

Quick Reference – Working with Distribution Lists

Distribution Lists determine who gets copies of the various reports available via e-mail from Park City Group (PCG). You can add, update, and delete lists, and determine which reports are sent to the list’s recipients.

Distribution Lists come in two flavors:

– **Item, Cost, and Promotion**

These lists distribute synchronization-based exports and reports, such as Cost Book Exports, Item Offer reports, Item Offer Acknowledgements, and Promotion Notifications.

– **Advanced Commerce**

These lists distribute SBT, DBT, and other Advanced Commerce documents, such as Delivery or Sales Error reports, Shrink Review documents, Missing Sales or Delivery alerts, and Sales, Delivery, or Shrink invoices.

This guide covers the basic tasks used to manage Distribution Lists for your company. For additional detail (and tasks), see **Manage Distribution Lists** in the *Online Help System*.

Note: Special authorization is required from PCG to perform these tasks. Otherwise, these buttons *will not* appear. This is normally granted to the Security Administrator within your company.

| | |
|--|---|
| Open the ADMINISTRATION window | 1 |
| View, Add, or Delete list Recipients | 2 |
| View and Update what’s sent in an <i>Item, Cost, and Promotion</i> list..... | 3 |
| View and Update what’s sent in an <i>Advanced Commerce</i> List..... | 4 |
| Add an <i>Item, Cost, and Promotion</i> Distribution List | 5 |
| <i>Item, Cost, and Promotion</i> Document Types | 6 |
| Add an <i>Advanced Commerce</i> DOCUMENT Distribution List..... | 7 |
| Add an <i>Advanced Commerce</i> ALERT Distribution List | 8 |

| | |
|--|---|
| <p>Open the ADMINISTRATION window</p> | <p>Distribution Lists are managed from the Administration window.</p> <ol style="list-style-type: none"> 1. Using your Internet browser, open www.ac.prescient.com. 2. Click Providers if you are a Supplier, or click Subscribers if you are a Retailer. 3. Enter your Username, Password, and click Log On. 4. From the drop-down at the top left (where it says Item & Cost), select Administration and click Go. 5. Manage Distribution Lists is located near the bottom. |
|--|---|

View, Add, or Delete list Recipients

Use these steps to manage the individuals who receive reports from a Distribution List.

Note: Distribution Lists cannot be shared between applications. "Advanced Commerce" and "Item, Cost, and Promotion" reports require separate lists.

| | |
|---|--|
| <p>Select the Application and click Find</p> | <ol style="list-style-type: none"> 1. Log on, select Administration, and click Go. 2. Click Manage Distribution Lists. 3. Select the Application from the drop-down. <i>(May not appear for all users.)</i> <p>Advanced Commerce for SBT and other Documents, Invoices, Reports, and Alerts.</p> <p>Item, Cost, and Promotion for sync-based reports, including Item Offer reports / Acknowledgements, Promotion Notifications, and Cost Book exports.</p> 4. Click Find. <p>If desired, narrow down the display by entering search criteria before clicking Find. <i>For example</i>, select a Person to display all lists that include that individual.</p> 5. Select the Distribution List Name. 6. Click Update. <p>The list's Recipients display.</p> <p><u>To Add a Recipient:</u></p> <ol style="list-style-type: none"> 1. Select the Person from the drop-down list. <p>Only people set up with PCG <i>Usernames</i> can be assigned to a list.</p> <p>If you are logged into a "child" business unit, people assigned to the "parent" business unit are also available for selection. This is helpful for including corporate personnel in division-level reporting. <i>(For example</i>, people in the head office can receive reports on individual bakeries, dairies, or retail chains.) Note that this only works from the "child" up, not from the "parent" down.</p> 2. Click Add. 3. Click Save. <p><u>To Delete a Recipient:</u></p> <ol style="list-style-type: none"> 1. Select the person from the list of Recipients. <p>Each Distribution List must have at least one Recipient. Any PCG Administrator listed was set up by Park City Group and cannot be deleted.</p> 2. Click Delete. 3. Click Save. |
|---|--|

View and Update what's sent in an **Item, Cost, and Promotion** list

Use these steps to work with Item, Cost, and Promotion Distribution Lists. These lists distribute sync-based exports / reports, such as Item Offer reports, Promotion Notifications, and Cost Book exports.

