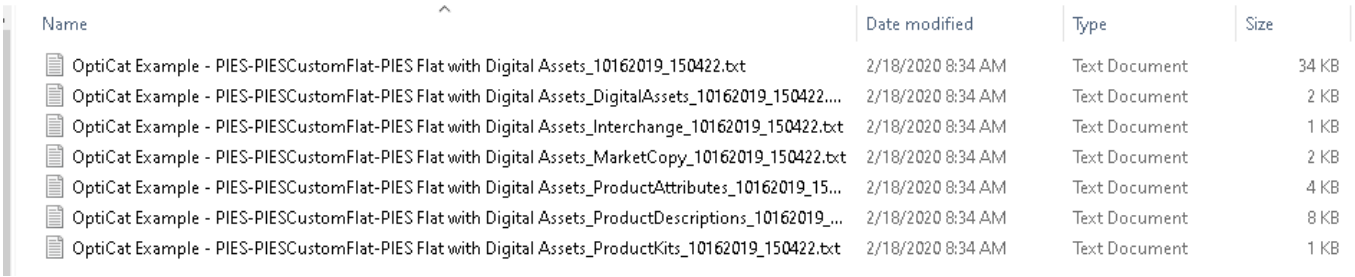
- Here you can set your format preferences for Image Sync:
  - We currently offer conversions to: .png, .jpg, .jpeg, .tif, .tiff, .eps, .gif, .bmp
  - You can set image sizing requirements to a specific height and width
  - Image renaming allows you to have images renamed by one of the following: File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

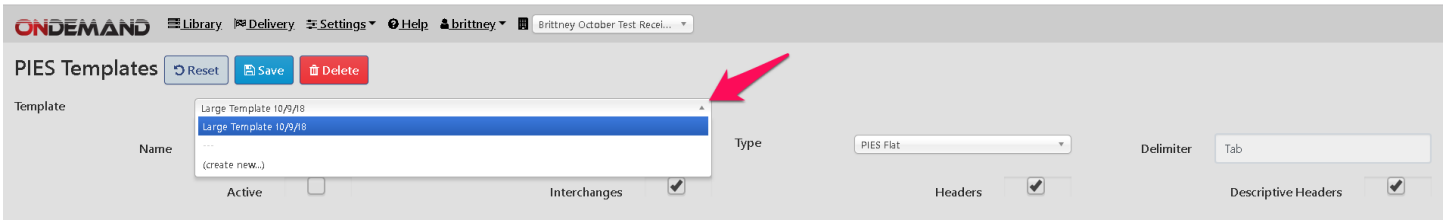
Custom PIES™ Templates:

- 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:





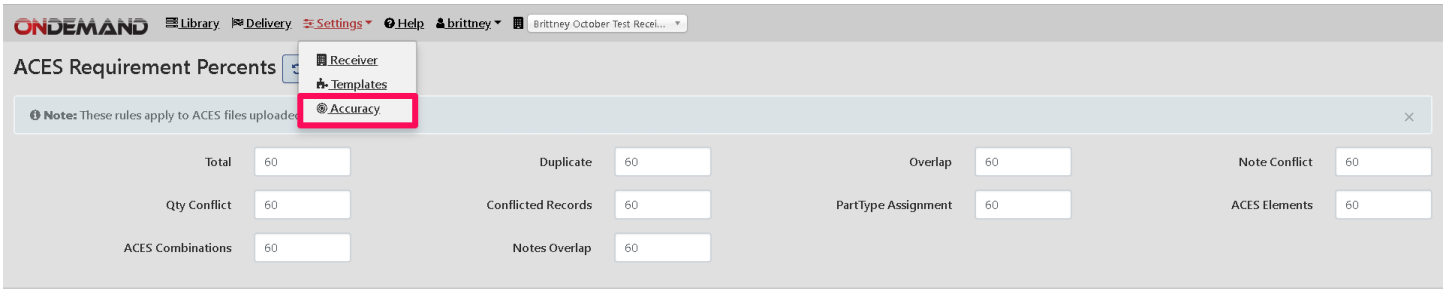
- Use the drop down and select ‘create new…’.
- Name your template.
- Choose the Type of file you would like to receive:
    - Can be PIES™ Flat (.txt file) that you can open in excel as tab delimited.
    - Can be PIES™ xml versions 6.5, 6.6, 6.7, 7.0, or 7.1.
- Check ‘Active’.
    - Note, this will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

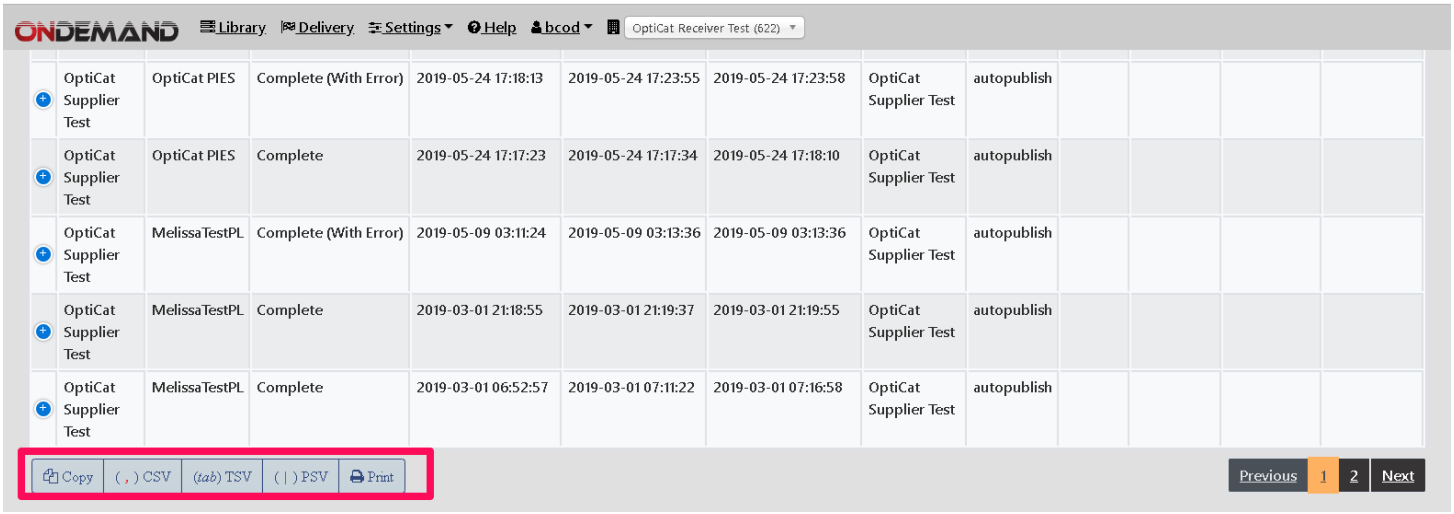
- Click the down arrow next to Settings, then click ‘Accuracy’.



- 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:

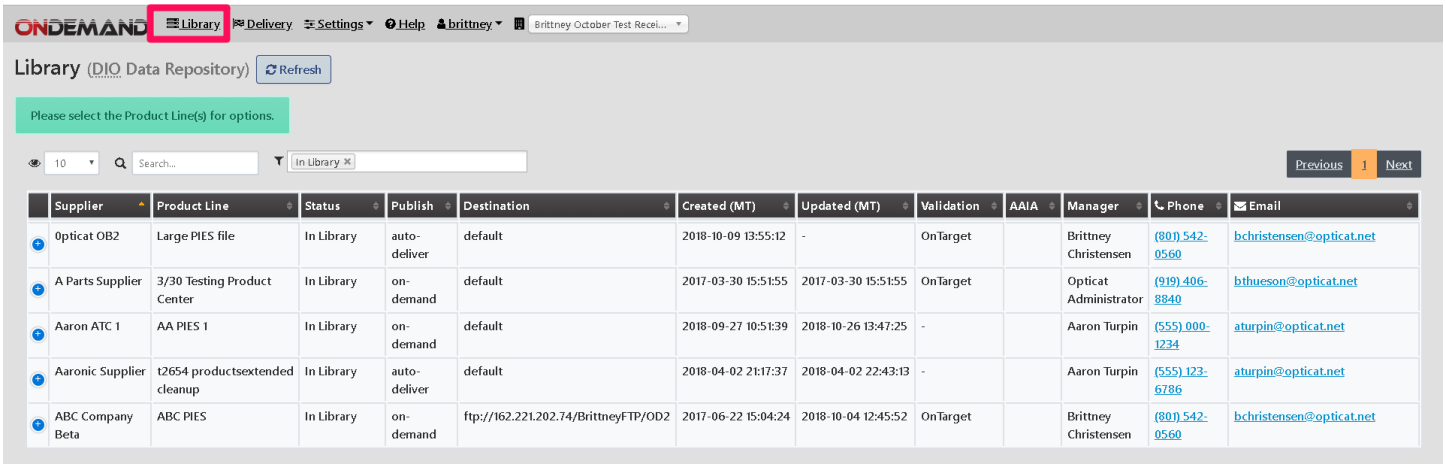


- This section will always give you the status of your exports and let you know if we ever have any issues delivering data. This section will let you know which company initiated the download, the delivery status, requested date, start date, and completion date.
    - If you encounter a complete (With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

- Clicking on the blue + button will show what files and exports types are delivered, as well as Export and Import messages.

