

# **USER GUIDE**

Basware Marketplace Standard for Buyers (Version 23.1)



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# 1 Getting started

With Basware Marketplace Standard, you can access your orders, manage your content, and keep on top of your business relationships anywhere you want to, whenever you want to. All you need to access the services is a supported web browser.

## 1.1 View your tasks

If you have the user role **Product Management**, you may have tasks such as reviewing agreements that are expiring or approving catalog updates. On the dashboard, you can view your tasks and act on them.



- 1. Log in to Basware Marketplace.
- 2. Go to Dashboard.
- **3.** If this is your first time visiting the dashboard, you will see the **Basware Marketplace Tutorial**. Follow the steps of the tutorial to learn how to do basic tasks in Product Manager, or click **Skip** to skip it.
- **4.** Under the **Tasks** section, you will see the five most recent tasks, along with the following information:

**Title** The type of task that needs to be done.

**Created** The date that the task was created.

**Role** The role that a user must be assigned in order to complete the task.

**Priority** Priority is determined by the type of task and is not editable.

- 5. To complete any task, click the task to go to the related document.
- 6. To see all of your tasks in a searchable list, click View all tasks.



# 2 Using Basware Marketplace Standard

### **For Buyers**

On Basware Marketplace Standard users can order items that they need from suppliers. To do these actions, you must have the Basic buyer or Buyer shopper role.

Step	Description	Further information
Find and order items from Marketplace	Find items that you need to order on Marketplace. Compare two similar items side by side to pick the right item easily.	<ul> <li>Find and view items on Marketplace</li> <li>Compare items on Marketplace</li> <li>Order items from Marketplace</li> </ul>
Create lists	Use lists to save items that you need to order frequently. With lists, you can find and order the items without needing to search Marketplace.	<ul> <li>Create your own lists</li> <li>Add items to your lists</li> <li>Order items from lists</li> </ul>
Create quick quotes	Quick quotes are used to start a bidding process among suppliers and get the best price for items or services.  Requires the Advanced buyer role.	Create quick quote RFQs

### **Basware Marketplace Standard for Managers and Administrators**

Product managers can manage the content that is available on Marketplace, share content with other buying organizations, and invite suppliers to join Basware Network. To perform these tasks, different user roles are needed, as defined in the description of each task.

Step	Description	Further information
Upload content	Add items and stock levels from external systems to Marketplace. You can use mappings to upload items in many different formats.  Requires the Product Management role.	<ul> <li>View mappings and supported columns for uploaded content</li> <li>Upload content</li> <li>Upload item stock levels manually</li> <li>Fix errors in your uploaded content</li> </ul>
Create agreements	To add items on Marketplace that the end users can order, you need to create agreements. Items in agreements can be managed by you or by the supplier. Some agreements have content that must be approved before it is published on Marketplace.  Requires the Product Management role.	<ul> <li>Create agreements</li> <li>Add suppliers to agreements</li> <li>Add approval schemes to agreements</li> <li>Publish agreements</li> </ul>
Configure approvals	Approvals for content are defined using approval schemes. Create approval schemes that require approval for all content changes, or only some types of changes.  Requires the Product Management role.	<ul> <li>Create approval schemes</li> <li>Add approval schemes to agreements</li> </ul>



Step	Description	Further information
Create views	Views define what items end users can see and order on Marketplace. First add agreements to a view, which include the items that are available for end users to order. Then, select which users the view applies to.  You can add organization lists as well, which include items that users of the view need to order frequently, or may have trouble finding.  Requires the Product Management role.	<ul> <li>Create views</li> <li>Add agreements to a view</li> <li>Add users to a view</li> <li>Add organization lists to a view</li> </ul>
Create groups	Share agreements with suppliers to other buying organizations on Basware Network using groups. Requires the Buyer administrator role.	<ul> <li>Create groups</li> <li>Invite members to groups</li> <li>Add agreements to groups</li> </ul>
Invite suppliers to Basware Network	Invite suppliers to Basware Network to collaborate with them on Marketplace. Suppliers must be on Basware Network to manage content for Marketplace. Requires the Buyer contract manager role.	Invite new suppliers to Basware     Network



# 3 Ordering items in Marketplace

The most essential task that you can do on Basware Marketplace Standard is order items. You can find items to order, add them to a basket, and then send them as a request to your organization's approval process.

#### **Marketplace**

Marketplace items are managed in a catalog, similar to an e-commerce website. The available items are managed by product managers. Marketplace item content can be uploaded by either the product managers or the suppliers themselves, and are typically reviewed and approved by the product managers.

For information on how item visibility is configured, see Views.

### **Delivery charges**

The items you order may have delivery charges already shown in Marketplace. If so, the delivery charges are shown in the shopping basket below each item. If the delivery charge is free, the charge is shown with the text **Free**. If the delivery charge is not provided for an item, no delivery charge is shown in the shopping basket.



If a delivery charge is not provided for an item in Marketplace, the supplier may still charge a delivery fee. The fee can be seen on the invoice from the supplier.

## 3.1 Find and view items on Marketplace



- **1.** From Basware Purchase-to-Pay, click **Shop** > **Marketplace**.
- 2. Type one or more relevant search terms in the search box, and click **Search**.

Marketplace searches for your terms in the following fields:

- Item ID
- Manufacturer ID
- Item Name
- Manufacturer Name
- Keywords
- Supplier Name
- Contract Reference
- Description
- Item classification

If you search with more than one word, items that include any of those words are displayed. For example, the search phrase "pink saddle" returns items with either "pink" or "saddle". To instead only see items that fit all words, select the option **Match all keywords**. For more information on how search works, see <u>Search in Marketplace</u>.



- ī
- It is not possible to use expressions in search, such as AND, BUT NOT, or double quotes. The search tool removes conjunctions and other common words from the search terms.
- **3.** On the search results page, you can sort and filter the results in several ways.
  - Sort by Relevance, Date, Price, Name, and Item ID.
  - Click **Categories** to see the list of all available categories and filter by category.
  - Select Show Expired Items to also see items in your search results that have expired and can no longer be ordered.
  - Select Match all keywords to see only items that include all of the words you searched with.
  - Select **Show Preferred Items** to see only items that are marked as preferred by your organization. For more information on preferred items, see <u>Set an agreement as preferred</u>.
  - In the **Price** field, type a minimum and maximum number to see only items in that price range.
  - Select a check box on the **Filters** pane to only see items with that attribute. Filters are dynamic the available attributes vary depending on the available items.
- 4. To view the details of an item, click the item's title.

The item details vary depending on the information provided. The item's price information may include price breaks, which are discounts on the item price when ordering above a certain quantity. The items may have information on bundled items or related items. Bundled items are typically sold with the current item as a set. Related items are similar items that are also available from the same supplier.

## 3.2 Search in Marketplace

To provide effective catalog content on Marketplace, it is helpful to understand how the catalog search works.

#### **Keyword searches**

Keyword search behaves in the following way:

- Search is not case-sensitive
- It is not possible to use expressions in search, such as AND, BUT NOT, or double quotes. The
  search tool removes conjunctions and other common words from the search terms. To limit
  search results to items that match the search term exactly, the user must select Match all
  keywords
- Search uses word matches. For example, "Whiteboard" is searched as one term. "White board" is searched as "white" OR "board".
- When applicable, search removes plurals, tenses, etc. from search terms. For example, when a user searches for "pens", Search looks for "pen".
- When applicable, some words are reduced to their root meaning. For example, when a user searches for "organization", Search looks for "organ".
- Language-specific search indexes are used when available.
- Users must enter at least three characters for accurate search results.
- If a blank search is performed, all catalog items are shown in the results, in no particular order.



### Natural language processing

Marketplace search uses some elements of natural language processing.

- N-grams Search terms are divided into sets of 3 characters across the word. Search is then
  performed with those sets of 3 characters, to better find search results that contain different
  forms of the same word. For example, the search term "catering" would be divided into these
  sets: CAT | ERI | NG, C | ATE | RIN | G, and CA | TER | ING. The sets are then checked against the
  catalog's item SKUs and item name. The divisions help ensure that the search term "catering"
  would also match with variations such as "caterer", "cater", or "catered":
  - Because of this functionality, search terms with fewer than three characters do not return accurate results.
- Symbols and common words, such as conjunctions, are either downprioritized or not considered during search. The search engine can identify the common words for many different languages.

#### Ranking of search results

Search results are ranked based on scores. Each score is the sum of different weightings assigned to each item field. Fields with the highest to lowest weighting:

- 1. Preferred items. An item that is marked as "Preferred" is strongly boosted in the search results.
- 2. Item ID, SKU
- 3. Manufacturer Name, Item Name
- 4. Keywords, Agreement Keywords, Contract Reference, Supplier Name, Custom attributes
- 5. Long Description, UNSPSC category labels

Based on how well the keywords match the fields, each search result is given an overall score. the item with the highest score is placed highest in the search results.

### **Filters**

Filters on Marketplace are used to finetune search results by removing less relevant items. Filter options are based on the supplier's item attributes and are case sensitive. The same filters may appear more than once if suppliers have provided their attributes with varying capitalization.

Filters are dynamic. Only attributes that are present in the current search results are available.

### Improve item searchability on Marketplace

You can do several things to help users find your items on Marketplace.

- Add keywords to your items. Use words that you expect buyers to use when searching.
- Use more general keywords and fewer brand-specific ones.
- When populating keywords, you do not need to repeat words that are already used in other fields such as item name or manufacturer name. These fields are already included in the search.
- When adding item attributes, be consistent with capitalization and format so that users can easily filter by attributes.
- Take care when using wordbreaks, such as hyphens or semicolons. They do not usually affect searchability but can lead to some unexpected search results.
- Be aware that numbers (such as paper sizes) are given lower priority in the item description and other fields, with the exception of item IDs.



## 3.3 Compare items on Marketplace

While searching for items to order on Marketplace, you can review items side by side. Comparing items can help you make more informed buying decisions.



- 1. From Basware Purchase-to-Pay, click **Shop** > **Marketplace**.
- 2. Search for the items you want to compare and click Search.
- **3.** From your search results on Marketplace, click **Compare** for any item to add it to the item comparison. You can compare up to ten items at a time.
- 4. When you have added the items that you want to see, click on to see the items side by side.
- 5. When comparing items, you can do the following:
  - To select one item that you want to compare with the others, select Make Primary. This pins
    the primary item to the left side of the page. You can scroll horizontally to compare the
    primary item with the other items.
  - To remove individual items from the comparison, click  $\times$ .
- **6.** When you have selected an item that you want to order, enter the quantity that you want and click **Buy**.

The selected item is added to the basket. You can continue adding other items or <u>check out</u> to finish your order.

## 3.4 Order items from Marketplace



- 1. From Basware Purchase-to-Pay, click **Shop** > **Marketplace**.
- 2. Search for the item that you want to order.
- **3.** For each item that you want to order, type the item quantity that you want and click **Add**. The default quantity for each item is its minimum order quantity.

The item is added to the basket and can be seen in the basket preview next to the Marketplace search results. Click the item name for more details (details cannot be shown for supplier punchout items in the basket).



For items with different currencies, you must create a new basket for each currency. Only items that use the same currency can be in one basket. If your Basware Purchase-to-Pay solution has one required currency, you cannot check out your Marketplace basket in a different currency. Choose items from Marketplace that use your organization's required currency, or contact your administrator for help.

- 4. Click **a** to open your basket.
- **5.** Make any changes needed, such as adjusting item quantity or removing items.
- 6. Click Checkout.
- 7. Create a requisition for your items.
  - a) In Your requisition, click Get approval.
  - b) Type a purpose.



- c) If the items ordered had delivery dates defined, the purchase requisition will automatically take the earliest target delivery date for the field **Desired delivery date**. Change this date if needed. You can also review and change the field **Desired delivery date** individually for each item on the requisition.
- d) Change any other information as needed.
- e) Click Get approval.

A purchase requisition is created and sent for approval based on your company's policy. If approved, the items will then be ordered from the suppliers.

## 3.5 Get quote for items on Marketplace

Sometimes when ordering items on Marketplace, the item's price is not available. Instead, you must get a quote for the item from the supplier. These items are known as "price-on-request" or "POR" items. Price on request items have the action **Get quote** in the catalog.

Some items only require a quote if you request more than a certain quantity.



- 1. Search for the item that you want to order.
- 2. Click Get quote.
- **3.** Fill in the form and click **Send**.

  The request for quote is sent to the supplier.
- 4. To see your quote, click of from Marketplace. You can then see all of your current and previous requests.
- 5. When the supplier has sent the quote, the icon will display a badge with the number of quotes you have pending. Click , then click to view the quote.
- 6. Click Accept or Reject for the quote.

If you accept the quote, the items are added to the basket at the quoted price. You can then complete the order as usual.

## 3.6 Select supplier for items on Marketplace

For some items or services on Marketplace, it is possible to select from a list of pre-qualified suppliers. These are called "tactical dynamic procurement system" or TDPS items. TDPS items have the action **View** in the catalog, then **Select Suppliers** action on the item details page.



- 1. Search for the item that you want to order.
- 2. Click View.
- 3. On the item details page, click Select Suppliers.
- In the filters, select the options that fit your needs.You must select at least one option before you can get quotes.
- 5. Select the checkboxes next to the suppliers from which you want to get quotes.
- 6. Click Get quotes.
- Fill in the form and click **Send**.The request for quote is sent to the supplier.



- 8. To see your quote, click of from Marketplace. You can then see all of your current and previous requests.
- 9. When the supplier has sent the quote, the icon will display a badge with the number of quotes you have pending. Click , then click to view the quote.
- 10. Click Accept or Reject for the quote.

If you accept the quote, the items are added to the basket at the quoted price. You can then complete the order as usual.

### 3.7 Order items from lists

A quick way to find items that you need frequently is by using lists. Lists are sets of items grouped together to make them easy to find and order. You can create your own lists, or your organization may have lists created for you. For more information on how lists are created and managed, see Lists.



- 1. From Basware Purchase-to-Pay, click **Shop** > **Marketplace**.
- 2. Click ≡.
- 3. Click the name of the list that you want to order from.
- 4. Add the items that you want to order to the basket. You can do this in two ways:
  - To add any single item, enter the item quantity that you want to order and click Add to basket.
  - To order all items on the list at one time, enter the item quantity for each item. Then click **Buy** all.
- 5. Click pto open your basket.
- **6.** Make any changes needed, such as adjusting item quantity or removing items.
- 7. Click Checkout.
- 8. Create a requisition for your items.
  - a) In Your requisition, click **Get approval**.
  - b) Type a purpose.
  - c) If the items ordered had delivery dates defined, the purchase requisition will automatically take the earliest target delivery date for the field **Desired delivery date**. Change this date if needed. You can also review and change the field **Desired delivery date** individually for each item on the requisition.
  - d) Change any other information as needed.
  - e) Click **Get approval**.

A purchase requisition is created. The requisition is sent for approval based on your company's policy. If approved, the items will then be ordered from the suppliers.

## 3.8 Bill of materials (BOM)

A bill of materials (BOM) is a comprehensive list of all items that are needed for a manufacturing product or other purpose. The list can include many items from different suppliers, and is a valuable tool for managing stock and production schedules.



Bills of materials with up to 100 items are supported in Marketplace. Users can create the initial bill of materials by adding catalog items to the shopping basket, then exporting the basket. Then, the user can import that file to Marketplace anytime to order similar items. If using free-text items, users can enter the items in an Excel template and import it to Marketplace to order the same items again.

Users with the **Product Manager** user right can enable the bill of materials toggle from **Organization** management > Features.

If you do not have the user rights to enable bill of materials, you can request that the feature be enabled from the Basware Customer Support Portal at https://basware.service-now.com/bw.

### 3.8.1 Create bill of materials from the basket

You can add catalog items to the basket and easily create a bill of materials with them. To instead create a bill of materials with free-text items, see Create bill of materials with free-text items.



Only standard items can be exported from the basket. Other item types, such as matrix and bundle items, are not included in the export file.



- 1. Find items in Marketplace and add the items that you want to the basket. You can add up to 100 items to be exported to a bill of materials.
- 2. Click 10 to go to the basket.
- 3. Click Export.
- 4. In the confirmation dialog, click Yes.
- 5. Save the Excel file to your computer.

The Excel file is your bill of materials. It contains information about all of the catalog items that were in the basket when the file was created.

When you want to order the same items again, import the file.

### 3.8.2 Import and order catalog items from bills of materials

To import a bill of materials with catalog items, first make sure you have created the bill of materials from the basket.



- 1. Click Shopping > Marketplace > 1. .

- 2. Click Import.
- 3. In the Bill of Materials Basket tab, click Upload.
- 4. Browse to the file that you want to upload and select it.
- Click Process.

The system matches the imported items to the existing Marketplace catalog. Matching is currently done by supplier and item ID.



- 6. Review your matched items. Items that have been matched to existing items in the catalog are blue. Items for which no matches are found are red. Click any item to see the details of the catalog item that it has been matched with.
- 7. If an item is not matched to an existing catalog item, you can still include it in your order by creating a free-text item. Click **Free Text**, fill in the details, and click **OK**.
- **8.** (Optional) If you want to order multiple sets of all items on the bill of materials, enter the number of sets in the **Multiplier** field and click **Run**.
  - The multiplier is applied to the quantity of each item in the bill of materials. If your bill of materials has 1 of item A and 2 of item B, and you set a multiplier of 3, the result will be 3 of item A and 6 of item B.
- 9. (Optional) If you want to specify a certain delivery date for your items, enable the toggle for **Use**Target Delivery, then select the desired date from the calendar.
  - If any items have a value in the **Date Offset** field, their target delivery date will be that many days later than your selected date.
- 10. When the items are ready to order, click Add to basket.
- 11. Make any changes needed, such as adjusting item quantity or removing items.
- 12. Click Checkout.
- 13. Create a requisition for your items.
  - a) In Your requisition, click **Get approval**.
  - b) Type a purpose.
  - c) If the items ordered had delivery dates defined, the purchase requisition will automatically take the earliest target delivery date for the field **Desired delivery date**. Change this date if needed. You can also review and change the field **Desired delivery date** individually for each item on the requisition.
  - d) Change any other information as needed.
  - e) Click Get approval.