Item, Cost, and Promotion lists use **Document Types** to determine which reports are sent to the list recipients. See *page 6* for a list of Document Types. These lists do not use schedules. Instead, each report is sent when certain conditions are met, such as a supplier making an Item Offer.

| | |
|---|--|
| <p>Use “Assign to Document Type”</p> | <ol style="list-style-type: none"> 1. Log on, select Administration, and click Go. 2. Click Manage Distribution Lists. 3. From the Application drop-down, select Item, Cost, and Promotion Exports. <i>(May not appear for all users.)</i> 4. Click Find. 5. Select the distribution list Name. 6. Click Assign To Document Type. 7. Current reports are listed under Assigned Document Types. <p><u>To add a Document Type to your list:</u></p> <ol style="list-style-type: none"> 1. Use the tables on <i>page 6</i> of this guide to determine whether or not the export / report requires a service agreement (trading partnership). 2. If the export / report is service agreement (trading partnership) based, leave the radio button set to Service Agreement Required. Otherwise click Service Agreement Not Required. The Document Types will change to show only types that are not trading-partnership specific. 3. Select from the Available Document Types. You can add more than one type to a single distribution list. 4. If a Document Type is for a specific service agreement (trading partnership), select the Service Agreement. You can select more than one agreement. Note to Retailers: If you use Sub-vendors, these are shown in parenthesis. <i>For example, (SV-1)</i>. 5. Click Assign Document Types. <p><u>To remove a Document Type from your list:</u></p> <ol style="list-style-type: none"> 1. Select the export / report under Assigned Document Types. 2. Click Unassign Document Types. 3. Click Yes to confirm. |
|---|--|

View and Update what's sent in an **Advanced Commerce** List

Use these steps to work with Advanced Commerce Distribution Lists. These lists distribute SBT and other Advanced Commerce reports, such as Delivery or Sales Errors, and Shrink Reviews. These advanced reports are called "documents" in Park City Group.

Advanced Commerce lists use a **Document Schedule** to determine what is sent to the recipients on the list. This is a combination of a pre-set schedule and one or more pre-assigned documents. You can view when a Document Schedule ran last and when it will run again. You can also view which documents are sent on the schedule and add other Document Schedules as needed. Park City Group offers a large variety of documents.

Note: These steps cover working with Advanced Commerce DOCUMENT lists. To view an **ALERT** list, such as for Missing Sales or Delivery alerts, choose **Assign To Document Type** instead of **Assign To Document Schedule**. See *page 8* for more information.

| | |
|--|--|
| Use "Assign to Document Schedule" | <ol style="list-style-type: none"> 1. Log on, select Administration, and click Go. 2. Click Manage Distribution Lists. 3. Leave the Application drop-down set to Advanced Commerce. 4. Click Find. 5. Select the distribution list Name. 6. Click Assign To Document Schedule. The current schedules assigned to the list display. Each schedule lists its Name, the e-mail Subject line, the Last and Next Runtime. ADA (as data arrives) and IMMEDIATE schedules run when data is received, and do not show a Next Runtime. 7. To view the documents generated and sent on a schedule, select the schedule from the list at the top. 8. Click View Associated Documents. Please note that only PCG Administrators can update which documents are included in each schedule and when it will run. <p><u>To add a Document Schedule to your list:</u></p> <ol style="list-style-type: none"> 1. Use the Assign Schedule drop-down list to select the desired Document Schedule. 2. Click Preview Associated Documents to view what is included. Click Back to return. 3. Click Preview Document Schedule to see when it runs. Click Back to return. 4. If this is the desired Document Schedule, click Assign Schedule. After assignment, each schedule lists its Name, the e-mail Notification Subject line, and the Next Runtime. ADA (as data arrives) and IMMEDIATE schedules run when data is received. <p><u>To remove a Document Schedule from your list:</u></p> <ol style="list-style-type: none"> 1. Select the schedule to remove. 2. Click Unassign Schedule. 3. Click Yes to confirm. |
|--|--|

Add an *Item, Cost, and Promotion* Distribution List

Use these steps to add a new Item, Cost, and Promotion Distribution List. These lists distribute sync-based exports / reports, such as Cost Book exports, Item Offer reports, and Promotion Notifications.

After setting up the Distribution List with its recipients, select which reports to send by choosing one or more **Document Types**. These lists do not use schedules. Instead, each report is sent when certain conditions are met, such as a supplier “activating” or “changing” a promotion (Promotion Export to retailers).

