basware

Simplify Operations, Spend Smarter.

# USER GUIDE

Basware Marketplace Standard for Suppliers
(Version 22.9)

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# 1 About Basware Marketplace Standard

One or more of your customers have chosen to implement the Basware Marketplace Standard service to maintain product catalogs from their suppliers. There is no cost for you as a supplier to use the Basware Marketplace Standard service to build and maintain your product catalog.

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# 2 Providing content to customers

You can make your products and services available to your customers either by creating a catalog on Basware Marketplace Standard or by allowing your customers to use your existing website as a punchout through their purchasing system.

## 2.1 Catalog hosted on Basware Marketplace Standard

On Basware Marketplace Standard, you can create your catalog by uploading content or by creating your items one by one.

The benefits of using a catalog hosted on Basware Marketplace Standard include:

- All you need is Basware Marketplace Standard and an internet connection.
- You can provide a high-quality catalog by specifying your search criteria and using images and logos.
- Content from all suppliers is displayed for your customer in the same format.
- You can upload your content using various methods (for example, a BMEcat file generated from your ERP system), and create items one by one.
- UNSPSC (United Nations Standard Product and Services Code) coding is used, which is a global multi-sector standard for classifying products and services.

**Next steps**

If you decide to host your catalog on Basware Marketplace Standard, follow the instructions in this user guide.

## 2.2 Punchout

Punchout enables users of Basware Marketplace Standard to access the goods or services that are hosted on your own e-commerce site. A link is created between Basware Marketplace Standard and your e-commerce site to enable the buyer to shop on your e-commerce site. When a buyer purchases goods or services using a punchout in their Basware system, the shopping basket with the items defined by the buyer is returned to Basware Marketplace Standard to go through the buyer's purchasing process.

Punchout sites are live, interactive catalogs run through a supplier's own e-commerce site. If your e-commerce site can support either the OCI or cXML standards for punchout, it should be able to integrate with Basware Marketplace Standard. Punchout (or double punchout, as it is more commonly known) uses HTTPS posts to relay messages between Basware Marketplace Standard and the supplier's e-commerce site based on the recognized OCI or cXML standards.

Punchouts are useful, for example, for complex products and services that require configuration, or for suppliers that have high volumes of product lines with constantly changing pricing or stock levels.

There are two levels of providing content by punchout. Level 1 punchout allows the buyer to access the punchout e-commerce site and search for items there. However, the buyer cannot find the items by using the search field on Basware Marketplace Standard, because they are located outside Basware Marketplace Standard. Level 2 punchout allows buyers to find all items also using the search field of

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Basware Marketplace Standard. The search is enabled by providing an index file that contains keywords describing the goods or services that the supplier offers, so these keywords can be found by the search, along with a link to the supplier's punchout e-commerce site.

The benefits of using a punchout include:

- You can update your prices and products from within your own environment.
- There is no need to maintain catalogs in Basware Marketplace Standard, which also removes the possibility of user error in the pricing and item configuration.
- There are no restrictions on how you display your content, because punchout is linked directly to your own e-commerce site.

**Business requirements**

Punchout may be an option for you if:

- Your customer is willing to use punchout. Some customers expect all their content to be provided as hosted content while others may be willing to accept content through punchout.
- You supply goods or services that:
  - Are highly configurable
  - Are regularly updated (for example, new editions or revised pricing)
  - Have many associated items (mandatory or optional)
  - Have dynamic pricing
  - Have variable attributes (for example, business cards or stationery)

**Technical requirements**

The following requirements must be met:

- Your organization has a secure e-commerce site, which can support the creation and transmission of shopping baskets to an external system.
- Your e-commerce site can fully support the OCI or cXML punchout standards.
- Your IT team is familiar with XML, as well as the OCI or cXML punchout standards.

Basware cannot provide detailed technical assistance on how to configure your website or guidance on upgrades and technical requirements, but we can offer some general guidance. Contact Basware Customer Support Portal.

**Next steps**

If you decide to create a punchout site and the business requirements and technical requirements are met, the next step to get your punchout site set up is the following:

1. Fill out the punchout form and send it to your customer. You can find the punchout form here.

If you are only providing your buyer with punchout information to your own webshop, and you will not be providing catalog content directly to your buyer, you do not need to register to Basware Marketplace.

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# 3 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.

## 3.1 Register to Basware Marketplace Standard

To get started with the Basware Marketplace Standard service, follow the steps below.

If you have already registered to Basware Marketplace, you do not need to do that again. In that case, your customer sends you an agreement for your catalog, and you can start creating your catalog. For instructions, see Working with Basware Marketplace Standard .

If you are only providing your buyer with punchout information to your own webshop, and you will not be providing catalog content directly to your buyer, you do not need to register to Basware Marketplace.

1. Make sure that your organization has a Data Universal Numbering System (DUNS) number. If you do not have one, go to https://www.dnb.com/choose-your-country.html, select your country, and create the DUNS number.
2. Send the following information to your customer:
   - Your DUNS number
   - Company name and address
   - Name and email address of your primary contact person
   - Email address where you want to receive order notifications
3. Wait for the customer to send you an email with a registration link.

   If you have just created the DUNS number, it make take a few weeks before your customer is able to send you the registration email.

4. Use the link in the registration email to register your organization to the Basware Marketplace Standard service:
   a) Click the registration link to open it in your default browser.
   b) Use your email address and the access code sent to your email address to access the registration page.
   c) Make sure that your organization details are correct, and add any missing information.

      The language that you select defines the language of your catalog items on Basware Marketplace Standard.
   d) Click **Next**.
   e) Read and accept the terms of service.

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After registering, you receive two emails, which include your Basware Marketplace Standard username and password. You can now use these credentials to log in.

If you do not log in within 90 days, your user account is disabled, but you can unlock the account by resetting your password. For instructions on how to reset your password, see here.

The system asks you to change your password at regular intervals.

Next, the customer creates an agreement for the Basware Marketplace Standard catalog and sends the agreement to you. Then, you can start creating your catalog and attach your price list to the agreement. For instructions, see Working with Basware Marketplace Standard .

If your content will be hosted on your own e-commerce site using punchout, the next step after registration is to fill out the punchout form and send it to your customer. For more information, see Punchout.

## 3.2 Log in

1. On the login page, enter your username and password

   If you have forgotten your password or username, see Reset password or Retrieve username.
2. Click **Log in**.

When you log in for the first time, you are asked to set a mandatory security question. Make sure that the answer to the security question is easy to remember, but hard to guess. The answer can be between two and twenty characters long.

## 3.3 Reset password

1. On the login page, click **Log in Help**.
2. Enter your email address in the text field.
3. Click **Reset Password**.

   The service sends you an email with a link to the page where you can reset your password.
4. When you receive the email, click the link.
5. Type the answer to the security question in the text field, and click **Submit**.

   If you fail to enter the correct answer after five attempts, or cannot remember the answer, you must contact the support desk to regain access to your account.
6. Type a new password in the **Password** and **Confirm password** fields.

   The password must:
   - Not be a dictionary word.
   - Include letters, numbers, and symbols.
   - Be at least eight characters in length.
   - Be different to the previous three passwords used.

