Guide to Buyer Managed Content

Create Agent Agreement → Download and edit Content Loader → Upload content → Publish

Introduction

With the Buyer Managed Content feature, it is possible for a buying organisation to create and manage content on behalf of a supplier. This is useful if a supplier is resistant to managing their own content.

To begin, create a new Agreement and select 'Agent Agreement' as the type, fill in the remaining required fields, and click the 'save' button:

Back to Agreement Directory

Create Agreement

Details

Agreement name *

Office chairs - BMC

Type *

Select type

- Select type
- Organisation agreement
- Punchout Agreement
- Shared Agreement
- **Agent Agreement**

Start date

10-04-2018

Territory

UK

In the following screen, enter the supplier details. The 'Ref' field is a required field that will be used to uniquely identify the supplier.

Important note: If you use DUNS numbers as the primary supplier identifier please ensure that the Supplier DUNS number is included in the Ref field. Failure to do this could result in a failure to transmit Purchase Orders to the supplier.

Keywords:

Supplier

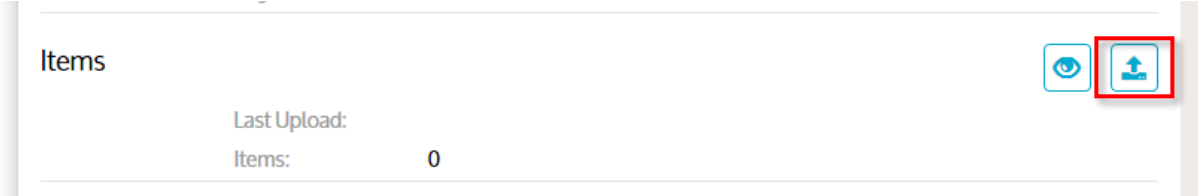Ref: 897746578

Name: Office Chair Ltd.

OK   Cancel

Attributes

Name: Value:

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basware

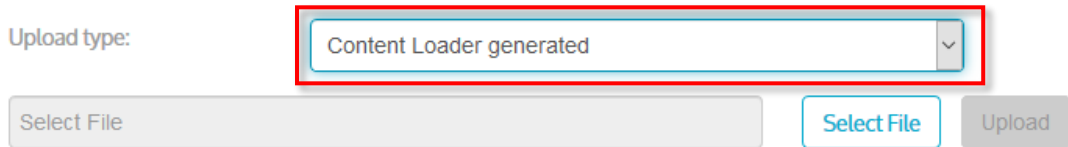| Create Agent Agreement | Download and edit Content Loader | Upload content | Publish |

Once the supplier details have been entered, the content can be loaded. Click on the 'Upload' button to view the import page.

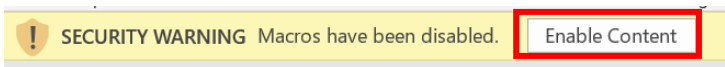On the import page, select 'Content Loader Generated' as the file type (recommended option):

On the help text on the right-hand side, click the link to download the Content Loader spreadsheet:

Open the Content Loader in Excel, you will need to click the 'Enable Content' button after opening:

Your catalogue data will be inputted into this spreadsheet. This guide will show you how to load a basic catalogue, however, more detailed instructions can be found by clicking the 'i' button:

To begin entering your data, click on the 'shopping trolley' button:

You will be presented with a blank worksheet with data field names displayed in the top row (cells with a blue background are required fields). Hovering the mouse cursor over the field names will

show a tooltip providing guidance for filling in each field (indicated with a small red triangle in the corner of the cell).

Item ID	Item Name	Item Type	Delivery Item ID	Delivery Type	Unit of Measure	Unit Price	Minimum Order Quantity	Quantity Interval	UNSPSC	Goods or Service?	Long Description	Keywords
aa01	Cristal Ballpoint Pen	Standard	NA	NA	BX	10.00	1	1	44121704	Goods	The Cristal Original is the classic affordable, high-quality ballpoint pen	pen biro

For the **Unit of Measure** field, click on the 'bottle' icon for a list of valid codes.

Example codes would be **EA** for 'each' or **BX** for 'box'.

