Channel Setup User Manual

Introduction

CommerceHub's Catalog Master solution enables suppliers to transmit product content to their retail partners through a web-based application.

This document describes how to configure Catalog Master to create the individual points of communication with your retail partners. To begin, we introduce several important Catalog Master concepts.

Products
Individual SKU records that are stored in **Catalogs**.

Taxonomy
Defines the structure of the catalog in terms of **Categories** and **Attributes**. For example, Fillpoint has a catalog, *FillpointMaster*, that holds all of your products. FillpointMaster has several taxonomies that offer varying views into the products in the catalog. For each taxonomy, the products are classified differently; the distinct features of a product are described by its attributes

Category
Classification of a product

Attribute
Description of a product

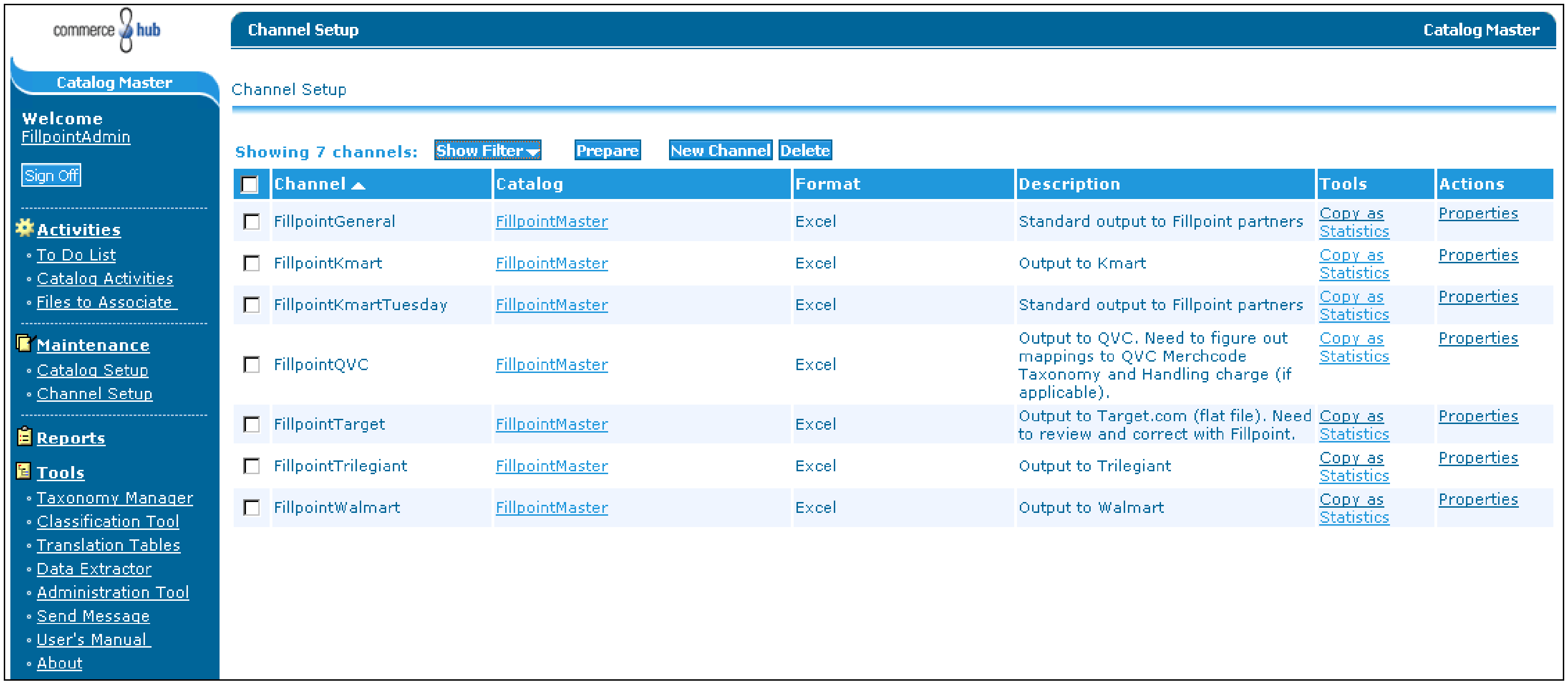
Channel
Transmits catalogs between a supplier and a single retailer. Three steps are required for proper catalog transmission: **Preparation**, **Approval**, and **Delivery.**

1. **Preparation**
   The preparation stage creates a file that contains the products of a single catalog.
2. **Approval**
   The approval stage declares that the file is in the correct format.
3. **Delivery**
   The delivery stage sends the file to the retailer.