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- Not be too similar to your username.

7. Click **Reset Password** to save your new password.

## 3.4 Retrieve username

1. On the login page, click **Log in Help**.
2. Enter your email address in the text field.
3. Click **Retrieve user name**.

   The service sends you an email with a link to the page where you can retrieve your username.
4. When you receive the email, click the link.

A page showing your username opens.

## 3.5 Edit user profile

You can check your profile details and, for example, change your password or security question.

1. In the upper-right corner of the screen, click your username.
2. Click **My Profile**.
3. To expand a section of your user profile so you can see the details in it, click ›.
4. Edit the information as necessary.
5. Click **Save**.

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# 4 Working with Basware Marketplace Standard




*Figure 1: Overall workflow on Basware Marketplace Standard*

| Step | Description | Further information |
|---|---|---|
| Register to Basware Marketplace Standard | Register to Basware Marketplace Standard when you receive an invitation to Basware services from your customer. | • Register to Basware Marketplace Standard |
| Create and upload content | Add the items that make up your product catalog. Later, you can attach these items to price lists and share them with your customer through an agreement.<br>You can create standard items and delivery items manually, or by uploading them. | • Items<br>• Create standard items<br>• Create delivery items<br>• Uploading content |
| Upload media | Make your product catalog more appealing by adding product-related images and other media. | • Upload images and other media in the Media directory view<br>• Upload images and other media using FTP<br>• Link images to items using association files<br>• Upload images and other media in the Media directory view |
| Create and upload price lists | Create price lists and attach your items to them. | • Price lists<br>• Create price lists<br>• Add items to a price list<br>• Add or edit multiple items with CSV import |
| Create product bundles, related items and matrix items | Use product bundles to sell a group of items as one bundle, related items to show the end users items that they may also want to buy, and matrix items to let your buyers select variations of the same item from a drop-down list. | • Create or edit product bundles<br>• Create or edit related items<br>• Create matrix items |
| Attach prices lists to agreements | Attach your price lists to an agreement and start doing business with your customers. | • Attach price lists to agreements |

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# 5 Items

Items are the goods and services that you sell on Marketplace. You can browse, create, edit, and archive items, as well as publish updated items to Marketplace.

**Item workflow**

When you first start using Basware Marketplace Standard, you must add items to your catalog either by creating items one by one or by uploading multiple items. After you have successfully created items, you can upload media—product images or product-related documentation—to Marketplace. This, too, can be done either by adding media to items one by one or by uploading the media files and linking them to items using an association file.

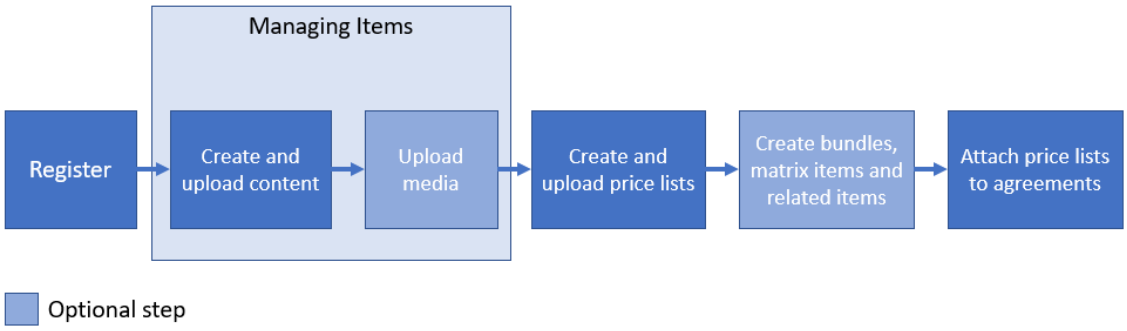



*Figure 2: Items as part of the overall workflow on Basware Marketplace Standard*

Once all the necessary items and the media related to them are available on Basware Marketplace Standard, you can create price lists and add your items on them.

**Item types**

Items are separated into the following categories:

| | |
|---|---|
| **Standard items** | All the goods and services that you sell are standard items. |
| **Delivery items** | Delivery items are the delivery fees that you charge for your items. You can apply these for each item, or for the entire shopping basket. |

**Item statuses**

As your create items, add them to price lists, approve, publish, and update them, they go through the following statuses:

| | |
|---|---|
| **New** | Items that have not yet been attached to any price lists |
| **Unpublished** | Items that are currently attached to one or more price lists |
| **Published** | Items that are on an agreement and are currently unchanged |
| **Updated** | Items that have undergone changes |
| **Withdrawn** | Items that were previously on an agreement and no longer are |

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# 5.1 Find and view items

You can access all your items in the Item directory view.

1. Click **Product Manager** > **Items**.
2. In the search box, type the name, item ID, or other search criteria.
3. Click **Search**.

   The items that match your query are displayed.
4. To sort the results, in the **Sort By** drop-down list, select the sort criteria that you want to use.

   You can sort items based on relevance, name, and by the date when the item was created.
5. To filter the results, select the filters that you want to use under **Show me**.

   You can filter items based on the item type, item status, and whether the item contains images or are based on a template.

   Click **All** to remove the filters.

# 5.2 Standard items

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

## 5.2.1 Create standard items

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

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

1.
2. Click **Create**.
3. In the **Item type** drop-down list, select **Standard item**.
4. In the **Supplier item ID** field, type an identification code for the item.
5. If necessary, add a template to the item. For instructions on creating and adding templates, see Templates.
6. 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.
7. 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. For more information on formatting, click next to the **Description** field.
8. In the **Keywords** field, type aliases, synonyms, or names of the key features of the item to help buyers find it.

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9. In the **Item attributes** section, enter additional information about the product. The available fields depend on the item class that you select.

| | |
|---|---|
| **Item class** | Categorizes the standard item. |
| **Service** | Type of legal service. |
| **Legal seniority** | Seniority level of legal service. |
| **Environment-friendly Item** | Select **Yes** if your product is environment-friendly. |
| **Hazardous item** | Select **Yes** if your product has a COSHH (Control of Substances Hazardous to Health) or other safety data sheet. If you want to emphasize that your product is not hazardous, select **No**. |
| **Manufacturer name** | Manufacturer of the product or the provider of the service, if not yourself. |
| **Manufacturer product ID** | Manufacturer's or service provider's unique identifier for the product or service. |
| **Lead time** | Number of days that the buyer can expect to wait for the item to be delivered. |
| **GTIN** | Global Trade Item Number (GTIN). |

10. If you want to define attributes of your own, next to **Custom attributes**, click ➕, and define the name and value of the attribute.
11. In the **Comparison UOM** drop-down list, select the correct unit of measure.
12. 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".
13. In the **Classification** section, define the classification of the item:
    - To add a UNSPSC classification, click ⚙ next to **UNSPSC**, and select the correct UNSPSC classification for the item.
    - To add an eCl@ss classification, click ➕ next to **Classification**, and select **eCl@ss**. Then, click ⚙, and select the correct eCl@ss classification for the item.
14. In the **Linked media** section, add your user guides and other media files. For instructions, see Product-related media. You can also skip this now and go back later.
15. In the **External Links** section, click ➕ to add a link to an external website.
16. Add images to the item. For instructions, see Product-related media. You can also skip this now and go back later.
17. 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.
- Create price lists and add standard items on them.