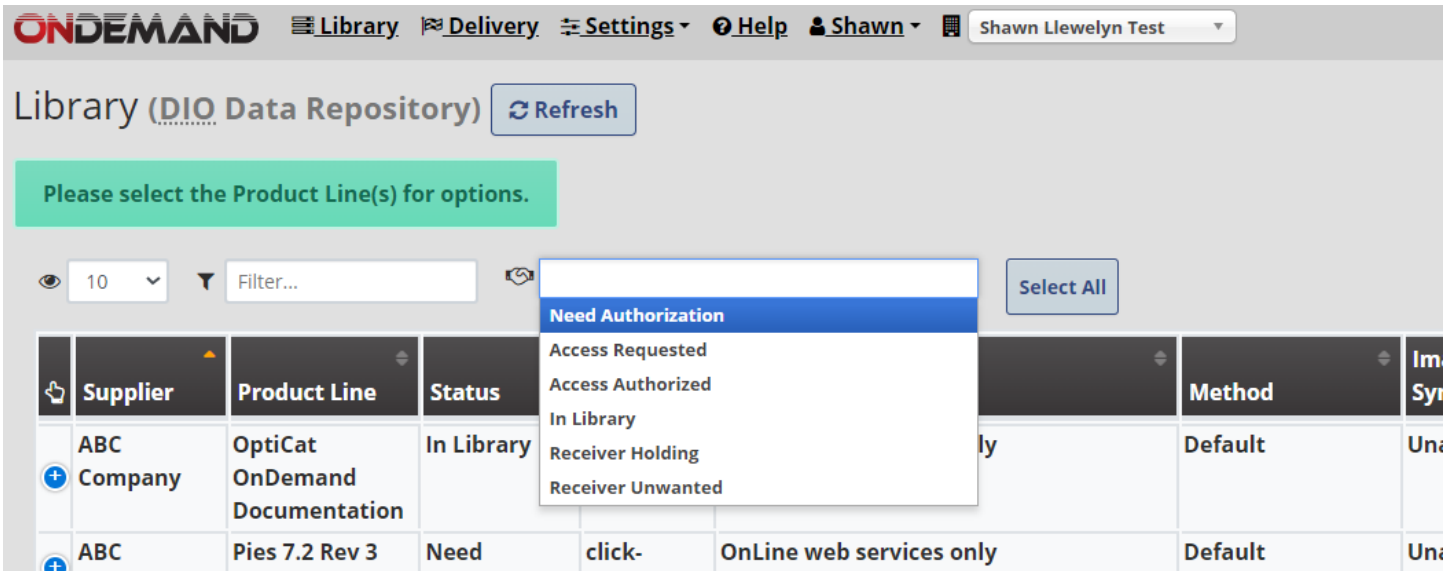
Your Data Library:

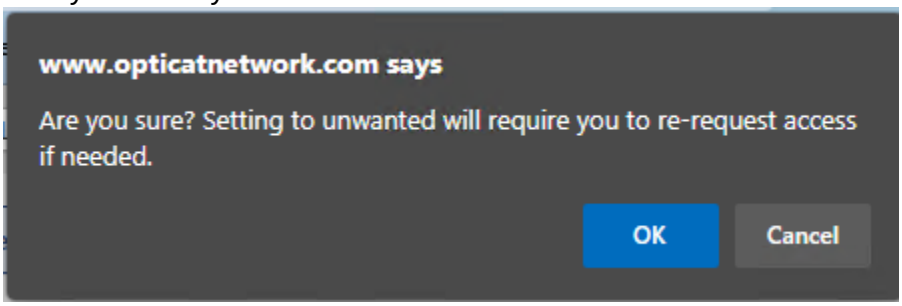
- Click on Library.



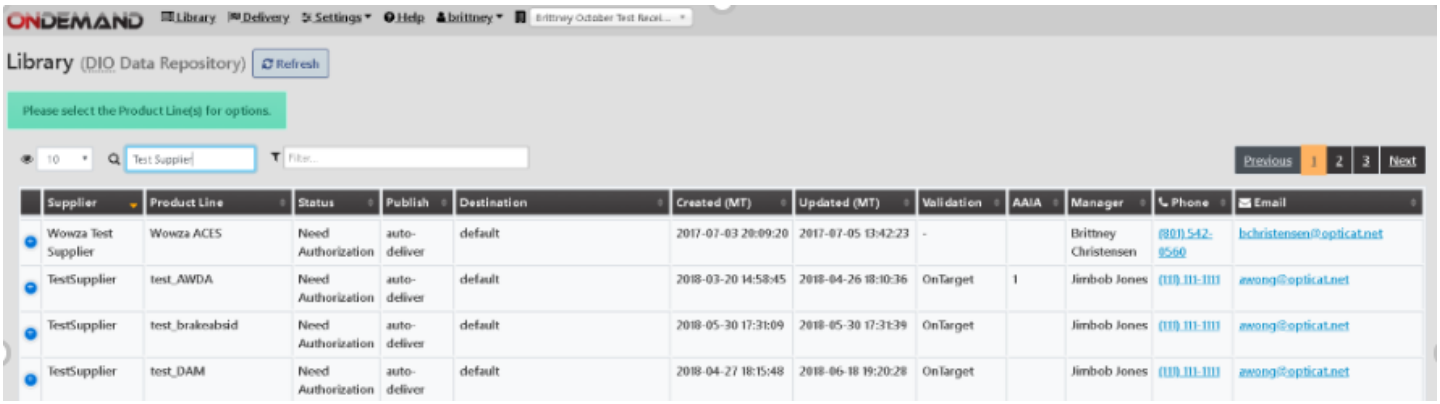
- This section will always filter by the product lines that have already been moved to 'In Library' status.
    - These are the product lines that are ready to be downloaded at any time.
    - You can remove In Library filter to view all by clicking the X next to In Library.
- If you select a product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

- Click the product line and then deliver all the data in the product line will be deliverer. In some cases a product line could contain numerous files. By clicking the blue + they can select the desired files individually by choosing the product line and the selected file(s) needed.
- The publish column will define if the supplier has set to Auto Publish, it will read Auto Deliver. If not it will read Click Deliver, meaning they will need to download the data as needed.
- Click on the Filter bar:

