Retail Onboarding

Supplier Checklist

Welcome to Syndigo!

This document has been designed to guide you through the process used to syndicate your product data to your Retailer.

Content Overview

Step 1: Initial Account Setup

STOP

If you already have an account set up with Syndigo, you can skip ahead to Step 2: Add your Retailer as a Recipient.

Required Actions:

1. **Agree to Syndigo's "End User Agreement" -** This is a required step to complete the account setup process when logging in to your account for the first time. **You may not skip this step.**
2. **Add your Recipient -** This action is required to access the needed requirements of your recipient and establish the connection for publication.
3. **Select Unique ID Attribute -** This is a required step to complete the account setup process when you log in for the first time. **Recommendation: GTIN**
4. Click **Save & Finish.**

Recommended Actions & Best Practices

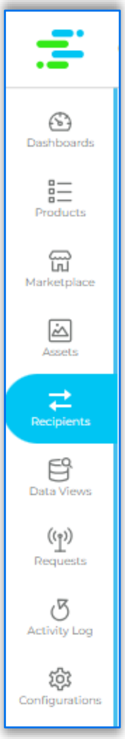
These steps can be completed during setup or may be skipped.

1. **Add Vendor Choices-** Add your Company's names to the account for use when completing requirement set data.
   - Supplier Name
   - MFG Name
   - MFG Brand Name
2. **Add words to Company Dictionary-** This is an optional step you can choose to complete if you have unique words specific to your company/brand. A yellow data quality alert (!) will display when a word is showing as misspelled.

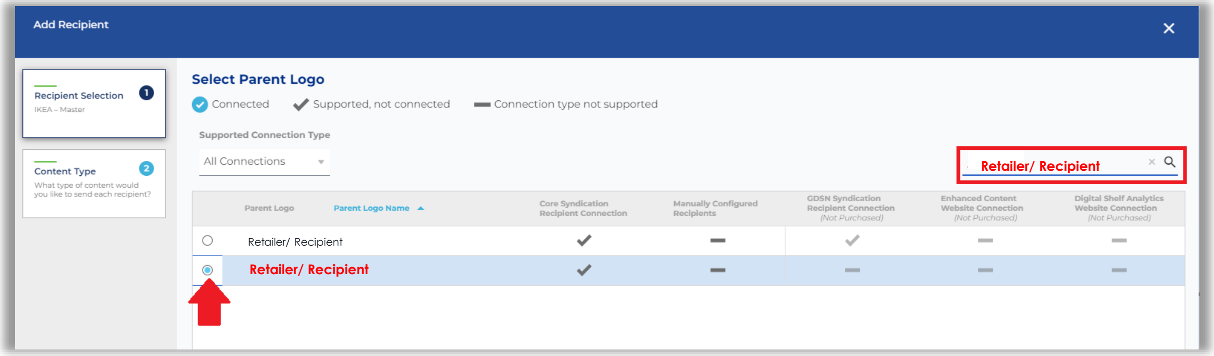
NOTE: *The yellow exclamation alerts are suggestions and will not prevent you from publishing product data.*

Continue to Step 2: Add your Retailer as a Recipient

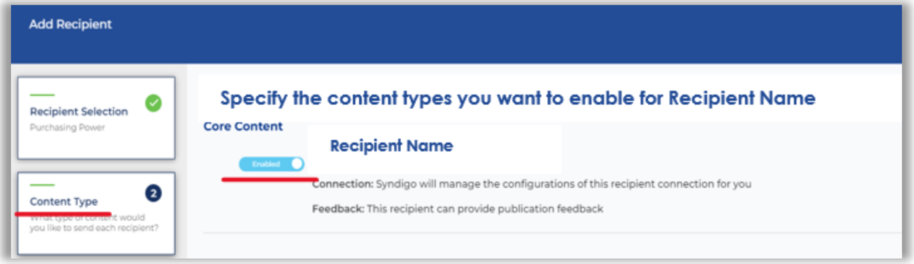
Step 2: Add your Retailer as a Recipient



- Navigate to the **Recipients** tab
- Click **Add New Recipient** & type in your retailer's name into the search bar
- Check the box next to your retailer/recipient's name
- **Next**

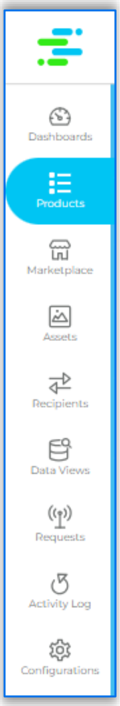


- Click the toggle on to **enable** the connection



- **Add Recipient**

Step 3A: Add Product Records



STOP If your data is maintained in a spreadsheet & you wish to import this information into the system, proceed to Step 3B: Importing Via Spreadsheet.