A purchase requisition is created and sent for approval based on your company's policy. If approved, the items will then be ordered from the suppliers.

### 3.8.3 Create bill of materials with free-text items

You can create a bill of materials with free-text items. To instead create a bill of materials with items from the Marketplace catalog, see <u>Create bill of materials from the basket</u>.



1. Click Shopping > Marketplace >



- 2. Click Import.
- 3. Click the tab labeled Bill of Materials (Free text) Excel.
- 4. Click Bill of Materials (Free text) Excel to download the Excel template.
- 5. Save the file to your computer and open it in Microsoft Excel.
- 6. Fill out the information for the item you want to order:



**Supplier Item ID** The item code or SKU. The ID must be unique in the data except when

specifying multiple values in some fields. If you have no ID for your item,

any other value can be entered into this field, such as "ABC123".

**Item Name** A short description that will appear on the purchase order. This field is

used to identify the item and so should be clear, precise, and easily

understood.

The unique ID for the supplier. This may be a D-U-N-S number or another Supplier ID code

identifying code. If the value entered is a 9-digit number, the value will be

validated as a D-U-N-S code. Otherwise the value is not validated.

**Unit Price** The price of the item, per unit.

**Unit of Measure** The units in which the goods or service are priced and delivered.

Quantity The number of units to order as part of this bill of materials.

Classification code The classification code of the item in your organization's defined class

scheme.

Name The name of a custom attribute that you want to display for the item. You

can have up to five of these per item.

Value The value for the custom attribute.

**Target date offset** The number of days after the defined target delivery date that you want to

receive the item. Use this if you want some items that you have ordered to

arrive earlier and some items to arrive later.

7. Repeat for up to 100 free-text items.

8. Save the file to your computer.

You have created your bill of materials. When you want to order the items, import the file.

### 3.8.4 Import and order free-text items from bills of materials

To import a bill of materials with free-text forms, first make sure you have created the bill of materials using the correct template.



1. Click Shopping > Marketplace > 1. .



- 2. Click Import.
- 3. Click the tab labeled Bill of Materials (Free text) Excel.
- 4. Click Upload.
- 5. Browse to the file that you want to upload and select it.
- **6.** Under **Currency**, select the correct currency.
- 7. Click Process.
- 8. (Optional) If you want to order multiple sets of all items on the bill of materials, enter the number of sets in the Multiplier field and click Run.



The multiplier is applied to the quantity of each item in the bill of materials. If your bill of materials has 1 of item A and 2 of item B, and you set a multiplier of 3, the result will be 3 of item A and 6 of item B.

- 9. (Optional) If you want to specify a certain delivery date for your items, enable the toggle for **Use**Target Delivery, then select the desired date from the calendar.
  - If any items have a value in the **Date Offset** field, their target delivery date will be that many days later than your selected date.
- 10. When the items are ready to order, click **Add to basket**.
- 11. Make any changes needed, such as adjusting item quantity or removing items.
- 12. Click Checkout.
- **13.** Create a requisition for your items.
  - a) In Your requisition, click Get approval.
  - b) Type a purpose.
  - c) If the items ordered had delivery dates defined, the purchase requisition will automatically take the earliest target delivery date for the field **Desired delivery date**. Change this date if needed. You can also review and change the field **Desired delivery date** individually for each item on the requisition.
  - d) Change any other information as needed.
  - e) Click **Get approval**.

A purchase requisition is created and sent for approval based on your company's policy. If approved, the items will then be ordered from the suppliers.



## **4 Lists**

Lists are sets of items that you can access and order quickly. They can be sets of items typically ordered together, such as a laptop, a mouse, and a laptop bag. Lists can also be items that are frequently ordered.

Two types of lists can be created on Marketplace:

- My Lists: these lists are your personal lists, visible only to you. You can create these lists, add
  items to them, remove items, or delete the lists at any time. By default, you have one list called
  Favorites.
- Organization Lists: these are created and managed by product managers and are available to many users in the organization.

Lists are helpful for sets of items that do not change. If the specific items that users are ordering change often or their availability varies, use <u>categories</u> instead.

## 4.1 Create your own lists



- 1. From Basware Purchase-to-Pay, click **Shop** > **Marketplace**.
- 2. Click ≡.
- 3. Click Favorites or another list name under the My Lists header.
- 4. Click Create.
- 5. Type a name for your list.
- 6. Click OK.

The new list is created and you can now add items to it.

## 4.2 Add items to your lists



You cannot add the same item to a list more than once.



- 1. From Basware Purchase-to-Pay, click **Shop** > **Marketplace**.
- 2. Search for an item on Marketplace.
- 3. When you see an item that you want to add to a list, click **Lists**.
- **4.** If you have more than one list to choose from, click the name of the list that you want to add the item to. If you have only one list, the item is automatically added.

## 4.3 Edit your lists



- 1. From Basware Purchase-to-Pay, click **Shop** > **Marketplace**.
- 2. Click ≡.
- 3. Click the name of the list that you want to edit.



- 4. To change the name of the list, click **Rename**.
- 5. To remove items from the list, click 💼 next to the item to be removed.

## 4.4 Create organization lists

To create an organization list, you must have the following:

- At least one agreement. For information on agreements, see Agreements and items.
- · Some buyer users in the system
- A view that has been published. For information on views, see Views.



- Click Product Manager > Views.
- 2. Click the name of a view to open it.
- 3. In the **Lists** section, click .
- 4. Click Create.
- 5. Type a name and description for the list.

The list name is shown on Marketplace, so make sure that it is meaningful to your buyers.

6. Click Save.

The items list displays all items that are available to add, based on the valid agreements in the current view.

7. Find the items that you want to add to the list, and click \(\ph\_\).

You can add up to 250 items.

- 8. For each added item, set the **Default quantity**. When users view this item in an organization list, the quantity field shows this value by default.
- 9. When the list is completed, set the toggle switch for **Available** to on.
- 10. Click Done.

The list is available for all users who have access to the view, under their **Lists** menu.

## 4.5 Edit organization lists



- 1. Click Product Manager > Views.
  - 2. Click the name of a view to open it.
  - 3. In the **Lists** section, click .
  - 4. Click the name of the list that you want to edit.
  - 5. Edit the list as needed.
    - To edit the name, click in the **Name** field and type a new name.
    - To edit the description, click in the Description field and change the description.
    - To remove items from the list, click -.
    - To add items to the list, change the **Show me** filter so that **Items not on list ({0})** is selected. Then find the items that you want to add to the list, and click +.
    - To adjust the default quantity, change the number in the **Default quantity** field.



**6.** When you have made all the necessary changes, click **Done**.

## 4.6 Hide organization lists from users

Sometimes you may need to make an organization list unavailable for some time. If you instead want to delete the list permanently, see <u>Delete organization lists</u>.



- 1. Click Product Manager > Views.
- 2. Click the name of the view containing the list that you want to hide.
- 3. In the **Lists** section, click .
- 4. Find the list that you want to hide.
- 5. Switch the toggle switch for Available to off.

## 4.7 Delete organization lists

When an organization list is no longer needed, you can delete it. After you have deleted a list, it cannot be recovered.



- 1. Click Product Manager > Views.
- 2. Click the name of a view to open it.
- 3. In the **Lists** section, click .
- 4. Next to the list that you want to delete, click 💼.



# **5 Agreements and items**

In **Product Manager**, agreements contain all the elements that enable product managers and suppliers to create, review, approve, and publish Marketplace content.

### **Agreement Process**

As agreements are created, approved, published, and updated they go through the following statuses:

- 1. Draft: created but not yet sent to the supplier or published
- 2. Awaiting response: sent to the supplier; pending the supplier's price list
- 3. Awaiting approval: pending buyer administrator's approval
- **4. Active**: have an approved price list
- 5. Expiring soon: will expire in the next 30 days
- 6. Expired: have expired

#### Items

All catalog items that are available for your users to buy are contained in agreements. For organization agreements, you send the agreement to a supplier and the supplier provides a price list with items. For agent agreements, you create the items in the agreement and publish it to make the items available on Marketplace.

## **5.1 Agreement types**

### **Organization agreement**

Organization agreements contain Marketplace content from a single supplier that is only available to your organization. The price lists are created and uploaded by the supplier, then approved and published by a product manager.

### **Punchout agreement**

Punchout agreements contain information for your organization's users to access a supplier's website and buy items from it using the punchout process. The punchout information is provided by the supplier.

A Basware consultant must create external webshops in Product Manager for you. These webshops are created as punchout agreements.

#### **Agent agreement**

Agent agreements contain Marketplace content that is only available to your organization. The price lists are created, uploaded, and published by a product manager. Suppliers are not directly involved in creating or managing these agreements. For more information, see <u>Agent agreements</u>.

### Framework agreement

Framework agreements contain Marketplace content that can be provided by several suppliers. The product manager uploads an item list with the available products and services, as well as all the suppliers that can provide them. When an item is ordered from the agreement, it must go through a quick quote to determine the item's final price and supplier.



For more information on quick quotes, see Quick quote RFQs.

#### **Free Text agreement**

Free text agreements contain a link to free-text forms that are published in Basware Purchase-to-Pay. When a free-text form is created and published in Basware P2P, an agreement is automatically created for it in Product Manager.

To use free text forms in Marketplace, users must have access to a view that the free text agreement is assigned to. Users must also have the appropriate user rights in Basware P2P Administration.

### 5.2 Item types

### **Standard items**

Standard items are all the goods and services that you sell on Marketplace.

Matrix items, product bundles, and price-on-request items are types of standard items.

### **Delivery items**

Delivery items are charges that are applied to standard items when they are delivered. When creating standard items, you can add a delivery item to the standard item to let the buyer know how much the delivery of the item will cost. Learn more about delivery items <a href="here">here</a>.

#### **Matrix items**

Catalog managers can create a product matrix to simplify the buyers' view into your product selection. If you offer a product that comes in multiple variations, a product matrix lets you link these variations under a single item. For instance, if you are selling t-shirts that come in multiple sizes and colors, you can link each of these under a single item. When the buyer opens this item, they can select their preferred size and color from a drop-down list, and put the item in their shopping basket. Learn more about matrix items <a href="https://example.com/here-example.com/her

#### **Product bundles**

Suppliers can can create product bundles on their price lists. Bundles are used to group one master item and up to five component items together. For example, if the supplier sells flowers, they can mark a bouquet of flowers as a master item and link a vase and plant food items as components as its component items. Then, when a catalog user adds the bouquet of flowers in the shopping basket, the component item are also added there.

#### **Price-on-request items**

Sometimes when ordering items on Marketplace, the item's price is not available. Instead, you must get a quote for the item from the supplier. These items are known as "price-on-request" or "POR" items. Price on request items have the action **Get quote** in the catalog.

Only suppliers can create price-on-request items. Price-on-request must be enabled in a <u>view</u> for users to order these items.

## 5.3 Find and view agreements



1. Click Product Manager > Agreements.



- 2. In the **Search** field, enter the agreement name or other search criteria.
- 3. Click Search.
- 4. To sort the results, click the Sort By list and select the sort criteria you want to use.
  You can sort by Relevance, Name, Supplier, Start date, Expiration Date, or Last modified.
- 5. To filter the results, select the filters you want to use under Show me.
  You can filter by agreement type or status. Click All to remove the filters.

### **5.4 Create agreements**



If you want to create a punchout agreement and set up an external webshop, contact <u>Basware</u> Support instead.

To create an agreement, follow these steps.



- 1. Click Product Manager > Agreements.
- 2. Click Create.
- 3. In the Agreement name field, type the name of the agreement. This field is required.
- 4. In the **Type** field, select the type of agreement. After the agreement is created, the agreement type cannot be changed.

Organization An agreement available only to your organization. This agreement type uses supplier-managed content.

Agent Agreement An agreement available only to your organization. This agreement type uses buyer-managed content.

Framework An agreement in which the buyer defines items available from several suppliers. Buyers must send items through the Quick Quote process to select the best supplier before purchasing the items.

- 5. In the Start date field, select the first day the agreement is in effect.
- In the Expiration Date field, select the day the agreement is no longer in effect.
   The expiration date is shown to users on the item details page for all items that are part of the agreement.
- In the Contract Reference field, enter any information about related contracts. Users of Product Manager can search by this information to find agreements.
- 8. In the Language field, select the language in which the agreement information is written.
- In the Currency field, select the currency in which all price lists in the agreement must be provided.
- **10.** In the **Keywords** field, type search terms end users can use to find this agreement's items on Marketplace. The keywords are not shown on the items themselves.
- **11.** In the **Description** field, enter a description of the agreement. Only you and other users of Product Manager can see the description. It is not visible on Marketplace and is not sent to suppliers.
- 12. Click Save.



The agreement is created in **Draft** status. If you have created an organization or shared agreement, you must now add a supplier. See <u>Add suppliers to agreements</u>.

If you have created an agent or framework agreement, you must now add items. See <u>Create standard</u> <u>items</u> to add each item individually, or <u>Upload content</u> to upload many items at once using a data file.

To limit the users who can see and edit this agreement, assign it to a team.

## 5.5 Add suppliers to agreements

You must add a supplier to all organization and shared agreements. You can skip this task if you are using an agent or framework agreement.

After adding a supplier, you can then send the agreement to the supplier to request a price list.



- 1. Click **Product Manager** > **Agreements**.
- 2. Find the agreement you want to add a supplier to and click .
- 3. In the **Supplier** section of the agreement details, click .
- 4. Find the supplier that you want to add to the agreement and click Add.
  You can only add one supplier to an agreement.
- 5. Click Submit to supplier.

The supplier is notified with your request for information. After you receive the information, you can approve the price list. See <a href="Approve agreements and price lists">Approve agreements and price lists</a>.

### 5.6 Agent agreements

Agent agreements contain items and services that are added and maintained by the buyer administrator. Suppliers are not involved in managing any content in an agent agreement. These can be a good tool for adding items to Marketplace from suppliers that are not registered on Basware Network.

A separate agent agreement is typically configured for each supplier. Depending on your business needs, it may be more efficient to configure a single agent agreement with your own organization as the supplier. Then for each item in the agreement, you can use the **Set item supplier** option to define the supplier for that item.

To add items to agent agreements, you can <u>add items individually</u> by managing the agreement or <u>upload</u> <u>content</u> through the Loader tab.

#### Item pricing in agent agreements

In agent agreements, pricing information is configured along with the item information. There is no separate price list for items in agent agreements.

### **Media in agent agreements**

You can add images directly when <u>adding items</u> to an agent agreement. You can also add an image URL to item import files when <u>uploading content</u>, or <u>upload media to the Media directory view</u> and then link it to an item.



### Agent agreement items in many languages

If you need to show item information from an agent agreement in more than one language, you must create a different agent agreement for each language you want to include. Then you can distribute the items in different languages by <u>creating a view</u> for each language and adding the respective agent agreement to it.

### Stock levels

Product managers can <u>upload stock levels</u> for items in agent agreements. Buyers can then see the quantity of the item that is available at one or many locations. This feature is only available to organizations with the Loader tab enabled.

Stock levels do not automatically change when buyers order items on Marketplace. Stock must always be updated using the manual upload.

### 5.6.1 Standard items

Standard items are all the goods and services that you sell on Marketplace.

### 5.6.1.1 Create standard items

When you want to create only a few items, follow these instructions.

If you need to create many items, <u>export the agreement as a Super Content Loader file</u> and use it to create items more quickly.



- 1. Click Product Manager > Agreements.
- 2. Find the agent agreement to which you want to add standard items and click 🕏.
- 3. In the Items section, click .
- 4. Click Create.
- 5. In the Item type drop-down list, select Standard item.
- 6. In the **Supplier item ID** field, type an identification code for the item.
- 7. If necessary, add a template to the item. For instructions on creating and adding templates, see Templates.
- **8.** To set the item's supplier set the toggle switch for **Set item supplier** to on. You must then complete the following fields:
  - a) In the **Supplier Name** field, enter the name of the supplier.
  - b) In the **Supplier code** field, enter the supplier's code, such as a DUNS number.
  - c) In the **Supplier email** field, enter the supplier's email address.
- 9. In the **Name** field, type a name for the item.
  - The name is the most prominent field in your user's search results. Make sure that you use a name that is both relevant and concise.
- **10.** In the **Description** field, type a description that will sell your item.
  - An abstract of this field is shown on the Marketplace search results. You can use formatting to call out key features of the item.



- 11. In the **Keywords** field, type aliases, synonyms, or names of the key features of the item to help buyers find it.
- **12.** In the **Content Tags** field, select a tag to be assigned to the item. For tags to be available, you must first <u>add tags to the agreement</u>.
- 13. In the Item attributes section, enter additional information about the product.