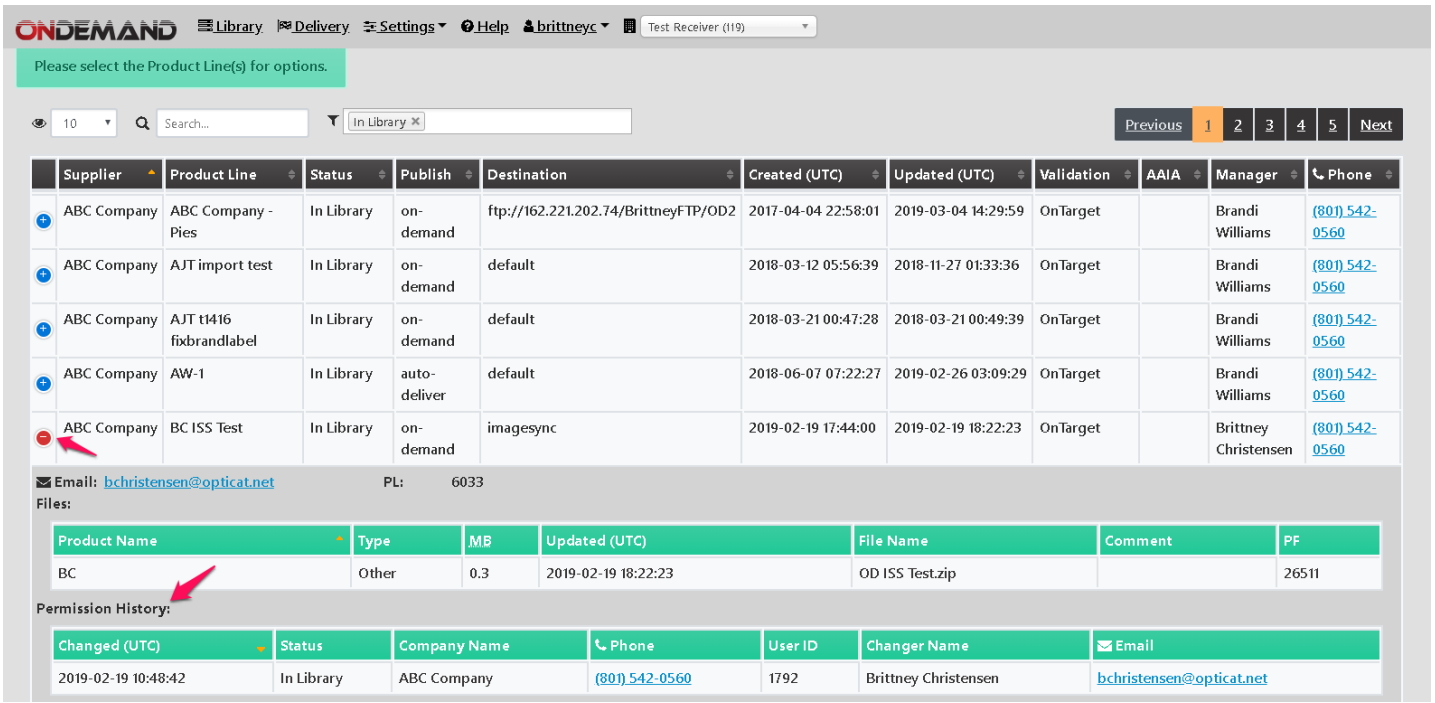


- You can filter by the following:
  - **Need Authorization-** This means you have not requested to access this product line.
  - **Access Requested**-This means you have requested access to the product line, but the supplier has not yet given you permission.
    - **Note:** The Supplier Manager's contact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

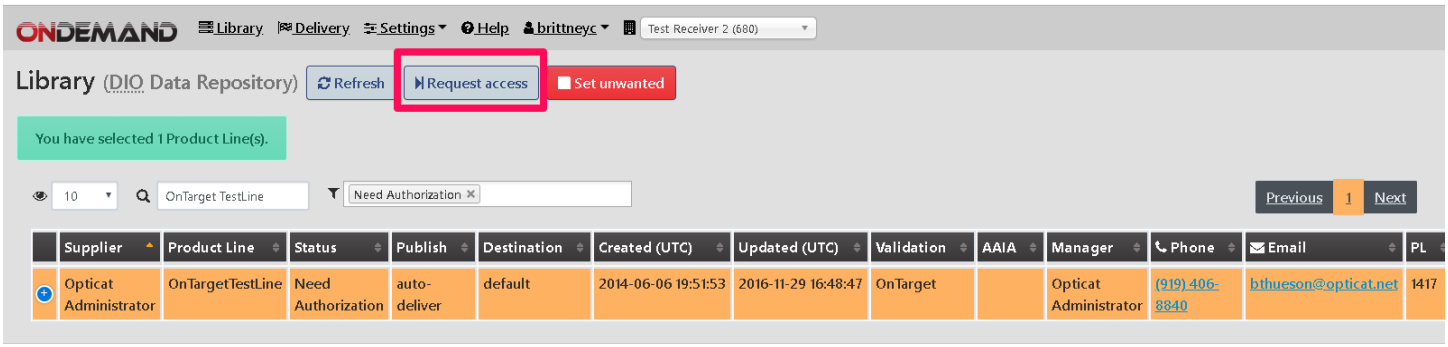
- You may also search by Supplier Name, Product Line Name, Validation, Manager Name, Phone or Email:



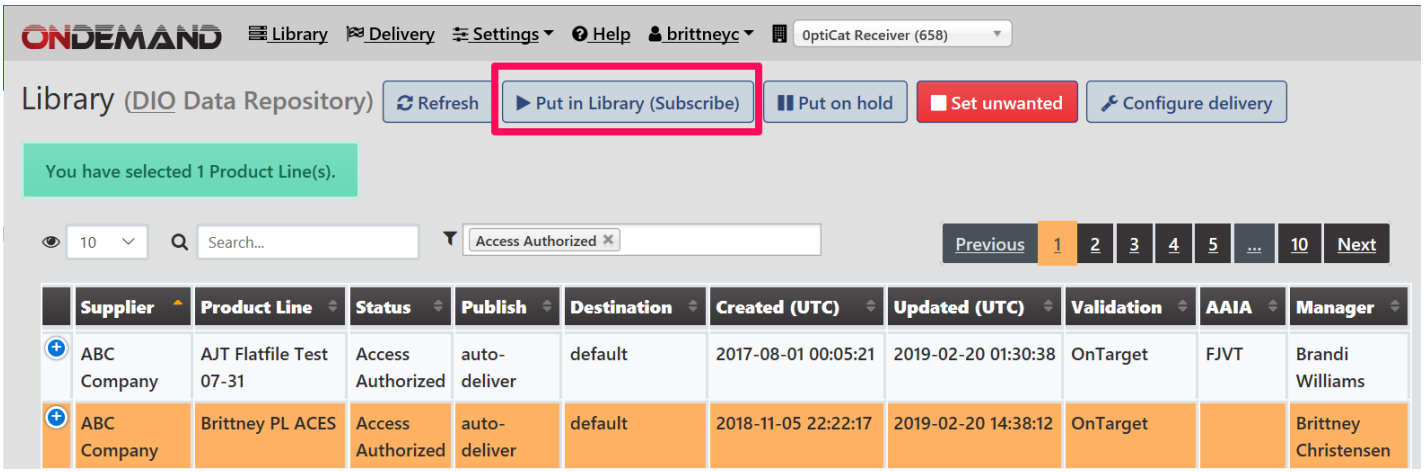
- You can use the arrows next to Supplier to filter from A-Z or Z-A.
- By clicking on the blue circle with the + next to the supplier's name, you can see Files with product name and product line permission history:



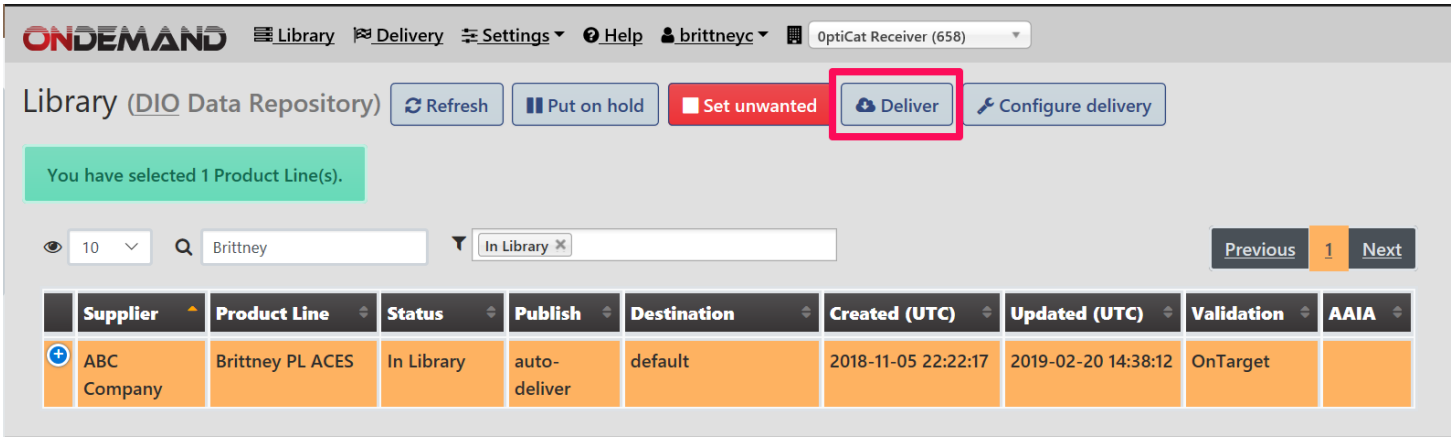
- In order to request access to a product line, simply click on the product line(s), and click Request Access:



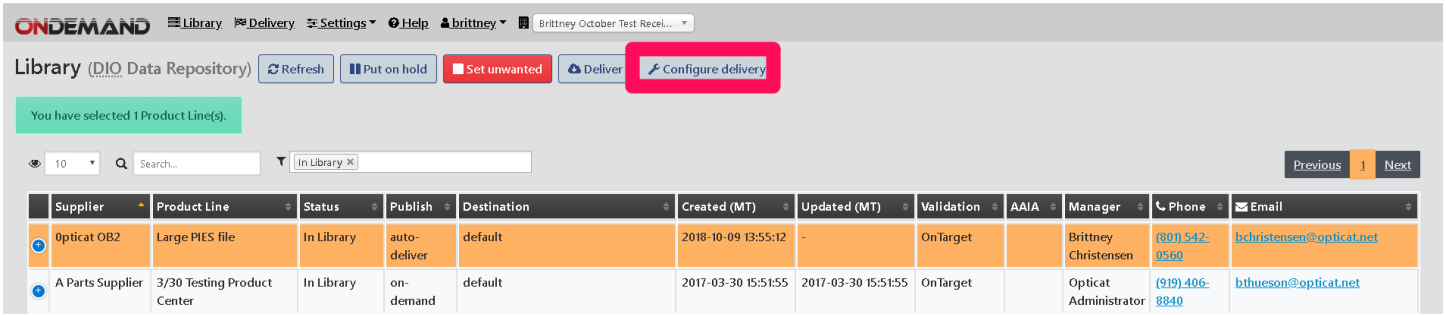
- This will send an email to the supplier letting them know that you have initiated the handshake.
- If the supplier agrees to grant access, you will receive an email notification (as long as that preference is set) letting you know you now have access to the product line- completing the handshake.
-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



