

# Definitions

Summary

## Order Types Supported

Requirement

**Fulfillment Items** - User places an order to fulfill and ship pre-printed material or material such as pens and mugs to a specific shipping address.

**Drop Ship** – User places an order to fulfill and ship the customized material to a specific shipping address.

**Direct Mail** – User uploads or purchases a mailing list, which contains the mailing addresses to which the customized material will be sent. The mailing list may also be used by the fulfillment partner to customize the printed pieces using a mail merge process.

# Definitions

## Summary

### Order Line Delivery Status

#### Requirement

The status of an individual item within an order (known as an order line) is displayed to the user in their Work Center. The following are descriptions of the order line statuses that will be displayed to the user.

**Submitted** – The status of submitted indicates the order was submitted by the user and is scheduled to be posted to the fulfillment partner.

**Processing** – The status of processing indicates the order was submitted by the user and posted to the fulfillment partner, but the fulfillment partner has not yet begun processing the order.

**Received** – The status of received indicates the order was submitted by the user and posted to the fulfillment partner, and the fulfillment partner has begun processing the order. The fulfillment partner returns a status of Received and the user's order status will update to Received.

**BackOrdered** - The status of backordered indicates the order was received by the fulfillment partner but the material is backordered. The fulfillment partner returns a status of BackOrdered and the user's order status will update to Back Ordered. Based on whether the material is available again or client direction the status will be updated to Shipped or Cancelled.

**Shipped** – The status of shipped indicates the order has been completed and shipped by the fulfillment partner. The fulfillment partner returns a status of Shipped and the user's order status will update to Shipped.

**Cancelled** – The status of cancelled indicates the order has been cancelled and will not be completed by the fulfillment partner. The fulfillment partner returns a status of Cancelled and the user's order status will update to Cancelled. Note: Cancellation of orders using any payment method must be refunded offline.

# Definitions

## Summary

### Order & Product Details

## Requirement

**SKU (Store Keeping Unit)** - This is a unique code that represents the fulfillment specifications and is used to determine the applicable rate, or cost of the item. SKU is provided by the fulfillment partner or client. SKU is equivalent to an Item number and identifies key pieces of information about the material.

**Order Number** - The Ansira application assigns an order number for each order that is transferred to the fulfillment partners.

**Order Line Number** - The Ansira application assigns an order line number for each item in the order. There will be one or more line numbers per order that is transferred to the fulfillment partner. This number is unique for each item that was checked out in the order and is used to track the fulfillment status of the order line.

**Order Line Shipping** - The Ansira application assigns an order line shipping number for each shipment in the order. There will be one or more shipping line numbers per order line that is transferred to the fulfillment partner. This number is unique and is used to track individual shipments for each order line in the order.

# Data Transfer

Summary

## File Requirements

Requirement

The fulfillment partner will submit required files in:

- Excel
- PDF

SELECTED OPTION:Object not found!

# Data Transfer

## Summary

### Data Transfer Method

#### Requirement

The fulfillment partner will have the option to:

- Manage and create the SFTP - or -
- Allow Ansira to manage and create the SFTP

SELECTED OPTION: Object not found!

Credentials for the SFTP location will be provided to the appropriate party and ensure accessibility.

If Fulfillment Partner (Vendor) will own creation and maintenance of the FTP, please see next section for specific details on read/write permissions.

**Internal Note: If Ansira will create/maintain the SFTP, you can mark the next requirement as Requirement Cancelled.**

# Data Transfer

## Summary

### Fulfillment Partner Owned SFTP

## Requirement

An individual login/account per client will be created and provided by the fulfillment partner for Ansira to utilize. The SFTP account will require read and write permissions on the Orders and Status folders. Additionally, the SFTP account should be able to perform the following actions on these two folders:

- CWD - Change working directory
- PWD - Print working directory
- SYST - Getting system (unix or windows)
- LIST - Listing all files
- MDTM - Modified date time
- RETR - Retrieve file (Get method)
- STOR - Storing file (Put method)
- DELE - Delete file

# Data Transfer

## Summary

### SFTP Directory Structure

## Requirement

The SFTP will have the following directory structure for Production and Stage (Test) environments:

