brandmuscle

ECHO Brand Management

Data Feed Specification

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Project ID: BBNCI-964 | ECHO BrandBuilder Implementation

Contents

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1 Change Log

Date	Change Author	Purpose	Sections changed
4/13/2020	Kayla Taras	Document data feeds	1.1
4/23/2020	Kayla Taras	Add a region field, update user/location & user/manager mapping	All
5/19/2020	Kayla Taras	Add phone number to manual user feed	2.3.2.11

2 Data Feeds

2.1 Definitions

- **Location**: A unique profile specific to a physical dealer location that pulls in details such as address, phone, etc. into a template. Profile must be assigned to a user in order to be used in template building.

- **User**: A unique individual with access to the site. Permissions can be assigned to control level of access and activity.

- **User Group**: A set of permissions assigned to various user levels. Every user belongs to a group.

- **Data Feed**: A file that allows for automatic ingestion of user and location data into BrandMuscle systems.

- **SFTP**: Stands for Secure File Transfer Protocol – a secure online space to transfer information between two systems.

- **Production Environment**: The version of the BrandMuscle site that is live to end users.

- **Non-Production Environment**: Versions of the BrandMuscle site that are not live to end users. These environments are used for testing prior to posting to production. These include 'Development', 'QA', and 'Stage'.

- **Exception Group**: A user group that can be manually assigned (i.e. not done by the data feed) to a user to stop the user's data from being managed by the data feed. You may assign a user to an exception group if they are not present in the data file, in order to not remove the user from the site in the case of a full refresh data feed.

- **Full Refresh**: A version of a data feed where all data is provided in one file and completely refreshed each time the data feed runs. Records no present in the feed are removed from the system.

- **Delta/Create-Update**: A version of a data feed where only the data that has been updated, added, or removed is updated each time the data feed runs. Records not present in the feed are not touched.

- **Approver**: A user that can be tied to a different user's account for the purpose of approving creative materials or orders.

- **Manager**: A user that can be tied to a different user's account for the purpose of being able to emulate the managed user, view the managed user's activity on the site, or to be able to view and edit the managed user's locations.

- **Emulate**: The ability to see and access the site as though you are a different user

- **User to Location Mapping**: A user must be tied to a location for the user to be able to build templates using that location's information. User to location mapping is the process of defining the connection between the two profiles. This could be a value that exists in both the user and location profile, or the username could be listed directly in the location feed file along with the location record.

2.2   Functional Requirements

2.2.1   User Data Feed – Manual Feed for Distributor and ECHO Users

- ECHO will submit a User data file to BrandMuscle one time at the start of the implementation.
- This file will be used to import the initial set of users into the BrandMuscle systems.
- User groups/roles will be manually populated into the one-time data file by ECHO.
- For ongoing user management, BrandMuscle and ECHO will establish a business process consisting of a request form for distributor users to add/remove users associated with their dealers.
- For large changes, such as annual reorganization, ECHO and BrandMuscle's account team will work together to schedule a bulk upload using the file format defined below.

2.2.2   User Data Feed – Automated Feed for Dealer Users

- ECHO will submit a location data file to a BrandMuscle SFTP daily.
- This file will be used to create Brand Management accounts for Dealer-level users.
- This file will contain ALL dealer locations and will fully refresh each night.
- User data will be managed by the data feed, except the following:
  - First Name
  - Last Name
  - Email Address

2.2.3   Location Feed

- ECHO will submit a location data file to a BrandMuscle SFTP daily.
- This file will be used to pull dealer location/address information into the BrandMuscle systems.
- This file will contain ALL dealer locations and will fully refresh each night.
- Location data will be managed by the data feed. End users will not make updates to locations unless there is a field that is NOT managed by the feed.