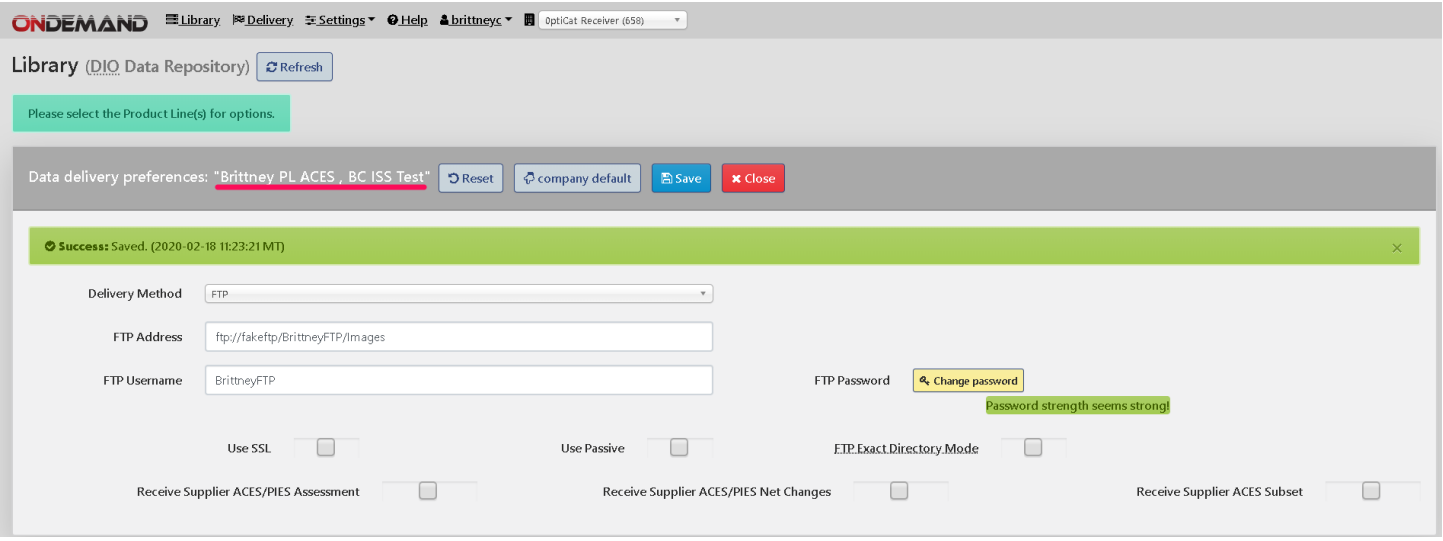
- Filter by 'Access Authorized.
- Select product lines.
- Click 'Put in Library (Subscribe)'.
- You may now filter by 'In Library':



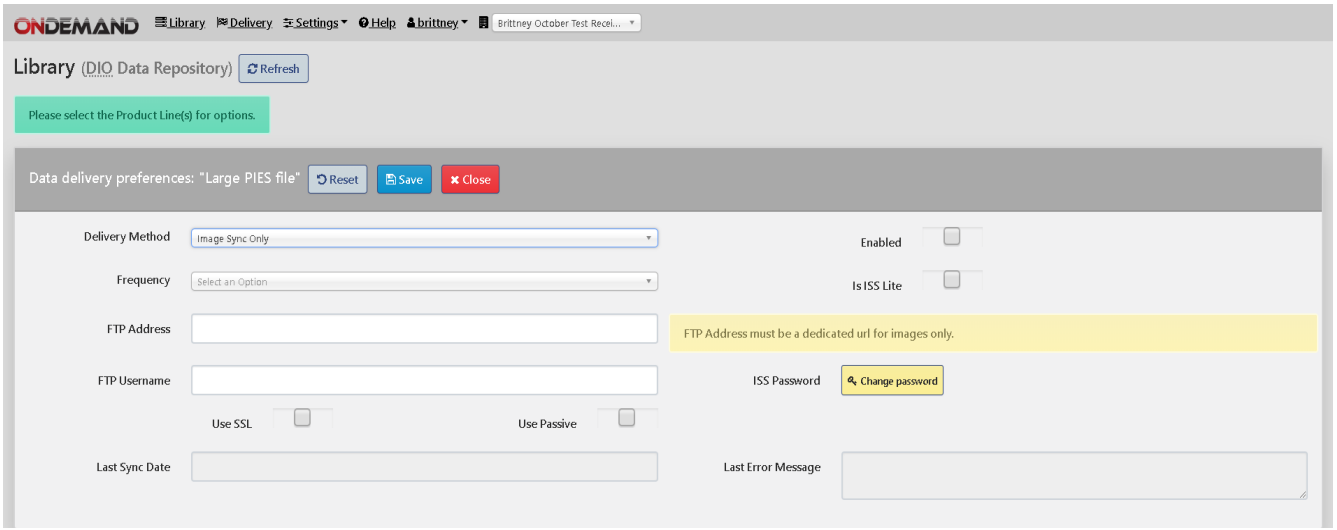
- Click on the product lines you want to download, then click Deliver.
  - **Note:** this will deliver to your default FTP or email destination. If you want it to be directed elsewhere, click on a single product line, then click 'Configure Delivery':



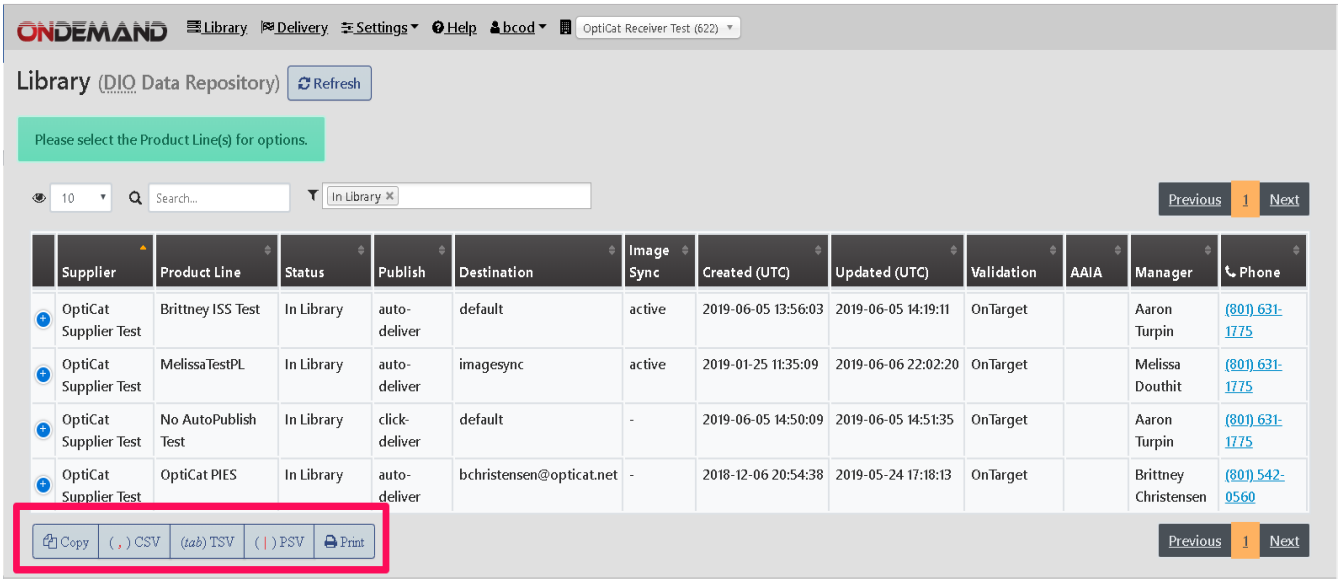
- This will allow you to update the delivery preferences for the selected product line(s) only.
  - **Note:** this is where you would enter subfolder information.
  - **Example:** ftp://opticat5.net