**Manufacturer name** Manufacturer of the product or the provider of the service, if not vourself.

**Manufacturer product ID** Manufacturer's or service provider's unique identifier for the product or service.

- **14.** If you want to define attributes of your own, next to **Custom attributes**, click **+**, and define the name and value of the attribute.
- **15.** In the **Comparison UOM** drop-down list, select the correct unit of measure.
- **16.** In the **Comparison Scale** field, type the comparison scale, which is used to create a price per UOM to the standard item. For example, if you want to define the price for 100 liters, type "100".
- 17. In the **Order unit** field, enter the unit in which the item can be ordered, such as Each, Case, Roll, and so on.
- **18.** In the **Number in an order unit** field, enter the number of individual items that the order unit contains.
- 19. In the **Order increments** field, enter the multiples at which the order unit must be ordered. For example, a buyer may need to buy the item only in multiples of 5 cases (5 cases, 10 cases, 15 cases). To allow a buyer to order any number of units, enter 1.
- **20.** In the **Price Breaks** section, enter the price information for the item.
  - a) In the Number of units field, enter the minimum number of units the buyer must order to get the specified price. The lowest number in the list is the minimum number of units a buyer can order. For example, if the lowest number of units listed is 10, a buyer cannot buy fewer than 10 units of the item.
  - b)In the **Price** field, enter the price per unit when the buyer orders at least the specified number of units.

An example set of price breaks could be:

Number of units	Price
1	20 GBP
10	18 GBP
25	16 GBP
100	13 GBP

In this case, a buyer who orders between 1 and 9 units pays 20 GBP per unit. A user who orders between 10 and 24 units pays 18 GBP per unit, and so on.

**21.** To define the classification of the item, click next to **Classification** and select the correct classification.



- **22.** In the **Linked media** section, add your user guides and other media files. For instructions, see <a href="Product-related media">Product-related media</a>. You can also skip this now and go back later.
- 23. In the External Links section, click + to add a link to an external website.
- **24.** Add images to the item. For instructions, see <u>Product-related media</u>. You can also skip this now and go back later.
- 25. Click Save to save the item.

Once you have created standard items, you can:

- Create delivery items to define the delivery charges for the products.
- Upload media and add them to your items.

After you have finished creating standard items, the items may need to be <u>approved</u> based on the agreement's approval scheme.

### 5.6.1.2 Edit standard items

When you want to edit only a few items, follow these instructions.

If you need to edit many items, <u>export the agreement as a Super Content Loader file</u> and use it to make changes more quickly.



- 1. Click Product Manager > Agreements.
- 2. Find the agreement on which you want to edit items and click .
- 3. In the Items section, click 💠.
- 4. Find the item that you want to edit.
- 5. Next to the item that you want to edit, click .
- 6. Make the necessary changes to the item.
  For information on the fields, see <u>Create standard items</u>.
- 7. Click **Save** to save the changes.

After you have finished editing items, the items may need to be <u>approved</u> based on the agreement's approval scheme.

### 5.6.1.3 Delete standard items

If you have items in an agent agreement's price list that you no longer need, you can delete them.



- 1. Click Product Manager > Agreements.
- 2. Find the agent agreement with the items you want to delete and click .
- 3. In the Items section, click .
- 4. Find the item you want to delete and click 💼.
- **5.** Click **Done** to save the changes to the price list.

After you have finished deleting items, the price list may need to be <u>approved</u> based on the agreement's approval scheme.



### **5.6.2 Delivery items**

Delivery items are charges that are applied to standard items when they are delivered. When creating standard items, you can add a delivery item to the standard item to let the buyer know how much the delivery of the item will cost. Two types of delivery items can be created:

**Item** The delivery charge is applied separately for each item being ordered. If several items that have this delivery charge are in the basket, the delivery charge is applied several times.

**Basket** The delivery charge is applied once for all items in the basket that use that delivery charge. If several items that have this delivery charge are in the basket, the delivery charge is applied only once.

### **Examples of delivery charges**

For these examples, the following items exist in Marketplace. Users can find the standard items in the catalog and order them. Delivery charges are automatically calculated based on the delivery item that is associated to each standard item.

Table 1: Standard items in the catalog (example)

Item name	Associated delivery item
Item A	Delivery item 1
Item B	Delivery item 2
Item C	Delivery item 3
Item D	Delivery item 3

Table 2: Delivery items in the catalog (example)

Item name	Delivery type	Delivery charge
Delivery item 1	Item	1 GBP
Delivery item 2	Item	5 GBP
Delivery item 3	Basket	10 GBP

- Buyer orders Item A, quantity 1
  - Total delivery charge: 1 GBP. Delivery item 1 is set as the delivery item for Item A, and it is applied per item.
- Buyer orders Item A, quantity 1, and Item B, quantity 1
  - Total delivery charge: 6 GBP (1 GBP + 5 GBP). Each item has a separate delivery charge.
- Buyer orders item C, any quantity
  - Total delivery charge: 10 GBP. Delivery item 3 is the delivery item for Item C, and the charge is applied once for the entire basket.
- Buyer orders item C, any quantity, and Item D, any quantity
  - Total delivery charge: 10 GBP. The same delivery charge is used for both of the items and is applied only once for the entire basket.
- Buyer orders Item A, quantity 1, and Item C, any quantity
  - Total delivery charge: 11 GBP (1 GBP + 10 GBP). The Item delivery charge is applied for Item A, and the Basket delivery charge is applied for Item C.



### 5.6.2.1 Create delivery items



- 1. Find the agent agreement to which you want to add standard items and click 🕏.
- 2. In the **Items** section, click .
- 3. Click Create.
- 4. In the Item type drop-down list, select Delivery Item.
- 5. In the **Delivery Type** drop-down list, select whether you want to apply the delivery item for each item, or for the entire shopping basket.
  - Item The delivery charge is applied separately for each item being ordered. If several items that have this delivery charge are in the basket, the delivery charge is applied several times.
  - **Basket** The delivery charge is applied once for all items in the basket that use that delivery charge. If several items that have this delivery charge are in the basket, the delivery charge is applied only once.
- 6. In the **Supplier item ID** field, type an identification code for the item.
- 7. To set the item's supplier set the toggle switch for **Set item supplier** to on. You must then complete the following fields:
  - a) In the **Supplier Name** field, enter the name of the supplier.
  - b) In the **Supplier code** field, enter the supplier's code, such as a DUNS number.
  - c) In the **Supplier email** field, enter the supplier's email address.
- 8. Fill in the Name, Description and Keywords fields.
- 9. In the **Price Breaks** section, enter the delivery charge per item or per order.
  - If the delivery type is set to **Item**, the price breaks define the delivery price per item depending on the number of items in the basket. If the delivery type is set to **Basket**, the price breaks define the delivery price for the basket depending on the value of the basket.
  - a) In the **Number of units** field, enter the minimum number of items OR minimum total basket value the buyer must order to get the specified delivery price. The first price break listed should always be 1, but many additional levels can be added.
  - b)In the **Price** field, enter the price per unit when the buyer orders at least the specified number of items or total basket value.

An example set of price breaks for a basket delivery item could be:

Number of units	Price
1	5 GBP
10	3 GBP
25	1 GBP
100	0 GBP

In this case, a buyer who orders between £1 and £9,99 of items pays a £5 delivery fee for the order. A user who orders between £10 and £24,99 units pays a £3 delivery fee, and so on.



- **10.** To define the classification of the item, click next to **Classification** and select the correct classification.
- **11.** Add an image to the item. For instructions, see <u>Product-related media</u>. You can also skip this now and go back later.
- 12. Click Save to save the item.

After you have finished creating delivery items, the price list may require <u>approval</u>. Once the delivery items are approved, you can apply them to standard items while <u>creating</u> or <u>editing</u> the standard items.

### 5.6.2.2 Edit delivery items



- **1.** <u>Find</u> the agent agreement to which you want to add standard items and click **‡**.
- 2. In the Items section, click .
- 3. Find the item that you want to edit.
- 4. Click property next to the item you want to edit.
- **5.** Make the necessary changes to the delivery item. For information on the fields, see <u>Create delivery items</u>.
- **6.** Click **Save** to save the changes.

After you have finished editing items, the items may need to be <u>approved</u> based on the agreement's approval scheme.

### 5.6.3 Matrix items

Catalog managers can create a product matrix to simplify the buyers' view into your product selection. If you offer a product that comes in multiple variations, a product matrix lets you link these variations under a single item. For instance, if you are selling t-shirts that come in multiple sizes and colors, you can link each of these under a single item. When the buyer opens this item, they can select their preferred size and color from a drop-down list, and put the item in their shopping basket.

As a buyer organization, you can create matrices using the Super Content Loader.

### 5.6.4 Product-related media

You can store images, PDFs, and other file types that you want to use to describe an item. You have several options on how to upload your media files and assign them to your items.

### 5.6.4.1 Upload images and other media in the Media directory view

You can upload your product images, user guides, and other files in the Media directory view. After the media is uploaded, you can link it to your items <u>individually</u> or by using the <u>Super Content Loader</u>.



- 1. Click **Product Manager** > **Media**.
- 2. Click Upload files.
- 3. Click **Add files** and browse to the files that you want to upload.



The files appear on the Upload Files page.

Next, add the files to your items:

- · Add media to individual items
- Add item images with Super Content Loader

### 5.6.4.2 Add media to individual items

You can add product images, user guides, and other media to your individual standard items.



- 1. Find the agent agreement that you want to add standard items to and click .
- 2. In the Items section, click 🌣 .
- 3. Find the item that you want to edit.
- 4. Click next to the item that you want to add media to.
- **5.** To add an image file, drag and drop the file to the **Drop file here to upload** box.



If you want to use an image that you have used earlier, click **Select Image from Media Directory**, and browse to the image that you want to add. All of the images that you have used earlier (or uploaded) are saved in the Media directory view.

**6.** Click **Save** to save the changes.

### **5.6.5 Templates**

You can create an item template when you want the buyer to fill out a form to customize the item or when you want to collect additional information. The item template defines what kind of information you want to collect from the buyer. Templates can be used with standard items and delivery items.

When a buyer adds a standard item to their basket that has a template, they are prompted to fill out the template information immediately. If the buyer adds a standard item to their basket and the item has a delivery item with a template, they are prompted to fill out the template information when they click **Checkout** from their basket.

### 5.6.5.1 Create item templates



- 1. Click Product Manager > Item Templates.
- 2. Click Create.
- 3. In the Name field, type a name for the template.
- 4. In the **Description** field, type an optional description.
- **5.** If you want the template to be available (that is, the template can be attached to items) immediately after you have saved it, set the toggle switch for **Enabled** to on.
- **6.** Under **Tools**, click on the tool that you want to add to your template. The tools will appear on the items in the order that you place them in.



**Text Entry (Single Line)** The buyer types one line of text.

**Text Entry (Multi Line)** The buyer types multiple lines of text.

**Dropdown (Single-select)** The buyer selects one option from a drop-down list.

**List (multi-select)** The buyer selects one or more options from a list.

**Buyer guidance text** You give instructions to the buyer to complete the form.

When you add a tool, a pop-up window appears.

7. In the pop-up window, define the template properties. The available options depend on the tool.

**Label** Title that the buyer sees. For example, "Color".

**Variable name** Identifier, for example, "COL" for "Color". The buyer will not see this, but you

need this identifier if you update items using a CSV file. The identifier and

the values selected for the variable is also shown in orders.

**Required** If you need the buyer to complete this field, select this check box.

Max size Maximum number of characters.

Min size Minimum number of characters.

**Override basket** If you want the value set by the buyer to override a specific variable of the

value item, select the variable in the drop-down list.

**Text** Instruction that will be visible for the buyer.

**8.** Repeat steps <u>6</u> and <u>7</u> until you have listed all the information that you want to collect from the buyer.

9. Click Save.

Next, add the template to items and define the content of the template (for example, the options that appear for each item in the drop-down list). You can do this for <u>individual items</u>.

### 5.6.5.2 Add templates to items

After you have created your item template, add it to the items that you want.



- 1. Find the agent agreement with the items for which you want to use a template and click .
- 2. In the Items section, click .
- 3. Next to the item that you want to edit, click .
- 4. Next to **Item template**, click 🕏.
- 5. Next to the template that you want to add, click 🛨.

Next, define the template data.



### 5.6.5.3 Define template data for individual items

When you want to use a template for only a few items, follow these instructions to define the content of the template, for example, the options in the drop-down menus.



- 1. First, add a template to an item.
- Next to Template Data, click >.

The content to be defined for the template is shown.

- 3. Define the content of the template:
  - a) For template entries of type **Text Entry (Single Line)** or **Text Entry (Multi Line)**, you can type a default text that will appear in the text box that the buyer fills in. The buyer can replace this text with their own.
  - b) For template entries of type **Dropdown (Single-select)** or **List (multi-select)**, define the options in the list:

**Display text** Type the option that will be selectable on the list.

Basket value Add an identifier for the option (Display text). For example, if you have listed

suppliers in the **Display text** field, this can be the DUNS number of the supplier. For options such as colors you can simply repeat the **Display text** 

value here.

**Default** For **Dropdown (Single-select)**, select if you want the option to be selected by

default.

To add more options, select +.

4. Click Save.

To make the changes visible to your buyers, <u>publish</u> the agreement. When users add items with templates to their shopping basket, they will be prompted to fill in the defined information before completing their order.

### 5.6.6 Set lead time for agent agreements

When creating and editing agent agreements, it is possible to set a default lead time, in days, at the agreement level. If any items in the agreement do not have lead time configured for them, their lead time will be automatically set to the agreement's default lead time. If an item does have a lead time set, the item lead time is used instead of the agreement's default lead time.

Lead time is shown to users on the item details page in Marketplace.



- 1. Create an agreement or find and open an existing agreement.
- 2. In the Attributes section, click the **Default Lead Time** field.
- 3. Enter a number.

The lead time is in days. For example, enter 5 if the lead time is 5 days.

4. Publish the changes to your agreement.



### 5.6.7 Export an agent agreement as a Super Content Loader file

You can export any of your existing agent agreements as a <u>Super Content Loader Excel workbook</u>. The exported workbook contains all of the standard and delivery items included in your agreement items list.



- 1. Click Product Manager > Agreements.
- 2. Find the agreement that you want to download and click to open it.
- 3. In the Items section, click .
- 4. Click Export.

You can now make the changes and additions you want directly in the Excel workbook and upload it. For instructions, see <u>Super Content Loader</u>.

### 5.6.8 Tax

Tax information can be added to items in Marketplace. When this feature is configured, buyers on Marketplace see item prices both including and excluding tax. If you would like to provide tax information for your items, contact Basware Support to enable this feature.

To use tax information, the buyer organization and supplier organization need to use the same tax territory. The available tax territories, tax codes, and tax rates are maintained by Basware.

Tax information for supplier-managed content is configured for each price list. The supplier must first choose the tax territory for the price list, then add a tax code for each item in the price list. The same item can have different tax codes on different price lists.

Tax information for buyer managed content is configured for each agent agreement. The buyer selects the tax type and tax territory for the price list, then adds a tax code for each item.

For users of the Marketplace catalog to see tax information, the users and the agreement with tax must be added to a view that has the **Show tax** option enabled.

### 5.6.8.1 Add tax territory to agent agreements

When uploading agent agreements, sometimes the buyer administrators need to add VAT information to the agreements. Tax information can only be changed on agreements that are in **Draft** status.



- 1. First, <u>create an agent agreement</u> or <u>find and open</u> a draft agreement.
- **2.** On the Manage Agreements page for the created agreement, click the **Tax type** field and select **VAT**.
- 3. Select the correct **VAT territory** from the drop-down list.

The tax information has been added to the agreement. Ensure that the items on the agreement have tax codes, then <u>publish the agreement</u>. After an agreement is published, you cannot edit the tax territory anymore.

To make the tax information available to users, add this agreement to a view with the **Show tax** toggle set to on.



### 5.6.8.2 Add tax code to items

Before adding tax codes to items, make sure you have added a tax territory to the agent agreement.

If you are providing tax information on your agent agreements, you must add a tax code to each item. If you have a small number of items, follow the instructions here. To add tax information to many items at once, use the Super Content Loader instead.



- **1.** Find the agreement on which you want to edit items and click **‡**.
- 2. In the **Items** section, click 🌣.
- 3. Next to the item that you want to edit, click .
- **4.** In the **Tax code** field, the default tax code for the agreement's tax territory is selected. Select the correct tax code from the drop-down list.
  - i

The available tax codes are determined by the tax territory selected for the price list.

5. Click **Save** to save the changes.

## **5.7 Framework agreements**

Framework agreements contain Marketplace content that can be provided by several suppliers. The product manager uploads an item list with the available products and services, as well as all the suppliers that can provide them. When an item is ordered from the agreement, it must go through a quick quote to determine the item's final price and supplier.

### **5.7.1 Create items for framework agreements**



- 1. Find the framework agreement to which you want to add items or services and click .
- 2. In the Items section, click .
- 3. Click Create.
- 4. In the **Supplier Item ID** field, enter an ID for the item or service.
  - Since items on framework agreements can be sent to multiple suppliers who may have different item IDs, this field can contain an internal item ID defined by you.
- 5. In the **Name** field, enter a name for the item or service. Make sure the name is easy for buyers to find in Marketplace.
- **6.** In the **Description** field, enter the details of the item or service. The description is visible to users in Marketplace, so make sure it is complete and relevant.
- 7. In the **Keywords** field, enter synonyms and related terms that may help buyers find the item or service more easily when searching in Marketplace.
- **8.** In the **Classification** section, click and select the UNSPSC classification information for the item or service.