After you have finished creating standard items, you must publish them to Marketplace so that your customers can find them.

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## 5.2.2 Edit standard items

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

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

1.
2. Find the item that you want to edit.
3. Click the name of the item to open the edit view.
4. Make the necessary changes to the item.

   For information on the fields, see Create standard items.
5. Click **Save** to save the changes.

After you have finished editing items, you must publish them to Marketplace so that your customers can see the changes that you have made.

## 5.2.3 Publish updated standard items

After you have made changes to standard items, you must publish the updates. Your customers can see the changes that you have made only after you publish them.

1. Click **Product Manager** > **Items**.
2. Do one of the following:
   - To publish the updates for an individual item, click the item to open it, and click **Update to Marketplace**.
   - To publish updates in all of your items at once, click **Publish Updates**.

## 5.2.4 Archive standard items

If there are standard items in your Item directory view that are no longer needed, you can archive them. After you archive an item, it will no longer be shown in the Item directory view.

Before you can archive a standard item, you must remove the item from all the price lists that it appears on.

1. Click **Product Manager** > **Items**.
2. Under **Show me**, select the **Withdrawn** check box to show only the standard items that have been removed from price lists.
3. Click the name of the standard item that you want to archive.
4. Click **Archive**.

## 5.2.5 Delete standard items

If there are standard items in your Item directory view that have never been attached to a price list and that you no longer need, you can delete them.

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1. Click **Product Manager** > **Items**.
2. Under **Show me**, select the **New** check box to show only the standard items that have never been added to price lists.
3. Click the name of the standard item that you want to delete.
4. Click **Delete**.

## 5.3 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

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- 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.

## 5.3.1 Create delivery items

1. Click **Product Manager** > **Items**.
2. Click **Create**.
3. In the **Item type** drop-down list, select **Delivery Item**.
4. 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.
5. In the **Supplier item ID** field, type an identification code for the item.
6. Fill in the **Name**, **Description** and **Keywords** fields.
7. In the **Classification** section, define the classification of the item:
   - To add a UNSPSC classification, click ⚙ next to **UNSPSC**, and select the correct UNSPSC classification for the item.
   - To add an eCl@ss classification, click ➕ next to **Classification**, and select **eCl@ss**. Then, click ⚙, and select the correct eCl@ss classification for the item.
8. Add an image to the item. For instructions, see Product-related media. You can also skip this now and go back later.
9. Click **Save** to save the item.

After you have finished creating delivery items, publish them to Marketplace.

To start applying your delivery items when buyers purchase your standard items, create price lists and add delivery items on them.

## 5.3.2 Edit delivery items

1. Click **Product Manager** > **Items**.
2. Find the item that you want to edit.
3. Click the name of the item to open the edit view.
4. Make the necessary changes to the delivery item.

   For information on the fields, see Create delivery items.

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

After you have finished editing items, you must publish them to Marketplace so that your customers can see the changes that you have made.

# 5.4 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.

## 5.4.1 Add images to individual items

You can add product images to your individual standard items. For a delivery item, you can add one image.

---

If you have lots of image files to add to items, you may want to upload images to the Media directory view and use an association file to link the images to items. For uploading, you can also use FTP.

---

1. Click **Product Manager** > **Items**.
2. Find the item that you want to edit.
3. Click the name of the item to open the edit view.
4. 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.

   ---

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

## 5.4.2 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 individually or by using the Super Content Loader.

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 images to individual items
- Add item images with Super Content Loader
- Add image files by linking them to items using association files.
- Add user guides and other files to items

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## 5.4.3 Upload images and other media using FTP

To upload product images and other media using FTP, you must have an FTP client program installed. You must have the Supplier administrator role.

1. Open the FTP client program.
2. Use the following details to connect to the server:

| | |
|---|---|
| **Host** | 212.124.224.188 |
| **Port number** | 22 |
| **Username** | Your Basware username |
| **Password** | Your Basware password |

3. Move the files to the server.

   The transfer may take some time.

Next, add the files to your items:

- Add images to individual items
- Add item images with Super Content Loader
- Add image files by linking them to items using association files.
- Add user guides and other files to items

The file transfer must be complete before you upload the association file, because the system is able to associate only files that exist on the server. If you do not upload an association file within seven days, the files are deleted from the server.

## 5.4.4 Link images to items using association files

Association files link your images to your items and determine the order that they appear in. Before you upload your association file, all of your images must be uploaded to Basware Marketplace Standard (see Upload images and other media in the Media directory view or Upload images and other media using FTP).

Each image file must have a unique name.

1. Open Microsoft Excel, and open a blank workbook.
2. Add the following headings to the first three columns of the Excel file:
   - Supplier Item ID
   - Index
   - File Name
3. Add information on your images under the headings as follows:

   **Supplier Item ID** Identifier of the item that you want to assign the image to.

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| | |
|---|---|
| **Index** | Number between 1 and 10. This number determines the order in which the images are displayed. |
| **File Name** | Name of your image file. |

4. Save the file on your computer in CSV (comma delimited) format.
5. To make sure that the format of the file is correct, use the Notepad application to open the CSV file, and check that the column values are separated with a comma (,). If there are other characters, replace them with commas and save the file.
6. On Basware Marketplace Standard, click **Product Manager**.
7. Click **Upload content**.
8. In the **Upload type** drop-down list, select **Media links**.
9. Next to the **File to load** field, click **Select File**, and browse to your saved CSV file.
10. Click **Upload**.
11. To confirm that your images have been associated successfully, find and open one of the items that you associated images to, and verify that all of the images that you associated with that item are visible.

### 5.4.5 Add user guides and other files to items

You can add user guide PDFs and other types of files to your standard items. Before adding the files to items, you must upload the files to the Media directory view.

1. Click **Product Manager** > **Items**.
2. Find the item that you want to edit.
3. Click the name of the item to open the edit view.
4. Under **Linked media**, click ➕.
5. Search for the file that you want to add to your item.
6. When you see the file that you want, click it.

## 5.5 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.

### 5.5.1 Create item templates

1. Click **Product Manager** > **Item Templates**.

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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 value** | If you want the value set by the buyer to override a specific variable of the item, select the variable in the drop-down list. |
| **Text** | Instruction that will be visible for the buyer. |

8. Repeat steps 6 and 7 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 individual items or use a CSV file to upload template content to multiple items.

## 5.5.2 Add templates to items

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

1. Click **Product Manager** > **Items**.
2. Find the item that you want to add the template to, and select the item title to open it. Templates can be used with standard items and delivery items.

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3. Next to **Item template**, click ⚙.
4. Next to the template that you want to add, click ➕.

Next, define the template data. Next, define the template data. If you only have a few items, you can do that for individual items. If you have a large number of items, use a CSV file.

## 5.5.3 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.

If you need to define template data for many items, use a CSV file.