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



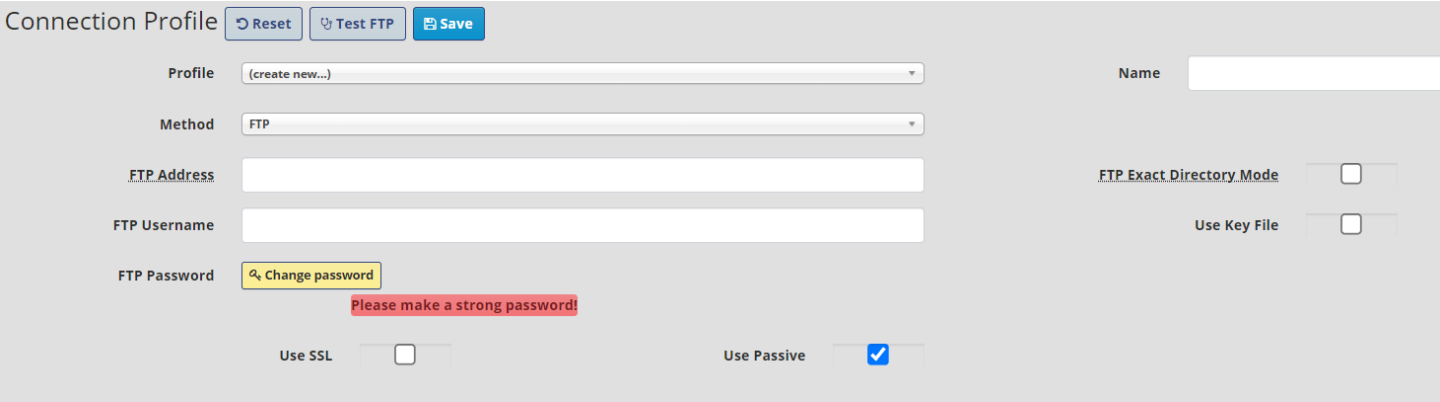
- You can copy, export a CSV, TSV, PSV, or print your library and product line status’s using the buttons at the bottom of the page:



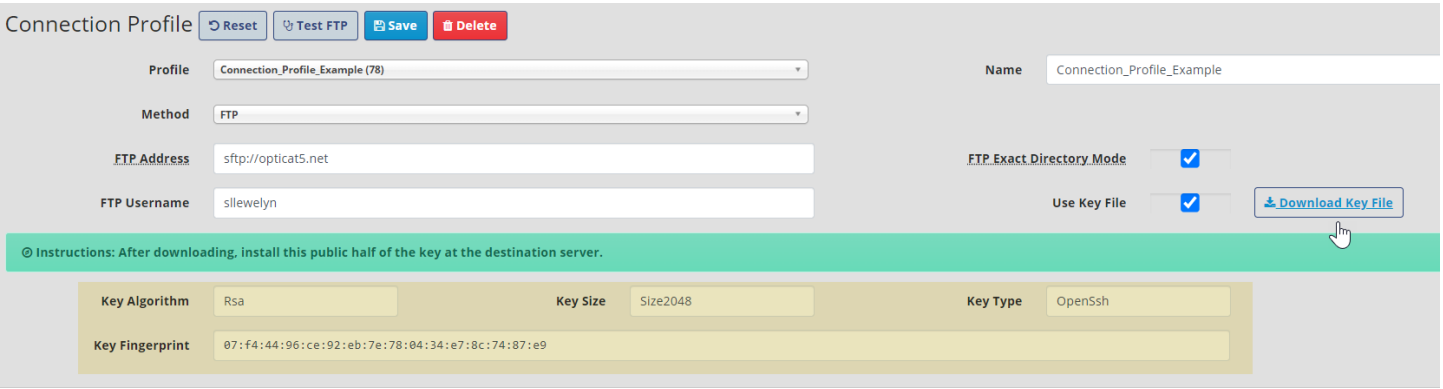
Connection Profiles – SSH Key Files

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.

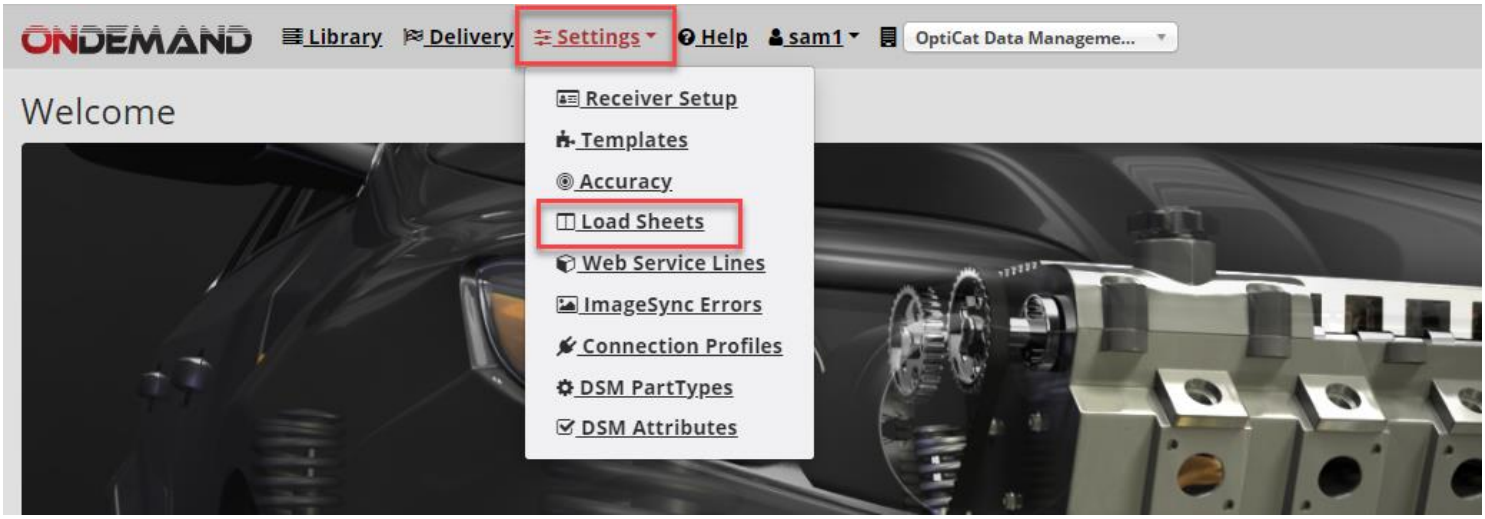


You also have the option to authenticate to your FTP server using an SSH key instead of password.