Add Products Individually or in Bulk

Recommended for smaller GTIN counts and/or data that is not currently in a format that can be imported to the Syndigo Platform.

- Go to the **Products** tab, select **Create New**

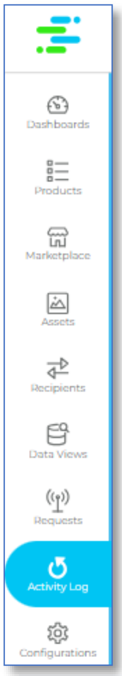
Two (2) Paths for Entering Product Data:

1. To create one product record at once – **Single Add**
2. To create multiple product records at once – **Bulk Add**

- Enter in your Product name(s) & click **SAVE** before proceeding

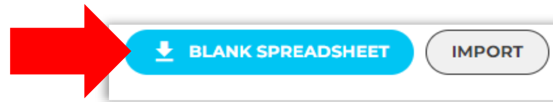
Continue to Step 4: Linking your Products to your Recipient

Step 3B: Export Recipient Template & Import Product Data

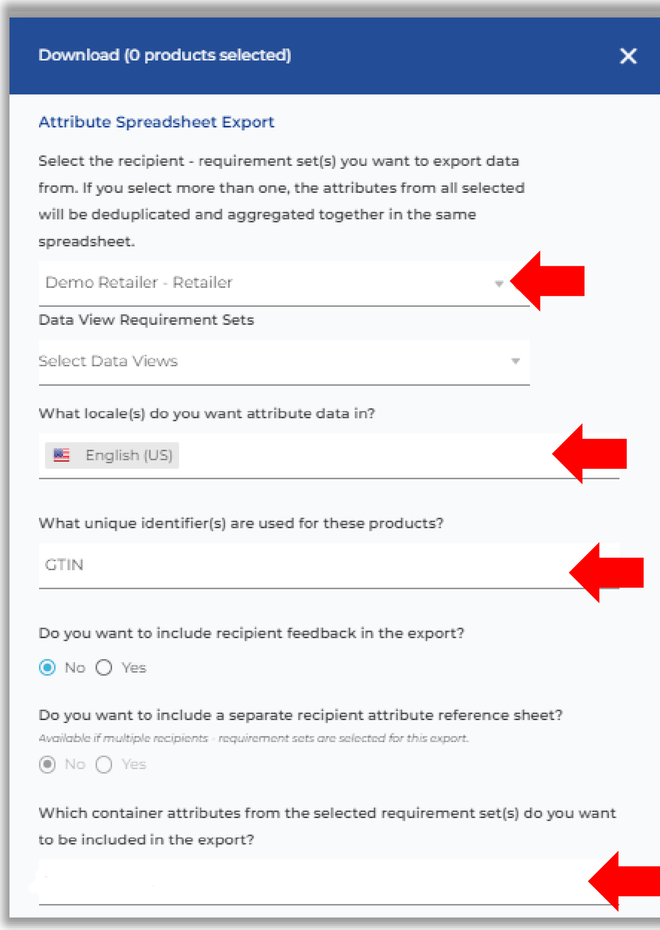


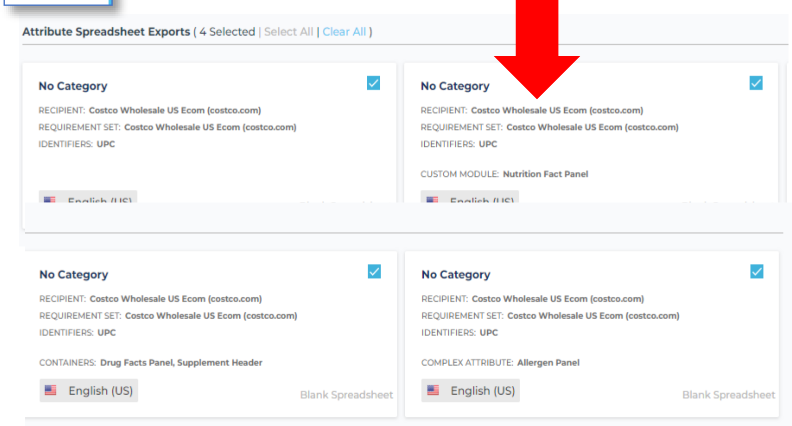
Create a Blank Attribute Export Template