1. First, add a template to an item.
2. 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, publish the item. When users add items with templates to their shopping basket, they will be prompted to fill in the defined information before completing their order.

## 5.5.4 Define template data for multiple items using a CSV file

When you have a large number of items that you want to add template data to, use a CSV file. If you only need to add template data to a few items, see Define template data for individual items.

1. Open Microsoft Excel, and open a blank workbook.

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Instead of creating an Excel file, you can also download the CSV template (Item template - CSV), and use it to add your template data.

2. In the Excel workbook, add the following headings to the first columns of the workbook:
   - **Supplier Item ID**
   - **Language**
   - **Variable name**
   - **Display text**
   - **Basket value**
   - **Flags**
   - **Default**
3. Add information on your template data under the headings as follows:

| | |
|---|---|
| **Supplier Item ID** | The identifier of the item that you want to add the template to. |
| **Language** | Applicable language code according to ISO 639-1 (two small letters). |
| **Variable name** | The identifier (**Variable name**) of the template entry that was defined when creating the template. |
| **Display text** | An option that will be selectable on the list (**Dropdown (Single-select)** or **List (multi-select)**). |
| **Basket value** | An identifier for the option. 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. |
| **Flags** | Leave this cell empty. |
| **Default** | Type "True" if you want the option to be selected by default (**Dropdown (Single-select)**). |

If you must use the following characters in the file, wrap them in quotation marks:

| Character | Type like this |
|---|---|
| , (comma) | "," |
| " (quotation mark) | """" |
| \ (backslash) | "\" |

4. Save the file on your computer in CSV (comma delimited) format.
5. To make sure that the format of the file is correct, use the Notepad application to open the CSV file, and check that the column values are separated with a comma (,). If there are other characters, replace them with commas and save the file.
6. On Basware Marketplace Standard, click **Product Manager**.
7. Click **Upload content**.
8. In the **Upload type** drop-down list, select **Item template values**.
9. Next to **File to load**, click **Select File**, and browse to the saved CSV file.
10. Click **Upload**.

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You can view the status of your upload under **Activity**. If there are errors, you can download an error report to find out what you should fix in your CSV file.

To confirm that your templates have been added to the items, find and open one of the items that you added a template to, and verify that all of the template content is visible.

## 5.6 Export all items to CSV

You can export all of the items in your item directory to a CSV file that includes the following information:

- Item ID
- Item Name
- Item Type
- Description
- Manufacturer Name
- Manufacturer Part ID
- Environment Friendly
- Hazardous
- Keywords
- Classification code
- Unit of measurement
- In Pricelist

The export includes all items in the directory, regardless of any filters or search keywords you have used.

To export your items:

1. Click **Product Manager** > **Items**.
2. Click .
3. Click **Export**.
   The system generates a CSV with the most updated item information.
4. When the file is generated, click the link with the file name and save it to your computer.

If you update the items and want to download the file again, make sure you click **Export** first. Then the file will include the most updated changes.

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# 6 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
- 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. Description, UNSPSC category labels

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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.

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# 7 Uploading content

You can download your product catalog and price list from your existing system and upload them to Basware Marketplace Standard.

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 Content Loading Templates library 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.

## 7.1 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.

1. 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.
     - **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.
     - **Price List CSV**: Mapping for uploading price lists in CSV format, including tax information.
     - **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.

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# 7.2 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 View mappings and supported columns for uploaded content.

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** | This is set to **Products and Price List** and cannot be changed. |
| **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.<br><br>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 Description** | Type a description to make sure that users use the mapping for the correct 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.

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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 column if empty** | If the column in the file that you upload is empty, copy the data from the 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**.

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8. Click **Save Mapping**.

You can now use this mapping when you upload content.

## 7.3 Upload content

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

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 View mappings and supported columns for uploaded content.
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 price list, and the content that is not included in the file remain untouched.
   - **Replace existing items**: The file that you upload overwrites the current price list 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:
   - **Products and Price List**: Upload items and price information.
   - **Import items only**: Upload only items and ignore 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**.

If the information that you upload contains price list information, the system creates a new price list that has the same name as the uploaded file. Product information always overwrites the existing items in the system.

After uploading content, commit it.

## 7.4 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**.
2. Click **Upload Status**.

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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 Fix errors in your uploaded content.

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

If the information that you upload contains price list information, the system creates a new price list that has the same name as the uploaded file, without the file name extension. Product information always overwrites the existing items in the system.

# 7.5 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 ⚠ icon.
   b) Click the field that has the ⚠ icon in it.
   c) Make the correction to the current value.

      If necessary, you can also delete the row by clicking 🗑 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**.

# 7.6 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**.

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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. Upload your content using the appropriate mapping in the Loader tool.

# 7.7 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 product bundles
- Create custom attributes for items
- Create price breaks for items

## 7.7.1 Use Super Content Loader to upload content

1. Download the Super Content Loader file to your computer from the Content Loading Templates view.

   If you want to make changes and additions to an existing price list, you can also export your price list 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 Scheme** | UNSPSC and eCl@ss are supported. |
| **Template Name** | Add the name of the Templates that you want to be applied to the item. The template must already exist in the system. After adding the template to |

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| | |
|---|---|
| | items using the Super Content Loader file, you must define the template data. |
| **Available** | Enter **Y** (Yes), if you want the item to be available to purchase, or **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). For example, you may want to hide an item if it is part of a product bundle, and you do not want the item to be found in the search results separately. |
| **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:<br>• Each<br>• Hour<br>• Kilogram<br>• Liter<br>• Meter<br>• Sheet<br>• Square Meter |

Also see the instructions in this user guide:

- Add matrix items with Super Content Loader
- Add custom attributes with Super Content Loader
- Add product bundles 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.

## 7.7.2 Export a price list as a Super Content Loader file

You can export any of your existing price lists as a Super Content Loader Excel workbook. The exported workbook contains all of the standard and delivery items included in your price list, as well as product bundles and matrix items.

1. Click **Product Manager** > **Price Lists**.
2. Find the price list that you want to download and click ⚙ to open it.
3. Next to the title **Manage price list**, 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 Super Content Loader.

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## 7.7.3 Add matrix items with Super Content Loader

You can add matrix items 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. |
| **Name** | Enter the name that you want to appear on the catalog and purchase order. For example, "T-shirt". |
| **Description** | Enter a description for the item. |
| **Name of custom attribute** | Enter the name of the custom attribute that you want to be visible for the buyer. For example, "Size". |
| **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 prvious row, because you want the custom attribute to be added to the same master item. |
| **Name of custom attribute** | Enter the name of the custom attribute that you want to be visible for the buyer. For example, "Color". |

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). |
| **Name** | Enter the name that you want to appear on the catalog and purchase order. For example, "Black t-shirt, size S". |
| **Description** | Enter a description for the item. |
| **Name of custom attribute** | Enter the name of the first custom attribute that you defined for the master item. For example, "Size". |
| **Value of custom attribute** | Enter the value of the custom attribute. For example, "S" for "small". |
| **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.