- **Orders** – The Ansira application will transfer the fulfillment orders to this directory. The directory name is configurable.
- **Orders\_Test** - The Ansira application will transfer the fulfillment orders from Stage environment to this directory. The directory name is configurable.
- **Status** – The fulfillment partner will place and update the order file for the order as the order line status changes. The Ansira application will periodically look for updated statuses orders in this directory and will update the status of the order line on the Ansira application. The directory name is configurable.
- **Status\_Test** - The fulfillment partner will place and update the Stage environment order file for the order as the order line status changes. The Ansira application will periodically look for updated statuses orders in this directory and will update the status of the order line on the Ansira application. The directory name is configurable.
- **Inventory** (*Optional*) - The fulfillment partner will place inventory management files to this directory. The Ansira application will look for inventory files in this directory to update the inventory levels on the Ansira site. The directory name is configurable.
- **Inventory\_Test** (*Optional*) - The fulfillment partner will place Stage (test) inventory management files to this directory. The Ansira application will look for inventory files in this directory to update the inventory levels on the Ansira site. The directory name is configurable.
- **Processed** (*Optional*) – The fulfillment partner can incorporate into their process to move orders to this directory once they pick up the orders for processing. The directory name is configurable.

# Data Transfer

## Summary

### File Naming Conventions

#### Requirement

The following file naming conventions will be used:

#### Order File

*<ClientName>-<OrderNumber>.xls*

*<ClientName>-<OrderNumber>-OrderDetails*

*<ClientName>-<OrderNumber>-ShippingDetails*

#### Advertising Material

*<creativeid>.pdf*

#### Mailing list (uploaded or purchased)

*<ClientName>-<OrderLineNumber>*

*Note: The file extension will be determined based on the File Requirement type chosen (xls, csv)*

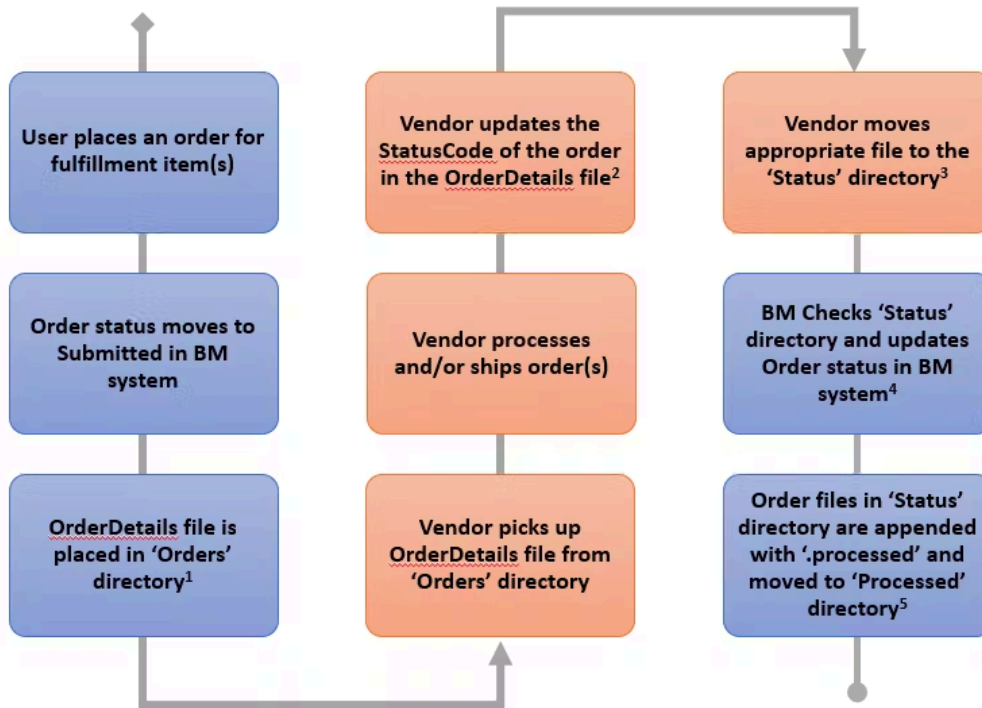
# Data Interface

## Summary

### Fulfillment Workflow

## Requirement

### Fulfillment Order Data Interface



<sup>1</sup> Every order will have its own OrderDetails zip file in the 'Orders' directory that contains all line items for the order with file name <ClientName>-<OrderNumber>\_OrderDetails

