



ACTIVE TRANSPARENCY. BRAND PROTECTION. CUSTOMER TRUST.™

ICIX Core Release - Winter 2019

Highlights + Key Features

January 2020



ICIX Core Winter '19 Release Preview

Release Preview

- Release information
- Top features
- Where to get more information

Release Information

Timeline:

- Planning to release on night of **Monday, January 13, 2020**
- Salesforce platform upgraded on Friday, September 20, 2019

Scope:

- User Experience, e.g. ICIX Tasks Search, Task Grouping, Page Loading, etc.
- Integration focus on getting data into ICIX
- Easier and more generalized configuration of ICIX applications
- Product Test application enhancements

Top Features



Product Test

- **Product Test Attributes (GA)**
- **Certificate Watermarks**
- Unknown Component Testing
- Start/End Dates for Tests in the PTM



Product Relationship Manager

- **Forms - Additional Pre-Fillable Fields**



Business Relationship Manager

- **CRE: Due Dates**
- **Request Auto-Approvals**
- ICIX Task Page UI Updates



APIs + Integrations

- **ICIX API v5.0**





Top Features

Product Test

Product Test Attribute Assignments (GA)

Instead of manually applying tests to products, you can now utilize product test attributes, which will automatically assign tests to products based on attributes that are assigned to products.

The screenshot shows the 'Edit Product Test Category' interface. A modal titled 'Product Test Attributes' is open, displaying a table with columns 'Attribute' and 'Value'. The table contains one entry: '1. Style Color' with the value 'Blue'. Below the table is a '+ Add attribute' link. The modal has 'Cancel' and 'OK' buttons at the bottom right. An orange arrow points from the text box below to the 'Style Color' attribute in the table.

Attribute	Value
1. Style Color	Blue

Product Test Attributes can be used to tag tests with values that drive test-to-product assignment. Instead of assigning an entire category of tests to a product for use in a test request, Product Test Attributes are a way of filtering out only those tests that meet certain requirements.



Top Features

Product Test

PT Certificate Watermarks

If you want to add a custom watermark per certificate, you can do so by uploading an image into Salesforce Files and then go into the Product Test Manager and select the image you want to use.

A different watermark can be used per generated certificate to meet the needs of your business. Once a certificate is generated with a watermark image, you cannot modify the certificate to remove it.

Edit Certificate Type
CPSIA

Template Page
CertificateCPSIA

Signature
g

Secondary Signature
-- No Signature --

Watermark Image
watermark-backg

CPSIA
This certificate con
ments of the CPSIA.

Product Description
Certificate Generation Date:
Certificate Expiration Date: 10/11/2020
Product No.

Importer of Record
Record Contact

Testing Information

Product Name and #	Manufacturing Facility Name and Location	Regulation	Test Report Date	Date of Mfg	Expiration Date	Test Report #	Lab

All testing data is housed at , ,

A system administrator who manages your ICIX Testing Programs can upload an image of a watermark that you would like to include in your generated certificates.



Top Features

Product Relationship Manager

Forms - Additional Pre-Fillable Fields

We are introducing additional, standard fields that can be used as pre-filled fields in your forms. When configuring a form in ICIX, you can refer to certain fields to be used to pre-populate data in forms before they reach your trading partners in your requests for information.

This functionality is not unique to PRM and is a general feature that can be used in any configured form.

Question fields	
Question Name *	Product Attribute
Question Text *	Product Attribute
Parent questions	+
Answer type *	--None--
Sub Data Entity	Product Attributes
Dependent Answer	
Formula	
Advanced section	<input type="checkbox"/>
Library Question	+
Option List Name	--None--
Data Entity	Product Data
Field API Name	ICIX_V1_Attribute_c
Dependency Action	--None--
Response Required	<input type="checkbox"/>

When you are configuring a form in ICIX, you have the option to refer to what we call “Sub Data Entity”. This drop down lets you essentially pull from related objects of the ICIX Product record. By entering in the Field API Name, the data related to your product when you trigger a request will populate a question’s answer field in your form.



Top Features

Business Relationship Manager

CRE: Due Dates

For the Compliance Rules Engine, we have added the ability to apply a default due date to follow up requests that get retriggered. The logic is very similar to how Group Requirements operate: for each rule that is configured, you can select a due date range such as 7, 14, 21, 60, and 90 days from when the request is triggered off.