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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 of custom attribute** | Enter the name of the second custom attribute that you defined for the master item. For example, "Color". |
| **Value of custom attribute** | 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.

## 7.7.4 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.
2. 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). |
| **Name of custom attribute** | Enter the name of the custom attribute that you want to be visible for the buyer. For example, "Unit of measure". |
| **Value of custom attribute** | 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.

## 7.7.5 Add product bundles with Super Content Loader

You can add product bundles with the Super Content Loader Excel workbook. For example, you can create a bundle consisting of a laptop, mouse, and laptop bag.

1. In the Super Content Loader Excel workbook, select the **Item Data** sheet.
2. To create the items that you want to be part of the bundle (bundle components), add each item on a separate row. The identifier of each item must be unique.

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For instructions on what kind of information to place in each cell, see the Detailed user guide sheet in the Super Content Loader workbook.

3. To start creating the master item ("Laptop bundle") that contains the items that you created in step 2, create a row where you define the following:

| | |
|---|---|
| **Item ID** | Add the item code or SKU. The identifier must be unique for this item. |
| **Name** | Enter the name that you want to appear on the catalog and purchase order. For example, "Laptop bundle". |
| **Description** | Enter a description for the item. |
| **Bundle items** | Enter the Item ID code of one of the bundle components (for example, laptop). |
| **Bundle link** | Enter **L** (Linked) if you want the quantity of the item to increase if the buyer purchases more than one bundle. Enter **F** (Fixed) if you want the quantity of the item to remain the same regardless of the amount of bundles. For our example, laptop, you probably would enter **L**, as you would want the buyer to get as many laptops as there are bundles. |
| **Bundle optional** | Enter **Y** (Yes) if the item is an optional part of the bundle, or **N** (No) if it is required. The buyer can then decide if they want to have the item. |

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

4. Create a row where you define the second bundle component as follows:

| | |
|---|---|
| **Item ID** | Add the same identifier as for the previous row, because you want to add this bundle component to the same master item. |
| **Bundle items** | Enter the Item ID code of another bundle component (for example, mouse). |
| **Bundle link** | Enter **L** (Linked) if you want the quantity of the item to increase if the buyer purchases more than one bundle. Enter **F** (Fixed) if you want the quantity of the item to remain the same regardless of the amount of bundles. For our example, mouse in a laptop bundle, you probably would enter **L**, as you would want the buyer to get as many mice as there are bundles. |
| **Bundle optional** | Enter **Y** (Yes) if the item is an optional part of the bundle, or **N** (No) if it is required. |



If you want that only the product bundle is included in the catalog search results, and not the individual bundle components, enter **N** (No) in the **Searchable** column.

5. Repeat step 4 for all bundle components.
6. Save the Excel workbook.
7. Upload the Excel file.

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

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## 7.7.6 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 qty** | Add the minimum number of units that can be purchased. |
   | **Price** | Add the price per unit when you order the minimum number of units. |
   | **Is 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 qty** | 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. |
   | **Price** | Add the price per unit when the buyer orders the number of units that you defined in the Minimum order qty field. In our example, you would add "8". |
   | **Is price on request?** | Enter **N** (No). |

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 qty** | 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. |
   | **Price** | Leave this field empty. |
   | **Is price on request?** | Enter **Y** (Yes). |

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7. Save the Excel workbook.

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

### 7.7.7 Add item images with Super Content Loader

Before starting this task, make sure you have uploaded the images 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 name / URL** | Enter one of the following:<br>• If the image is hosted on the web, enter the full web address to the image.<br>• 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.
6. Save the Excel workbook.

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

## 7.8 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.

### 7.8.1 Create automation records

1. Click **Product Manager** > **Loader**.
2. Click **Automation**.

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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 and price lists to be published automatically, select the **Auto Publish** check box. If you do not select this check box, you must publish the items and price lists manually.
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**.

## 7.8.2 Edit automation records

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

## 7.8.3 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).

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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.

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# 8 Price lists

Price lists are used to link your items to an agreement and provide your customers with prices. Price lists can be specific to each customer or re-used many times.

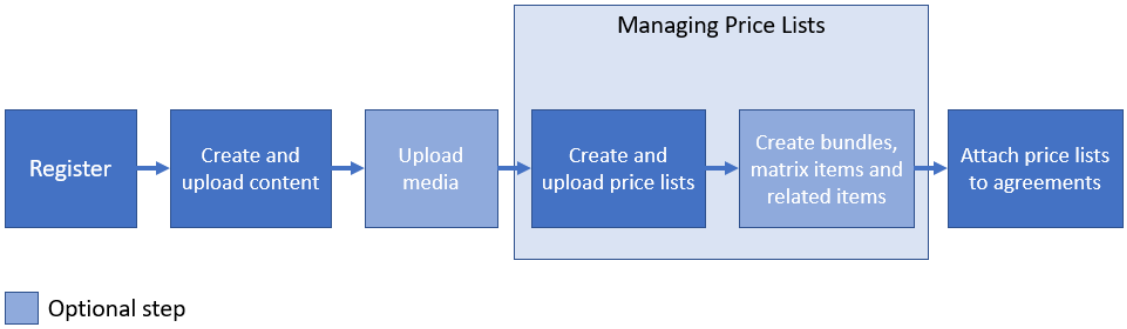



*Figure 3: Price lists as part of the overall workflow on Basware Marketplace Standard*

**Price list types**

**Standard** A standard price list is one that is published on Marketplace for your customers to buy from.

**Price list statuses**

As your create price lists, add items to them, and publish them, the price lists go through the following statuses:

| | |
|---|---|
| **New** | Newly created price lists that do not contain any items yet |
| **Unpublished** | Price lists that contain items, but are not yet published |
| **Published** | Price lists that have been sent to a buyer |
| **Modified** | Price lists that have changes applied that affect the items |
| **Withdrawn** | Price lists that were once attached to an agreement but are no longer |

## 8.1 Find and view price lists

1. Click **Product Manager** > **Price Lists**.
2. In the search box, enter the name of the price list or other search criteria.
3. Click **Search**.

   The price lists that match your query are displayed.
4. To sort the results, click the **Sort By** drop-down list and select the sort criteria that you want to use.

   You can sort price lists based on relevance, name, and by the date when the item was last modified.
5. To filter the results, select the filters that you want to use under **Show me**.

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For example, you can filter price lists based on price list type and price list status.

To remove the filters, click **All**.

6. To view a price list, click ⚙ next to the price list.

## 8.2 Create price lists

When you have added items on Basware Marketplace Standard and received an agreement proposal from your customer, you can create a price list that you can then attach to the agreement.

1. Click **Product Manager** > **Price Lists**.
2. Click **Create**.
3. In the **Name** field, type a name for the price list.
4. In the **Type** drop-down list, select the price list type.
5. In the **Reference** field, type a description.

   The reference will not be visible to your customer.
6. In the **Start date** and **Expiration Date** fields, select the date when the price list will be made available to your customer and the date when the price list expires from an agreement.
7. In the **Currency** drop-down list, select the currency that you provide your products and services in.
8. In the **Description** field, provide additional information about the price list.
9. In the **Keywords** field, add alternative phrases and words that can be used to search for your price list.
10. Click **Save** to save the item.