For the **UNSPSC** field, click on the 'UNSPSC Codes' button for assistance (version 19 and 8 are supported). Due to the large number of codes, detailed instructions on how to search the codes are provided in the worksheet. Codes can also be found online using a search tool: https://www.unspsc.org/

Once you have entered all your data, it must be validated to ensure no errors are present. Click the 'check' button to run the validation:

If errors are found, they will be displayed in a report. All errors will need to be addressed and resolved before the data can be exported.

Once the validation check has passed, click on the file export button:

An XML file will be created on your computer, save the file with a meaningful name in a convenient location.

Note: Delivery Items, Price Breaks, and Price On Request items are not supported for Buyer Managed Content.

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Once you have exported the XML content file, it can be uploaded. Click on the 'Select File' button on the Import page to locate the file on your PC. Once the file has been selected, the name of the file will appear in the text field. Click on the 'Upload' button to begin uploading the file.

Import

| Office Chairs.csv | | Select File | Upload |
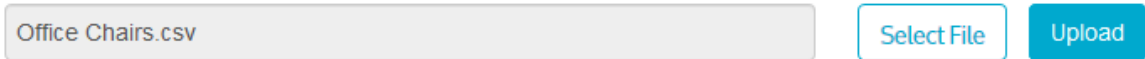
The upload may take a few minutes if large numbers of items are being loaded. If there are any issues with the content in the file, an error message will be displayed highlighting the problems. The file will need to be re-edited to address any problems and uploaded again.

Once the file has uploaded successfully, a success message will be displayed, and you will be taken back to the 'Manage Agreements' page.

To view uploaded items, click on the 'View' button:

Items

| Last Upload: | 27-Apr-18 10:59 |
| Items: | 2 |
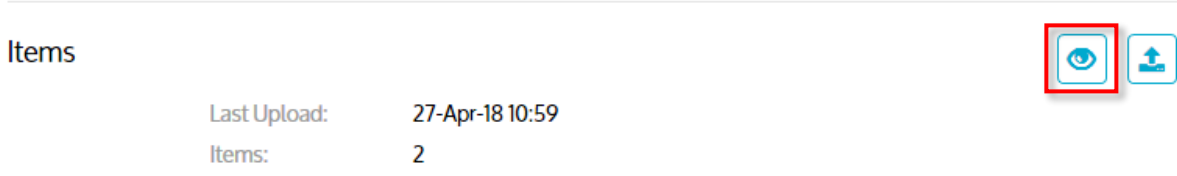
The items are displayed in a list. Click 'Done' to return to the 'Manage Agreement' page.

Agreement Price List

Proposed Price List: Office Chairs.csv

| | ✖ | Search | | Done |

1-2 / 2   < >

Black office chair

Item ID:	CHR01	Item type:	Agent
Order unit:	Each	Price:	49.99 GBP (1 Price Break)
Changes:	Added	Content tag:	
Keywords:	office chair		

Change   ✚ Added

Luxury office chair

Item ID:	CHR02	Item type:	Agent
Order unit:	Each	Price:	129.99 GBP (1 Price Break)
Changes:	Added	Content tag:	
Keywords:	office chair luxury		

Change   ✚ Added

If there are mistakes in the content, simply create a new file using the Content Loader, and upload it again. Make sure to select the 'replace' option when importing the updated file:

Import

What would you like to do?

Note: By selecting Replace existing items you will remove any items you have already added and replace them with items on the file to upload. By selecting Merge with existing items, new and amendments to existing price list items will be made.

Replace existing items on this price list. ⌄ *

| Office Chairs.csv | Select File | Upload |

The upload completed successfully. (27-Apr-2018 09:59)

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Once you are satisfied with the content, click on the 'Approve' button:
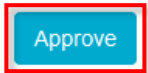
The content is now published to Marketplace. Users assigned to a View linked to this Agreement will be able to access this new content.

Updating content:

After content has been loaded and published, it is possible to amend or replace it.

To add additional items, simply import a new file by following the 'Upload content' steps above, and select the 'Merge' option, upload and publish. The new items will be available alongside the original content.