Depending on how you configure the channel, the steps can occur either automatically or manually—it's your choice. The remainder of this document describes how to create and configure channels.

Creating and Configuring Channels

Figure 1 shows the home page of the **Channel Setup** section. You navigate here by clicking on the Channel Setup link on the navigation menu on the left side of the screen. From here you see a list of your current channels. You have the ability to create a new channel or modify the **Properties** of an existing channel. (A channel's properties determine its behavior.)



Channel	Catalog	Format	Description	Tools	Actions
FillpointGeneral	FillpointMaster	Excel	Standard output to Fillpoint partners	Copy as Statistics	Properties
FillpointKmart	FillpointMaster	Excel	Output to Kmart	Copy as Statistics	Properties
FillpointKmartTuesday	FillpointMaster	Excel	Standard output to Fillpoint partners	Copy as Statistics	Properties
FillpointQVC	FillpointMaster	Excel	Output to QVC. Need to figure out mappings to QVC Merchcode Taxonomy and Handling charge (if applicable).	Copy as Statistics	Properties
FillpointTarget	FillpointMaster	Excel	Output to Target.com (flat file). Need to review and correct with Fillpoint.	Copy as Statistics	Properties
FillpointTrilegiant	FillpointMaster	Excel	Output to Trilegiant	Copy as Statistics	Properties
FillpointWalmart	FillpointMaster	Excel	Output to Walmart	Copy as Statistics	Properties

Figure 1—Channel Setup

Create A New Channel

To create a new channel, click on the **New Channel** button at the top of the screen.

Configuring a Channel

To configure a channel you need to fill out eight tabs of properties.