You can now add items on the price list and attach the price list to an agreement.

## 8.3 Add items to a price list

Add the items that you want to be included on the price list.

---

If you need to add or edit a large number of items on a price list, you can import the price list items using a CSV file.

---

1. Click **Product Manager** > **Price Lists**.
2. Find the price list to which you want to add items and click ⚙ to open it.
3. Add standard items to the price list:
   a) Next to **Standard Items**, click ⚙.

      A list that shows the standard items currently on the price list opens.
   b) Under **Show me**, select the **Items not on price list** check box.
   c) Use the filters under **Show me** to refine the list further, or use the search box to find specific items.
   d) Click ✚ next to the standard item that you want to add to the price list.

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e) Click **Done** to return to the price list.

4. Add delivery items to the price list:
   a) Next to **Delivery Items**, click ⚙.
   b) Under **Show me**, select the **Items not on price list** check box.
   c) Use the filters under **Show me** to refine the list further, or use the search box to find specific items.
   d) Click ➕ next to the delivery item that you want to add to the price list.
   e) Click **Done** to return to the price list.

You can now edit the standard items and delivery items on the price list.

# 8.4 Edit standard items on a price list

Edit the standard items on your price list to define, for example, the price and order increments.

---

If you need to add or edit a large number of items on a price list, you can import the price list items using a CSV file.

---

1. Click **Product Manager** > **Price Lists**.
2. Find the price list that you want and click ⚙ to open it.
3. Next to **Standard Items**, click ⚙.

   A list that shows the standard items currently on the price list opens.
4. Use the filters under **Show me** to refine the list further, or use the search box to find specific items.
5. Click ✏ next to the item that you want to edit.
6. If the item is part of a product bundle and you do not want the item to be found in the search results separately, set the toggle switch for **Searchable** to off.
7. If you want to hide the item for the time being, set the toggle switch for **Available** to off.
8. In the **Order unit** field, enter the unit in which the item can be ordered, such as Each, Case, Roll, and so on.
9. In the **Number in an order unit** field, enter the number of individual items that the order unit contains.
10. 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`.
11. 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 that 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.

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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.

12. If you want to provide the price on request instead of setting a fixed price, set the **P.O.R** toggle switch to on.
13. If the item is the master (container) item in a product bundle, and you want to move only the bundle components (and not the master item) to the basket when a user buys the product bundle, set the **Container** toggle switch to on.
14. To link a delivery item to your standard item, select the delivery item in the **Delivery** drop-down list.
15. Click **Save**.
16. Click **Done** to return to the price list.

# 8.5 Edit delivery items on a price list

Edit the delivery items on your price list to define their price.

If you need to add or edit a large number of items on a price list, you can import the price list items using a CSV file.

1. Click **Product Manager** > **Price Lists**.
2. Find the price list that you want and click ⚙ to open it.
3. Next to **Delivery Items**, click ⚙.

   A list that shows the delivery items currently on the price list opens.
4. Use the filters under **Show me** to refine the list further, or use the search box to find specific items.
5. Click ✎ next to the item that you want to edit.
6. 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 that 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.

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7. Click **Save**.
8. Click **Done** to return to the price list.

## 8.6 Remove items from a price list

1. Click **Product Manager** > **Price Lists**.
2. Find the price list from which you want to remove items and click ⚙ to open it.
3. Next to **Standard Items** or **Delivery Items**, click ⚙.

   A list that shows the items currently on the price list opens.
4. Use the filters under **Show me** to refine the list further, or use the search box to find specific items.
5. Next to the item that you want to remove from the price list, click 🗑.

   ---

   ℹ You cannot remove a delivery item if it is linked to a standard item on the price list.

   ---
6. Click **Done** to return to the price list.

## 8.7 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.

1. Find the price list that you want to edit and click its name to open it.
2. Export the CSV:
   a) Next to **Standard Items** or **Delivery 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 ⬆.
   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**.

## 8.8 Delete price lists

If a price list is not attached to any agreement, you can delete it.

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1. Click **Product Manager** > **Price Lists**.
2. Find the price list that you want to delete.
3. Next to the price list, click 🗑.

# 8.9 Matrix items

Once you have created a price list, you can define a product matrix on it. 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.

Basware Marketplace Standard has a simple tool that lets you create a product matrix. First, you need to define the dimensions, or the different aspects of your item that the buyers can choose from. After this, the system creates a matrix based on the dimensions you defined. All you need to do after this is to fill in the product identifiers that correspond with each item in the matrix.

## 8.9.1 Create matrix items

You can create a product matrix by following these instructions. First, you create the items that are part of the matrix – such as "size S red t-shirt" and "size M blue t-shirt". Then, you collect these different variants under a matrix master item, "t-shirt".

---

If you have lots of matrix items that you want to create or edit, use the Super Content Loader Excel file or a CSV file.

---

1. Create or upload the items that you want to be part of the matrix. Use the **Custom attributes** section to define the product dimensions (for example, example, size and color).
2. Make sure that the items have been added to the price list to which you want to create the matrix item. If necessary, create a price list or add your items to an existing price list.
3. To start creating the matrix master item, click **Product Manager** > **Price Lists**.
4. Next to the price list to which you want to create your matrix master item, click ⚙ to open it.
5. Next to **Matrix Items**, click ⚙.
6. Click **Create**.
7. In the **Name** field, type a name for the matrix master item (for example, "T-shirt").
8. In the **Description** field, type a description that will sell your item.
9. In the **Language** field, select the language.
10. Define the custom attributes of the matrix master item:
    a) Next to **Option Sets**, click ➕.
    b) In the **Custom Attribute** field, type the name of a custom attribute. For example, for t-shirt color, type "Color".

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Use exactly the same names that you have defined for the custom attributes of items (step 1).

c) Repeat steps 10.a and 10.b for all product dimensions.

11. Under **Items**, enter the Item ID for each product option.
12. Click **Save** to save the item.

## 8.9.2 Edit matrix items

1. Click **Product Manager** > **Price Lists**.
2. Find the price list that contains the matrix that you want to edit, and click ⚙ to open it.
3. Do one of the following:
   - To edit an individual matrix, click ⚙, and next to the matrix, select ⚙. Edit the matrix in the same way as when creating a product matrix.
   - To add or edit a large number of matrix items, use a CSV file.

## 8.9.3 Create or edit matrix items with CSV import

When you have a large amount of matrix items to create or update, you can do this by exporting and then importing a CSV file.

1. Click **Product Manager** > **Price Lists**.
2. Find and open the price list where you want to create or edit the product matrix.
3. Next to **Matrix Items**, do one of the following:
   - If the price list already contains matrix items, click ⬇ to download the existing matrix items.
   - If there are no matrix items yet, and the ⬇ button is grayed out, click ⬆, and download a template from the **here** link.
4. Download and save the file on your computer.
5. Use Microsoft Excel to add and edit the items in the CSV file, and save the file. If using the template, remove the sample data and add your own matrix data.
   a) In column A, use the following controls:

| | |
|---|---|
| **MATRIX** | Use this control in the row that contains the name and description of the matrix |
| **OPTIONSET** | Use this control in the rows that contain the different option sets, such as Color or Size. |
| **ITEM** | Use this control in the rows that contain the information for each available item. |

   b) In the MATRIX row, enter the matrix name in column B and the matrix description in column C.
   c) In each OPTIONSET row, enter the option set name, such as Color or Size, in column B. Then enter the available options in the next columns of that row.