1. Go to **Activity Log → Exports → Product**
2. Click the **Blank Spreadsheet** download button



3. Select **Attribute Spreadsheet – Typical Data Flow** from the options presented.
4. In the pop-up window, select your **retailer/recipient**.
5. Select the **locale** requirement for your retailer.
6. We recommend selecting **GTIN** as your unique identifier.
7. Select the appropriate **container attributes** (if applicable).
8. Hit **CONFIRM** to access available spreadsheets.



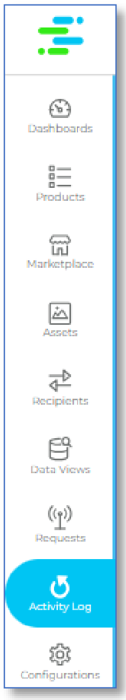


- Select direct download or have the spreadsheets sent to you via email

Complete Your Spreadsheets

1. Open the spreadsheets applicable to your products.
2. Fill in product data & hit **SAVE**

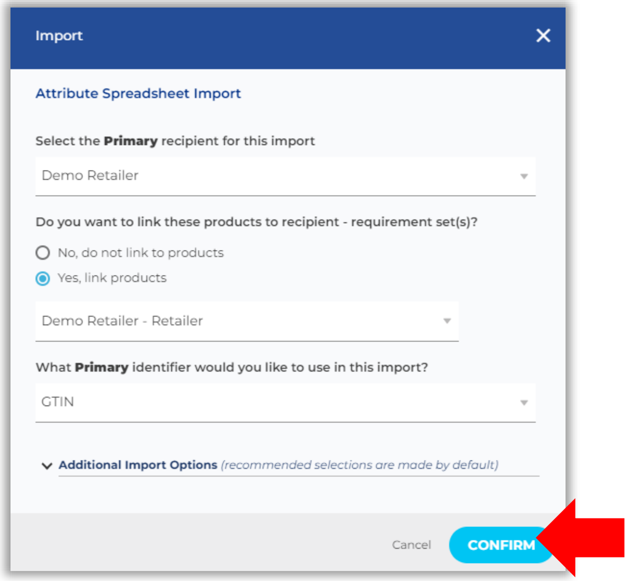
Helpful Hints:
- Do **NOT** make **ANY** modifications to your spreadsheet template beyond adding your data.
- The more complete these spreadsheets are, the higher the chance you'll reach compliance on the first import.



Import Your Template

1. Return to the **Activity Log**
2. Click on **Import** at the top of the page to begin the process.

3. Select **Attribute Spreadsheet – Typical Data Flow** from the options presented.
4. Fill out the import pop-up window with the appropriate recipient, as shown in the screenshot below.
5. Click **CONFIRM**

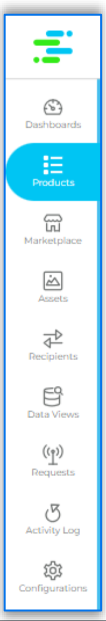


The notification bar will indicate when the import has successfully been completed.

1. Click **UPLOAD FILES** & navigate to your saved spreadsheet.
2. Your file will appear below the upload window once imported.

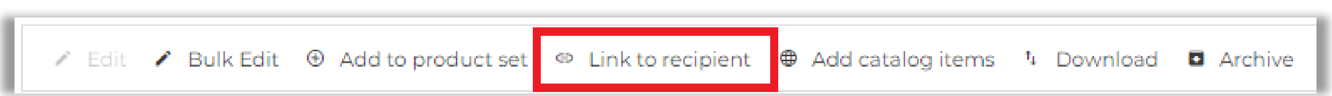
Helpful Hint: If your file fails to upload, go back & ensure no formatting changes were made to the spreadsheet (including the title)

Step 4: Link your Product(s) to your Recipient/ Requirements



- Navigate to the **Products** tab.