- **9.** Add suppliers to the item. These suppliers are automatically added to the RFQ during the quick quote process when this item or service is ordered by a buyer.
  - a) In the **Suppliers** section, click +.
  - b) Find a supplier you want to add to the item and click \_\_\_. To find suppliers more easily, use the search bar at the top of the list.
  - c) Repeat for each supplier you want to add to the item.
  - d) When all suppliers are added, click Close.
- **10.** Add images to the item. For instructions, see <u>Product-related media</u>. You can also skip this now and go back later.
- 11. Click Save to save the item.

The item has been added to the framework agreement. Depending on the approval schemes in place, changes to the framework agreement may require approval. After the changes are approved, the item is then visible in the catalog for users to order.

#### 5.7.2 Edit items on framework agreements



- 1. Find the framework agreement on which you want to edit items or services and click .
- 2. In the Items section, click .
- Make the necessary changes to the item.For information on the fields, see Create items for framework agreements.
- 4. Click **Save** to save the changes.

After you have finished editing items, the items may need to be <u>approved</u> based on the agreement's approval scheme.

### 5.7.3 Delete items on framework agreements

If you have items in an framework agreement that you no longer need, you can delete them.



- 1. Click Product Manager > Agreements.
- 2. Find the framework agreement with the items you want to delete and click .
- 3. In the Items section, click .
- 4. Find the item you want to delete and click a.
- 5. Click **Done** to save the changes to the item list.

After you have finished deleting items, the agreement may need to be approved based on the agreement's approval scheme.

# **5.8 Tactical Dynamic Procurement System**

Large or widely distributed businesses sometimes need flexible or local options for who supplies their goods and services. Marketplace provides this with the Tactical Dynamic Procurement System, or TDPS.



TDPS is a dynamic purchasing system, such as those often used by the public sector. Catalog users can select their preferred suppliers for an item from a list of suppliers who are pre-approved by the buyer's procurement team. To join a dynamic purchasing system, suppliers follow a three-step process.

- 1. First, they must answer a qualification questionnaire that is set up by the buyer's procurement team. This questionnaire ensures that the supplier is compliant with the buyer's terms and conditions.
- 2. Based on their answers to the questionnaire, each supplier is approved or rejected. The approval can be automated or a procurement professional can review each supplier.
- 3. When a supplier is approved, they can then add an item to the TDPS and answer the item-level questionnaire. The item questionnaire gives the buyers information by which they can filter and select the appropriate supplier for their needs.

For public sector procurement, the customer cannot limit the number of suppliers who answer the qualification questionnaire. Suppliers can join at any time while the system is open for them.

As a procurement organization, you can create as many TDPS surveys as you wish, such as one TDPS per procurement services sub-category (i.e. marketing agencies, cleaning services, IT consulting services, etc).

#### 5.8.1 Create a TDPS framework agreement

To set up a tactical dynamic procurement system, you must first create a framework agreement.



- 1. Click Product Manager > Agreements.
- 2. Click Create.
- 3. In the Type field, select Framework Agreement.
- 4. Fill out the other fields for the agreement and click Save. For more information, see the topic Create agreements.
- **5.** On the Manage Agreements page, switch the toggle for **DPS** to on.
- 6. Type in the email address for the buyer contact person in the Contact Email field.
- 7. Select the country for the TDPS in the Locale field. To create the TDPS for multiple countries, switch the toggle for Global to on.

After the agreement is created, add an item to it.

### **5.8.2 Add TDPS item to agreements**



- 1. In the Items section, click 🌣.
  - 2. Click Create.
  - 3. In the **Supplier Item ID** field, enter an ID for the item or service. Since items on framework agreements can be sent to multiple suppliers who may have different item IDs, this field can contain an internal item ID defined by you.
  - 4. In the Name field, enter a name for the item or service. Make sure the name is easy for buyers to find in Marketplace.
  - 5. In the **Description** field, enter the details of the item or service. The description is visible to users in Marketplace, so make sure it is complete and relevant.



- **6.** In the **Keywords** field, enter synonyms and related terms that may help buyers find the item or service more easily when searching in Marketplace.
- 7. In the **Classification** section, click and select the UNSPSC classification information for the item or service.
- 8. Click **Save** to save the item.

After adding an item, <u>create the questionnaires</u> for suppliers to answer.

#### **5.8.3 Create TDPS questionnaires**

Each item you create in the TDPS has two questionnaires:

- Qualification questionnaire: A screening questionnaire for all suppliers. Suppliers can be approved or rejected for the TDPS based on the answers they provide.
- Item questionnaire: Specific questions about the TDPS item that the supplier is offering. If configured to do so, answers to these questions can help catalog users filter available suppliers to find the one that best fits their needs.



- 1. From the agreement items page, click the o icon to open the qualification questionnaire.
- 2. In the **Questionnaire Options** section, select the approval option you want to use:
  - Manual Approval: Every supplier response must be reviewed by a professional buyer and approved or rejected. This approach is best for questionnaires that use text entry fields, and for controlling the number of suppliers that qualify for the TDPS.
  - **Auto Approve**: Suppliers can be automatically approved based on their answers to the questions. This approach is best for questionnaires that use multi-select and single-select questions, and for allowing an unlimited number of suppliers to qualify.
- 3. Click and drag components of the questionnaire from the Available components column to the Questionnaire Form column. You can choose as many fields as you need from the following options:

**Display Link** Provide a URL for the supplier to access. The link could be to Terms

and Conditions, for example.

**Display Text** Provide a text explanation or instructions to the supplier.

**List (multi-select)** Allow the supplier to choose one from a list of options that you

define.

**List (single-select)** Allow the supplier to choose several from a list of options that you

define.

Number Input Allow the supplier to input a number.

Text Input (Single Line) Allow the supplier to freely input text.

**URL Input** Allow the supplier to input a URL

**Input Group** Create a group of components. This can be helpful if you have several

questions and you want to organize them into categories.

**Display Attachment** Provide an attachment, such as an image or PDF document, to the

supplier



**Input Attachment** Allow the supplier to upload an attachment, such as an image or PDF

document.

4. For each component in the Questionnaire Form column, click 

and configure the field options.

These options vary for each field type.

Some components have additional configuration options:

**Restricted** If selected, Marketplace catalog users cannot see the information the supplier

provides for this question.

Filterable If selected, Marketplace catalog users can filter by this criteria when selecing a

**Field** supplier for the item.

**Copy Filter** If selected, the filters that the Marketplace user selects when viewing suppliers

for the TDPS will be copied **Description** field of the quick quote that the user

creates.

**Siblings** When selected, if you have configured parent/child relationships in the options,

the user can only select options at the lowest level of each hierarchy. Also, the user can only select multiple options if they are children of the same parent.

Here is an example of how this works with delivery options:

Postal mail

- Electronic delivery
  - Fmail
  - Mobile phone
    - Deliver to the app
    - SMS text message

The supplier could select: Postal mail, Email, Deliver to the app, SMS text message, or Deliver to the app and SMS text message. No other selections or combinations are possible.

- 5. Click Save.
- 6. Click **Back** to return to the agreement items page.
- 7. From the agreement items page, click the o icon.
- 8. Repeat the previous steps to build the questionnaire. The same components are available.
- 9. Click Save.
- 10. Click **Back** to return to the agreement items page.

To make the TDPS items available to catalog users and suppliers, publish the agreement.

### **5.8.4 Publish TDPS framework agreement**



- 1. Follow these steps to publish the framework agreement.
- 2. Follow these steps to add the agreement to a view.

When the agreement is published, it is available for suppliers to apply to. When suppliers answer the qualification questionnaire, you must <u>approve their responses</u> before they can create their items.



#### 5.8.5 Edit published TDPS questionnaires

You can edit the questions on a published TDPS questionnaire, with some limitations.



- 1. Find and open the item with the TDPS questionnaire that you want to edit.
- 2. Click o top open the qualification questionnaire or o to open the item questionnaire.
- **3.** To edit an existing question, click .



When editing existing questions, some limitations apply:

- · Questions cannot be reordered
- Ouestions cannot be deleted
- Item options can be added but not deleted.
- The question type cannot be changed. For example, a single-select question cannot be changed to multi-select.
- Questions cannot be set as required if they were not already required when the questionnaire was first published.
- **4.** To add a new question, click and drag components of the questionnaire from the **Available components** column to the **Questionnaire Form** column.
  - i

When adding new questions, some limitations apply:

- New questions can only be added after the existing questions.
- · New questions cannot be set as required
- 5. Click Save.
- **6.** Click **Back** to return to the agreement items page.

### 5.8.6 Approve or decline suppliers for TDPS items

After you have posted a TDPS, suppliers can respond to the qualification questionnaire. If you have selected the **Manual Approval** questionnaire option, you must approve the suppliers' responses before they can submit items for the TDPS.



- 1. From the agreement items page, click the 👤 icon.
- Find the supplier that you want to approve and click .
   To quickly find agreements that need approval, use the filter Pending.
- 3. Review the supplier's responses and click Approve or Reject.

If you have approved the supplier, they receive a notification email that they have been approved. They can then add an item to the TDPS. After they have added an item, they will be available for catalog users to select and request a quote from.



### 5.9 Content tags

With content tags, you can define tags and assign them to individual items in agreements. You can use content tags for the following purposes:

- Break up a large agreement and provide partial access to specific users. This is useful, for
  example, when suppliers provide one large catalog but you need to control which users can see
  which items.
- Guide users to specific items in Marketplace with custom search filters.

You can create content tags for both buyer- and supplier-managed agreements. Each item can only have one content tag.

To use content tags, complete these steps:

- 1. Create content tags in an agreement
- 2. Assign content tags to standard items in the agreement
- 3. Add the agreement to a view

#### 5.9.1 Create content tags in agreements



- 1. Find the agent agreement for which you want to create content tags and click .
- 2. Click + in the Content Tags section.
- 3. Type in a content tag that you want to use.
  - A tag can contain letters, numbers, hyphens (-), underscores (\_), and periods(.). A tag name cannot contain spaces.
- 4. Click Add or press the ENTER key.

The tag has been added to the agreement. Next:

- Follow these steps to assign tags to items on an agent agreement or organization agreement.
- To assign content tags to many items at once, edit items using CSV import.

After assigning tags to items, add the agreement to a view.

### 5.9.2 Assign content tags to items on an agreement

To assign content tags to many items at once, edit items using CSV import.

To assign content tags to only a few items on an agent agreement, edit the standard item.

To assign content tags to only a few items on an organization agreement:



- 1. Find the agreement on which you want to edit items and click .
- 2. In the **Price List** section, click .
- 3. Find the item to which you want to add a tag.
- 4. Click the Content Tags field.



5. Select the tag.

Only one tag can be added to an item.

6. Click **OK** to save your changes.

Content tags have been assigned to the items. Next, you can <u>add the agreement to a view</u> to control which users see items with specific tags in the catalog.

### **5.10 Add approval schemes to agreements**

Before you can complete this step, you must have an approval scheme created that you want to add to an agreement. For more information, see <u>Create approval schemes</u>. Also, an agreement's approval schemes cannot be edited if the agreement is currently awaiting approval. Approve the agreement first (see <u>Approve agreements and price lists</u>), then change the approval scheme.

Approval schemes are used for organization, shared, and punchout agreements. They are also used for agent agreements, especially those updated using an automated SFTP upload.

Approval schemes allow the product manager to define who can approve price lists or punchout information and under what circumstances. Approval can be triggered if items are added and removed, if prices rise or fall, or if units of measure are changed. One or many users can be informed with an email when a rule is triggered.

One approval scheme is assigned to each agreement. A single approval scheme can be used for many agreements, but each agreement can only have one approval scheme assigned to it.

To add an approval scheme to an agreement:



- 1. Click Product Manager > Agreements.
- 2. Find the agreement you want to add an approval scheme to and click .
- 3. Click in the Approvals section.
- 4. Find the approval scheme that you want to use. You can search by keywords or sort by **Name** or **Last modified**.
- **5.** When you find the approval scheme you want to use, click to view or edit the approval scheme.
- **6.** When the approval scheme is ready to be used, click to add the approval scheme to the agreement.
- 7. Click Done.

The approval scheme is added and the **Manage agreements** page opens. When changes are made to the agreement, approvals are requested based on the rules in the newly added approval scheme. For information on how to approve an agreement, see <u>Approve agreements and price lists</u>.

# 5.11 Add or edit multiple items with CSV import

When you need to add or edit a large number of catalog items, you can export the items as a CSV file and import the file after you have edited it. You can also export a CSV when you do not have any existing items—the exported CSV is your template for creating the items.

You can use CSV imports to edit items on agent or organization agreements.





- **1. Find** the agreement that you want to edit and click its name to open it.
- 2. Export the CSV:
  - a) Next to **Items**, click **.**
  - b) Download and save the file on your computer.
- 3. Use Microsoft Excel to add and edit the items in the CSV file, and save the file.
- 4. Import the edited CSV file:
  - a) Next to the section to which you want to import the CSV file, click 1.
  - b) In the **Select Action** drop-down list, select if you want to merge or replace the items.

    Merging means that the CSV file content makes additions and changes to the current items, and the items that are not included in the CSV file remain untouched. Replacing means that the imported file overwrites all items, that is, all previous items are deleted and the items on the CSV file take their place.
  - c) Click **Select File** and browse to the edited CSV file.
  - d) Click Upload.

### 5.12 Approve agreements and price lists

When a supplier changes a price list in an organization agreement or an agent agreement is updated through an automated SFTP upload process, the changes may trigger a rule in the agreement's approval scheme. If you are set up as the approver for the rule that was triggered, you must approve the agreement changes before they are shown to users on Marketplace.



- 1. Click Product Manager > Agreements.
- 2. Find the agreement that you want to approve and click .

To quickly find agreements that need approval, use the filter Awaiting approval.

- 3. View the content changes that require approval:
  - For an organization agreement, click prize heat to the Price List.
  - For an agent agreement, click on next to Items.
- 4. View the changes to the content. If needed, filter the list as follows:
  - To see items for which the price increased, click **Price Increased**.
  - To see items for which the price decreased, click Price Decreased.
  - To see items that have changed in some other way, click **Cannot compare**.
  - To see items that have been removed, click Removed.
  - To see items that have been added, click **Added**.
  - To see all current items, click Current.
  - To see items that are proposed additions, click Proposed.
- 5. To approve the changes to the content, click **Approve**. To reject the changes, click **Reject**.
- 6. Publish the agreement.

If approved, the agreement is saved and published with the changes. Users can immediately see the new information on Marketplace.



### **5.13 Publish agreements**

After you make any changes to agreements, you must publish the agreement for the changes to be visible to end users of Marketplace. The system shows a message when an agreement contains changes that require publishing.



- 1. Click Product Manager > Agreements.
- 2. Find the agreement you want to publish to and click .
- 3. Click Publish.

The changes are saved and visible to buyers on Basware Marketplace Standard.

### 5.14 Set an agreement as preferred

Sometimes when searching for items in a large catalog, requesters may find many search results for one type of item. To help guide users to the best option, administrator buyers can flag any organization or agent agreement as Preferred. The Preferred status indicates that, when possible, users are encouraged to choose items from this agreement over other similar items.



- 1. Click Product Manager > Agreements.
- 2. Find the agreement you want to set as preferred and click .
- 3. Set the toggle switch for **Preferred** to on.
- 4. In the confirmation message, click Confirm.
- 5. Click Publish.

The items from the agreement are shown on Marketplace with a green thumbs-up icon to let requesters know that the items are preferred. Preferred items also appear first in catalog search results. In the search options, users can choose to see only preferred items.

### 5.15 Set an item as preferred

Sometimes when searching for items in a large catalog, requesters may find many search results for one type of item. To help guide users to the best option, administrator buyers can flag specific items on any organization or agent agreement as Preferred. The Preferred status indicates that, when possible, users are encouraged to choose these items over other similar items.



- 1. Click Product Manager > Agreements.
- 2. Find the agreement on which you want to edit items and click .
- 3. In the Items section, click .
- 4. Next to the item that you want to edit, click .
- 5. Set the toggle switch for **Preferred** to on.
- 6. In the confirmation message, click Confirm.
- 7. Click **Save** to save the changes.
- 8. Publish the agreement for the changes to be visible on Marketplace.



The items from the agreement are shown on Marketplace with a green thumbs-up icon to let requesters know that the items are preferred. Preferred items also appear first in catalog search results. In the search options, users can choose to see only preferred items.

# 5.16 Set classfication for agreement

When creating and editing agreements, it is possible to set a classification code at the agreement level. When the classification code is set at the agreement level and the items in the agreement have classification codes, the agreement-level classification code is used during checkout. If no classification code is defined at the agreement level, the item-level classification is used.



- 1. Create an agreement or find and open an existing agreement.
- 2. Click the Classification field.
- **3.** Enter the numerical code of the classification that you want to apply to all items in the agreement.
- 4. Publish the changes to your agreement.

Now, when users order items from that agreement, all items will have the classification code that you set for the agreement.

# **5.17 Archive agreements**

An agreement can be archived only after the content has been published, and the agreement is not in a group. By archiving an agreement, you remove all its content from Marketplace and remove suppliers' access to the agreement.



- 1. Click Product Manager > Agreements.
- 2. Find the agreement that you want to archive. For information on finding agreements, see <u>Find</u> and <u>view agreements</u>.
- 3. Click .
- 4. Click Archive.

# **5.18 Restore archived agreements**

After an agreement is archived, it is possible to return it to **Active** status so that the items in it are again shown in the end users' Marketplace.



- 1. Click Product Manager > Agreements.
- 2. Click **Archived** to show only archived agreements.
- 3. Click the name of the agreement you want to restore.
- 4. Click Restore.