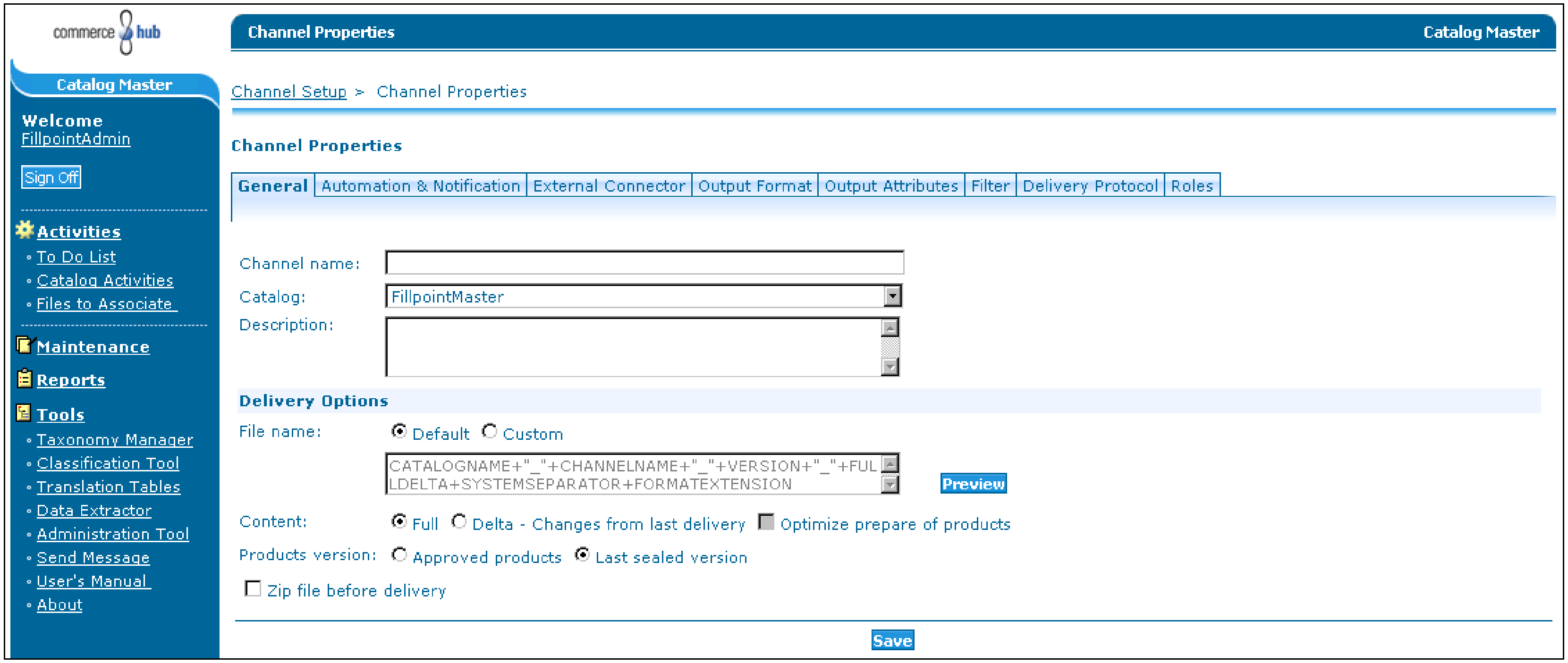


Figure 2—General Properties

TAB1—GENERAL

The first tab is the **General** tab, that is used to configure the following properties:

- **Channel Name**
  The name of the channel. Use the format: Fillpoint<Retailer Name>
- **Catalog**
  A channel exports products from a single catalog; here you must choose the catalog that the new channel will use.
- **Description**
  Enter a description of the channel so that other people will understand its purpose.
- **File Name**
  You have two choices for the name of the file that the channel will create: **Default** or **Custom**.

  The Default filename is created by the system and uniquely identifies the output file.

  The Custom filename depends on the requirements of your retail partner. For example, if the partner wants a file of the form: `Fillpoint<Day of the Week>`. You can use the **Expression Builder** to create the custom name.

- **Content**
  You must choose whether you want to export the entire catalog as-is (Full) or just the changes from the last time that you executed the channel (Delta).
- **Products Version**
  You must choose whether you want to export all approved products, or only the products that are contained in the last sealed version of a catalog.
- **Zip File**
  If you choose this option, the file created by the channel will be contained in a WinZip archive – only select this option when your retail partner asked for it.

When you're finished with the General properties, click on the next tab: **Automation and Notification**.