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d) In each ITEM row, enter the values from each option set that correspond to the catalog item. For example, enter "Red" in column B and "Large" in column C for a large red shirt. Finish the item row with the matching item ID, or leave blank if no item ID is available.

e) If needed, add a second matrix to the file. Add a MATRIX row to define the beginning of the next matrix.

No commas are allowed in the import data.

6. Import the edited CSV file:
   a) Next to the section to which you want to import the CSV file, click .
   b) In the **Select Action** drop-down list, select if you want to merge or replace the items on the price list. Merging means that the CSV file content makes additions and changes to the current price list, and the items that are not included in the CSV file remain untouched. Replacing means that the imported file overwrites all items on your price list, 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**.

# 8.10 Product bundles

You can can create product bundles on your price lists. You can use them to group one master item and up to five component items together. For example, if your company sells flowers, you 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 your customer adds the bouquet of flowers in the shopping basket, the component item are also added there. Your customers cannot order the master item separately, and it cannot be added to another bundle as a component. Your customers can order component items as part of other bundles, or individually.

## 8.10.1 Create or edit product bundles

You can create and edit product bundles by using a CSV template.

You can also create and edit your product bundles using the Super Content Loader Excel file.

1. Click **Product Manager** > **Price Lists**.
2. Find the price list to which you want to create product bundle, and click  to open it.
3. Next to **Bundles**, do one of the following:
   - If the price list already contains product bundles, click  to export a CSV containing the current bundles.
   - If there are no product bundles yet, click , and download a template from the **here** link.
4. Edit the product bundles:
   a) Open the CSV file.

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b) Under **Bundle master**, add the master item's ID.

Repeat for as many rows as necessary.

c) Under **Item or Matrix**, add either **Item** or **Matrix**.

d) Under **Bundle component**, add the component item IDs.



Only items in the same price list can be in a bundle.

e) Under **Fixed or Linked Quantity**, define the quantity of the component items:

- **Fixed**: The quantity of the items does not change.
- **Linked**: The quantity of the items is linked to the master item's quantity.

f) Under **Optional or Mandatory**, add either **Optional** or **Mandatory**.

g) Save the bundle template.

5. In the **Select Action** drop-down list, select if you want to merge or replace the bundles on the price list. Merging means that the CSV file content makes additions and changes to the current price list, and the bundles that are not included in the CSV file remain untouched. Replacing means that the imported file overwrites all bundles on your price list, that is, all previous bundles are deleted and the bundles on the CSV file take their place.
6. Click **Select file** and select the CSV file that you created.
7. Click **Upload**.

### 8.10.2 Delete product bundles

To remove a component item from a product bundle, or to completely ungroup product bundles, you can export and edit the bundle template in CSV format and then import the updated file.



1. Click **Product Manager** > **Price Lists**.
2. Find and open the price list that contains the bundles that you want to edit.
3. Next to **Bundles**, click  to download the current bundles as a CSV file.
4. Open the CSV file, and edit it to remove the components or entire bundle rows as necessary.
5. Save the CSV file.
6. In the **Select Action** drop-down list, select **Replace existing simple bundle links on this price list**.
7. Click **Select file** and select the CSV file that you edited.
8. Click **Upload**.

## 8.11 Related items

You can use related items to link together standard items that are, in some way, related to each other. For example, if you sell laptops, you may want to suggest laptop bags and wireless mouses as related items. When the user opens the details page of a standard item, they will also see a list of related items linked to that item. Related items are not linked in the way that bundles are - each item is ordered separately by the user.

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You can add up to 50 related items to any standard item as long as all the items are on the same price list. All standard items can have their own related items and appear as another standard item's related item.

## 8.11.1 Create or edit related items

You can create or edit related items by using a CSV file.

1. Click **Product Manager** > **Price Lists**.
2. Find and open the price list on which you want to create related items.
3. Next to **Related Items**, do one of the following:
   - If the price list already contains related items, click to download the existing related items.
   - If there are no related items yet, click , and download a template from the **here** link.
4. Download and save the file on your computer.
5. Use Microsoft Excel to add and edit the items in the CSV file:
   a) Open the CSV file.
   b) Under **Master Item**, add the master item's ID.
   Repeat for as many rows as necessary.
   c) Under **Related Items**, add the related item's ID.

   Only items in the same price list can be linked as related items.

   d) Save the CSV file.
6. Import the edited CSV file:
   a) In the **Select Action** drop-down list, select if you want to merge or replace the related links on the price list. Merging means that the CSV file content makes additions and changes to the current price list, and the related links that are not included in the CSV file remain untouched. Replacing means that the imported file overwrites all related links on your price list, that is, all previous related links are deleted and the related links on the CSV file take their place.
   b) Click **Select file** and select the related item links template you created.
   c) Click **Upload**.

## 8.11.2 Delete related items

To remove related items from price list items, you can export and edit the related item template and then import the updated file.

1. Click **Product Manager** > **Price Lists**.
2. Find and open the price list from which you want to delete related items.
3. Next to **Related Items**, click to download the current related items in CSV format.

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4. Open the CSV file, and edit it to remove the related items that you want to remove, or entire rows as necessary.
5. Save the CSV file.
6. In the **Select Action** drop-down list, select **Replace existing related item links on this price list**.
7. Click **Select file**, and select the CSV file that you edited.
8. Click **Upload**.

## 8.12 Publish price lists

After you have made changes to price lists, you must publish the updates. Your customers can see the changes that you have made only after you publish them.

You can only publish a price list that is attached to an agreement. For instructions, see Attach price lists to agreements.

1. Click **Product Manager** > **Price Lists**.
2. Under **Show me**, select the **Modified** check box to only view the price lists that have been modified after they were last published.
3. Next to the price list that you want to publish, click ⚙.
4. Click **Publish**.

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# 9 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.

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.

## 9.1 View available tax territories

1. Click **Product Manager** > **Tax**.
   The **VAT Territory directory** is displayed.
2. To view the details of a specific territory, such as the available rates and which rate is the default, click .

## 9.2 Add tax territory to price lists

When a tax territory is added to a price list, you must also add a tax code to each item on the price list before you can publish the price list again. If your price list has many items, you can easily add a tax code to all items at once with the Super Content Loader.

1. Click **Product Manager** > **Price Lists**.
2. Find the price list to which you want to add a tax territory and click  to open it.
3. To edit the tax type, click the **Tax type** field and select an option in the drop-down list.
   The tax type is changed. The **VAT territory** field is displayed.
4. Click the **VAT territory** field and select the correct territory.

The tax territory has been added to the price list. Next, add tax codes to items on the price list.

