3rd Party Connections

Overview

A core feature of Avantalytics is its ability to easily integrate your data along with other customers in a controlled fashion in order to facilitate inter-related data-driven services. The primary use case for this is to permit sharing of inventory data between your company and other merchandising companies you may work with. If both are Avantalytics customers, creating a 3rd party partnership is as easy as defining the stores you want to provide visibility to your inventory. The benefit of this is that as partners, the merchandisers can see and alter your inventory as necessary to help reflect markdowns and other adjustments in your account in real-time. Task management is another sharing possibility whereby store merchandising tasks you may need done can be automatically seen as your partner enters the store. As they complete the task, you get realtime updates and feedback on this progress in your account.
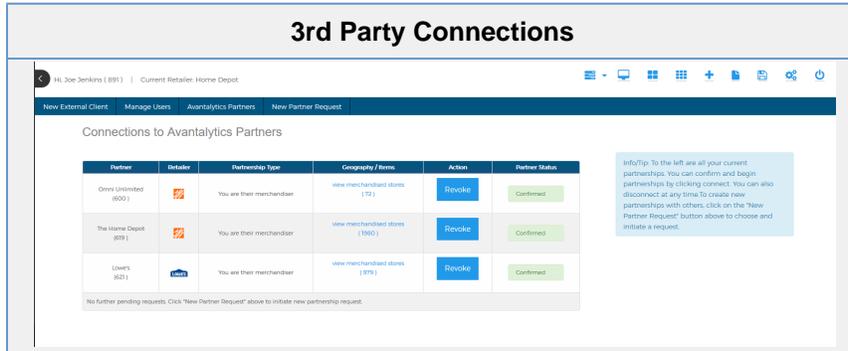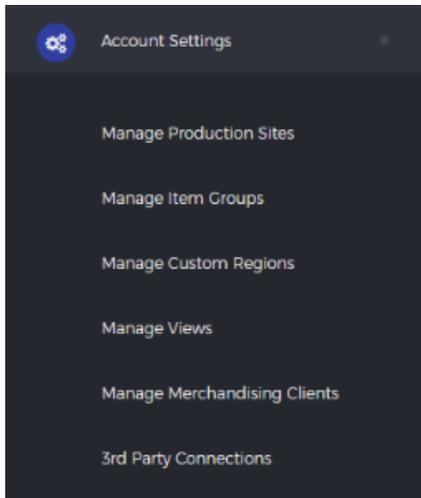
Related Links

- Mobile Inventory
- Manage Tasks
- Establish 3rd Party Connections

In the screenshot above, you see the standard interface for adding and managing connections. To find this - click on the left-hand side menu option "Account Settings" then choose the sub-option "3rd Party Connections"

Adding a New Partner

To add a new partner, locate the toolbar at the top and choose "New Partner Request". You'll be given the screen below.   Type in the company name to find the partner you seek. If you need help or do not see them, please contact us for help.

New External Client   Manage Users   Avantalytics Partners   New Partner Request

Adding New Merchandising Partner

Company Name:

[Request Partner]

Info/Tip: Start typing the partner name and we'll suggest based on our merchandise link clients matching your input. If you see the partner you want in the list, use the down-arrow key to scroll to the suggestion.

Please note: Once you've found a partner, you initiate the request. Once its confirmed, you can manage the stores within your partnership.

Note: The partnering process is a two-step process. The requesting party makes a request, and then the requested party will be notified of the request and must confirm the partner request. **By making a request, you do not immediately share any data.** The requesting party is always the party seeking to have work done and is volunteering information to be shared. You cannot solicit parties to work for them by initiating a request.

The requesting process sets up the next phase where the requester must choose the geography (stores) where they wish to make their data available to the other party. This list can be amended only by the requester only and by removing all stores you can effectively remove any data sharing without purging the partnership. Once you've found the partner, the requester screen will look similar to below. Note there are three confirmed partnerships and one which is pending partner confirmation. On the partner's end they will have the option to confirm the request.

Connections to Avantalytics Partners

Partner	Retailer	Partnership Type	Geography / Items	Action	Partner Status
Mainline Nursery (444)		Mainline Nursery will be your merchandiser	view/change merchandised stores (0)	Delete	Pending Partner Confirmation.
Omni Unlimited (600)		You are their merchandiser	view merchandised stores (72)	Revoke	Confirmed
The Home Depot (619)		You are their merchandiser	view merchandised stores (1980)	Revoke	Confirmed
Lowe's (621)		You are their merchandiser	view merchandised stores (979)	Revoke	Confirmed

No further pending requests. Click "New Partner Request" above to initiate new partnership request.

Info/Tip: To the left are all your current partnerships. You can confirm and begin partnerships by clicking connect. You can also disconnect at any time.To create new partnerships with others, click on the "New Partner Request" button above to choose and initiate a request.

Managing Stores For Each Partner

In the above table you can see that the Geography / Items is a link (blue text) which shows the number of active stores where sharing is possible. The requester can select this at any time and update the stores much like you'd update a custom region. Below you can add stores by a CSV store list or by any custom region you make. We recommend making custom regions and using those as their much more flexible for use throughout the system.

Manage Partner Stores Covered

Add Stores Below (separated by commas)

OR Add By Custom Region Below

Choose Region

Add Stores   Remove All

Retailer	Store #	City	State	Zip	Market	Remove?
You have no current assigned stores for this clients. Enter a comma separated list of stores above to add stores for this client.						

Finished

Once you've added the stores, the partner will immediately have visibility to tasks you've created for these stores and inventory within the stores. Additionally they'll be able to update the progress of these datum and it will be reflected immediately in your account. In this way you can easily arrange for services in areas where you may not have a high presence, the partner can perform work and the workflows are uniform so they can do so quickly and efficiently.