TAB2—Automation and Notification

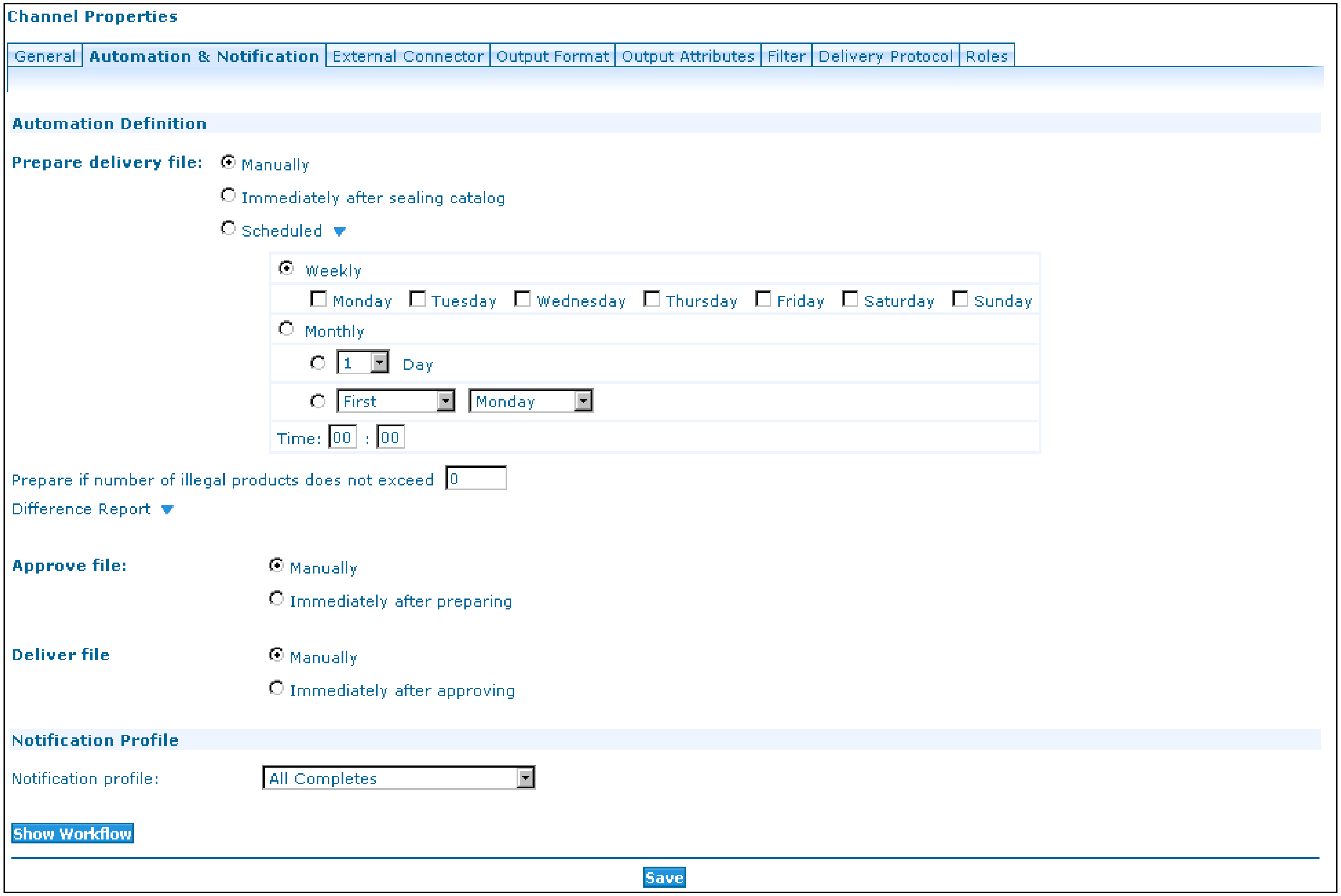


Figure 3—Automation & Notification Properties

Automation and notification configures parameters dealing with when and how files are prepared and delivered.

- **Prepare Delivery File**
  As described earlier, there are three steps in the transmission of catalog data through a channel: Prepare, Approve and Delivery. You must first determine how you want to prepare the channel. You have three choices: *Manually*, *Immediately after sealing the catalog*, and *Scheduled*.

  Use **manual** preparation for channels that will be executed intermittently.

  Use **scheduled** preparation for channels that will be executed on a regular basis. Click on the blue triangle next the *Scheduled* label to display the properties for the scheduled preparation. You must choose either Weekly or Monthly, and the time of the day (in 24 hour time) that you want the channel to be prepared.

- **Approve File**
  After preparation, the channel must be approved. If you choose manual approval, you will have an activity in the **Catalog Activities** report for the approval of the channel. Most of the time you will want to configure the approval to be *Immediately after preparing*.
- **Delivery File**
  After approval, the channel must be delivered. Choose whether you want the delivery to happen automatically after the approval, or if you want to do it manually. If you choose manually, you will have an activity in the Catalog Activities report to deliver the file manually.
- **Notification Profile**
  You may select to have emails sent to you during the steps in the channel execution process. Determine your needs and choose the appropriate selection.

When you have finished configuring the Automation and Notification properties, click on the Output Format tab.

Note: We are skipping the External Connector tab for now.

TAB4—OUTPUT FORMAT

The Output Format tab controls the encoding and format of the files you send.