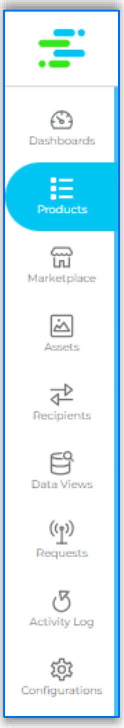
1. Check the box next to your product(s)
2. Click **Link to Recipient**



3. Select your recipient/ requirement set from the drop-down menu
4. Click **Apply Link**

Continue to Step 5: Categorize your Products

Step 5: Categorize your Products (if applicable)

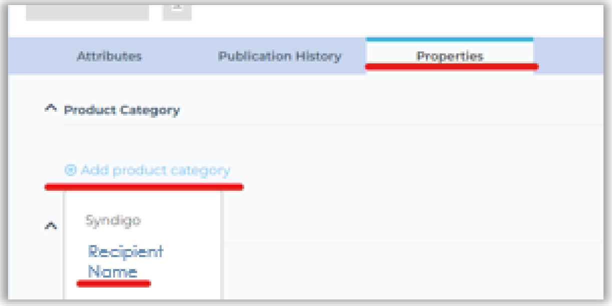


Not all Retailers require product categorization: *If your Recipient has a requirement for your item to be categorized under their taxonomy, their name will reflect in the drop-down menu outlined below. If you see only Syndigo's name as a category option, your recipient requires you categorize under Syndigo's taxonomy. If you see NO options listed, your recipient does not require a categorization.*

- Navigate to the **Products** tab.
- Select your product(s) & click **Edit** or **Bulk Edit**

Single Item Edit

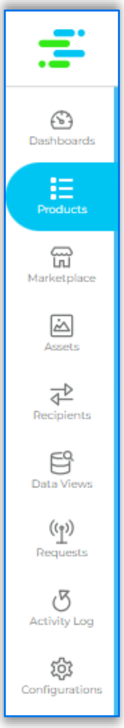
1. Click the **Properties** tab
2. Select **Add product category.**
3. Scroll/ search & select applicable product categories.
4. Click **Select**



Bulk Edit

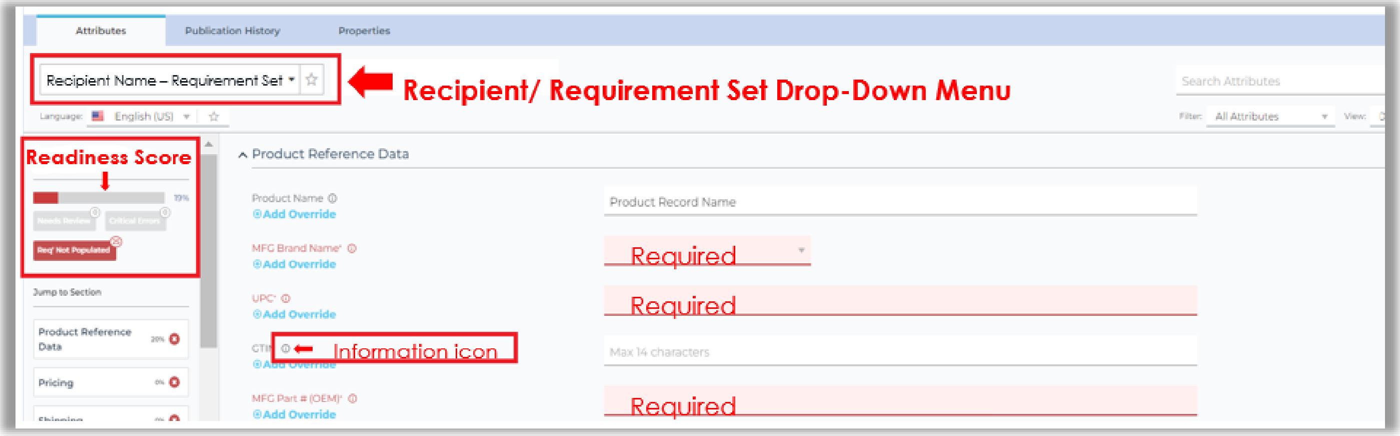
1. Scroll/ search through requirements until you find one listed for recipient category.
2. Click into field & scroll/search & select applicable product categories.
3. Click **Select**

Step 6: Complete Product to 100% under your Recipients Requirements



- Return to the **Products** tab
  1. Select the product & click **Edit** or **Bulk Edit.**
  2. Select your Recipient & associated requirement set from the drop-down menu on the top left.
  3. Click **Apply.**
  4. Complete all the required fields shown in **red** & save your changes as you go.