The agreement is restored. If the agreement had expired, you must update the agreement expiration date to make items on the agreement available on Marketplace. If the agreement needs information from the supplier, you can submit the agreement to the supplier.



# **5.19 View agreement change history**

When buyers or suppliers perform actions on any agreements, such as uploading items, approving a price list, or publishing the agreement, the changes are recorded in the agreement's history. Changes are listed with the most recent change first.



- 1. Find and open the agreement for which you want to view the history.
  - 2. In the History section, click .

The full list of changes that have been made to the agreement is shown.



# **6 Uploading content**

You can download content from your existing system and upload it to Basware Marketplace Standard. The types of content that you can upload depend on your role.

Basware Marketplace Standard allows using various kinds of files to upload content. This is possible because of the flexible content loader, which maps the data fields in your files to the respective fields on Basware Marketplace Standard.

If you need file templates to get started, go to the <u>Content Loading Templates library</u> to download templates for different types of content. You can then upload the file directly or compress the file into a .zip file and upload it. Loader only supports .zip files that contain a single file. You cannot upload multiple files in a single .zip file.

# 6.1 View mappings and supported columns for uploaded content

Mappings are needed to link the data fields in the files that you upload to the respective fields on Basware Marketplace Standard. In addition to the predefined mappings that are provided, you can also create your own mappings for your organization.

Follow these steps to see the supported columns and required data for each type of content upload.



Click Product Manager > Loader.



The **Mappings** tile at the top of the view shows you the number of customized organization mappings that you have.

#### 2. Click Mapping Directory.

You can see two kinds of mappings in the Mapping Directory view:

- System Mappings are predefined mappings that you cannot edit or remove:
  - Content Loader CSV: Mapping for uploading CSV files that have been saved from the Content Loader Excel file.
  - Super Content Loader Excel: Mapping for uploading Super Content Loader Excel files.
  - Bill of Materials (Free text) Excel: Mapping for uploading bills of materials.
  - **Content Loader Excel**: Mapping for uploading files. This mapping does not include tax information.
  - EHF Catalog: Mapping for uploading XML that has been converted to an EHF file.
  - Content loader (With Tax) CSV: Same as Content Loader CSV, but including tax.
  - Item template CSV: Mapping for uploading item template values.
  - Content Tagging CSV: Mapping for uploading content tags to existing items.
  - Agent Stock CSV: Mapping for uploading stock, if your organization manages stock levels.
  - Agent Agreement Items CSV: Mapping for uploading agent agreement items in CSV format.
  - Agent Agreement Items CSV: Mapping for uploading agent agreement items via CSV.
  - BMEcat XML: Mapping for uploading XML that follows the BMEcat format.



- Organization Mapping are mappings created by you or other people in your organization.
- 3. To view the rules of a mapping, click the title of the mapping.

### **6.2 Create mappings**

If the predefined mappings are not applicable for your content, you can create your own mapping. For more information on the available predefined mappings, see <u>View mappings and supported columns for uploaded content</u>.



- **1.** Click **Product Manager** > **Loader**.
- 2. Click Mapping Directory.
- 3. Click Create.
- 4. On the **Tools** pane, fill out the information (the available fields depend on the file type):

#### **Select Destination** Select **Agent Stock** or **Products and Price List**.

#### **Source File**



Before uploading the source file, first check that the **File Type**, **Sheet Number**, **Start Row**, **File Encoding**, and **CSV separator** fields below are set correctly.

Select **Choose a File**, and browse to a CSV, Excel, or XML file that represents the data that you want to upload to the system using this mapping. The system identifies the columns in the file and uses those in the mapping.

**File Type** Select the file type.

**Sheet Number** If you are uploading an Excel workbook with multiple sheets, select the

sheet.

**Start Row** Select the start row of the file. For example, if you have a CSV or Excel file

that has a header on the first row, you want the mapping to start on row 2.

**File Encoding** Select the encoding. The default value is UTF-8 for CSV and Excel files.

**CSV separator** If you are uploading a CSV file, enter the character that is used to separate

values. The default value is "," (comma).

**Mapping Name** Type a name for the mapping.

Mapping Type a description to make sure that users use the mapping for the correct

**Description** files.

5. To select where the information from a column in the source file ends up on Basware Marketplace Standard, drag and drop a box from Source Columns (the columns in the source file that you upload) to the correct placeholder under Destination Columns (the fields that exist on Basware Marketplace Standard).

The mandatory destination columns are marked with an asterisk ("\*").

Most boxes appear only once under **Destination Columns**, but it is possible to add certain boxes multiple times. For example, you can add multiple price breaks.



Some placeholders under **Destination Columns** may consist of multiple boxes. In that case, you must fill in all of the boxes that the placeholder consists of.

**6.** If you want to change the information in your source file columns during the upload process, click **Mapping Actions**, and choose from the following. Several actions can be done to one column during upload by selecting more than one action:

**Date Format** Change the information in the selected column to date format.

**Copy Field** Copy a value from another column of your source file.

Map Convert the source value into another value in the destination field. For

example, if the value in the source file is "EACH", and you want to convert it

to "EA", enter EACH in the first field and EA in the second field.

**Header** For CSV and Excel files only. Replaces the value of this field with a specified

column header, determined by an index. The column index starts at 0 (zero). For example, to use the header from the first column of your spreadsheet,

enter 0. To use the header from the second column, enter 1.

Organization

Value

Returns the organization's tax territory code, such as GBR.

**Upper Case** Change the text in this column to use only UPPER CASE.

**Replace** Find all instances of a value in the source field and replace with a different

value.

**Split** Splits the current value into parts based on a specified delimiter, then

returns only the part requested with part number. Part numbers start from 0

(zero).

**Substring** A set of characters in a phrase. For example, if you want to pick the word

"tax" from the phrase "valid tax information", enter 6 in the field **Enter start index** and 8 in the field **Enter end index**. Note that the first character's number is 0 (zero), which is why the character "T" in the above example is number 6, although it is the seventh character in the phrase. If you do not add any value to the **Enter end index** field, the substring will contain all of

the characters starting from the value defined in **Enter start index**.

Copy from

If the column in the file that you upload is empty, copy the data from the

column if empty

other column that you define here.

**Set value if empty** If the column in the file that you upload is empty, use the value that you

define here.

**Truncate** Shorten the content of this column by cutting off the characters after the

defined number.

7. If you want use a constant value that is the same regardless of whether it is included in your file or not:

- a) Next to **Source Columns**, click +
- b) Click **Constant**.
- c) Type the value.



- d) Click Add.
- e) Drag and drop the box to the applicable placeholder under **Destination Columns**.
- 8. Click Save Mapping.

You can now use this mapping when you upload content.

### 6.3 Upload content

If you need a file template in which you can enter your content, see <u>Download and use templates for uploading content</u>.



1. Click Product Manager > Loader.



The **Uploading** tile at the top of the view shows you the number of files that are currently uploading.

- 2. Click Upload Files.
- **3.** Under **Mapping**, select the mapping that you want to use for the file. For more information on mappings, see <u>View mappings and supported columns for uploaded content</u>.
- 4. Under Source File, click Choose a File, and browse to the file that you want to upload.
  Make sure that the format of the uploaded file matches the mapping that you selected. You can upload a file directly or upload a it as a compressed ZIP file.
- 5. In the **Enter an Action** drop-down list, select one of the following:
  - **Merge with existing items**: The file that you upload makes additions and changes to the current agreement, and the content that is not included in the file remains untouched.
  - **Replace existing items**: The file that you upload overwrites the current agent agreement content, that is, all previous items are deleted and the items on the imported file take their place.
- 6. Under **Output Type**, select the content that you want to upload:
  - Agent Stock: Upload stock levels for items on agent agreements.
  - Products and Price List: Upload items and price information.
- 7. Under Language, select the language.
- 8. Under UNSPSC version, select the version of UNSPSC classification that you use.
- 9. Under Currency, select the correct currency.
- 10. Click Upload.

After uploading content, commit it.

# 6.4 Upload item stock levels manually

You can add stock levels for items on agent agreements. The stock level is displayed on an item's details page and tells buyers how much of an item is available at one or several locations. Stock and stock location are only updated by manual upload and do not change when buyers purchase the items on Marketplace.





Stock levels are automatically cleared 30 days after upload. To keep your stock information up-to-date, upload the stock levels regularly or <u>use automated uploads</u>.



- 1. Enable stock on an agent agreement.
  - a) Find an existing agent agreement and click to open it, or create a new one.
  - b)On the Manage agreements page, set the toggle switch for **Stock Levels** to on.
- 2. Prepare the stock CSV file.
  - The CSV file must have the following columns: SKU, Location, and Quantity.
  - If you need to download a file template for stock upload, go to the information panel on the right side of the page, scroll to the Stock Levels section, and click the **here** link.
- 3. Next to Stock Levels, click 1.
  - The Loader page opens and the **Agreement ID** field is automatically filled in with the agreement's information.
- 4. In the Mapping field, select Agent Stock CSV.
- 5. In the **Source File** field, click **Choose a File** and select the CSV file with the stock information. You can also drag and drop the file into the **Upload** box.
- 6. In the Enter an Action field, select Merge with existing items.
  - This action will match the CSV data to to items already in the agreement based on the items' SKU. The stock data will be added to the items, and any existing stock data for the items will be overwritten. Other item information will remain unchanged.
- 7. In the Output Type field, select Agent Stock.
- 8. Click Upload.
- 9. After the file is uploaded, check the content for errors on the Staging page.
- **10.** When the data is correct, click **Commit**.

The stock is loaded to the agreement's items. While shopping on Marketplace, users can view the stock from the item details page.

Stock levels are automatically cleared 30 days after upload.

### 6.5 View and commit your upload

After you have uploaded your content, you must commit the data for the content to be visible to your buyers.



- 1. Click Product Manager > Loader.
- Click Upload Status.

The list shows all the recent uploads and their status.

The system checks your file in two stages. First, your file goes through the mapping check, where the system checks (among other things) that the type of the file matches the selected mapping. Then, the system validates the content of the file. If there are errors in either of the two checks, the system notifies you. For information on how to fix errors, see <a href="Fix errors in your uploaded">Fix errors in your uploaded</a> content.



- 3. To view an upload, click View.
- 4. To finalize the uploaded content, click Commit.

After you have committed the upload, the system creates a new <u>agent agreement</u> that has the same name as the uploaded file, without the file name extension. You can <u>find the agreement</u> in the **Agreement Directory** to view the updates to the agreement and make additional changes to the content.. If configured, the updated agreement may require <u>approval</u> before it is published to the catalog.

# 6.6 Fix errors in your uploaded content

If an uploaded file contains errors, you can find and fix them in the Upload Status view.



If there are lots of errors, it is recommended to fix the errors in the original source file and upload it again.



- 1. Click Product Manager > Loader.
- 2. Click Upload Status.

The system checks your file in two stages. First, your file goes through the mapping check, where the system checks (among other things) that the type of the file matches the selected mapping. Then, the system validates the content of the file. If there are errors in either of the two checks, the system notifies you.

- 3. To view an upload, click View.
- 4. To see only the rows that contain errors, select the Errors check box.
- 5. To correct a row that contains an error:
  - a) Scroll the view horizontally until you see a field that contains the  $\Lambda$  icon.
  - b) Click the field that has the A icon in it.
  - c) Make the correction to the current value.

    If necessary, you can also delete the row by clicking in on the right side of the row.
  - d) Click Update.
- 6. Repeat step 5 for all of the rows that contain errors.
- 7. To finalize the uploaded content, click Commit.

# 6.7 Download and use templates for uploading content

To help you easily create content files to upload in the Loader tool, Product Manager provides a library of template files for different content types.



- 1. Click Product Manager > Loader.
- 2. Click Content Loading Templates.

The list of all available templates opens.

- 3. If needed, narrow the list by Type of Content and Format using the filters to the left.
- **4.** Click the name of the template you want to download.

  A dialog box opens with details about the selected template.



- **5.** Click the version that you want to download, typically **Latest**.
- 6. If required, select the location on your computer where you want to save the template file.
- 7. Open the template file from your computer.
- **8.** Fill in your own content information in the template and save your changes.
- **9.** <u>Upload your content</u> using the appropriate mapping in the Loader tool.

### **6.8 Super Content Loader**

Super Content Loader is an Excel workbook that you can use to keep your content in Marketplace up to date. You can maintain your entire catalog using that single workbook. With the Super Content Loader workbook, you can:

- Create items and add images and external links to them
- · Create matrix items
- · Create custom attributes for items
- · Create price breaks for items

#### **6.8.1 Use Super Content Loader to upload content**



 Download the Super Content Loader file to your computer from the <u>Content Loading Templates</u> view.



If you want to make changes and additions to an existing agent agreement, you can also export your agent agreements as a Super Content Loader file and use that instead of an empty template.

- 2. In Microsoft Excel, open the Super Content Loader file.
- 3. Go to the Item Data sheet.

For instructions on how to add your content to the Excel workbook, see the **Instructions** and **Detailed user guide** sheets on the Excel workbook. The **Detailed user guide** sheet also tells you which data is mandatory.

Note the following columns:

Classification

UNSPSC and eCl@ss are supported.

type

**Item template** Add the name of the <u>Templates</u> that you want to be applied to the item. The

template must already exist in the system. After adding the template to items using the Super Content Loader file, you must <u>define the template</u>

data.

**Availability** 

Enter  $\mathbf{Y}$  (Yes), if you want the item to be available to purchase, or  $\mathbf{N}$  (No) if you want it to be unavailable. If you leave this field empty, the item is

available (Y).



Searchable Enter Y (Yes), if you want the item to be shown in catalog search results, or N

(No) if you want it to be hidden. If you leave this field empty, the item is

searchable (Y).

Comparison UOM The comparison unit of measure should be the lowest possible unit for an item. This facilitates cost comparisons among items that are sold in different quantities. Valid comparison UOMs are:

- Each
- Hour
- Kilogram
- Liter
- Meter
- Sheet
- Square Meter

Also see the instructions in this user guide:

- Add custom attributes with Super Content Loader
- Add price breaks with Super Content Loader

After you have added all of your catalog items to the Item Data sheet, upload the Excel file.

#### 6.8.2 Add custom attributes with Super Content Loader

You can add any additional information to your items by adding them as custom attributes to the Super Content Loader Excel workbook. For example, you can add your custom unit of measure.



- 1. In the Super Content Loader Excel workbook, select the Item Data sheet.
- Find the item that you want to add the custom attribute to, and create a new row under it.
- 3. On the new row, add the following information:
  - Item ID Add the identifier of the item that you want to add the custom attribute to (the same Item ID value as on the previous row).
  - Enter the name of the custom attribute that you want to be visible for the buyer. For Name example, "Unit of measure".
  - Value Enter the value of the custom attribute.
- 4. Save the Excel workbook.

After you have added all of your catalog items to the Item Data sheet, upload the Excel file.

### 6.8.3 Add price breaks with Super Content Loader

You can add price breaks for your items with the Super Content Loader Excel workbook. For example, you can define that when the buyer purchases 1-10 units, the price is 10 GBP per unit, and when they purchase 10-20 units, the price is only 8 GBP per unit. Additionally, you can define that when the buyer purchases more than a specific amount of units, you want to provide the price on request.





- 1. In the Super Content Loader Excel workbook, select the Item Data sheet.
- 2. If the item that you want to add price breaks to does not exist yet, create it by adding a row with the relevant information on the item.

For instructions on how to add your content to the Excel workbook, see the **Instructions** and **Detailed user guide** sheets on the Excel workbook. The **Detailed user guide** sheet also tells you which data is mandatory.

3. On the row of the item that you want to add your price breaks to, add the following information:

Minimum Order Quantity Add the minimum number of units that can be purchased.

**Unit Price** Add the price per unit when you order the minimum number of units.

Price On Request Enter N (No).

**4.** To create the first price break, create a new row under the item that you want to add the price break to, and define the following:

**Item ID** Add the identifier of the item that you want to add the price break to (the

same Item ID value as on the previous row).

**Minimum Order** 

Quantity

Add the minimum number of units that the buyer must purchase to get the price that you want to define. For example, if you want the price to be 8 GBP

when the buyer purchases 10-20 units, add "10" in this field.

**Unit Price** Add the price per unit when the buyer orders the number of units that you

defined in the Minimum Order Quantity field. In our example, you would add

"8".

Price On Enter N (No).

Request

- 5. Repeat step 4 for all price breaks.
- **6.** To define that you want provide the price on request when the buyer purchases more than a specific amount of units, create a new row, and define the following:

**Item ID** Add the identifier of the item for which you want to define the price on

request (the same Item ID value as on the previous row).

**Minimum Order** 

Quantity

Add the minimum number of units that the buyer must purchase to get the price on request. For example, if you want to provide the price on request

when the buyer purchases more than 20 units, add "21" in this field.

**Unit Price** Leave this field empty.

**Price On Request** Enter **Y** (Yes).

7. Save the Excel workbook.

After you have added all of your catalog items to the Item Data sheet, upload the Excel file.



#### 6.8.4 Add matrix items with Super Content Loader

You can add <u>matrix items</u> with the Super Content Loader Excel workbook. For example, you can define that the buyer can select from t-shirt sizes (S, M, L) and colors (black or white).

When creating a matrix item, you first create the master item ("T-shirt") and define the custom attributes that you want to use for that item ("Size" and "Color"). After that, you create the standard items that you want to link to the master item ("Black t-shirt, size S").