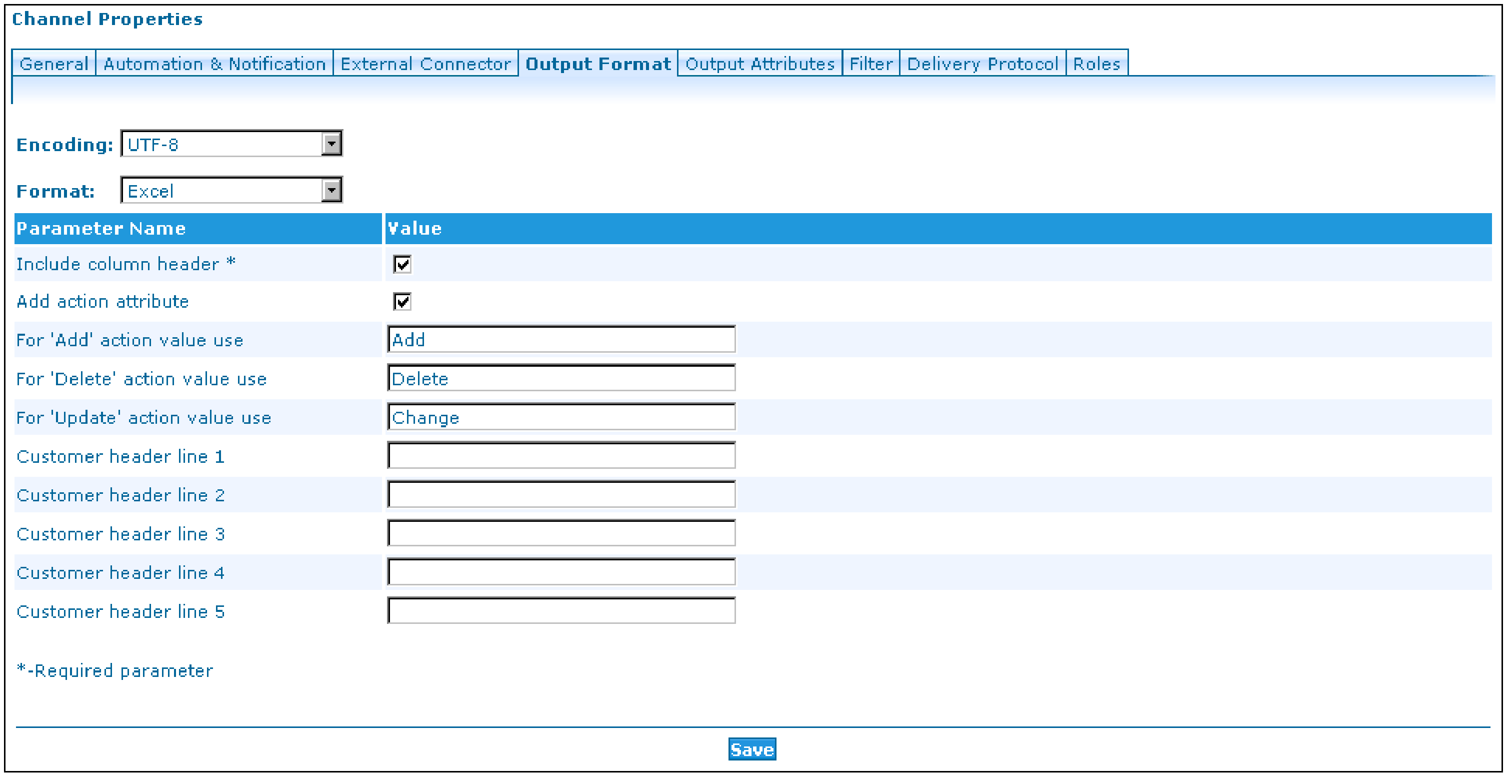


Figure 4—Output Format Properties

- **Encoding**
Select the appropriate character encoding using the select box. For most partners, the default UTF-8 encoding is correct.
- **Format**
You must also select the format of the underlying file (remember, in the end the channel exists to create files to send to partners). Excel is likely the most common format. For Excel files, you must choose whether or not you want to include column headers, and whether to include action attributes (Add, Chance, or Delete).

When you are finished with the Output Format properties, click on the Output Attributes tab.

TAB5—OUTPUT ATTRIBUTES

The Output Attribute tab sets the columns that you want included in the channel's output file as shown in Figure 5. You choose a label for the column (**Output Attribute Name**) and select a catalog attribute that will be the value of the column for each product (**Catalog Attribute Name**). You may also use the expression builder to create a calculated field name.