<sup>2</sup> Vendor updates StatusCode in the OrderDetails file with appropriate status (Received or Shipped) and any appropriate shipping details columns including tracking if Shipped

<sup>3</sup> File changes based on Status:

- If status is Received – Vendor will save the updated <ClientName>-<OrderNumber>\_OrderDetails file and place in 'Status' directory
- If status is Shipped – Vendor will change the updated OrderDetails file name to <ClientName>-<OrderNumber>\_ShippingDetails and place in the 'Status' directory

<sup>4</sup> If tracking information is provided it will be included in the updated status on the BM site

<sup>5</sup> This is to prevent files from being processed more than once

Directory	Frequency
Orders	Posted every hour
Status	Posted 2x per day 7am ET 8pm ET
Inventory	On demand or scheduled

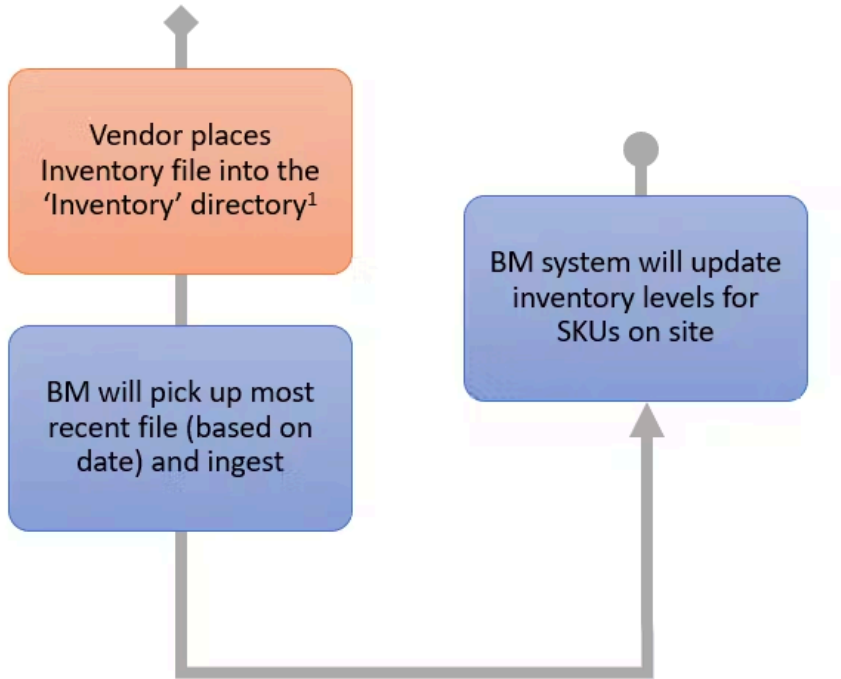
# Data Interface

Summary

## Inventory Workflow

Requirement

### Inventory Update Data Interface



<sup>1</sup> File name should follow the convention of <ClientName>\_Inventory. Files will remain in the 'Inventory' directory.

Directory	Frequency
Inventory	On demand or scheduled

## Data Elements

### Summary

#### Order File

### Requirement

An order submitted on the Ansira application will be posted to the SFTP and will be comprised of the following:

- Ansira will choose an appropriate option based on the chose file requirement type (Excel or CSV)
- Excel: Each order will contain one or more order line items in the Delivery\_Order Details tab for each order and one or more shipping line items per line item in the Delivery\_ShippingDetails tab
- CSV: Two separate documents will be provided for an order that contains the order line items and shipping line items per order line in the CSV files

SELECTED OPTION: Choose One

One zip file will be provided per order. This zip file will contain all the files relevant to the order. The fulfillment partner will need a software tool to unzip and process the zip that the Ansira application will provide.