2.3   Technical Requirements

2.3.1   FTP Configuration

2.3.1.1   User Feed

Data Feed Posting Time	Non-scheduled. Manual post.
BrandMuscle Pick-Up Time	By request
SFTP Address	sftp.brandmuscle.net
Directory Name – PRODUCTION	/Incoming
Directory Name – Non-production	/Incoming_Non-Production
Username	ECHOIncorporated
Password	S7h$rEpmL3
Filename(s)	ECHO_Users_yyyyMMdd_HHmmss.csv

2.3.1.2   Location Feed

Data Feed Posting Time	6:00 am CT
BrandMuscle Pick-Up Time	12 am CT
SFTP Address	sftp.brandmuscle.net
Directory Name – PRODUCTION	/Incoming

Directory Name – Non-production	/Incoming_Non-Production
Username	ECHOIncorporated
Password	S7h$rEpmL3
Filename(s)	ECHO_Locations_yyyyMMdd_HHmmss.csv

2.3.2 User Data Feed – Manual Feed for Distributor and ECHO Users

2.3.2.1 **Exceptions groups not deleted or updated by the feed include:** DoNotDelete

2.3.2.2 **Data feed file format:** Comma Separated Values - .csv file

2.3.2.3 **User data feed update frequency:** Manual deployment upon request

2.3.2.4 **For existing users included in the data feed, the site will be configured to:**
Update existing user data with data included in the data feed with the exception of users that belong to the exception groups.

2.3.2.5 **For existing users not included in the data feed, the site will be configured to:** Retain user data

2.3.2.6 **For users belonging to exception groups but who appear in the feed:**
Honor exception group and do not update user record.

2.3.2.7 **User group assignments will be:** Listed directly in feed file

2.3.2.8 **If multiple instances of one username are encountered:**
   - Use data from first record
   - Concatenate data in DistributorDealerNo, EchoDealerNo

2.3.2.9 **Fields with multiple values will be represented in feed file as**: Separate rows

2.3.2.10 **Primary account key will be**: UserName

2.3.2.11 **User Data Feed Structure - Manual Feed for Distributor Users**

Seq	Client Field Name	BMI Field Name	Data type	Example Data	Req[1]	Rules
0	UserName	UserName	String	apieplow@floridaoutdoor.com	Y	
1	FirstName	FirstName	String	Andrew	Y	
2	LastName	LastName	String	Pieplow	Y	
3	Email	Email	Email	apieplow@floridaoutdoor.com	Y	
4	Phone	Telephone	String	123-456-7890	N	
5	Role	Group	String – preset options (see below *)	Account Manager	Y	
6	DistributorNo	Custom1	Numeric – 8 digits	22700100	Y	
7	DistributorName	BusinessName	String	Lawn Equipment Parts Company	N	
8	DistributorAbbr	Custom4	String	LEPCO	N	
9	Region	Region	String		N	
10	EchoDealerNo	Custom3	Numeric	21276	Y	
11	DistributorDealerNo	Custom2	Alphanumeric	6024	Y	

| 12 | Delete | | Y or blank | | N | If Y, delete user record from site. |

[1] If this column is marked Y and data is not present, the user will not be created on the site. Information these columns is either a required field for Brand Management to function correctly or is required to associate users with locations.

* Role Options:
- Dealer
- Account Manager
- Regional Manager
- Marketing Manager
- ECHO Corporate Admin
- ECHO Corporate - View Only

2.3.3   User Data Feed – Automated Feed for Dealer Users

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2.3.3.4   **For existing users included in the data feed, the site will be configured to:** Update existing user data with data included in the data feed with the exception of users that belong to the exception groups.

2.3.3.5   **For existing users not included in the data feed, the site will be configured to:** Retain user data

2.3.3.6   **For users belonging to exception groups but who appear in the feed:** Honor exception group and do not update user record.