Channel Properties - FillpointGeneral

General | Automation & Notification | External Connector | Output Format | **Output Attributes** | Filter | Delivery Protocol | Roles

Output Attributes   Add Output Attribute   Default

Order	Output Attribute Name	Catalog Attribute Name	Formula	Type	Req.	Constraint	Output Format	Actions
1	Product Number	Fillpoint_Product_Number		String			No limit	
2	UPC	UPC		String			No limit	
3	Description	Name		String			No limit	
4	Vendor	Vendor_ID		String			No limit	
5	Weight	Weight		String			No limit	
6	1st Instock Date	Computed...	FormatDate (First_Ar...	String			No limit	
7	Approx Retail	MSRP		String			No limit	
8	Platform	Computed...	Translate ("Fillpoi...	String			No limit	
9	Genre	Genre		String			No limit	
10	Sub-Genre	Sub_Genre		String			No limit	
11	Num Players	Number_Of_Players		String			No limit	
12	Width of Box	Width		Numeric			No limit	
13	Length of Box	Length		Numeric			No limit	
14	Height of Box	Height		Numeric			No limit	

Figure 5—Output Attributes Properties

When you have completed building the columns of the output file, click on the Filter tab.

TAB6—FILTER TAB

The Filter tab allows you to create a filter that will export only a subset of the products contained in a catalog. The subset is created by one of four ways: **Item List**, **Search Rule**, **Classification**, or **Filtered Criteria**.

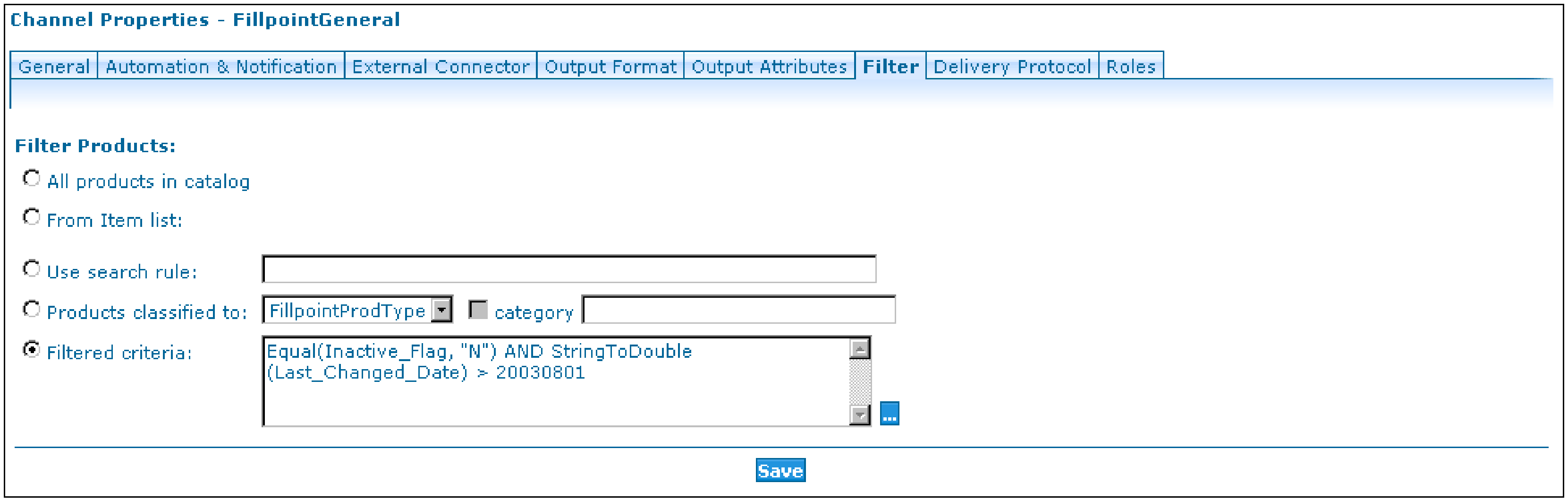


Figure 6—Filter Properties

- **Item List**
  Catalog Master allows you to create a list of products called an **Item List**. You may choose to create a filter that only exports products contained in the Item List by select the *From Item List* radio button, and then choosing the appropriate Item List.
- **Search Rule**
  Search Rules are defined by saving search criteria from catalog searches. If you have created such a rule, you may create a filter based on the rule by selecting the *Use Search Rule* radio button, and then choosing the appropriate search rule.
- **Classification**
  If you wish, you can create a filter that only exports products that are contained within a certain category. To do so, choose the *Products Classified To* radio button, select the appropriate taxonomy, and then select the category that you want to use in the filter.
- **Filtered Criteria**
  The Filtered Criteria option allows you to use the expression builder to create a logical expression to filter products. For example, the expression in Figure 6 will only export products that are active and have a `Last_Changed_Date` greater than August 1st, 2003.