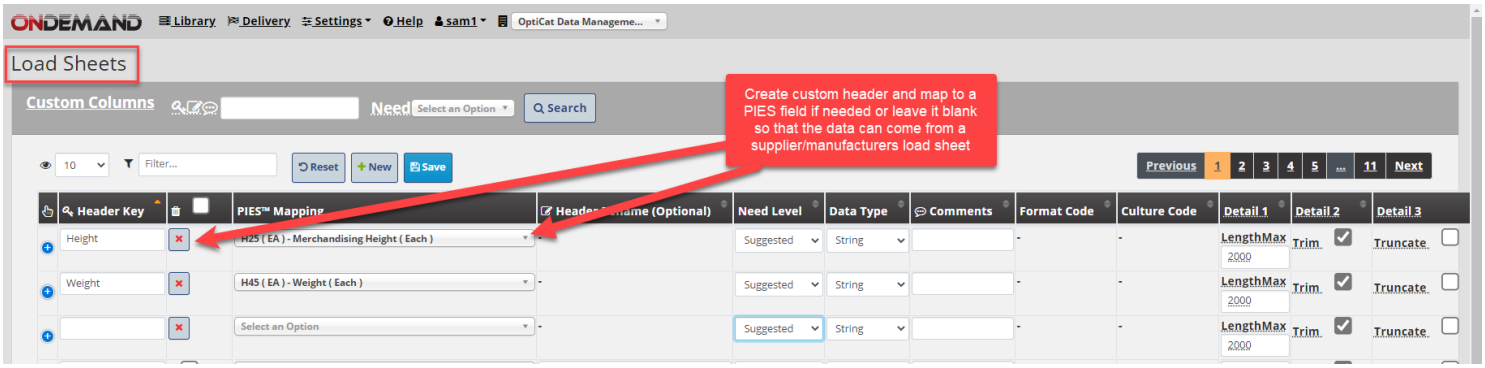


Load Sheets

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



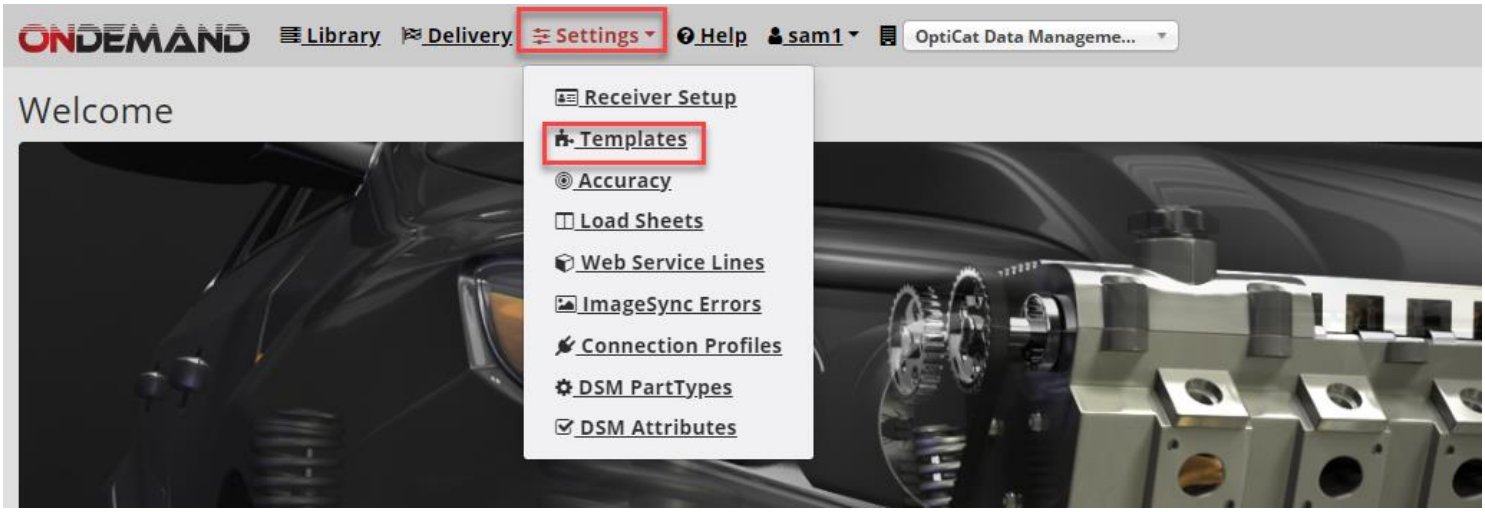
- This is where the customer/data receiver will create all their load sheet headers.



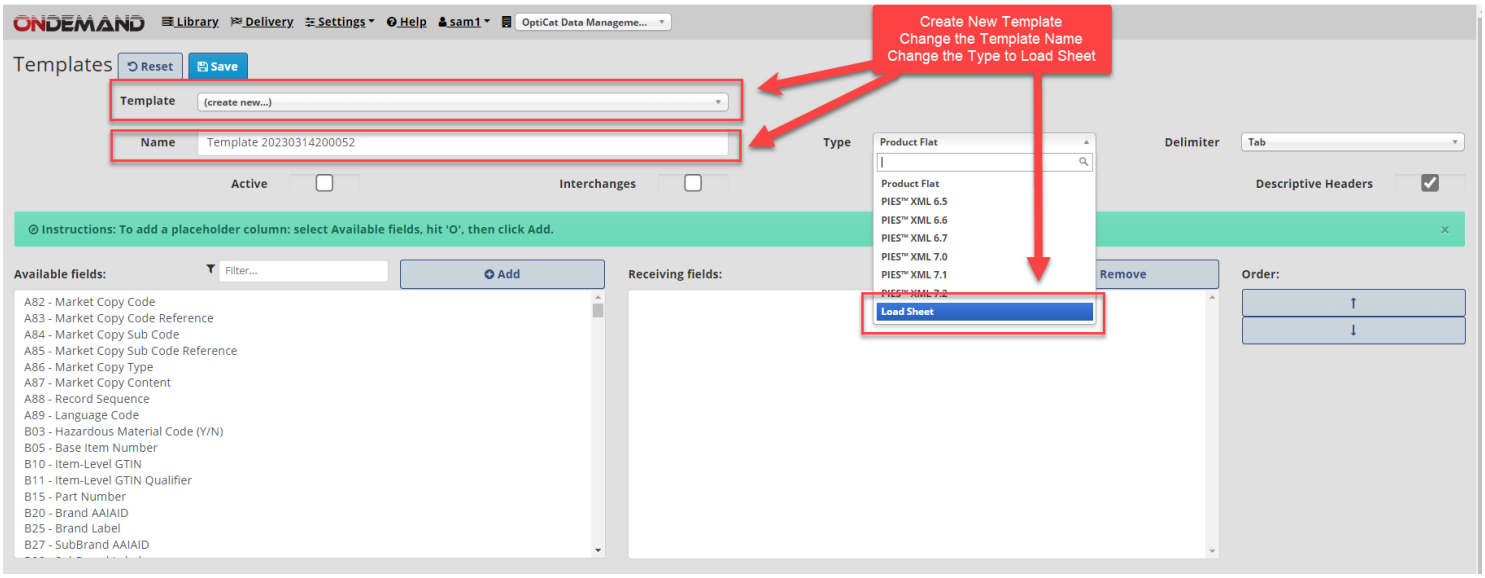
- Load Sheet Headers are all headings that need to be delivered to the customer/data receiver in a Flat Load Sheet File
  - These headers are used in place of PIES Field Header Names
  - Those headers can be mapped to a PIES field on this screen.
- The remaining headers that aren't mapped to a PIES field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

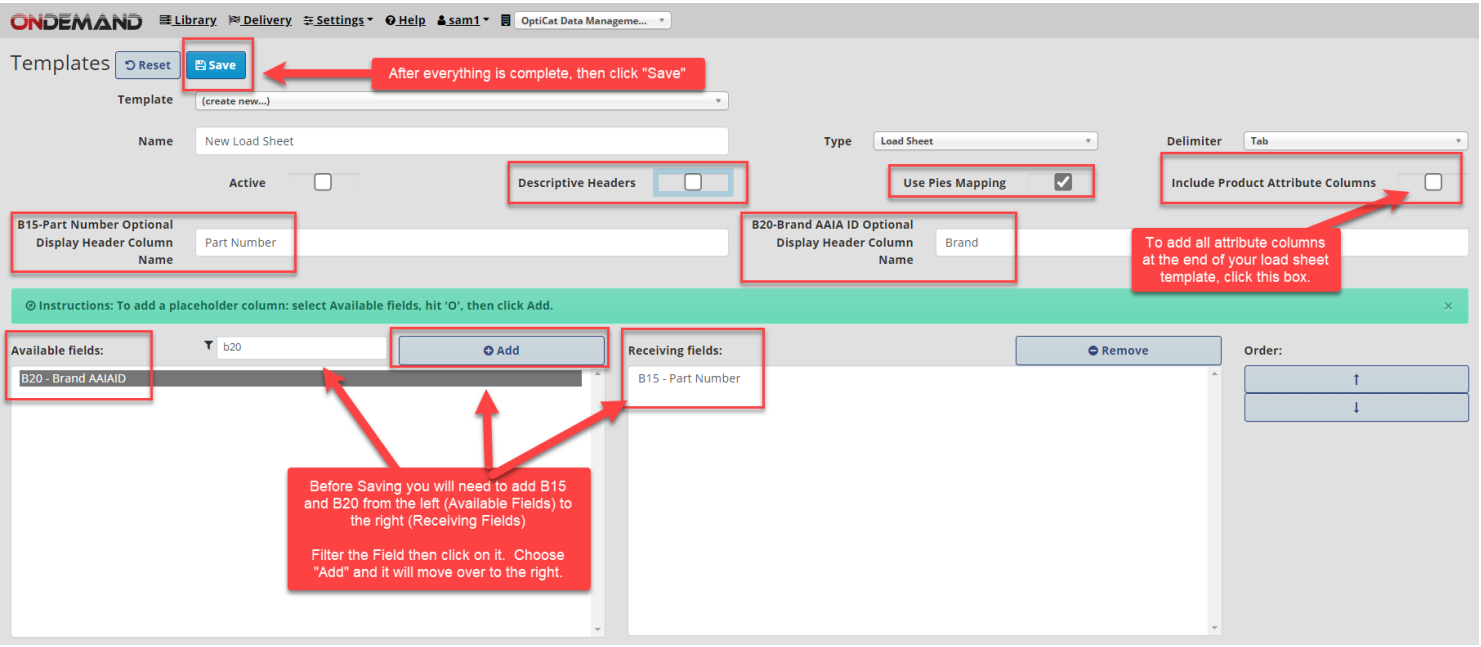


- Choose the option to Create a New Template
  - Change the Template Name
  - Choose the Type: Load Sheet



  - 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"

- SAVE



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

IMAGE SYNC

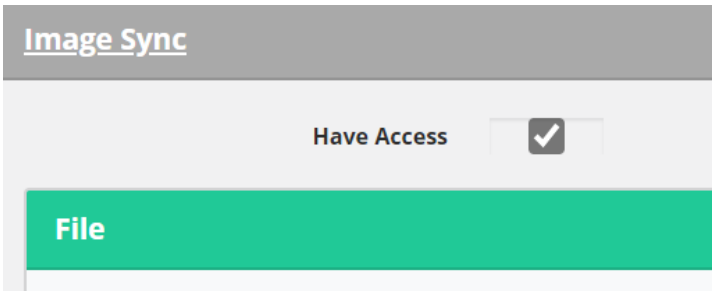
Image Sync is a feature of OnDemand that allows receivers to set specifications and specific file names to image files and digital assets that are being delivered. This includes file format, image dimensions, and file renaming. Net Changes is also another feature that can be used in the setup of Image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

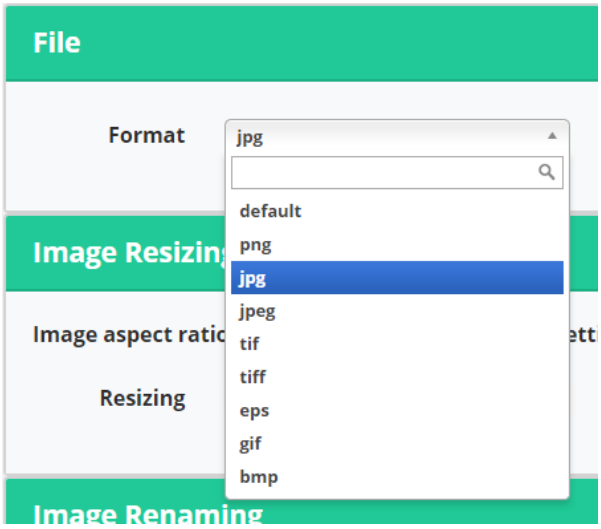


Image Resizing:

- 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.