2.3.3.7   **Users in feed that belong to exception groups should be:** Updated by data feed

2.3.3.8   **Users NOT in feed that are owned by users in exception groups should be:** Ignored by data feed

2.3.3.9   **User group assignments will be:** Set to 'Dealer' per the supplemental data file (listed below)

2.3.3.10 **If multiple instances of one username are encountered:** Use data from first record

2.3.3.11 **Fields with multiple values will be represented in feed file as**: Comma separated data

2.3.3.12 **Primary account key will be**: UserName

2.3.3.13 **User Data Feed Structure - Automated Feed for Dealer Users**

Seq	Client Field Name	BMI Field Name to map data to	Data Type	Example Data	Req	Rules
0	Status	Do not map	String	Active	N	Only create users with records marked Active
1	DistributorNumber	Custom1	Numeric. 8 digits.	14400100	Y	
2	DistributorAbbr	Custom4	Alpha	LEPCO	Y	
3	DistributorDealerNo	Custom2	Numeric	PI5301A	Y	
4	Region	Region	String		N	
5	EchoDealerNo	Custom3	Alpha Numeric	175	Y	
6	OrganizationName	BusinessName	String	PIPERSVILLE GARDEN CENTER	N	
7	Address	Address	String	6940 OLD EASTON RD.	N	
8	City	City	String	PIPERSVILLE	N	

9	State	State	2-char state code	PA	N	
10	Zip Code	Zip	5-digit zip code	18947	N	ECHO will send 5-digit zip codes only. Will suppress '-XXXX' data if present.
11	Country	Country	2-char country code.	USA	N	ECHO will send USA instead of US and CAN instead of CA
12	Latitude	Do not map				
13	Longitude	Do not map				
15	Phone	Telephone	String	(215) 766-0414	N	
16	ServiceType	BusinessType	String	SIGNATURE DEALER	N	
17	ECHODealer	Do not map				
18	ECHOCordlessDealer	Do not map				
19	ShindaiwaDealer	Do not map				
20	DisplayInECHOStoreLocator	Do not map				
21	EcommerceDealer	Do not map				
22	EliteDealer	Do not map				
23	DealerWebsite	Do not map				
24	DealerFacebookPage	Do not map				

[1] If this column is marked Y and data is not present, the user will not be created on the site. Information these columns is either a required field for Brand Management to function correctly or is required to associate users with locations.

2.3.3.14 Supplemental Dealer User Data File

For security purposes, BrandMuscle requires an email address, first name and last name for all user accounts. The purpose of the email address is to allow a user to set a password upon first login.

In order to create a dealer profile, BrandMuscle and ECHO will maintain a supplemental mapping file containing DistributorNo, DistributorDealerNo, FirstName, LastName, and Email. This mapping file will be posted to the same SFTP as the Location Data file but will be maintained in partnership by ECHO Site Admin and BrandMuscle Client Success.

Rules:
- If there is a record in this supplemental feed for DistributorNo + DistributorDealerNo, the system will create an account for it using the information from the location feed, joined with the information from the supplemental file.
- If there is no record in this supplemental feed for DistributorNo + DistributorDealerNo, the system will ignore the record in the location feed. As such, only accounts for which we have an email address on file will have an account created.

BM Field Name	Data Treatment	Req	Notes
DistributorNo	Numeric	Y	
DistributorDealerNo	Alphanumeric	N	
UserName	Alphanumeric	Y	User name will be defined as: [DistributorABBR][DistributorDealerNumber] (ex. FOE6024)
FirstName	String	Y	ECHO must source this information via the distributors for any dealer wishing to place their own orders.

LastName	String	Y	ECHO must source this information via the distributors for any dealer wishing to place their own orders.
Email	Email address	Y	ECHO must source this information via the distributors for any dealer wishing to place their own orders.
Group	String	Y	Always 'Dealer' unless a future enhancement dictates otherwise.

2.3.3.15 **Manager Mapping**

Manager mapping will vary based on user group:

- **Dealer group:**
  - User in Account Manager group with a matching DealerNumber (Custom2) should be marked as manager.
  - User in Regional Manager group with a matching DistributorNumber (Custom1) and Region should be marked as manager.
  - User in Marketing Manager group with a matching DistributorNumber (Custom1) should be marked as manager.
- **Account Manager group:**
  - User in Regional Manager group with a matching DistributorNumber (Custom1) and Region should be marked as manager.
  - User in Marketing Manager group with a matching DistributorNumber (Custom1) should be marked as manager.
- **Regional Manager group:**
  - User in Marketing Manager group with a matching DistributorNumber (Custom1) should be marked as manager.

