



## SOLAR Reporting Overview

TCB Data Systems, Inc. | SOLAR Main Locations - Microsoft Internet Explorer

Address: https://www.tcbdata.com/services/vendor/solar2/index.cfm?page=solarHome

Logged in as Thomas Butts (tcb) [viewing ZZZ] [logout]

**Guyute Brokerage (ZZZ)**

Guyute Brokerage > SOLAR Main Locations

SOLAR Accounts Show All or filter selected column by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

Find Acct

View Main Locations  
Vendor Summary Page

SOLAR Reports

Transaction History  
Subscriber Reporting History  
View File Upload History

SOLAR Tools

Update SOLAR via File  
Revert to Last Processed  
Submit Pending Activity  
End SOLAR Session

Support

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Documentation  
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**Guyute Brokerage (ZZZ) - Main Locations**

This page lists all of your main locations. Click an entry to view its Branch Locations. If the location has no branches, you will be directed to the Account Summary. [more...]

include inactive

Account	[ Company Name ]	City/State	Country
HERSHEYCO	Choco Co. Cuckoo	Hershey	US
CADBURY	Clucking Rabbit LLC	London, Lancashire	GB
FUDGE2	Fudge Co Main Office	Hershey, Pennsylvania	US
GUMMYBEAR	Gummy Bear Co.	Albany, New York	US
KRISPY	Kripsy Kreme	Charlotte, North Carolina	US
LOLLY	Lollypop Lane	London	GB
PEANUT3	Peanut Acres	Nuttenville, Connecticut	US
SNOWFLAKE	Snow Flake Lake	Anchorage, Alaska	US
TAFFY	Taffy Trading	Cook County, Idaho	US
CHOCOLATCO	The Chocolate Swamp	Hershey, Pennsylvania	US
LICORICE	The Licorice Forest, LTD.	Pittsburgh, Pennsylvania	US

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## Introduction

The Subscriber On Line Automated Reporting System (SOLAR System) has been developed to facilitate timely, accurate reporting of subscriber information. The system provides an electronic reporting facility intended to replace paper reports and eliminate inherent reporting errors.

SOLAR simplifies the reporting process by allowing the sender to use one process to report to multiple data providers. SOLAR correctly applies each data provider's business rules and data format specification as it generates output reports. SOLAR simplifies the administrative processes and eliminates the need to create and maintain various output programs to collect, format, and deliver their inventory declaration to each data provider.

SOLAR users can report

- All North American market centers
- European and Asian market centers
- Other data and news providers



### Processing Overview

Using SOLAR, information vendors update their customer inventory via their web browser by manual updates or by uploading spreadsheets or data files. Typically, once per month each vendor triggers an output report. New and historical data is used to create each data provider's report declaration according to their specification.

File processing includes:

- Convert product codes used by the vendor to those used by the data provider
- Collect new activity for market centers requiring update reports
- Collect every customer's inventory for market centers requiring complete inventory reports each month
- Include current and historical data as required by each data provider's specification
- Create output files in the provider's requested format
- Deliver reports to the appropriate market center in accordance to their delivery instructions
- Notify vendors and market centers by e-mail that their reports were delivered

Data is delivered to the appropriate data provider using a Product Code Table that contains all products distributed by each information vendor. Vendors and data providers can use different codes for the same product, but both must agree on what codes will be used for each product. After vendors and data providers agree upon the code(s), the data providers will enter the codes in the Product Code Table. Vendors should check the product code table periodically.

**NOTE: All product codes must be set up by the data providers before they are available to the SOLAR System.**

### Online Capabilities

SOLAR can be updated by web browser (http) or by ftp file transfer. The web interface allows users to manually enter inventory changes, to upload VARS, .csv, or spreadsheet files, to peruse their data online, and to generate historical audit and revenue reports. Login to SOLAR at [www.tcbdata.com](http://www.tcbdata.com).