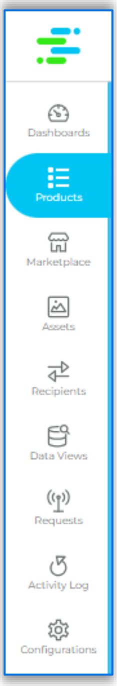
Helpful Hint: You can **favorite** a recipient/ requirement by clicking the star next to the selected recipient/requirement. When the star is blue, the recipient/ requirement set will be auto-selected when you pull the linked item into edit.



Step 6: Publish your Product(s)

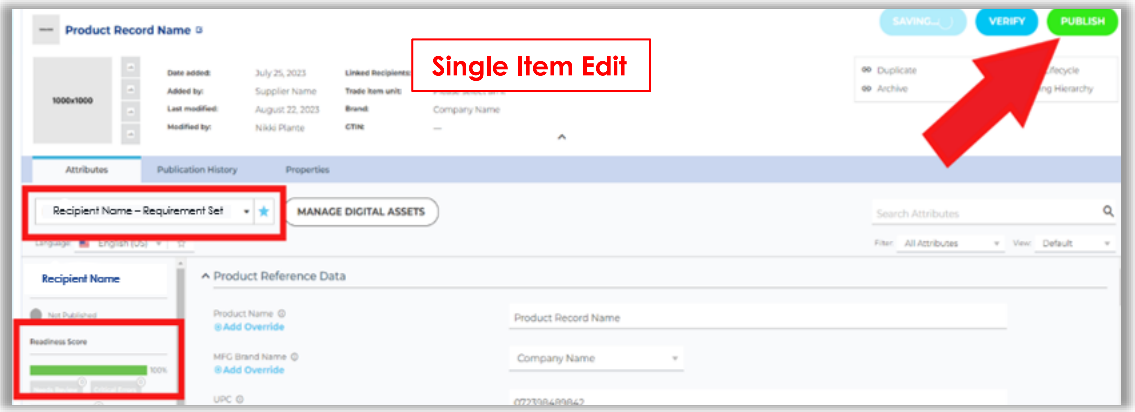
- Once the following is complete, your items are ready for publication:
  - ✓ Product is filled out to 100% readiness under your retailer's recipient & requirement set
    - ✓ Including **category attributes** (if applicable)
    - ✓ Including additional **language requirements** (if applicable)

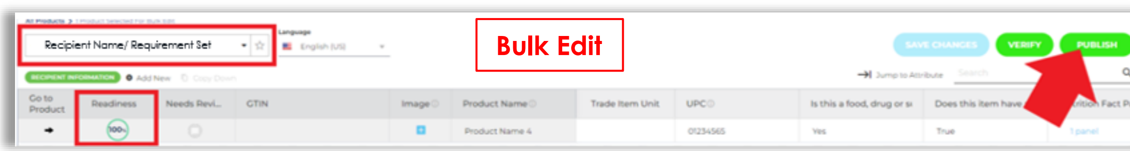
You can Publish one of the following ways…

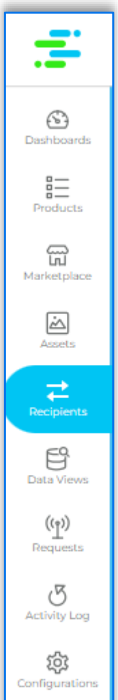


1. From the Product itself:

- Navigate to the **Products** tab.
  1. Pull the item into **Single Item Edit** or multiple items into **Bulk Edit**
  2. Select your retailer's recipient & requirement set from the drop-down
  3. Click **Publish**