When you have completed configuring the filter properties, click on the Delivery Protocol tab.

TAB7—DELIVERY PROTOCOL

The Delivery Protocol specifies how you want the channel output file to get where you want it to go. You may select HTTP Post, FTP, Email or File Drop. If you choose to email a file to a partner, you need to specify your own email address (**Sender**), the recipient's email address (**Recipient**), and optionally you may also select a **Subject** and a **Message** for the email.

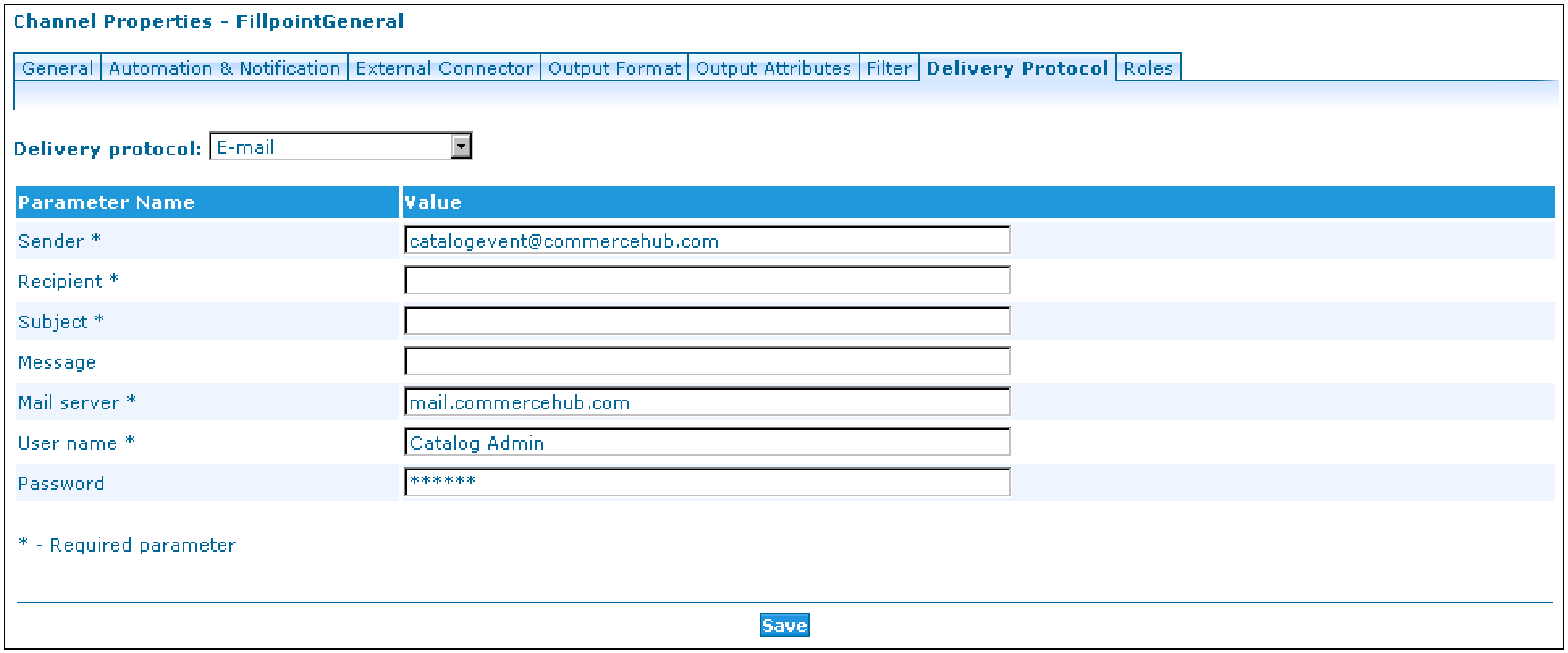


Figure 7—Delivery Protocol Properties

When you have completed setting the delivery protocol attributes, click on the Roles tab.