Note: Distribution Lists cannot be shared between applications. "Advanced Commerce" and "Item, Cost, and Promotion" reports require separate lists.

| | | |
|-----------|--------------------------------|--|
| A. | Add the List | <ol style="list-style-type: none"> 1. Log on, select Administration, and click Go. 2. Click Manage Distribution Lists. 3. From the Application drop-down, select Item, Cost, and Promotion Exports. <i>(May not appear for all users.)</i> 4. Click Find and review to ensure the list isn't already set up. 5. Click Add. 6. Enter the new Distribution List Name. We recommend naming the list so that it's easy to tell what will be sent or who will receive it. <i>For example</i>, "Item Offer Ack – Dan B." or "Promos - Dairy Dept. Buyers." 7. Select the first Person to include and click Add. 8. Continue with the next Person as needed. 9. Click Save. |
| B. | Assign to Document Type | <p>Assigning the Distribution List to one or more Document Types tells the application which exports / reports to collect and send.</p> <ol style="list-style-type: none"> 1. Select the Distribution List you just added (or updated). 2. Click Assign To Document Type. 3. If the export / report is service agreement (trading partnership) based, leave the radio button set to Service Agreement Required. <i>For example</i>, Item Offers and Item Offer Acknowledgements are based on partnerships. Otherwise click Service Agreement Not Required. The Document Types will change to show only types that are not trading-partnership specific. 4. Select from the Available Document Types. You can add more than one type to a single distribution list. See the Document Types on <i>page 6</i> for a guide. 5. If a Document Type is for a specific service agreement (trading partnership), select the Service Agreement. You can select more than one agreement. Note to Retailers: If you use Sub-vendors, these are shown in parenthesis. <i>For example</i>, (SV-1). 6. Click Assign Document Types. 7. Click Back. |

Item, Cost, and Promotion Document Types

The following are the basic reports and exports available for *Item, Cost, & Promotion* Distribution Lists. Other reports and exports can be set up, but those are designed for specialized environments not covered here.

Some exports and reports are based on “**Service Agreements**”, which means that they are specific to a supplier / retailer trading partnership. *For example*, an *Item Offer Acknowledgement* requires two parties – the supplier who created the item offer and the retailer who acknowledges the offer by accepting or rejecting the items. Other reports, such as *Import Acknowledgements*, are not partner specific and don’t require a Service Agreement.

Note: Although the following are labeled *Retailer report* or *Supplier report*, these are guidelines only. Suppliers can copy themselves in Distribution Lists that send Item Offers to retailers.

Service Agreement Required

| | |
|---|--|
| CBEXPORT – Cost Book Export | <i>Retailer export.</i> File used to feed costs to retailer’s proprietary system. |
| CSTCHG – Cost Change | <i>Retailer report.</i> Lists a supplier’s cost changes in zones to which the retailer is authorized. |
| ITEMCHANGE – Item Change | <i>Retailer report.</i> Lists supplier changes to basic item information. |
| ITEMOFRACK – Item Offer Acknowledgements | <i>Supplier report.</i> Lists the retailer’s response to a supplier’s item offer. |
| ITEMOFFER – Item Offers | <i>Retailer report.</i> Lists items offered to the retailer by the supplier. |
| PROMOACCPT – Promotion Accepts | <i>Supplier report.</i> Sent when a supplier has finalized (activated) a promotion, making it ready to become effective on the start date. Used to alert associates within the supplier’s company. <i>(Rarely used.)</i> |
| PROMOEXP – Promotion Exports | <i>Retailer report.</i> Lists details of a supplier’s promotion, including any updates. Sent when a supplier Activates, Changes, or Cancels a promotion. |
| PROMONOTIF – Promotion Notifications | <i>Supplier or Retailer report.</i> Sent when a supplier has set up, but not finalized (activated) a promotion. Serves as a “heads up”. |
| TXTMSG – Text Message | <i>Supplier or Retailer export.</i> Communicates free form text. <i>(Rarely used.)</i> Normally sent in an EDI 847. |

Service Agreement Not Required

| | |
|--|---|
| IMPORTACK – Import Acknowledgements | <i>Supplier or Retailer report.</i> Acknowledges that a file uploaded online or sent by VAN, AS2, or FTP was received. Normally sent ONLY when errors are detected, serving as an error log . |
| PROMOWARN – Promotion Warnings | <i>Supplier report.</i> Lists errors found in a promotion uploaded online or sent by VAN, AS2, or FTP. <i>For example</i> , a warning is sent when an item in a new promotion has no effective cost. |
| PROXYITEM – Proxy Item | <i>Supplier report.</i> Used for GS1 (1sync) clients only . PCG creates a <i>Proxy Item</i> when a cost or promotion arrives for which no item exists. Serves as a placeholder while waiting for actual item data. The Proxy Item report notifies a supplier that a Proxy Item has been built. |

Add an **Advanced Commerce** DOCUMENT Distribution List

Use these steps to add a new Distribution List for SBT and other documents, invoices, and reports. *For example*, Delivery or Sales Errors, Shrink Reviews, and Invoices. Check with your *PCG Account Manager or Implementer* if you need information on the types available. These lists use **Document Schedules**.