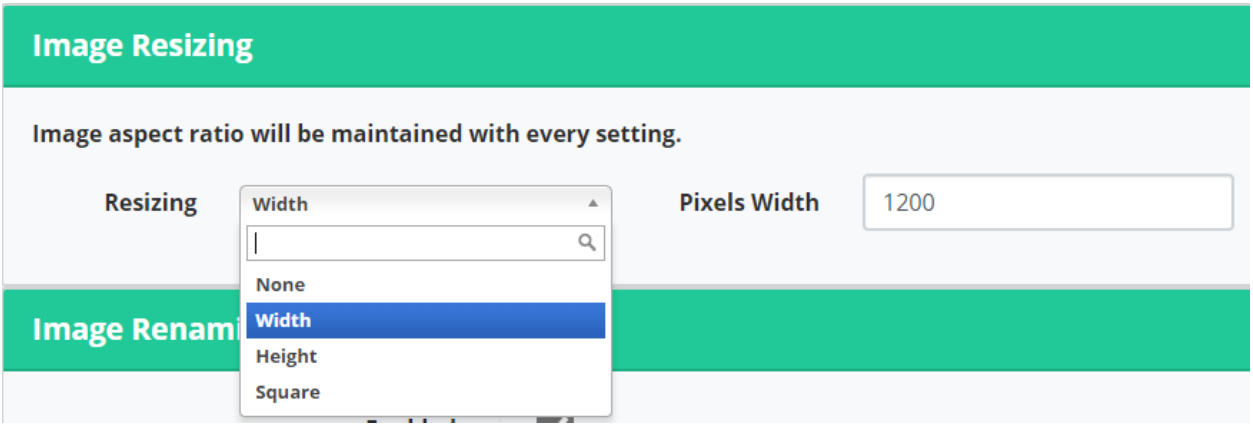
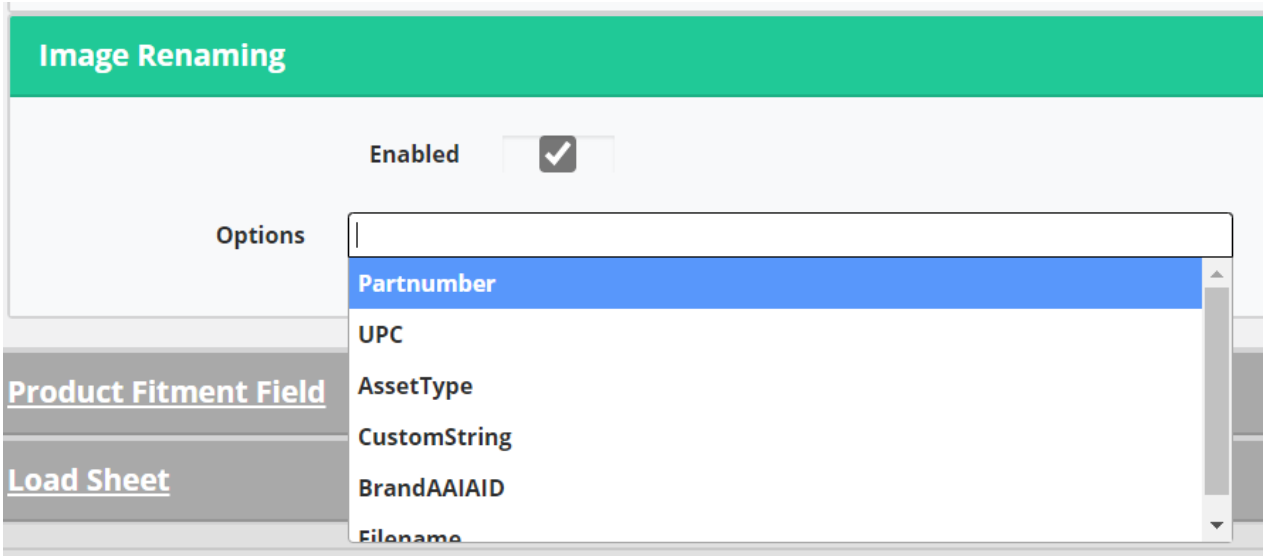
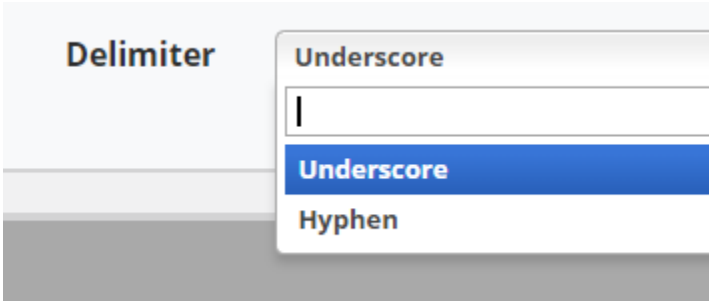


Image Renaming

- 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:

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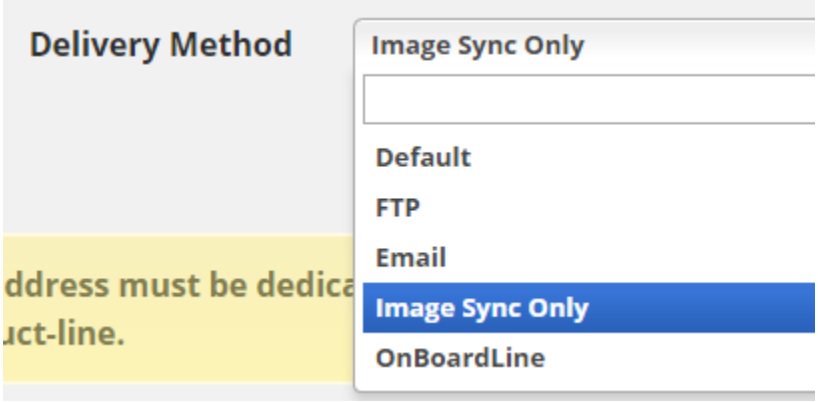
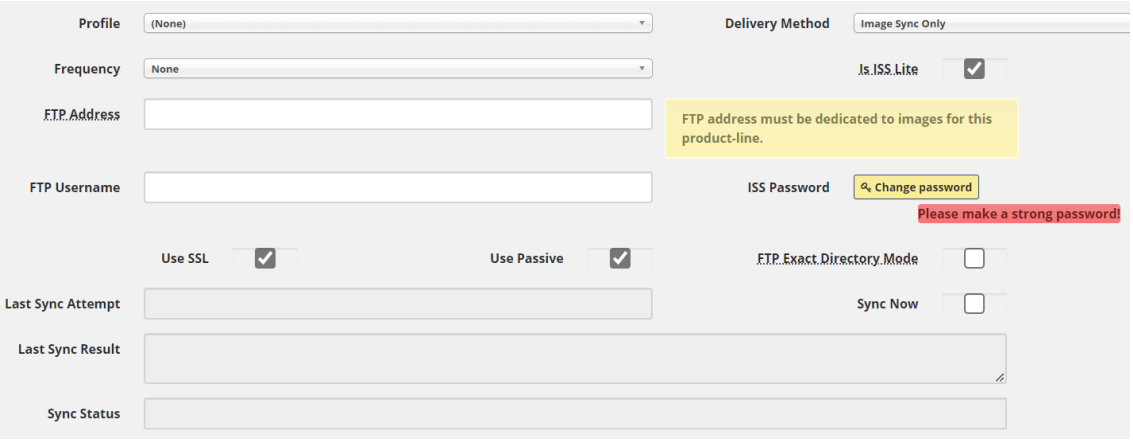
- Image/Digital Assets Product Lines need to be setup to deliver via Image Sync to function correctly.
- Highlight the Image Product Line and select the Configure Delivery Option at the top of the window.
- Once in the configuration screen you will select Image Sync from the Delivery Method drop down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



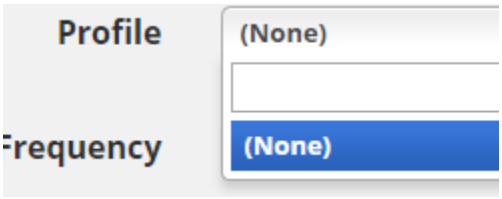
- Note: The window will change to the Image Sync delivery options window.
- The receiver will enter the information required and save accordingly.