1. In the Super Content Loader Excel workbook, select the Item Data sheet.

**2.** To create the master item for the matrix and define the first custom attribute ("Size"), create a row where you define the following:

**Item ID** Add the item code or SKU. The identifier must be unique for this item.

**Item Name** Enter the name that you want to appear on the catalog and purchase order.

For example, "T-shirt".

**Long Description** Enter a description for the item.

Name Enter the name of the custom attribute that you want to be visible for the

buyer. For example, "Size".

**Value** If you want to define a specific order for the attribute values, list all values

here as a comma-separated list. For example, "S, M, L, XL, XXL". If you leave

this field blank, all attribute values are listed in alphabetical order.

**Item Type** Enter **M** (Master item).

3. To create another custom attribute ("Color"), create a new row, and define the following:

**Item ID** Add the same identifier as for the previous row, because you want the custom attribute to be added to the same master item.

Name Enter the name of the custom attribute that you want to be visible for the buyer.For

example, "Color".

**Value** If you want to define a specific order for the attribute values, list all values here as a comma-separated list. For example, "Red, Blue, Green, Orange". If you leave this field blank, all attribute values are listed in alphabetical order.

4. Create a standard item that uses a specific set of custom attributes of the master item ("Black t-shirt, size S"). First, create a new row where you define the data for the first custom attribute ("Size") as follows:

**Item ID** Add the item code or SKU. The identifier must be unique (do not use the

same identifier as the master item).

**Item Name** Enter the name that you want to appear on the catalog and purchase order.

For example, "Black t-shirt, size S".

**Long Description** Enter a description for the item.

Name Enter the name of the first custom attribute that you defined for the master

item. For example, "Size".



**Value** Enter the value of the custom attribute. For example, "S" for "small".

i

If you have defined a custom sort order for the attribute values on the master item (step 2), make sure that the value you entered here is included in the list of values.

**Item Type** Enter **S** (Standard item).

**Matrix item** Enter the Item ID from the master item that you created in step 2.

Add all other relevant information for the item, such as the UNSPSC or eCl@ss code and price.

5. Create a row where you define the data for the second custom attribute ("Color") as follows:

Item ID Add the same identifier as for the previous row, because you want to add this

custom attribute to the same set.

**Name** Enter the name of the second custom attribute that you defined for the master item.

For example, "Color".

**Value** Enter the value of the custom attribute. For example, "Black".

**Item Type** Enter **S** (Standard item).

**Matrix item** Enter the Item ID from the master item that you created in step 2.

Now you have created the item "Black t-shirt, size S".

- **6.** To create other attribute combinations, such as "Black t-shirt, size M" and "White t-shirt, size L", repeat steps 4 and 5 for all combinations.
- 7. Save the Excel workbook.

After you have added all of your catalog items to the Item Data sheet, upload the Excel file.

### **6.8.5 Add item images with Super Content Loader**

Before starting this task, make sure you have <u>uploaded the images</u> that you want to use to the media directory, or you have web addresses with the images you want to use. Images must be in PNG or JPEG format.

When you have product images in the media directory, you can use the Super Content Loader to associate images to the items in your catalog.



- 1. In the Super Content Loader Excel workbook, select the Item Data sheet.
- 2. If the item that you want to add images to does not exist yet, create it by adding a row with the relevant information on the item.

For instructions on how to add your content to the Excel workbook, see the **Instructions** and **Detailed user guide** sheets on the Excel workbook. The **Detailed user guide** sheet also tells you which data is mandatory.

3. On the row of the item that you want to add images to, add the following information:



**Image** Enter one of the following:

- Name / URL If the image is hosted on the web, enter the full web address to the image.
  - If the image is uploaded to the media directory, enter the file name of the image. Be sure to include the file type, such as "image3.png".
- 4. (Optional) To add a second image, create a new row under the item that you want to add the image to and repeat step 3.

The first image listed for each item becomes the main image in the catalog.

- 5. Repeat for each item you want to add images to.
- Save the Excel workbook.

After you have added all of your catalog items to the Item Data sheet, <u>upload the Excel file</u>.

### 6.9 Automate your uploads through SFTP or PEPPOL

If you prefer using SFTP or PEPPOL to upload your content, you must set up automation records in Basware Marketplace Standard. The automation records define, for example, which mapping is used in the upload.

You must have a **System** user account to be able to use SFTP to upload content. The credentials of this user account are used to log in to the SFTP location. Basware provides the SFTP location details to you.

#### 6.9.1 Create automation records



- 1. Click Product Manager > Loader.
- Click Automation.

The existing automation records are shown in this view, if there are any.

- 3. Click Create.
- 4. In the **Name** field, enter a name for the automation record.
  - Do not use special characters.
- 5. If you want the automation record to be available for use immediately after you have saved it, select the **Enabled** check box.
- 6. In the Automation Type field, select how you want to upload files: SFTP or PEPPOL.
  - The **PEPPOL** option is used for uploading EHF files from Basware Network.
- 7. If you selected to use SFTP, in the **Location** field, type a name for the directory that the system creates on SFTP for uploading files.
  - The location cannot be a subfolder. Do not use special characters.
- 8. In the Data Mappings drop-down list, select the mapping that you want to use when you upload.
- 9. In the Output Type drop-down list, select the content that you want to upload. The options will vary depending on the data mapping you selected.
- 10. Select your preferred options for the following drop-down lists. The options will vary depending on the data mapping you selected.



- 11. Define the error setting. If you select the check box Validation failed error, a notification email will be sent to the email address configured in the Error Email field.
- 12. Define the upload settings.
  - If you want the uploaded content to be created and committed automatically, select the Auto Commit and Auto Create check boxes. If you do not select these check boxes, you must commit the upload manually.
  - If you want the uploaded items to be published automatically, select the **Auto Publish** check box. If you do not select this check box, you must <u>publish the agent agreement manually</u>.

If you are uploading stock items, we recommend that you select all of the check boxes.

- 13. Define the email addresses to which you want to receive notifications:
  - Create Email: Notifications about new documents that have been uploaded
  - Error Email: Notifications about errors in the uploads
  - **Update Email:** Notifications about updates to existing documents
- 14. Click Create.

#### 6.9.2 Edit automation records



- 1. Click Product Manager > Loader.
- 2. Click Automation.
- 3. Next to the automation record that you want to edit, click 🔼.

### 6.9.3 Upload content using SFTP



1. Find the directory that you created when you created the automation record (the location that you defined in the Location field).

You can use, for example, FileZilla to access SFTP.

2. Move the file that you want to upload to the directory.

The maximum file size is 10 MB.

You can view the status of your upload on the Loader tab.



# 7 Groups

Groups are used to share Marketplace content among buying organizations. Buyer administrators can create groups, then add agreements and invite members from other buying organizations to join the groups. If they accept, the group members can then view the agreements that have been shared to the group and make those items available to their own end users.

#### **Group directory view**

The group information shown depends on if the owner is your own organization or another organization. If it is your own organization, you can see the following information:

**Type** The group's type, either Standard or Community

**Owner** In this case, always shows My Organization

**Status** Shows whether the group is Unpublished or Published

**Description** A short description of the group

**Invited** The number of organizations that have been invited to your group

**Accepted** The number of organization that accepted the invitation

**Rejected** The number of organizations that rejected the invitation

**Agreements** The number of agreements that are shared in the group

If the group is owned by another organization, you can see the following information:

**Type** The group's type, either Standard or Community

**Owner** In this case, always shows My Organization

**Description** A short description of the group

**Membership** Your organization's response when invited to join the group

**Agreements** The number of agreements that are shared in the group

#### **View group contents**

You can click to view all agreements that have been shared with a group. Next to an agreement, click to view all items included in the agreement.

### 7.1 Find and view groups

You can see all groups that you have created or been invited to join in the **Group directory** view.



- 1. Click Product Manager > Groups.
- 2. In the **Search** field, enter the group name or other search criteria.
- 3. Click Search.
- **4.** To sort the results, click the **Sort By** list and select the sort criteria you want to use.

You can sort groups based on name or the date the group was last modified.



5. To filter the results, select the filters you want to use under **Show me**.

You can filter groups based on your ownership or membership in the group.

Click All to remove the filters.

# 7.2 Manage organization's group requests

You can set which other Basware buyer organizations can invite you to their groups, and which invitations you want to accept automatically.



- 1. Click **Settings** > **Organization management**.
- 2. Expand the **Sharing setup** section.
- 3. For the setting Visible for community group requests, set the toggle switch to on or off. When on, you can receive requests from Basware buyers in your community, which is a subset of your network.
- **4.** For the setting **Visible for network group requests**, set the toggle switch to on or off. When on, you can receive requests from Basware buyers in your network.
- **5.** For the setting **Visible for all requests**, set the toggle switch to on or off. When on, you can receive requests from any buyer organization who uses Basware Network.
- **6.** For the setting **Auto-accept community group requests**, set the toggle switch to on or off. When on, any group requests from buyers in your community are automatically accepted.
- 7. For the setting Auto-accept group requests from existing sharers, set the toggle switch to on or off. When on, any group requests from buyers that your organization already shares content with are automatically accepted.
- **8.** For the setting **Auto-accept all group requests**, set the toggle switch to on or off. When on, any group requests from buyer organizations in Basware Network are automatically accepted.
- 9. Click Save.

### 7.3 Create groups

To begin sharing agreements with other Basware buyer organizations, you must first create a group.



- 1. Click Product Manager > Groups.
- 2. Click Create.
- **3.** Add the **Group name**. This is visible to all organizations who are invited to the group.
- 4. Add My description. This is only visible to you and your organization.
- 5. Add Member description. This is visible to all organizations that you invite to the group.
- 6. Click Save and Continue.

The group is created and the **Manage group** page is opened. You can now do the following:

- Invite members to groups
- Add agreements to groups



### 7.4 Invite members to groups

To share agreements with other buyer organizations, you can invite them to a group that your organization owns. Once an organization has joined a group, it is not possible to leave the group. However, the organization can choose whether or not to show the group's content on Marketplace.



- 1. Click Product Manager > Groups.
- 2. Find the group you want to invite members to and click .
- 3. In the Members section, click .
- **4.** Find the organizations that you want to invite to the group, and click **Add** next to each one. You can search for and sort organizations on the list to find the right ones quickly.
- 5. When all the organizations that you want to invite are added, click **Done**.
- 6. Click Publish.

The selected organizations are invited to the group. If they accept the invitation, they can see all agreements that are shared in the group. After you invite an organization, you can remove them only if they have not yet accepted the invitation.

### 7.5 Add agreements to groups

You must first have a group that your organization is the owner of. To create a group, see <u>Create groups</u>. You must also have at least one agreement that has been published.

You can add organization, agent, framework, and punchout agreements to a group. Other members of the group can then view the agreements that you shared and, if they want to use them, add the agreements to a view.



- 1. Click **Product Manager** > **Groups**.
- 2. Find the group you want to add agreements to and click .
- 3. In the **Resources** section, click .

  The agreements list opens, displaying all of your published agreements that can be shared.
- 4. Find the agreements that you want to add to the group and click Add next to each one.
- 5. After you have added all the agreements that you want, click **Done**.
- 6. Click Publish.



# 8 Views

As a product manager, you can use views to define what content is visible to end users on Marketplace. You can configure agreements and organization lists to be visible in each view, and then add users to the view to give them access to the content.

Two types of views are available:

**Agreement** Used to manage the items groups of users can see and order on Marketplace.

**Sourcing** Used to manage Quick Quote settings and user access. Only one Sourcing view is allowed per organization.

In agreement views, you can also set up organization lists. These are shopping lists that contain specific items and are assigned to all users in an agreement view. The lists can be tailored to your users' specific needs and corporate functions to make their requesting experience quick and easy.

### 8.1 Find and view views

To access views, you must have the **Product Management** role.



- 1. Click Product Manager > Views.
- 2. In the **Search** field, enter the name of the view or other search criteria.
- 3. Click Search.
- 4. To sort the results, click the **Sort By** list and select the sort criteria you want to use.

You can sort views based on:

- Relevance
- Name
- Last modified
- **5.** To filter the results, select the filters you want to use under **Show me**.

You can filter views by:

- View type
  - Agreement
  - Sourcing
- · Who the view is assigned to
  - User: specific users are defined who can see this view.
  - Organization: the entire organization is selected to see this view.
- Status
  - All
  - Draft
  - Empty
  - Published
  - Processing
- Show tax: tax information is shown for items in this view.



6. Click the name of a view to see more details.

#### 8.2 Create views

Create a view to easily control user access to specific content on Marketplace.



- 1. Click Product Manager > Views.
- 2. Click Create.
- 3. In the **Type** field, select the type of view you want to create.

**Agreement** Used to manage the items groups of users can see and order on Marketplace.

**Sourcing** Used to manage Quick Quote settings and user access. Only one Sourcing view is allowed per organization.

For information the types of views, see Views.

- 4. In the View name field, type the name of the view.
- 5. In the **Description** field, type a description for the view.
- 6. Click Save.

A new view is created with status **Empty**. Depending on the type of view that you created, you can now do the following tasks to define the content available in your view.

For agreement views:

- Assign views to teams
- Add agreements to a view
- Add users to a view
- · Add organization lists to a view
- Create a checkout form for a view

#### For a sourcing view:

· Add users to a view

# 8.3 Add agreements to a view

Before adding agreements to a view, you must have an <u>agreement view created</u>. You must also have at least one <u>agreement</u> that is not expired.

Agreements define which items are available to users who have access to that view. The specific items are determined in the agreements' price lists.



- 1. Click Product Manager > Views.
- 2. Click the name of a view to open it.
- 3. In the Agreements section, click .
- 4. To search the list of agreements, type search terms in the text box and click **Search**.
- 5. (Optional) Use the filters to sort and narrow down the agreements that you want to see.
- 6. Click + for each agreement that you want to add to the view.

If an agreement or its price list has expired, you cannot add it.



- 7. If the agreement that you added has content tags, a dialog will appear. Choose whether to use content tags:
  - To ignore tags and make all items available to users who can access the view, turn the toggle switch for **Use content tags?** to off.
  - To make only items with certain tags available to users who can access the view, turn the toggle switch for **Use content tags?** to on. Then turn the toggle switch on for each tag that you want to include.
- 8. After you have added all agreements, click **Save** to save the agreements to the view.
- 9. Click Publish.

Users who can access the view can see the items on the agreements' price lists. When searching the catalog, users who can access the view can use any of the included content tags as search filters.

#### 8.4 Add users to a view

After creating a view and adding an agreement to it, you must add users. The users that you select can see the content of the active agreements on Marketplace. The users can also see any organization lists that you have added to the view.



- 1. Click **Product Manager** > **Views**.
- 2. Click the name of a view to open it.
- 3. In the **Users** section, click .
- 4. You can select users in one of two ways:
  - To make the view available to all users in your organization, set the toggle switch for **Whole organization** to on.
  - To select certain users who can access the view, search for them on the list and click —. You can search by keyword and sort the results. Click **Add these** to add all users that are currently displayed to the view. Click **Remove These** to remove all users that are currently displayed from the view.
- 5. When you have selected all the users that you want to access the content in the view, click Done.

### 8.5 Add organization lists to a view

Organization lists can help users find items that they need to order frequently, for more efficient ordering. Organization lists are specific to each view and are built from the items in the view's agreements.



- 1. Click Product Manager > Views.
- 2. Click the name of a view to open it.
- 3. In the **Lists** section, click .
- **4.** Search for the list that you want to add to the view. You can search for lists using keywords and sort the results by **Name** or **Last modified**, or create a new organization list.
- 5. When you have found the list to add, set the toggle switch for **Available** to on.
- 6. When you have added all the needed items to the list, click Back to [view name].



The organization lists are made available. All users assigned to the view can see the lists in their **Lists** menu on Marketplace.

### 8.6 Add categories to a view

If you want to create categories that are only visible to some users in your organization, add the categories to a view. Categories added to views are displayed on the Marketplace landing page for users that are assigned to the view. For information about what categories do and how to create categories for all users in your organization, see <u>Categories</u>.



- 1. Click Product Manager > Views.
- 2. Click the name of a view to open it.
- 3. In the Categories section, click .
- 4. Create your categories. For more information, see Create categories.
- **5.** (Optional) Organize your categories by creating category headings. For more information, see Create category headings.
- 6. After you have added all of the categories, click Save.
- 7. Click Publish.

### 8.7 Create a checkout form for a view

When creating a view, you can choose to add a checkout form. The checkout form is displayed when a user who is assigned to that view clicks **Checkout** from the basket. The form contains fields that the user must complete to finish their order.

This functionality can be useful, for example, for external contractors who need to supply extra information about the project that they are working on.

To create a checkout form for a view:



- 1. Create a view with the type Agreement.
- 2. In the section **Checkout form**, click + to add a field.
- 3. To configure the field, do the following:
  - a) In the **Variable name** field, enter the name of the data that you need to collect. This variable identifies the data and is used when exporting the basket on Marketplace to a purchase requisition on Basware Purchase-to-Pay.
  - b) In the **Label** field, enter the label for the field as you want it to appear for buyers on the checkout form (max 150 characters). This can be a field name, a question, or any other text that makes it clear to the buyer the data that you need.
  - c) In the **Answer format** field, click the arrow and select the format in which the answer must be provided. The options are:
    - N number. Displays an input field in which only numerical values are valid.
    - D date. Displays a date picker from which the user can select a date.
    - T text. Displays a text field in which the user can type the answer.
- 4. Repeat steps 2 and 3 for each field that you want to add to the checkout form.