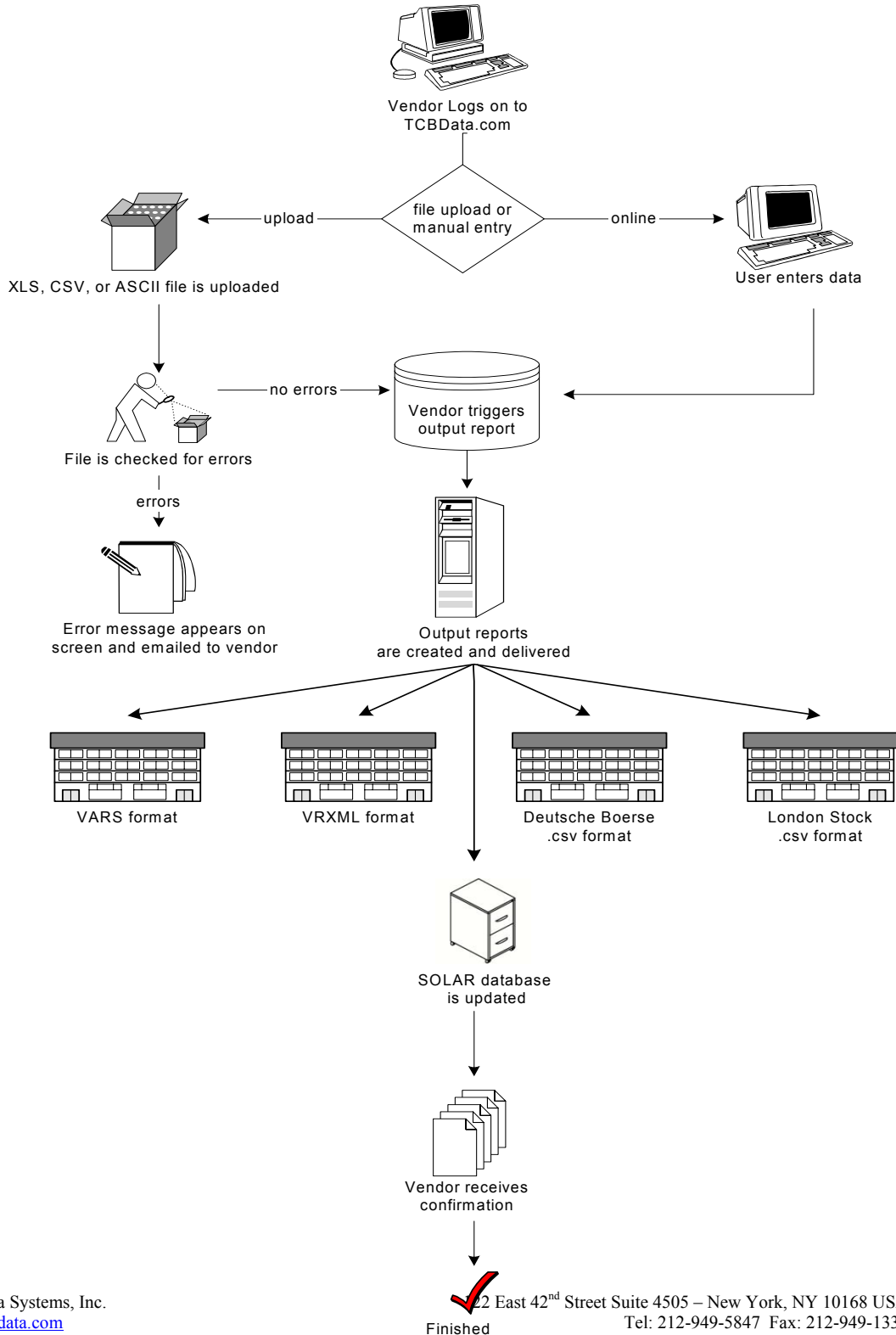
The ftp file transfer gives vendors an easy way to automate updating SOLAR by file. When a file is received, it is automatically loaded into SOLAR and an output file is generated if no data errors are encountered. Results are emailed to the sender. The SOLAR ftp server is located at [ftp.tcbdata.com](ftp://ftp.tcbdata.com).

The SOLAR System is easy to use. Its features include:

- Multiple ways of entering data
- An audit trail for tracking customer accounts and activity
- A sophisticated database system for account management
- Multiple output file formats (vars, vrxml, .csv etc.)
- Historical reports that detail customer activity that has been sent to data providers, current or historical inventory reports, product reports, reporting history, trial revenue reports and other reports.



# SOLAR Reporting





### Using SOLAR

Data in SOLAR is organized by customer, then by location, and then by inventory product. A Customer 'Main Location' has one or more 'Branch Locations'. Branch locations have product inventory. Product inventory is updated by creating 'Transactions' that add or remove inventory as of a specified 'Effective Date'. These inventory transactions provide a detailed audit trail of each location's product update history.

To update SOLAR online, the first step is to identify the customer. This is accomplished from the 'Customer Index Page'. If the account number is known, you can enter it and jump right to the 'Customer Update Screen'. Alternatively, the customer can be selected by clicking on their name from the list that is displayed on the Customer Index Page. Clicking on the column headings changes the page sort. A wildcard character selection on the top of the screen filters on the select character and column sort.

If the customer main location has multiple branch locations, select the desired branch from the displayed list. The Customer Update Page lists the most recent transaction for each product. The 'Show Detail' button displays all update history. The 'Add Transaction' button displays a list of all product codes and allows the user to add or remove inventory by selecting the code(s) and entering a change-quantity and effective date. Data is checked for validity (inventory cannot become negative, etc.) and any error conditions are displayed on the screen. Customer inventory is updated only when a change occurs.

If the customer is new, a new Main Location is created or a new Branch Location is added to an existing Main Location. All locations must have unique account numbers. Then inventory is added.

SOLAR incorporates several output reports. Reports can limited content to include a specified product code or data provider, and can be viewed on the screen, printed, or saved as a spreadsheet. The Spreadsheet Template Report is particularly useful because it outputs the current SOLAR inventory in a spreadsheet format that can be updated using Microsoft Excel and then re-uploaded into SOLAR. For vendors with more than a few hundred customers and who must manually update their inventory, this can be a tremendous time saver.

### Other SOLAR Capabilities

Vendors reporting via SOLAR can be configured to have multiple 'sub-vendor' accounts. Each 'sub-vendor' has their own login, maintains their own data, and has full SOLAR functionality. However, when the vendor generates an output report to his/her data providers, data from each sub-vendor, is collected and combined into a single report. This is useful when multiple business units maintain their own data, yet contractually a single report must be created each month.

Vendors can create data products that are not reported to their data providers. This allows a vendor to use SOLAR to maintain a complete profile of their customer data products and other charges. These products are included in other print and file outputs.

Data providers can be configured to allow them to view online their vendor's SOLAR inventory. Data providers are restricted to view only their data products. Immediate access to inventory update history can greatly reduce the time required to sort out inventory changes and charges.

Additional information is available to registered users in the documentation section at [www.tcbdata.com](http://www.tcbdata.com). Alternatively, you can contact Thomas Butts at 212.949.5847 Ext. 15.