## Data Elements

### Summary

#### Advertising Material

### Requirement

Each order with user configured material will produce one PDF for each customized piece of Advertising Material. BrandMuscle recommends all Advertising Material templates be set up in CMYK format.

The press ready PDF will be delivered to the fulfillment partner in the Order directory of the SFTP.

The naming of the PDF is based on the **CreativeID** and is referenced in one of the following:

- Appropriate options based on the chosen file requirement (CSV or Excel)
- Delivery\_OrderDetails tab in Excel file
- OrderDetails.csv

SELECTED OPTION: [ ] .

In the case of Fulfillment items, there will be no creative included.

# Data Elements

## Summary

### Mailing List Uploaded by User

## Requirement

When a user completes the Direct Mail ordering process in the Ansira application, they may have the option to upload their own mailing list. If they choose to upload a mailing list, it will be included in the Order file uploaded in the SFTP for the fulfillment partner.

The order and headers for the columns are configurable at a fulfillment partner level. Refer to [File Formats](#) for the default file layout.

# Data Elements

## Summary

### Mailing List Purchased thru Provider

## Requirement

When a user completes the Direct Mail ordering process, they may have the option to purchase a mailing list from a mailing list provider. If they choose to purchase a mailing list, it will be included in the order. Refer to [File Formats](#) for our USAData integration.

One zip file will be provided per order. This zip file will contain all the files relevant to the order. The fulfillment partner will need a software tool to unzip and process the zip that the Ansira application will provide.

# Fulfillment Partner Processing

## Summary

### Process & Ship by Fulfillment Partner

## Requirement

The fulfillment partner will read the Excel or CSV file(s) and process the order based on the creative (if applicable), order line items and the ship line items.

# Ansira Status Updates

## Summary

### Status File

## Requirement

The Ansira application will check the 'Status' directory twice a day:

- Before 7am ET the start of business
- EOD after 8pm ET

If the Fulfillment partner has posted a Status file in the directory, Ansira will retrieve the order line number and status documented on the file and update it in the Ansira database. This will not apply to any orders that are already at Cancelled or Shipped status. Such orders will not have further status updates applied. The system will then append a ".processed" extension to the file name to indicate we have processed it.

# Integration Stages

## Summary

### Initial Post to Fulfillment Partner Details

#### Requirement

Ansira application sends one zip file to the SFTP for every order placed on the platform. The zip file will contain the Order file, any creative files (if applicable) and mailing lists (if applicable). This zip file is posted to the <ORDERS> directory on the SFTP site.

See Appendix for file formats related to User uploaded mailing list and purchased mailing list from a provider.

# Integration Stages

## Summary

### Fulfillment Partner Processing Details

#### Requirement

Fulfillment partner will:

1. Grab the Order zip file from the <ORDERS> directory and open the Order File
2. Add the appropriate Order Status to the file
3. Put the updated file in the <STATUS> directory
4. Process the Order

#### Details:

The fulfillment partner places a copy of the file with the **StatusCode** column filled in into the <STATUS> directory. If using CSV format, both OrderDetails and ShippingDetails must be updated and placed into the <STATUS> directory.

- <Received> is the status code for identifying the fulfillment partner has received the order. Providing this status code is optional.
- <Backordered> is the status code for identifying the material is back ordered with the fulfillment partner.
- <Cancelled> is the status code for identifying the order is cancelled with the fulfillment partner.
- <Shipped> is the status code for identifying that the order has been shipped. For shipped orders, the fulfillment partner is able to provide TrackingNo, CarrierNo, ShipDate, TrackingURL and a VendorShippingNote as part of the shipping information in the Delivery\_ShippingDetails tab of the excel or the OrderDetails.csv.

# Integration Stages

## Summary

### Status Update Details

#### Requirement

The Ansira application polls this directory for a file that fits the follow criteria:

1. Naming convention of “<ClientName>-<OrderNumber>.xls”
2. Order lines NOT in the Shipped or Cancelled status.

If files are found that meet this criteria, they are parsed, order line and status columns are viewed, and the Ansira system is updated accordingly. For Shipped order lines, if tracking information is provided, it will be included in the update. The update will fail if values provided are incorrect.