2.3.4 Location Data Feed

2.3.4.1 **For existing locations included in the data feed, the site will be configured to:** Update existing location data with data included in the data feed.

2.3.4.2 **For existing locations not included in the data feed, the site will be configured to:** Delete location

2.3.4.3 **Locations in feed that are owned by users in exception groups should be:** Updated by data feed

2.3.4.4 **Locations NOT in feed that are owned by users in exception groups should be:** Ignored by data feed

2.3.4.5 **Data feed file format:** Comma Separated Values - .csv file

2.3.4.6 **Data feed update frequency:** Daily

2.3.4.7 **If multiple instances of one location are encountered:** Use the details from the first record

2.3.4.8 **Fields with multiple values will be represented as**: Separate rows

2.3.4.9 **Primary account key will be**: EchoDealerNo (BM field name: LocationCode)

2.3.4.10 **Data Formatting**: Data will appear in Brand Management exactly as it is presented in the data feed file. If Address information is to appear as Title Case, ECHO should format as such in the feed file sent to BrandMuscle.

2.3.4.11 **Location Data Feed Structure**

Seq	Client Field Name	BMI Field Name to map data to	Data Type	Example Data	Req[1]	Rules

0	Status	Active	String	Active	N	BM will only create records marked 'Active'. Translate value to 'Y' to map to BMI active field.
1	DistributorNo	CustomField1	Numeric. 8 digits.	14400100	Y	
2	DistributorDealerNo	CustomField2	Alpha Numeric	PI5301A	Y	
3	EchoDealerNo	LocationCode	Numeric	175	Y	
5	OrganizationName	LocationName	String	PIPERSVILLE GARDEN CENTER	N	ECHO – see note below 2. ECHO will send data as Title Case
6	Address	Address	String	6940 OLD EASTON RD.	Y	ECHO will send data as Title Case
7	City	City	String	PIPERSVILLE	Y	ECHO will send data as Title Case
8	State	State	2-char state code	PA	Y	
9	ZipCode	Zip	5-digit zip code	18947	Y	ECHO will send 5-digit zip codes only. Will suppress '-XXXX' data if present.
10	Country	Country	3-char country code.	US	Y	ECHO will send USA instead of US and CAN instead of CA
11	Latitude	DirectionalLine	Numeric	40.425950	N	See note 3 below
12	Longitude	DirectionalLine2	Numeric	-75.141320	N	
13	Phone	Phone	String	(215) 766-0414	N	
15	ServiceType	CustomDropdown1	String	SIGNATURE DEALER	N	
16	ECHODealer	CustomField3	Y or N	Y	N	If Y, value = ECHO. If more than one value in 14, 15, 16, comma separate in CustomField3. See example in note 4 below.
17	ECHOCordlessDealer	CustomField3	Y or N	Y	N	If Y, value = ECHO Cordless; If more than one value in 14, 15, 16, comma separate in CustomField3. See example in note 4 below.
18	ShindaiwaDealer	CustomField3	Y or N	Y	N	If Y, value = Shindaiwa; If

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						more than one value in 14, 15, 16, comma separate in CustomField3. See example in note 4 below.
19	DisplayInECHOStoreLocator	CustomDropdown2	Y or N	Y	N	
20	EcommerceDealer	CustomDropdown3	Y or N	N	N	
21	EliteDealer	CustomDropdown4	Y or N	Y	N	
22	DealerWebsite	URL	URL string	pipersvilletractor.com/	N	ECHO will suppress http://www. or https://www. and any closing '/' characters when sending to BrandMuscle. Bad data will be suppressed by ECHO before sending to BM.
23	DealerFacebookPage	FacebookURL	URL string	facebook.com/Pipersville-Garden-Center-154711447900421/	N	ECHO will suppress http://www. or https://www. and any closing '/' characters when sending to BrandMuscle. Bad data will be suppressed by ECHO before sending to BM.
24	AccountManager	ContactName	Email (should match Account Manager's username in system, which is their email address).		N	ECHO will send this data for Golden Eagle records

[1] If this column is marked as 'Req: Y' and data is not present, the user will not be created on the site. Information these columns is either a required field for Brand Management to function correctly or is required to associate users with locations.