Note: Distribution Lists cannot be shared between applications. "Advanced Commerce" and "Item, Cost, and Promotion" reports require separate lists.

| | | |
|------------------|---|---|
| <p>A.</p> | <p>Add the List</p> | <ol style="list-style-type: none"> 1. Log on, select Administration, and click Go. 2. Click Manage Distribution Lists. 3. Leave the Application set to Advanced Commerce Exports. 4. Click Find and review to ensure the list isn't already set up. 5. Click Add. 6. Enter the new Distribution List Name. We recommend naming the list so that it's easy to tell what will be sent or who will receive it. <i>For example</i>, "Shrink Review – Joe D." or "Accounting Dept." 7. Select the first Person to include and click Add. 8. Continue with the next Person as needed. 9. Click Save. |
| <p>B.</p> | <p>Assign to Document Schedule</p> | <p>At least one Document Schedule must be added for Advanced Commerce lists. The Document Schedule determines which documents are sent and when they are generated.</p> <p>Please note that these must be <i>pre-configured</i> by a PCG Associate.</p> <ol style="list-style-type: none"> 1. With the new list selected, click Assign To Document Schedule. 2. Use the Assign Schedule drop-down list to select the desired Document Schedule. 3. Click Preview Associated Documents to view what is included. Click Back to return. 4. Click Preview Document Schedule to see when it runs. Click Back to return. <i>If an Error displays, it means the schedule is an ADA (as data arrives) or IMMEDIATE schedule. There is no set runtime.</i> 5. If this is the desired Document Schedule, click Assign Schedule. After assignment, each schedule lists its Name, the e-mail Notification Subject line, and the Next Runtime. ADA (as data arrives) and IMMEDIATE schedules run when data is received, and do not show a Next Runtime. 6. If this is not the desired Document Schedule, select it and click Unassign Schedule. 7. Work with the Document Schedules until your setup is correct. 8. Click Back when finished. |

Add an **Advanced Commerce** ALERT Distribution List

Use these steps to add a new Distribution List for SBT, and other Alerts. Alerts notify a company that expected data was not received by Park City Group, such as a daily sales file for a particular store / supplier.

Your PCG setup must be pre-configured to generate these alerts. Otherwise, no alerts will be sent.

Two alert types are available:

Missing-Delivery Alerts – Occur when supplier delivery data does not arrive for a store as expected.

Level 1 alerts are sent when no deliveries have been reported for a store in the past *7 days*.

Level 2 alerts are sent when no deliveries have been reported for a store in the past *14 days*.

Missing Sales Alerts – Occur when sales data does not arrive for a store / supplier / day as expected. The number of missing days that trigger each alert is configurable by PCG, but in general are as follows:

Level 1 - No sales are reported from the previous day for a store.

Level 2 - Sales are missing for two days.

Level 3 - Sales are missing for three or more days. The reporting period for Level 3 extends to the previous 30 days. **Missing sales older than 30 days are not included in Sales Alerts.**

Optional **Level 4** alerts are available for days greater than Level 3 (i.e., seven or more days), but are not commonly used.

It is NOT necessary to assign a **Document Schedule** for alerts. All client accounts are checked for alert conditions based on a single PCG schedule. Alerts are sent only if a “missing” condition exists. Choose a **Document Type** instead.

Note: Distribution Lists cannot be shared between applications. "Advanced Commerce" and "Item, Cost, and Promotion" reports require separate lists.

| | | |
|-----------|---------------------|--|
| A. | Add the List | <ol style="list-style-type: none"> 1. Log on, select Administration, and click Go. 2. Click Manage Distribution Lists. 3. Leave the Application set to Advanced Commerce Exports. 4. Click Find and review to ensure the list isn't already set up. 5. Click Add. 6. Enter the new Distribution List Name. We recommend naming the list so that it's easy to tell what will be sent or who will receive it. <i>For example</i>, "Missing Sales – Jill H." or "IT Dept." 7. Select the first Person to include and click Add. 8. Continue with the next Person as needed. 9. Click Save. |
|-----------|---------------------|--|

(continued)

Add an **Advanced Commerce ALERT** Distribution List (continued)

| | | |
|-----------|--------------------------------|---|
| B. | Assign to Document Type | <ol style="list-style-type: none">1. Select the Distribution List you just added (or updated).2. Click Assign To Document Type.3. Select from the Available Document Types. <i>For example, if you are setting up Missing Sales Alerts, select Missing Sales Level 1 Alert, Missing Sales Level 2 Alert, and Missing Sales Level 3 Alert.</i>4. Click Assign Document Types.5. Click Back. |
|-----------|--------------------------------|---|