Ansira application will finish reading the file and updating the system. It will then rename the file and append a “.processed” to the end of the file name (<ClientName>-<OrderNumber>.xls.processed) so that the Ansira application does not process the same file multiple times and so that the Fulfillment Partner has an indication that the Ansira application has processed the file and clean up can be performed. If further Order Lines need to be updated within the same file, the Fulfillment Partner can reuse the same file by removing the processed extension and editing the file for Ansira to pick up during the next poll.

# Appendix

## Summary

### A. Order Details

#### Requirement

#### Delivery\_OrderDetails tab (Excel) File Format

Column	Column Name	Data Type	BrandMuscle Supplied Value	Partner Supplied Value	Description
1	OrderNumber	String	YES	NO	Generated by BrandMuscle application when an order is placed. Identifies all items checked out together
2	ClientID	String	YES	NO	Identifies a client in the BrandMuscle application.
3	OrderLineNumber	String	YES	NO	Generated by BrandMuscle application when an order is placed. Identifies individual items checked out in an order.
4	SKU	String	YES	NO	Identifies fulfillment specification. SKU numbers are predetermined and provided by the fulfillment partner.
5	CreativeID	String	YES	NO	ID of configurable creative associated with the order line.
6	ItemDescription	String	YES	NO	Short Description of the SKU
7	Quantity	String	YES	NO	Quantity Ordered
8	OrderLineCost	String	YES	NO	Order Line Cost
9	CostCenter	String	YES	NO	Cost Center
10	OrderLineShipping	String	YES	NO	Order Line Shipping and Handling Cost
11	OrderLineTax	String	YES	NO	Order Line Tax
12	OrderLineShippingTax	String	YES	NO	Order Line Shipping Tax
13	StatusCode	String	NO	YES	Fulfillment partner updates the status for order lines.

# Appendix

## Summary

### B. Shipping Details

#### Requirement

#### Delivery\_ShippingDetails tab (Excel) or ShippingDetails.csv File: Format

Column	Column Name	Data Type	Ansira Supplied Value	Partner Supplied Value	Description
1	OrderLineNumber	String	YES	NO	Generated by Ansira application when an order is placed. Identifies individual items checked out. This maps to column 3 in the first tab.
2	OrderLineShippingID	String	YES	NO	Generated by Ansira application when a shipment is placed. Identifies individual shipping destinations for each order line. For direct mail orders, this identifies the entire direct mail shipment.
3	ShippingMethod	String	YES	NO	Shipping Method selected by the user placing the order. Example, Next Business Day, Ground, etc. Shipping Methods offered in Ansira application are predetermined by the fulfillment partner and provided to Ansira during implementation
4	Quantity	String	YES	NO	Quantity associated with this shipment.
5	Name	String	YES	NO	In the case of Drop Ship or Fulfillment orders, this field contains Name of the beneficiary to whom the order will be shipped as entered by the user placing the order. In the case of a Direct Mail order this field contains First Name & Last Name of the user that placed the order.
6	DealerName	String	YES	NO	Company Name entered by the user placing the order (default to the value registered in Ansira's application).
7	Address1	String	YES	NO	Shipping Address/Return Address as entered by the user placing the order.

8	Address2	String	YES	NO	-- same as above --
9	City	String	YES	NO	-- same as above --
10	State	String	YES	NO	-- same as above --
11	Country	String	YES	NO	-- same as above --
12	ZipCode	String	YES	NO	-- same as above --
13	Phone	String	YES	NO	-- same as above --
14	OrderLineShippingCost	String	YES	NO	Ship cost for this order ship line
15	OrderLineShippingTax	String	YES	NO	Any tax associated with above
16	OrderLineMailingListCost	String	YES	NO	Mailing list cost if purchased list
17	OrderLineMailingListTax	String	YES	NO	Any tax associated with above
18	TrackingNo	String	NO	YES	Generated by fulfillment partner to track the order.
19	CarrierNo	String	NO	YES	Shipping carrier actually used by the fulfillment partner. e.g Fed Ex AND/OR Service level used by the fulfillment partner. e.g. Next Day, 2 Day
20	ShipDate	String	NO	YES	Date shipment was shipped. Format: mm/dd/yyyy
21	TrackingURL	String	NO	YES	Clickable URL supplied by fulfillment partner.
22	VendorShippingNote	String	NO	YES	The partner can update the report with shipping notes