Options:

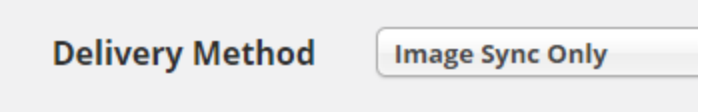
Profile:

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



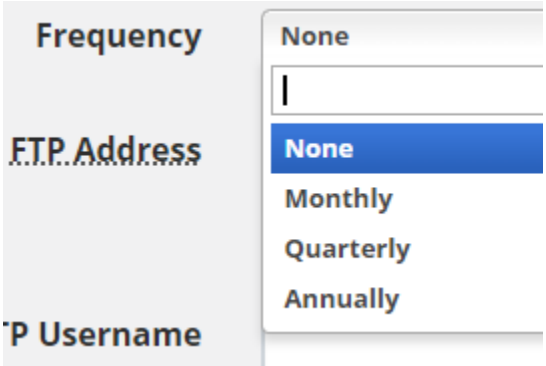
Delivery Method:

- 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:

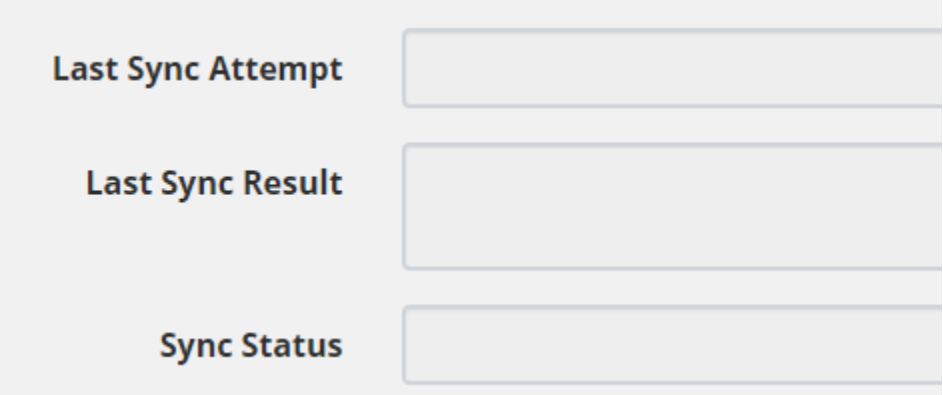
- The ISS Lite option enables the feature where only changes to the original file are delivered.
- This will result in more efficient deliveries from the Supplier.
- Please note that for ISS Lite to work properly, the original full image file will need to remain in the specified FTP folder location entered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

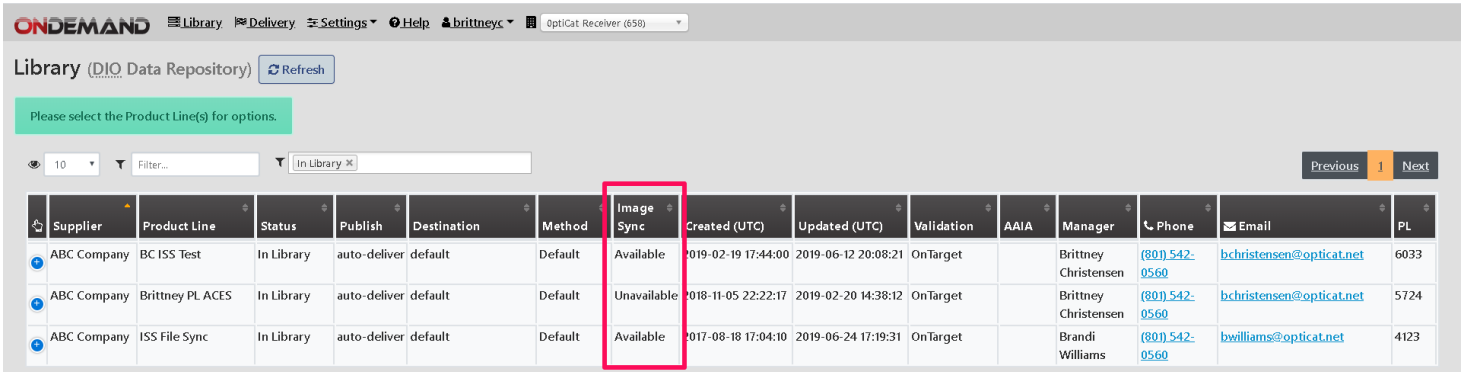
ISS allows resizing of the images. The desired width or height can be selected, and the original aspect ratio will be preserved. We recommend a selection of width: 1500 in accordance with the Autocare best practices.

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:



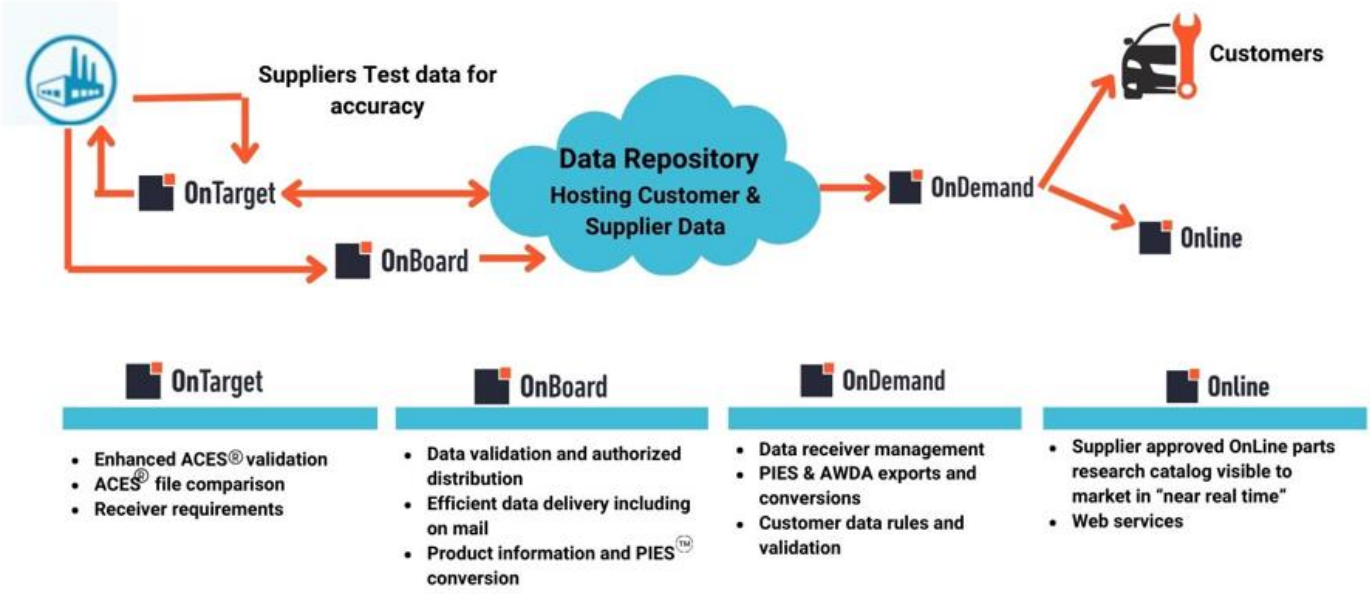
1. Click on the product line so that it is highlighted orange, then click ‘configure delivery’.
2. This will bring you to the ‘Data Delivery Preferences’ screen
    a. Select ‘Image Sync Only’ in the Delivery Method dropdown.
    b. Check ‘Enabled’.
3. Select a frequency that the sync will run.
    a.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

JNPSoft
OptiCat

www.jnpopticat.com
www.opticatonline.com



OnTarget

- Enhanced ACES® validation
- ACES® file comparison
- Receiver requirements

OnBoard

- Data validation and authorized distribution
- Efficient data delivery including on mail
- Product information and PIES™ conversion

OnDemand

- Data receiver management
- PIES & AWDA exports and conversions
- Customer data rules and validation

Online

- Supplier approved OnLine parts research catalog visible to market in "near real time"
- Web services

Autocare.org Disclaimer

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Appendix A – Invalid Characters in Element Data

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

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