[2] The feed will insert Organization ame as it is written in the feed. In the dealer profile, user will be able to edit a separate field called 'DBA' to provide a preferred name. Within templates, user will choose whether to use Organization Name or DBA. If user has not updated DBA but does not wish to use OrganizationName, they will be able to edit within the template. It will not save to the dealer profile unless the edit is made directly in dealer profile.

[3] Latitude and Longitude will be used in dynamic landing pages to place a GPS pin on a Google map. If this field is blank for a dealer who orders a digital campaign, the Google map pin will be missing from the dynamic landing page.

[4] ECHODealer, ECHOCordlessDealer, and ShindaiwaDealer will appear in Brand Management UI as a checkbox list.
Example, if all 3 are Y:
Products:

- ✓   ECHO
- ✓   ECHO Cordless
- ✓   Shindaiwa

2.3.4.12 User to Location Mapping

Mapping will be done nightly along with data import in order to map newly created users to the proper locations. If additional EchoDealerNo's are added to a user's profile, the user will be marked as an owner of those locations the following day after the feed runs.

Users will be mapped to locations using user profile field to location profile field mapping. Mapping will vary by user role/group.

- **Dealer group**: If Custom3 (EchoDealerNo) in user profile matches LocationCode (EchoDealerNo) in location profile, user owns location. User can own multiple locations.
- **Account Manager grop**: If Custom3 (EchoDealerNo) in user profile matches LocationCode (EchoDealerNo) in location profile, user owns location. User can own multiple locations.
- **Regional Manager role**: If Custom1 (DistributorNo) and Region in user profile matches CustomField1 (DistributorNo) and Region in location profile, user owns locations. User will own many locations (all locations associated with Distributor Number and Region. If user and location does not have a region, user will own all)
- **Marketing Manager group**: If Custom1 (Distributor Number) in user profile matches CustomField1 (Distributor Number) in location profile, user owns locations. User will own many locations (all locations associated with Distributor Number)
- **ECHO Corporate Admin group**: Will see all locations as a function of the ViewAll role. No feed mapping required.
- **ECHO Corporate Admin - View Only group**: Will see all locations as a function of the ViewAll role. No feed mapping required.

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3 Requirements Acceptance

The undersigned have reviewed the Software Requirements Specification document. By signing below, we agree with the content and direction stated in this document. Timing estimates will be based upon the requirements in this document. It is understood that any change to the defined scope or requirements will require modified estimates to timing and effort.

Accepted By:

Client Service Lead

_____
Name

_____
Authorized Signature   Date

Support Engineering Lead

_____
Name

_____
Authorized Signature   Date

Quality Assurance Lead

_____
Name

_____
Authorized Signature   Date

Implementation Project Manager

_____
Name

_____
Authorized Signature   Date

Client Stakeholder

_____
Name

_____
Authorized Signature   Date

Client IT Representative

_____
Name

_____
Authorized Signature   Date

4 Testing Acceptance

The undersigned has tested the solution developed according to these requirements and agree that this site can be released to production. It is understood that any future issues found related to this implementation will be treated as new issues/bugs.

Accepted By:

Client Service Lead

_____
Name

_____
Authorized Signature   Date

Quality Assurance Lead

_____
Name

_____
Authorized Signature   Date

Implementation Project Manager

_____
Name

_____
Authorized Signature   Date

Client Stakeholder

_____
Name

_____
Authorized Signature   Date