# Appendix

## Summary

### C. Mailing List Details

#### Requirement

#### Format of mailing list when uploaded by user.



Column	Column Name	Data Type	Ansira Supplied Value	Partner Supplied Value	Description
1	First Name	String	YES	NO	Addressee's First Name
2	Last Name	String	YES	NO	Addressee's Last Name
3	Company	String	YES	NO	Addressee's Company
4	Title	String	YES	NO	Addressee's Title
5	Address1	String	YES	NO	Addressee's Address Line 1
6	Address2	String	YES	NO	Addressee's Address Line 2
7	City	String	YES	NO	Addressee's City
8	State	String	YES	NO	Addressee's State
9	Zip	String	YES	NO	Addressee's Zip
10	Country	String	YES	NO	Addressee's Country
11	NOT USED CURRENTLY				

#### Format of mailing list when purchased through USAData



Column	Column Name	Data Type	Ansira Supplied Value	Partner Supplied Value	Description
1	PrefixTTL	String	YES	NO	Addressee's salutation
2	IndividualName	String	YES	NO	Addressee's complete name

3	firstname	String	YES	NO	Addressee's first name
4	middlename	String	YES	NO	Addressee's middle name
5	lastname	String	YES	NO	Addressee's last name
6	address	String	YES	NO	Addressee's address line 1
7	Address2Line	String	YES	NO	Addressee's address line 2
8	city	String	YES	NO	Addressee's city
9	State	String	YES	NO	Addressee's state
10	zip	String	YES	NO	Addressee's 5 digit zip
11	zip4	String	YES	NO	Addressee's additional 4 zip digits
12	NOT USED CURRENTLY				
13	PreDirectional	String	YES	NO	Addressee's street's directional prefix
14	Number	String	YES	NO	Addressee's street number
15	street_name	String	YES	NO	Addressee's street name
16	NOT USED CURRENTLY				

# Appendix

## Summary

### D. Inventory Details (Optional)

#### Requirement

#### <VendorName>\_Inventory.csv File Format

Column	Column Name	Data Type	Ansira Supplied Value	Partner Supplied Value	Description
1	WarehouseBinName	String	NO	YES	Value used by Ansira application to align items in a warehouse bin.
2	ExternalItemID	String	NO	YES	SKU/Item numbers are predetermined and provided by the fulfillment partner. The SKU/Item needs to exist in the Ansira application to assign an inventory level.
3	InitialQuantity	String	NO	YES	This value is used for the first-time load of the data and can remain the same value for every subsequent load of a new Inventory file.
4	CurrentQuantity	String	NO	YES	This value represents the current on hand quantity for the fulfillment partner available for ordering on the Ansira application.

# Appendix

Summary

## E. Status Codes

Requirement

### Order Status Code Naming Conventions

Order Status Description	Client Code Configuration	Status in Work Center
Order Received by Fulfillment Partner	Received	Received
Order Shipped by Fulfillment Partner	Shipped	Shipped
Order Cancelled by Fulfillment Partner	Cancelled	Cancelled
Material Back Ordered at Fulfillment Partner	BackOrdered	BackOrdered

# Appendix

## Summary

### F. SFTP Details

#### Requirement

### SFTP Test Directory

Order Posting Frequency	Processed as needed
Order Status Update Frequency	Processed as needed
SFTP Address	
Username	
Password	Provided via a secure link
Directory Name	
Subfolder Definition	
Orders_Stage	Orders_Test
Status_Stage	Status_Test
Processed_Stage (Optional)	

### SFTP Production Directory

Order Posting Frequency	Every 60 minutes
Order Status Update Frequency	Twice per day outside of business hours
SFTP Address	
Username	
Password	Provided via a secure link
Directory Name	

Subfolder Definition

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Orders

Orders

---

Status

Status

---

Processed (Optional)

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