TAB8—ROLES

The Roles tab allows you to choose which sets of Catalog Master users will be able to view the channel (**Channel Viewer**), edit the channel (**Channel Manager)**, approve the channel (**Channel Approver**), and prepare the channel (**Channel Operator**). For a more detailed explanation of each role, click on the name of the role to the left of each select box.

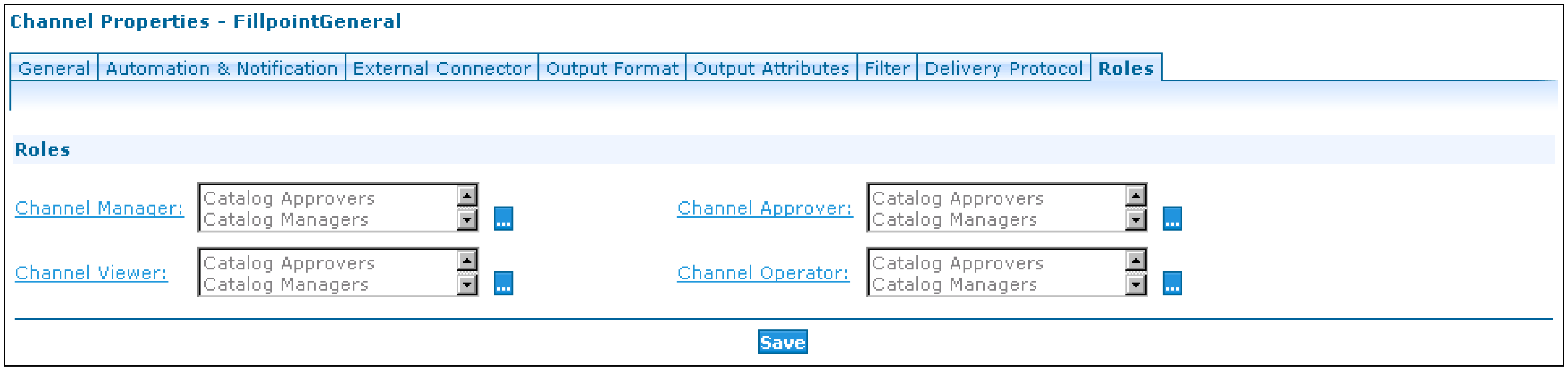


Figure 8—Roles Properties

In general, select the Catalog Manager group for all of the roles. Click the Save button when you are finished with the channel.

Returning to the Channel Setup Menu

Click on the Channel Setup link shown in Figure 9 to return to the channel menu.

Figure 9—Channel Setup Link

TESTING YOUR RESULTS

After you create or edit a channel, make sure to test its results by clicking on the select box to the left of the channel's name, and then clicking on the Prepare button at the top of the screen as shown in Figure 10.

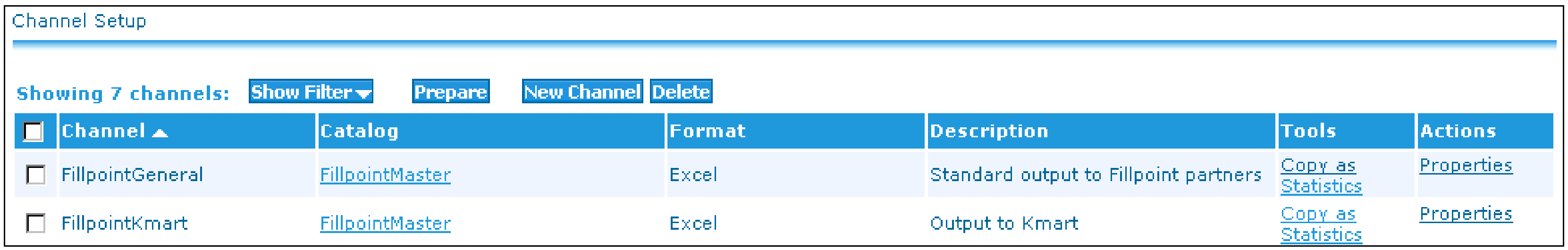


Figure 10—Channel Display

You can track the channel's status through its steps by clicking on the running activities link on the left menu bar.