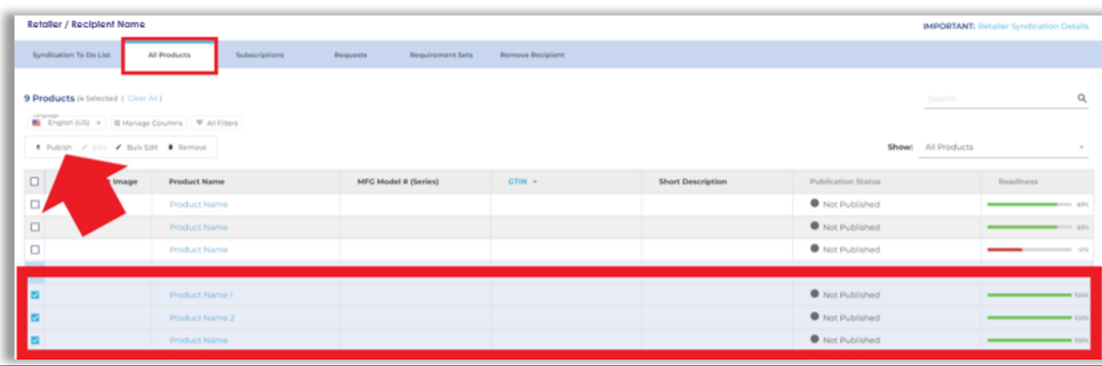






2. From the Recipients tab:

- Navigate to the **Recipients tab**
  1. Select your recipient
  2. Click on **All Products**
  3. Check the box of the products you want to publish
  4. Click **Publish**



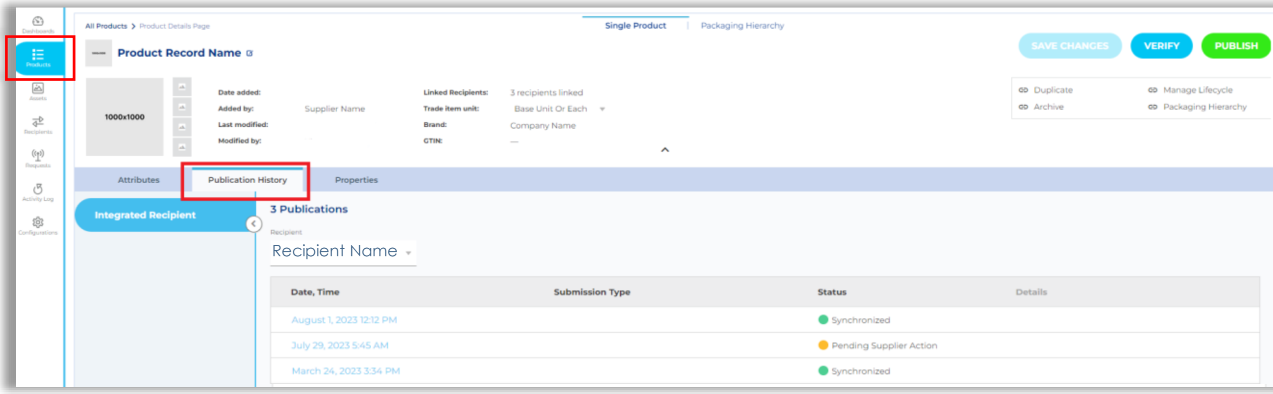
Retail Onboarding

Syndigo

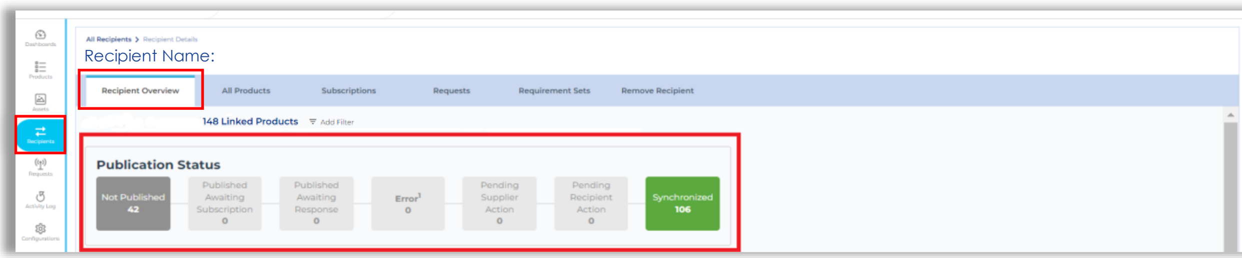
How to Track the Status of Your Published Items