- 5. When all fields are added, click Save.
- **6.** Make sure that the <u>agreements</u>, <u>lists</u>, and <u>users</u> are configured for the view.
- 7. Click **Publish** to finalize the view and make it available for your users.

# 8.8 Edit agreement views



- 1. Click Product Manager > Views.
- 2. Click the name of a view to open it.
- **3.** To edit the **Quotes** field, click the field and type a new number. Quotes defines the number of quotes that must be received from suppliers before an RFQ can be awarded. For more information on RFQs, see <u>Create quick quote RFQs</u>.
- **4.** Set the toggle switch for **Requisitioner** to on if users should be able to assign RFQs to other users, who can then check out an awarded quote.
  - When the toggle switch for **Requisitioner** is on, an additional toggle switch is shown for **Requisitioner mandatory**. Set this toggle switch to on if the requisitioner should be required for REOS
- 5. To edit the view description, click the **Description** field and type the new description.
- **6.** Set the toggle switch for **Show price on request items** to on if users should be able to see and order items for which the price is not provided on Marketplace. The prices for these items must be requested from the supplier.
- 7. Set the toggle switch for **Show tax** to on if users should be able to see the tax information for items on Marketplace. See <u>Tax</u> for more information about showing tax information on Marketplace.
- **8.** Set the toggle switch for **Hide Prices** to on if users should not be able to see any item prices when viewing items on Marketplace.
- To edit the agreements, lists, or users for the view, click in the related section.

# 8.9 Edit sourcing views



- 1. Click Product Manager > Views.
- 2. Click the name of a view to open it.
- **3.** To edit the **Quotes** field, click the field and type a new number. Quotes defines the number of quotes that must be received from suppliers before an RFQ can be awarded. For more information on RFQs, see <u>Quick quote RFQs</u>.
- **4.** Set the toggle switch for **Requisitioner** to on if users should be able to assign RFQs to other users, who can then check out an awarded quote.
  - When the toggle switch for **Requisitioner** is on, an additional toggle switch is shown for **Requisitioner mandatory**. Set this toggle switch to on if the requisitioner should be required for RFQs.
- **5.** To edit the view description, click the **Description** field and type the new description.



- **6.** Set the toggle switch for **One-off Suppliers** to on if users should be allowed to send RFQs to suppliers the organization does not normally use.
- 7. To edit the users for the view, click .

### 8.10 Remove views

When you no longer want to use a view, you can take it out of use by removing all users associated to the view.



- 1. Click **Product Manager** > **Views**.
- 2. Click the name of a view to open it.
- 3. In the **Users** section, click .
- **4.** If the view is available for the whole organization, set the toggle switch for **Whole organization** to off.
- **5.** If the view is available for certain users, select the filter for **Selected users ({0})**. All users with access to the view are displayed and selected.
- 6. Click Remove These.
- 7. Click Done.

All users are removed from the view. The view is still visible in the list of views, but its content is no longer usable on Marketplace by any end user.



# 9 Approvals

Approval schemes allow the buyer administrator to define who can approve price lists and agent agreements and under what circumstances. Up to five levels of rules can be defined and combined to create sophisticated approval schemes. Approval can be triggered if items are added and removed, if prices rise or fall, or if units of measure are changed. One or many users can be informed in an email when a rule is triggered.

A single approval scheme can be used for many agreements, but each agreement can only have one approval scheme assigned to it. By using one approval scheme for many agreements, it is easy to manage approval schemes without needing to change them for each agreement individually.

#### Levels

Approvals are defined by levels. By using levels, the buyer administrator can have different approval rules for different types of price list changes.

By default, every approval scheme has a default level, also shown as level 1. This is the final possible level of approval, the final check that determines the action taken for any changes to the price list.

The buyer administrator can add up to four additional levels: levels 2, 3, 4, and 5. For each level, approval rules can be selected, as well as the approvers to be notified when the rule conditions are met.

Levels are checked in descending order. The rules at level 5 are checked first, then level 4, level 3, level 2, and the default level 1 is the last to be checked. The first rule that is triggered creates an approval alert for the defined approvers at that level.

#### **Rules**

Rules are changes to the price list for which an administrator's approval can be required. When configuring approval schemes, the buyer administrator can select one or many rules to be checked at each level of approval. The possible rules are:

**Item added** Any item is added to the price list.

**Item removed** Any item is removed from the price list.

**Base price increased** The base price of any item is increased by a defined percentage.

**Base price decreased** The base price of any item is decreased by a defined percentage.

**Base units** The number of base units in the price list changes.

**Base unit of measure** The base unit of measure for any item changes.

**Price on request** An item in the pirce list is set to use Price on Request.

#### **Quality scoring rules**



Quality scoring rules are not used for agent agreements.

Quality scoring rules can be added to an approval scheme to monitor the quality of a supplier-managed price list. Buyer administrators can use this tool to enforce a high level of quality for their price lists. If



the quality score is too low, the buyer can ask the supplier to improve it by adding pictures and keywords, providing detailed classification information, and improving other elements.

The buyer can add any of five possible areas to score the price list on. Each area gives a score from 1 (worst) to 5 (best). The average score of the areas can then be seen for each item and the price list as a whole when viewing each price list. The item scoring is determined by the following criteria.

#### **Images**

- 1 no picture
- 3 one picture
- 5 two or more pictures

#### Classification

- 1 level 1 UNSPSC
- 3 level 2 UNSPSC
- 5 level 3 or higher UNSPSC

Keywords - only counted if they are different than the item name

- 1 no keywords
- · 2 one keyword
- 3 two keywords
- 4 three keywords
- 5 four or more keywords

#### Item Details

- 2 Item Name and Item ID do NOT match
- 3 Item Name and Item ID do not match AND Item name and item description do not match
- 5 Item Name and Item ID do not match AND Item name and item description do not match AND all words within the Item ID are 5+ characters long

#### Attributes

- 1 none
- 3 one
- 5 two or more

# 9.1 Default Approval Scheme

A default approval scheme is automatically created by Basware Marketplace, with the name **Default approval scheme**. The default approval scheme is automatically applied to all agreements that do not have a custom approval scheme applied.

When created, the default approval scheme is set to auto-approve price lists, so no user approval is required for any new or updated content. The buyer administrator can edit the default approval scheme's settings at any time.



### 9.2 Quality scoring rules

With quality scoring, buyer administrators can define what elements of a catalog are important to them and easily see the quality of price list that a supplier has provided. The rating can inform approval decisions for individual price list items or the price list as a whole, and help buyer administrators maintain high-quality catalog content.

Catalog quality scoring is defined by buyer administrators when <u>creating an approval scheme</u>. Any combination of the 5 available rules can be used:

- Supplier part ID
- Classification
- Attributes
- Keywords
- Images

Price list items are scored using points. The number of stars given for each item is the average of the points earned in each category. The number of stars given to the entire price list is the average of the stars for each item.

- Classification
  - Level 1 UNSPSC: 1 point
  - · Level 2 UNSPSC: 3 points
  - Level 3 or higher UNSPSC: 5 points
- Attributes
  - No custom attributes: 1 point
  - One custom attribute: 3 points
  - Two or more custom attributes: 5 points
- Images:
  - No picture: 1 point
  - One picture: 3 points
  - · Two or more pictures: 5 points
- Keywords these are only counted if they're not used in the item name
  - No keywords: 1 point
  - One keyword: 2 points
  - Two or more keywords: 3 points
  - Two or more keywords, AND the keywords are not present in the Item Description: 5 points
- Supplier part ID
  - Item Name and Item ID do **not** match: 2 points
  - As above AND Item Name and Item Description do **not** match: 3 points
  - As above AND all words within the Item ID are 5+ characters long: 5 points

When an organization agreement is assigned an approval scheme with quality scoring, the buyer administrator can see the quality score for the supplier's submitted price list and for each item as a rating from 1 to 5 stars. By hovering over the star rating, the user can see a breakdown of the rating based on each rule selected for the quality score.



#### 9.3 Create approval schemes

You must have the **Product Management** role to manage approval schemes.

To create an approval scheme:



- 1. Click Product Manager > Approvals.
- 2. Click Create.
- **3.** Type a name and description for the approval scheme. Make sure the scheme name is easily recognizable to you and your administrative team.
- 4. To have the agreements that go through this approval scheme auto-exported every time they are updated or approved, select the check box for **Auto export**. You will choose the trigger for auto-export later.
- 5. Click Save.

The approval scheme's details display and the **Default level** is created. The **Default level** is mandatory for any approval scheme.

- 6. If you selected **Auto export** on the previous page, select an option for **Auto Export Trigger**:
  - On Update
  - On Approval
- 7. Configure the following options for the **Default level**:
  - **Auto** switched to on: all changes made the the agreements are automatically approved and updated on Marketplace. Click to select one or more buyer administrators who will be notified by email if a price list changes. The selected administrators do not need to take any action, since the changes are automatically approved.
  - **Auto** switched to off: Click  $\rightarrow$  to choose at least one buyer administrator who can approve changes to the agreements' price lists. One of the selected administrators must approve any price changes, added items, or removed items.
- **8.** If needed, click **Add level** to add an additional level of approvals. You can add up to four additional approval levels. To configure an approval level:
  - a) Click + in the **Rules** section to display all possible rules. Rules are changes to the price list for which an administrator's approval can be required.
  - b) Click + to select a rule. The available rule options are:

**Item added** Any item is added to the price list.

**Item removed** Any item is removed from the price list.

Base price increased The base price of any item is increased by a defined percentage.Base price decreased The base price of any item is decreased by a defined percentage.

**Base units** The number of base units in the price list changes.

**Base unit of measure** The base unit of measure for any item changes.

**Price on request** An item in the pirce list is set to use Price on Request.

c) To add more rules to the level, click + again and add an additional rule.



- d)Click  $\frac{1}{2}$  in the **Approvers** section to display all possible approvers.
- e) Click + to select an approver. To add more approvers, click + in the **Approvers** section again and add an additional approver.
- f) To remove any rules or approvers, click -.
- 9. In the Quality scoring rules section, click + to add a quality scoring rule.
  - For more information on quality scoring rules, click <u>here</u>.
- **10.** When all configurations to the approval scheme are complete, click **Save**.

The approval scheme is created. It is now available to use for any organization or agent agreement. See Add approval schemes to agreements.

### 9.4 Edit approval schemes

Changes made to an approval scheme are automatically applied to all agreements linked with that scheme.



- 1. Click Product Manager > Approvals.
- 2. Click next to the approval scheme that you want to edit.
- **3.** Make the necessary changes to the approval scheme. If needed, refer to the information for creating an approval scheme.

#### 9.5 Delete approval schemes

To delete an approval scheme, the scheme must not be in use by any agreements.



- 1. Click Product Manager > Approvals.
- 2. Click next to the approval scheme you want to delete.

If the im button is not available for an approval scheme, the approval scheme is being used by at least one agreement and cannot be deleted.



# **10 Categories**

To help catalog users quickly browse the most commonly needed types of items, you can create categories. Categories contain pre-set lists of search terms that the user can search by.

For example: a fitness studio wants to easily browse and order seasonal ingredients for smoothies. The buyer administrator can set up a category called "Smoothie Kit", with the keywords fruit, vegetable, juice, and yogurt. When a catalog user selects the Smoothie Kit category from the Marketplace landing page, they are taken to the catalog with the keywords already in the search bar.

Categories are helpful if the specific items that users are ordering change often or their availability varies. For sets of items that do not change, use <u>lists</u> instead.

#### **10.1 Create categories**

Create categories to provide easy search shortcuts for catalog users. Follow these steps to create categories that are visible to all catalog users. To instead create categories that are only visible to some users, add categories to a view.



- 1. Click Product Manager > Categories.
- 2. Click the drop-down arrow from > Category.
  A new category is added at the end of the list. If you have many categories already, you may need to scroll down to see it.
- 3. In the Name field, type the name of the category.
- **4.** In the **Search** field, type the keywords to search when a catalog user selects that category. Separate multiple keywords with a space.
- **5.** Repeat steps 2-4 for each categoriy that you want to create.
- **6.** (Optional) Organize your categories by creating category headings. For more information, see Create category headings.
- 7. Click Publish.

#### **10.2 Create category headings**

If you have many categories, you may want to group them together with category headings. When you have category headings in use, the category heading name is shown to the catalog user on the Marketplace landing page. The user can then click that heading to see the list of all categories contained in the heading.

If a category is not contained in a heading, it is shown separately on the Marketplace landing page.

To create category headings:



- 1. Click Product Manager > Categories.
- 2. Click the drop-down arrow from ► > Heading.
  A new category heading is added at the end of the list. If you have many categories already, you may need to scroll down to see it.
- 3. In the **Name** field, type the name of the category.



- 4. You can add categories to the heading in two ways:
  - <u>Create a category</u>. If you create the category immediately after adding a heading, the category is automatically added under the new heading.
  - Click and drag existing categories using the 🔁 button.
- 5. Click Publish.



### 11 Coder

With the Coder, you can assign custom codes to items offered in Marketplace based on their existing UNSPSC code. For example, the custom codes could be account codes from your general ledger or purchasing categories.

You can use Coder in two ways:

- Add the custom codes to your item without changing the existing UNSPSC code
- Replace the existing UNSPSC code with a new code

#### 11.1 Map item UNSPSC codes to custom codes

Follow these steps to add a custom code to your items based on their existing UNSPSC codes. If you instead want to replace existing UNSPSC codes with new codes, see <a href="Map item UNSPSC codes to">Map item UNSPSC codes to</a> replacement UNSPSC codes.



- 1. Click Product Manager > Coder.
- 2. Disable the option Use Codes as replacement UNSPSC.
- 3. In the **from** field, enter the beginning of the range of item UNSPSC codes that you want to map.
- **4.** In the **To** field, enter the end of the range of UNSPSC codes that you want to map.
  - To map a single code, enter the same code in both the **from** and the **To** fields.
- **5.** In the **Code** field, enter the custom code. This code is applied to any item with a UNSPSC code in the defined range.
  - You can enter up to 30 characters in the Code field.
- 6. Repeat for each code range that you want to map.
  - i

All UNSPSC codes must be mapped. Any codes that have not been mapped to custom codes will use the default mapping, which is the last line on the list.

Code ranges can overlap. In these cases, mapping is done based on the first code range listed on the **Coder** page.

7. To apply the mapping, click Save.

# 11.2 Map item UNSPSC codes to replacement UNSPSC codes

Follow these steps to replace item UNSPSC codes with new UNSPSC codes when transferring items from the Marketplace basket to your ERP solution. If you instead want to add an additional custom code to items based on their UNSPSC codes, see <a href="Map item UNSPSC codes">Map item UNSPSC codes</a> to custom codes



- 1. Click Product Manager > Coder.
- 2. Enable the option Use Codes as replacement UNSPSC.
- 3. In the **from** field, enter the beginning of the range of item UNSPSC codes that you want to map.



- **4.** In the **To** field, enter the end of the range of UNSPSC codes that you want to map. To map a single code, enter the same code in both the **from** and the **To** fields.
- 5. In the **Code** field, enter the UNSPSC code that you want to replace the existing code range with.
- 6. Repeat for each code range that you want to map.
  - i

All UNSPSC codes must be mapped. Any codes that have not been mapped to custom codes will use the default mapping, which is the last line on the list.

Code ranges can overlap. In these cases, mapping is done based on the first code range listed on the **Coder** page.

7. To apply the mapping, click Save.



# 12 Quick quote RFQs

Quick quote RFQs are an easy way to request quotes for a product or service from several suppliers in your network. When you create and send the quick quote RFQ, the relevant suppliers receive an email and can respond. After you get the responses, you can award the RFQ to a supplier and add it to the basket to go through the purchasing process.

A quick quote RFQ can also be created when a Marketplace user requests a quote for an item. These price-on-request (POR) items also appear in the same RFQ Directory view as quick quotes.

Before using quick quote RFQs, you must first create and publish a sourcing view.

#### 12.1 Create quick quote RFQs



- 1. Click Shopping > Quick Quote.
- 2. Click Create new.
- 3. Under Header details, fill out the basic details of the RFQ:
  - a) In the **RFQ Title** field, type a short and readable description for the RFQ.
  - b) If you want another user to be able to add the items from the RFQ to their basket after the RFQ has been awarded, type the email address of the user in the **Requisitioner** field.
  - c) To add an attachment to the RFQ, click + next to the **Attachments** field, and browse to the file that you want to attach.
  - d)In the **Expiration Date** and **Expiration Time** fields, select when you want the RFQ to expire. When the RFQ expires, an email notification is sent to the email address defined under **Delivery Details**.
  - e) In the **Currency** field, select the currency.
  - f) If you want to define the highest price that the supplier can bid, type the price in the **Maximum price** field.
  - g) If you do not want other people in your organization to be able to view the RFQ, set the toggle switch for **Restricted** to on.
  - h) If you do not want the buyer to see any submitted quote details until the RFQ expiration date has passed, set the toggle switch for **Sealed** to on.
- 4. Under Requested Product Details, define the item for which you want to receive quotes:
  - a) In the **Item Name** and **Description** fields, describe the item as clearly as possible. You are more likely to receive useful replies if the description is clear.
  - b)To add a classification for the item, click next to the **Classification** field, and browse to the classification.
  - c) Type the quantity of the requested items in the **Quantity** field, and enter the unit of measure in the **Order unit** field.
  - d)To complete, click Add.
  - e) If you want to add more items, click +.
- 5. Under **Delivery Details**, give the delivery details:



- a) In the **Email address** field, type the email address to which you want the notifications to be sent.
- b)In the **Phone Number** field, type the phone number that you want the suppliers to contact if necessary.
- c) In the **Address** field, select an address from the drop-down list, or type the address manually. If you want to save the address for future use, click , type a name for the address information in the **Alias** field, and fill out the address information.
- d)In the Target Delivery Date field, select the date when you want the item to be delivered.
- **6.** If the suppliers to which you want to send your RFQ have registered to Basware Network, select the suppliers:
  - a) Under **Suppliers**, click **Add**.
  - b) Next to each supplier that you want to include, click Add.
  - c) Click Save.