×

Edit Rule-00000

Form Validity Rule Name

Rule-00000

Form Name ⓘ

Required Field Test

×

Form Validity in Days ⓘ

12

Customer Name ⓘ

lance

No of days to send Reminder Email ⓘ

Created By

PM Dev Req 01 LL, 7/18/2019 1:34 PM

Is Internal notification required ⓘ

☒

Days prior expiry for Renewal Request ⓘ

0

Days for Renewal Request expiration ⓘ

✓ --None--

7

14

21

60

90

Last Modified By

Cancel

Save & New

Save



Top Features

Business Relationship Manager

Request Auto-Approvals

Sometimes certain forms that you use to collect data/documents don't require manual approval or rejection.

This feature enables you to configure requests that use a certain form to be automatically approved when the request is returned from our responder community. No tasks and no emails will be created for users for these automatically approved requests.

Note: This feature only applies to requests using the ICIX 2-Actor Workflow.

Container Template
LST - Food Product Spec

Container Template Name	LST - Food Product Spec	Status	Published
Type	Product Spec	Parent Template	Lidl Basic Food Product Specification - VA
Container Type	Single Form	Version	2
Active	<input checked="" type="checkbox"/>	Effective Date	8/1/2016 5:19 PM
Best Practice Form	<input type="checkbox"/>	Expiration Date	
Library		Auto-Approve 2-Actor Requests	<input checked="" type="checkbox"/>
Global Id	a0C3600000Dbbh0EAB	Previous Version	Lidl Basic Food Product Specification - VA
Creator Global Id		Workflow Definition Global Id	WD2
		Description	

By checking this field as “True”, all requests that use this Container Template (Form), will be queued in a batch job that runs daily to automatically mark these requests as Closed and setting the Workflow to Approved.





ICIX API v5.0

v5.0 of the ICIX API is now for general use!

This version of the ICIX API drastically reduces the impact on your ICIX environment because services are broken down into smaller chunks, enabling you to better control how data makes its way into your ICIX environment.

For more information on the v5.0 ICIX API, please visit www.api.icix.com for documentation on these services.

Search

ICIX API Introduction

Recent Updates

Setup - All Versions

v5.0 - Post Request

v4.0 - Post Request

v5.0 - API Commands

AddProducts

AddProductAttributes

RelateProducts

SetProductTest

AddPurchaseOrders

AddTestingPrograms

v4.0 API Commands

v3.0 API Commands

Salesforce Standard Services

Errors

Need help?

v5.0 - API Commands

AddProducts

Create and update products, relationships, universal and non-universal IDs.

Request Body

Field Name	Type	Description
Products	Object[] (Product[])	An array of objects containing the product information. The Product Object is described below.

Product Object

Field Name	Type	Description
SalesforceId	String	The Salesforce Id of the product
ExternalId	String	A unique ID that may be set by the user for reference in subsequent actions
Name	String	The name of the product
Description	String	A description of the product

javajson

```
{
  "Products" : [
    {
      "ExternalId" : "Product1",
      "Name" : "Product1",
      "Description" : "Description Product1",
      "UniversalIds" : {
        "GTIN" : ["Product1"]
      },
      "Relationships" : [
        {
          "TradingPartnerIdType": "Vendor",
          "TradingPartnerId" : "123",
          "Status" : "Active",
          "Type" : "Buy",
          "InternalIds" : {
            "SKU" : ["SKU-Product1-1", "SKU-Product1-2"]
          }
        },
        {
          "TradingPartnerIdType": "Vendor2",
          "TradingPartnerId" : "123",
          "Status" : "Active",
          "Type" : "Buy",
          "InternalIds" : {
            "SKU" : ["SKU-Product1-1", "SKU-Product1-2"]
          }
        }
      ]
    }
  ]
}
```



How do I get more information?

Winter '19 is Here!

1. Release notes will be published to docs.icix.com in a few weeks with finalized details
2. Engage with Customer Support or your ICIX Contact to learn the details of each feature we are releasing
3. Please start testing the new features and functionality when your sandboxes are upgraded

THANK YOU



ICIX

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