NOTE: *Items requiring your attention, updates, and/or alterations will be shown as* ***Pending Supplier Action***

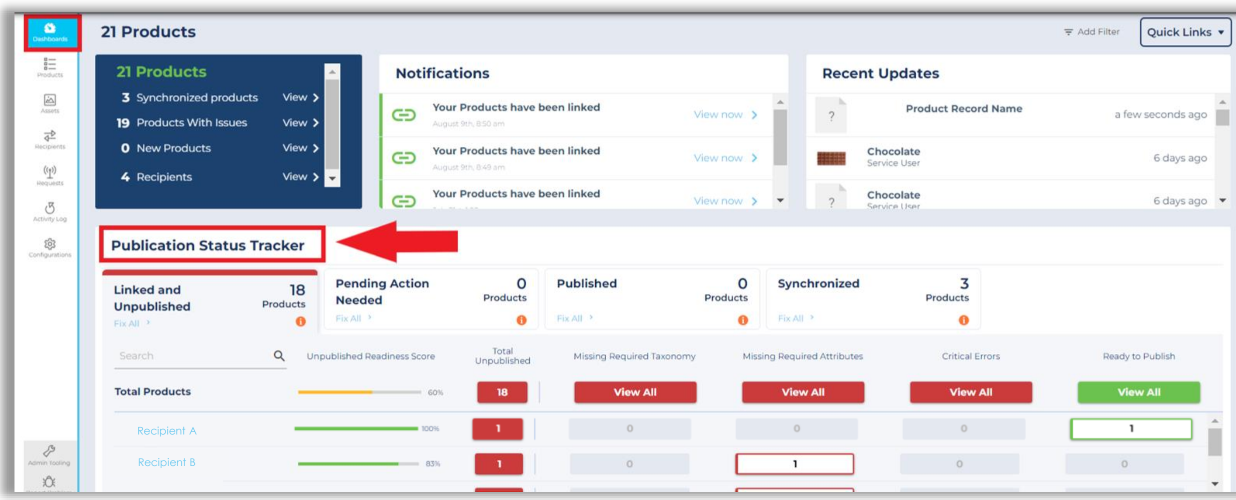
Within the **Publication History** tab within **Single Item Edit** view:



Within the **Publication Status** under the **Recipient Overview** in the **Recipients tab:**



From the **Publication Status Tracker** in the **Dashboard:**



Supplier FAQ's

Syndigo

Q: Why can't I get passed the "Initial Account Set-Up" steps?

A: You can skip through most of the Account Set-Up steps and enter them directly in your account. However, the below two steps cannot be skipped and are required for platform setup:

- Agreeing to Syndigo's **Terms & Conditions**
- Unique ID Attribute: **GTIN**

Q: Why isn't my Retailer showing as a recipient in my "Recipient's" tab?

A: You will need to complete a one-time action of adding your retailer into the Recipients tab. Go back and follow steps outlined in Step 2: Add your Retailer as a Recipient. You can also access this Syndigo Help Center article on how to add a recipient to your account.

Q: How do I know which Recipient matches up to my Retailer?

A: If you are not sure what recipient matches up to your retailer in the Syndigo platform, please reach out to your Syndigo Onboarding Specialist, your main point of contact at your Retailer, or the Syndigo Support Team here.

Q: Can I edit multiple items at once?

A: Yes! You can pull multiple items into bulk edit to edit multiple fields at one time.

Q: Why isn't my Retailer/ Recipient showing as an option under the recipient/requirement set drop-down when I'm adding/editing my item?

A: You may need to link your item to your recipient and associated requirement set. Please review this Syndigo Help Center article on how to link products to a requirement set.

Q: Are there any requirements for images?

A: If your Retailer requires images of your product, please reach out to your MPOC at your Retailer to confirm specifications, but industry best practice for images is a minimum of 1000x1000 pixels each.

Q: What if I still don't know the information that's being asked for in an attribute (even after looking at the description)?