The selected suppliers are added to the RFQ. For information about supplier registration, see Supplier registration.

- 7. If the suppliers that you want to send your RFQ to are not regular suppliers, you may not want to invite them to register. In this case, add the supplier as a one-off supplier:
  - a) Under One-off Suppliers, click Add.
  - b) Fill out the information on the supplier, and type the email message that you want to send to the supplier.
  - c) Click Add.

The supplier receives an email with a link and an access code that they can use to provide a quote. The supplier does not have to register.

- 8. Do one of the following:
  - If you want to save the RFQ so that you can <u>send</u> it later, click **Save**.
  - If you want to send the RFQ now, click **Send**. The suppliers receive an email about the RFQ.

All selected suppliers will receive an email with an invitation to respond to the RFQ. When the first supplier submits their quote, you will receive an email notification. You will not receive further notifications when the other suppliers submit their quotes.

#### 12.2 Send saved quick quote RFQs



- 1. Click **Shopping** > **Quick Quote**.
- 2. Click Draft.
- 3. Click next to the RFQ that you want to send.
- 4. If necessary, edit the information. For more information, see <a href="Create quick quote RFQs">Create quick quote RFQs</a>.
- 5. Click Send.

All selected suppliers will receive an email with an invitation to respond to the RFQ. When the first supplier submits their quote, you will receive an email notification. You will not receive further notifications when the other suppliers submit their quotes.



#### 12.3 View quick quote RFQs



- 1. Click Shopping > Quick Quote.
- 2. Do one of the following to open the RFQ Directory view:
  - · To view quick quote RFQs that have not been sent yet, click Draft.
  - To view RFQs that have been sent but have not received all of the requested quotes yet, click
     Sent.
  - To view RFQs that have received all of the requested quotes, click Award RFQs.
  - To view awarded RFQs, select Check out.

The RFQ Directory view opens so that the relevant check box is selected under **Show me**.

**3.** To view other RFQs, select a filter check box under **Show me**. The RFQs shown in each filter are described in the following table.

Table 3: RFQ filters

Filter	Description
All	All RFQs
Needs attention	RFQs that require actions. For example, RFQs that have received quotes from all of the requested suppliers and are ready for awarding. To see why the RFQ needs attention, click the RFQ and see the notification at the top of the screen.
Draft	RFQs that have not been <u>sent</u> yet.
Open	RFQs that have been <u>sent</u> but have not received all of the requested quotes yet. If the RFQ status is <b>Open</b> , it has not received any quotes. If the status is <b>Quotes received</b> , it has received one or more quotes.
Ready	RFQs that have received all of the requested quotes but have not been <u>awarded</u> yet.
Awarded	RFQs that have been <u>awarded</u> but not yet <u>checked out</u> .
Expired	RFQs that have expired but have not been <u>awarded</u> to any supplier. The expiration date and time are defined when the RFQ is <u>created</u> .
Archived	RFQs that have been archived. An RFQ is archived automatically, when you close, withdraw, or check out an RFQ. Also RFQs that have been awarded are archived after their expiration date. Under <b>Header details</b> , the <b>Resolution</b> field shows if the RFQ has been awarded or not, or if it has been withdrawn.
Template	RFQ templates.
My RFQs	RFQs that you have created. You can use this filter together with another filter, for example, to view only open RFQs that you have created.

- 4. To search for an RFQ within a filter, type one or more search terms in the search box.
- 5. To view the information of an RFQ, click on next to the item.

#### 12.4 Send messages to suppliers



- 1. When viewing a quick quote RFQ, click Contact.
- 2. Type your message and click **Send**.



The message is sent to all suppliers of that quick quote RFQ. An email notification is sent to the suppliers, informing them about the message that they have received.

#### 12.5 Reply to messages from suppliers

If a supplier sends a message regarding a quick quote RFQ, an email notification is sent to the email address defined in the **Delivery Details** section of the quick quote RFQ.



- **1.** Find and open the quick quote RFQ.
  - The sent and received messages are shown under Messages.
- 2. Next to the message that you want to reply to, click -.
- 3. In the field **Send to all suppliers**, select an option:
  - Yes: sends the message to all suppliers who received the RFQ.
  - No: sends the message only to the supplier that you are responding to.
- 4. Write your message.
- 5. Click Send.

#### 12.6 Withdraw quick quote RFQs

If some suppliers have not yet sent their quotes for an RFQ, you can withdraw the RFQ.



- 1. Click **Shopping** > **Quick Quote**.
- 2. Click Sent.
- 3. Next to the RFQ that you want to withdraw, click to open the RFQ.
- 4. Click Withdraw.

When you withdraw an RFQ, it is archived automatically. Suppliers may be notified in several ways of the withdrawn RFO:

- If the RFQ has not yet expired, suppliers who have submitted quotes will receive an email that the RFQ has been withdrawn.
- If the RFQ has expired, suppliers who have submitted quotes will receive an email that their bid
- Suppliers who did not submit quotes will not receive any notification of the withdrawal.

#### 12.7 Award quick quote RFQs

You can award a quote for an RFQ that has received one or more quotes.

Depending on your organization settings, you may only be able to award RFQs after the expiration date has passed. This setting is enabled or disabled from **Settings** > **Organization management** > **Options**.



- 1. Click Shopping > Quick Quote.
- 2. Do one of the following:
  - To award a quote from an RFQ that has expired, click **Award RFQs**. This page shows RFQs that have received all of the requested quotes. The status of these RFQs is **Ready**.



- To award a quote from an RFQ that has received some quotes but not all of them, click **Sent**. The status of these RFOs is Quotes received.
- 3. Click next to the RFQ that you want.
- 4. In the section **Header details**, check that the requisitioner email address is provided and correct. If you do not provide a requisitioner email address, you can only assign the requisition to yourself.
- 5. Under Quotes, click the supplier to view more information about their quote.
- 6. Next to the supplier of your choice, click Award.
- 7. If necessary, edit the messages that will be sent to the suppliers (Awarded and Not awarded).
- 8. In the section **Requisitioner**, select if you want the awarded RFQ to go to you or to the requisitioner defined in the section Header details.
- 9. Click Award.

The supplier is notified via email that the RFQ has been awarded to them. Other suppliers are notified that the RFQ has been awarded and is now closed.

After you have awarded a quote, you or the selected requisitioner must add the RFQ to your basket to purchase it.

### 12.8 Add quoted items to your basket



- 1. Click Shopping > Quick Quote.
  - 2. Click Check out.
  - 3. Click p next to the RFQ that you want.
  - 4. Click Add.
  - 5. To go to your basket, click Basket.

Check out the items in the basket as usual. For more information, see Order items from Marketplace.

#### 12.9 Close quick quote RFQs

If all of the requested suppliers have sent quotes to the RFQ but you do not want to award any of the quotes, you can close the RFQ.



- 1. Click Shopping > Quick Quote.
- Click Award RFOs.
- 3. Next to the RFQ that you want to close, click .
- 4. Click Close.

Participating suppliers are notified via email that the RFQ has been closed.

#### 12.10 Create templates for quick quote RFQs

If you often create RFQs for similar items, you can create a template that contains the common details. This way, it is not necessary to enter these details every time when a new RFQ is created.





- 1. Click Shopping > Quick Quote.
- 2. Click RFQ Directory.
- 3. Select the **Template** check box.
- 4. Click Create.
- **5.** Enter the details that you want to include in the template. For more information on the fields, see <u>Create quick quote RFQs</u>.
- 6. Click Save.

### 12.11 Create quick quote RFQs based on a template

If a suitable template exists, you only have to enter the missing details.



- 1. Click Shopping > Quick Quote.
- 2. Click RFQ Directory.
- 3. Under Show me, select the Template check box.
- 4. Next to the template that you want to use, click +.
- **5.** Enter the necessary details, and send or save the RFQ. For more information, see <u>Create quick quote RFQs</u>.



# 13 Supplier registration

To collaborate with suppliers on Marketplace using agreements or RFQs, the supplier must first be registered to use Basware Network. You must have the Buyer contract manager role on Marketplace to invite suppliers to register, or to view and manage the invitations.

For suppliers, registration is free and easy. When you invite a supplier organization to register, they receive an email with a link to self-register to Basware Network, a username, and a password. The supplier can then register to start providing content, managing orders, and handling e-invoices.

#### 13.1 Invite new suppliers to Basware Network



- 1. Click Settings > Supplier Registration.
- 2. Click Invite.
- **3.** To search for the supplier, fill out information on the supplier, and click **Find this supplier**. All suppliers that match the information are displayed in the list.
- 4. Find the supplier you want to add and click Invite this supplier.
- **5.** Fill out the supplier's contact name and the email address that you want the invitation to be sent to, then click **OK**.

An email is sent to the supplier with instructions to complete the registration to Basware Network. When the supplier has registered, you receive an email notification. After this, you can start collaborating with the supplier, starting with the creation of an agreement.

If the supplier does not respond to the invitation after some time, you can send them a reminder.

#### 13.2 View invited suppliers

This task is to view suppliers who you have recently invited to join Marketplace. If you want to view all of your suppliers instead, see View all suppliers.



- 1. Click Settings > Supplier Registration.
- 2. In the filter beside the supplier list, select **Invited**.
- 3. If necessary, you can sort the list using the Order By drop-down list.:
  - Last updated: suppliers who were most recently invited or reminded to register for Basware
     Network are listed first
  - Relevance: suppliers who best match your search criteria are listed first
  - Name: arranges the suppliers in alphabetical order by name
- 4. To find a specific supplier, type one or more search terms in the search box, and click **Search**.

Suppliers matching your search criteria and filters are displayed on the list.

The following actions are available from the supplier list only for suppliers who have not yet responded to an invitation to register:



- Set the toggle switch to on to mark the supplier as a targeted supplier. You can filter the supplier list to show only targeted suppliers, so that you can easily see the suppliers that you are most interested in.
- Click to see the activity with the supplier. You can see supplier invitations, reminders, and registration information.
- Click to remove the supplier from Basware Network.



If you remove a supplier, it will be removed for all organizations in your community. Remove suppliers with care.

#### 13.3 Set suppliers as targeted

You can flag the suppliers that you are most keen to get to register to Basware Network, so that you can find them quickly.



- 1. Click Settings > Supplier Registration.
- 2. Click Invited.
- 3. Next to the supplier, click ....

You can see all targeted suppliers by filtering for **Targeted** in the supplier list. For more information on viewing suppliers, see <u>View invited suppliers</u>.

#### 13.4 Send reminders to invited suppliers

If it seems that it takes a long time for suppliers to register to Basware Network, you can send them reminders.



- 1. Click Settings > Supplier Registration.
- 2. If needed, filter the supplier list:
  - To view the suppliers that have been invited to join Basware Network but have not registered vet, click Invited.
  - To view the suppliers that you are most keen to get to register to Basware Network, click
     Targeted.
- 3. Select the check box next to the suppliers to which you want to send the reminder.
- 4. At the top of the page, click **Send Reminder**.

The reminder email is sent to the supplier with instructions on how to register for Basware Network.

#### 13.5 Remove invited suppliers from your list

You can remove suppliers from the supplier list if they have not yet responded to an invitation to register to Basware Network.



If you remove a supplier, it will be removed for all organizations in your community. Remove suppliers with care.





- 1. Click Settings > Supplier Registration.
- 2. If needed, filter the supplier list:
  - To view the suppliers that have been invited to join Basware Network but have not registered yet, click Invited.
  - To view the suppliers that you are most keen to get to register to Basware Network, click Targeted.
- 3. Next to the supplier you want to remove, click -.

The supplier is removed from the supplier list. The supplier can no longer complete registration with Basware Network. To add this supplier to Basware Network, you must invite them again.

#### 13.6 View all suppliers



1. Click Directory.

The list shows all suppliers that are registered to Marketplace and the following information for each supplier:

- Registered name and location
- D-U-N-S number
- Capabilities: Suppliers can have the following capabilities:
  - \(\mathbb{L}\): Environmentally Certified
  - **1**: Open punchout
  - 1: Punchout capable
  - #: Has catalog
- Active: Whether or not each supplier has been active on Marketplace in the past six months.
- 2. If necessary, sort and filter the list as follows:
  - To view suppliers that have been either active or inactive on Marketplace in the past six months, click Active.
  - To view only suppliers that are in your community, click Community.
  - To view suppliers that have punchout content available, click Punchout.
- 3. To see more details and contact information for a supplier, click their name on the list.
  - i

If a supplier's information needs to be updated, contact the supplier and ask them to update it from their Marketplace account in **Settings** > **Organization management**.



## 14 Audit

Users who have the **Buyer administrator** role and do not have the roles **Buyer Info** or **Buyer Support** can access the system audit from **Settings** > **Audit**. This feature must first be enabled for your organization.

The audit shows information about the following:

- Direct user logins
- Punchins to Marketplace from an external system
- Users switching from another organization to the current one. The entries for switches show the
  organization that the user is originally from and the reason that the user provided when they
  switched organizations.

The audit list can be filtered by type and by a date range.



# 15 Organization management

#### 15.1 User teams

Typically, a user's ability to manage content in Product Manager is controlled by roles. When a user has a role assigned, they always have full access to the role - for example, a user with the role **Product**Management can access and modify all of their organization's agreements, views, media, and so on.

If that level of access is not required because some users only need to manage a few agreements or views, you can create teams to separately control which users have access to different agreements and views.

Teams must be enabled by a Basware consultant. When it is enabled, users with the role **Buyer** administrator can do the following tasks:

- · Create and edit user teams
- Add users to teams

Then, users with the role **Product Management** can do the following tasks:

- · Assign agreements to teams
- · Assign views to teams

#### 15.1.1 Create and edit user teams

To perform this task, you must have the role **Buyer administrator**.

User teams are groups of users with permission to edit only a limited set of agreements or views. Teams are hierarchical and have parent/child relationships.

If a child team is given access to any agreements or views, all of its parent teams can also access that content.



- 1. Click - > Organization management.
- In the section User Teams, click .
   You can see a hierarchical list of all teams that currently exist.
- 3. Click any team to see the users, agreements, and views that are currently assigned to that team.

#### Create user teams

- 4. To create a team, click Add child team.
- **5.** Select the parent team. The new team will be placed directly under the parent team in the hierarchy.
- 6. Type in a team name (up to 40 characters) and description (up to 200 characters).
- 7. Click Add.

Organize teams in the hierarchy



- **8.** To move teams within the hierarchy, click the  $\hat{\mathbf{1}}$  icon or click and drag anywhere on the team name.
- 9. To delete teams, click 前 next to the team name.

When a team is deleted, any access that team had to agreements or views is moved to the parent team

After you have created teams, you can do the following:

- Add users to teams
- Assign agreements to teams
- Assign views to teams

#### 15.1.2 Add users to teams

Before starting this task, make sure you have created user teams.

Users can be added or removed from teams at any time. When a user's team membership is changed, the change takes effect the next time the user logs in.



- 1. Go to - > User Management.
- 2. Find the user you want to edit and click 💍.
- 3. Click **Teams** to expand the panel.
- 4. Set the toggle switch to on for all teams that you want to add the user to.
- 5. Click Save.

The user is added to the selected teams. They can edit information only on agreements and views that are assigned to one of their teams or to **Universal**.

#### 15.1.3 Assign agreements to teams

To perform this task, you must have the role **Product Management**.

To limit the number of users who can see the details of an agreement and edit it, you can assign the agreement to a team. When assigned to a team, an agreement is still visible to all users on the **Agreement Directory** page, but it can only be opened and edited by members of the team.

Agreements can only be assigned to one team at a time. If a child team is given access to any agreements or views, all of its parent teams can also access that content.



- 1. Click Product Manager > Agreements.
- 2. Find the agreement that you want to assign to a team and click 💠 .
- 3. Click the field Access to edit it.

If the field says **Universal**, all Product Manager users have access.

**4.** In the dropdown, select the user team that you want to manage the agreement. The users of the selected team and all of that team's parents can manage the agreement.

You can only select a team that you are a member of.

5. Click OK.



The agreement can now only be edited by users of the selected team and its parents. Other users can view the agreement in the directory, but cannot view the details or edit the agreement.

#### 15.1.4 Assign views to teams

To perform this task, you must have the role **Product Management**.

To limit the number of users who can see the details of a view and edit it, you can assign the view to a team. When assigned to a team, a view is still visible to all users on the **View directory** page, but it can only be opened and edited by members of the team.

Views can only be assigned to one team at a time. If a child team is given access to any agreements or views, all of its parent teams can also access that content.



- 1. Click Product Manager > Views.
- 2. Find the view that you want to assign to a team and click .
- 3. Click the field Access to edit it.
  - If the field says **Universal**, all Product Manager users have access.
- **4.** In the dropdown, select the user team that you want to manage the view. The users of the selected team and all of that team's parents can manage the view.
  - You can only select a team that you are a member of.
- 5. Click OK.

The view can now only be edited by users of the selected team and its parents. Other users of Product Manager can see the view in the directory, but cannot see the details or edit the view.