A: Syndigo will not be able to provide guidance on what your Retailer wants from your product data. You will need to reach out to your Retailer contact/merchant/buyer depending on the attribute.

Supplier FAQ's

Q: **How do I delete a product from my account?**

A: Navigate to the Products tab, check the item you'd like to remove, select **Manage Product Lifecyle** & then **Discontinue & Delete**.
Note: *The Syndigo platform requires your item to be in "Discontinued" status for 24hrs before fully being removed from your account.*

Q: **Can work on my product data outside of the platform?**

A: Yes! You can choose to complete an exported spreadsheet with your Retailer's requirements then import that data into the Platform.
Note: *The smart spreadsheets are heavily built out with code.* ***DO NOT*** *color code, change the text, rearrange columns, etc. or the spreadsheet will fail to import back into the platform.*

Q: **Why is my product data showing a spelling error even though it is correct?**

A: Some proper nouns, terms with propriety spellings, or "quirky" words that are commonly used in your product content may be marked as spelling errors within your account. By adding these terms to the Company Dictionary, Syndigo will view them as accurate & correct when used in your product content.

Q: **How do I know if my product requires a category?**

A: You can follow the steps outlined in **Step 5: Categorize your Products** to see if your Retailer requires your products to be categorized or you can confirm with your Syndigo Onboarding Specialist or Retailer main point of contact.

Q: **Why is my Brand Name not showing in the drop-down option?**

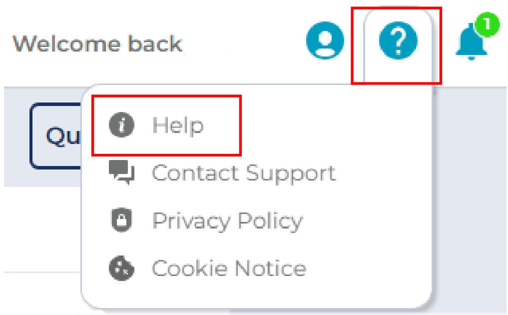
A: Your brand name will needto be added as a Vendor Choice Attribute under the Configurations tab. Navigate to **Configurations > Attribute Library > Vendor Choice >** Check the attribute with missing name **> Edit > Add Choice > Save Changes**

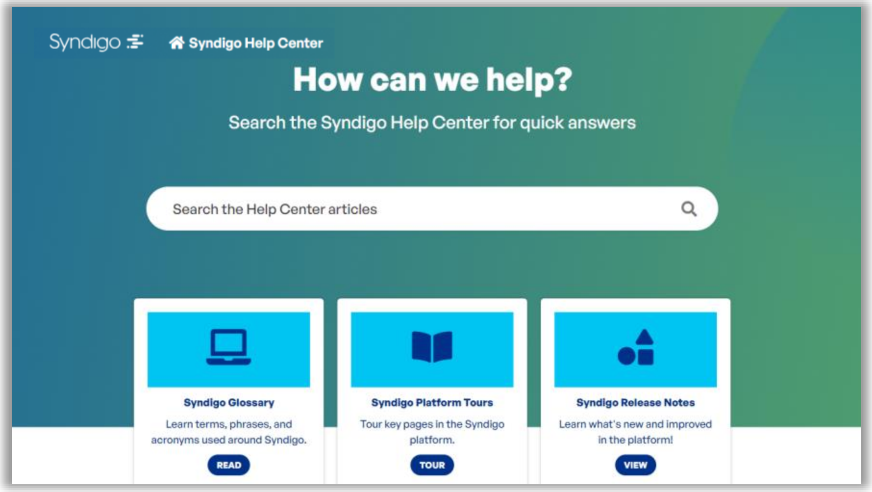
Q: **Why are my products not publishing to my retailer?**

A: Carefully review & complete steps listed above in our checklist. If you receive an error upon publishing or have tried to publish your product data multiple times, please take a screenshot of any errors & reach out to your Onboarding Specialist or our Support Team for help.

Syndigo Help Center:

- Access helpful articles & videos by going to help.syndigo.com or directly from the Syndigo Platform by clicking the **Help** icon in the top right corner & clicking **Help.**





Syndigo Support:

- Submit a support request by going to syndigo.com/support or directly from the Syndigo Portal by clicking the **Help** icon & clicking **Contact Support.**