## 9.3 Add tax code to items

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

If you are providing tax information to your buyers, you must add a tax code to each item on your price lists. If you have a small number of items, follow the instructions here. If your agreement has many items, you can easily add a tax code to all items at once with the Super Content Loader.

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1. Next to **Standard Items**, click .

   A list that shows the standard items currently on the price list opens.

2. Click next to the item that you want to edit.
3. In the **Tax code** field, the default tax code for the price list's tax territory is selected. Select the correct tax code from the drop-down list.

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

4. Click **Save**.
5. Click **Done** to return to the price list.

When you have made all of the changes to your price list items, publish your price list.

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# 10 Agreements

An agreement in Product Manager pulls together all the things that enable you and a buyer to review, approve, and publish content to Marketplace.

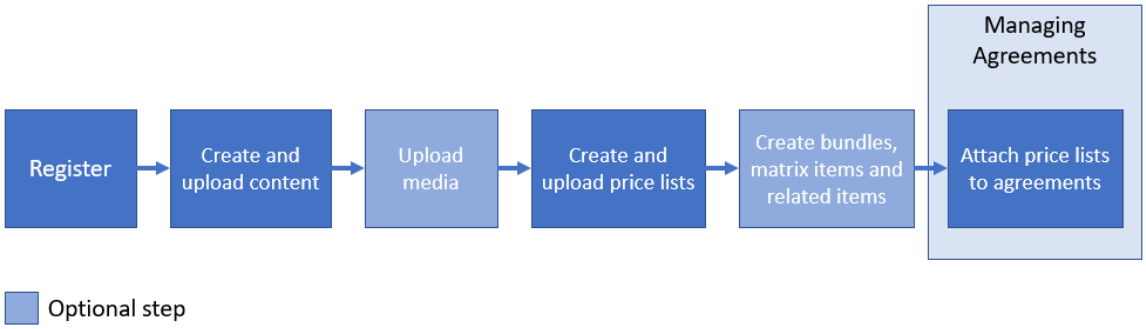



***Figure 4: Agreements as part of the overall workflow on Basware Marketplace Standard***

### Agreement types

Buyers can create following types of agreements:

| | |
|---|---|
| **Standard Agreement** | Buyers share your products within their organization only. |
| **Shared Agreement** | Buyers can share your products with a group of organizations within Basware Network. |

### Agreement statuses

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

| | |
|---|---|
| **New** | New agreements from buyers. |
| **Awaiting Response** | Agreements waiting for you to add content (including new ones) and send it to the buyer. |
| **Awaiting Price Approval** | Agreements that have been sent back to the buyer for them to review and approve. |
| **Expiring Soon** | Agreements that will expire within the next 30 days. |
| **Expired** | Agreements that have expired. |
| **Active** | Approved agreements that are with the buyer. An active agreement may have content on Marketplace or the content may have expired. |

## 10.1 Find and view agreements

1. Click **Product Manager** > **Agreements**.
2. In the search box, type the name of an agreement or other search criteria.
3. Click **Search**.

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The agreements that match your query are displayed.

4. To sort the results, click the **Sort By** drop-down list and select the sort criteria that you want to use.

   You can sort agreements based on relevance, name, agreement owner, start and expiration date, as well as the date when the agreement was modified.

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

   You can filter price lists based on the agreement type and agreement statuses

   To remove the filters, click **All**.

6. Click the name of an agreement to view the agreement details.

If there are agreements in **Awaiting response** status, open these agreements, attach a price list on them, and send the agreements back to your buyer for approval.

# 10.2 Attach price lists to agreements

Price lists enable your customers to purchase goods and services from you on Marketplace. When you receive an agreement from your customer, you must attach a price list to it and send it back to your customer for review.

If you have already prepared a price list, simply open the agreement and attach the price list on it. If not, first create content and a price list, and then attach the price list to the agreement.

1. Find and open the agreement to which you want to attach a price list.
2. In the **Price List** section, click **Add**.

   The list of price lists opens.
3. Next to the price list that you want to add to the agreement, click ✚.
4. To send your catalog and price list to your customer for review, click **Publish**.

When the customer has reviewed and accepted your price list, the customer publishes the catalog for their end users. You can follow the acceptance status by monitoring the status of the agreement in the Agreement directory.

# 10.3 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 **View**.

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

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# 11 Quotes

When you receive a request for quote (RFQ) from a buyer, you can respond to it by creating and sending a quote to the buyer. If you do not want to respond to the quote, you can close the RFQ. If you have questions regarding the RFQ, you can also send a message to the buyer.

You can view the RFQs sent by buyers and sort, filter, and search them to find the information that you want. You can also watch specific RFQs that you want to keep a close eye on.

If you send a quote to a buyer, the buyer may award the RFQ to your organization, and purchase the products. After the RFQ has been awarded, you can close the RFQ.

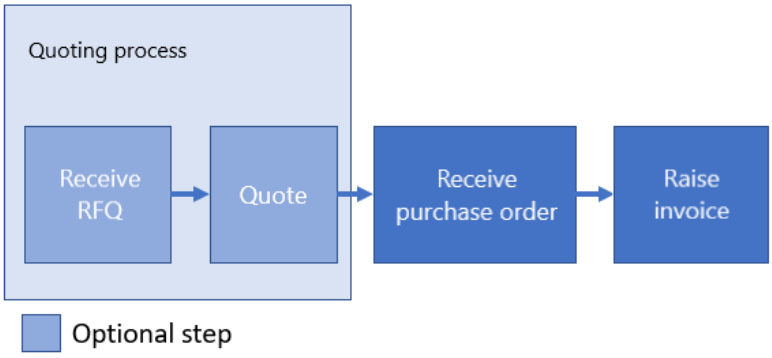



*Figure 5: Quote workflow*

It is also possible to receive purchase orders without the RFQ and quote.

**RFQ statuses**

Your RFQs go through the following statuses:

| | |
|---|---|
| **Open** | New RFQs. |
| **Sent** | RFQs that have been quoted. |
| **Awarded** | RFQs that the buyer has awarded to your organization. |
| **Expired** | RFQs that have expired, that is, the expiration date set by the buyer has passed. |
| **Closed** | RFQs that have been closed after they have been awarded or have expired. Also RFQs that the buyer has withdrawn become closed. |

## 11.1 Find and view RFQs

1. Click **Quotes**.
2. To search for a specific RFQ:
   a) In the search box, type applicable search criteria.
   b) Click **Search**.

   The items that match your query are displayed.

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3. To sort the results, click the **Sort By** drop-down list and select the sort criteria that you want to use.

   You can sort RFQs based on relevance, name, by the date when the item was created, and by the date when the RFQs will expire.

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

   You can filter RFQs based on RFQ statuses. You can also filter the RFQs to only show the RFQs that need attention or RFQs that you are watching.

   Click **All** to remove the filters.

5. To view the content of an RFQ and possible quote related to it, next to the RFQ, click ⚙ (for open RFQs) or 👁.

## 11.2 Respond to RFQs

1. Find and open the RFQ that you want to respond to.
2. Click **Quote**.
3. Fill out the information on the requested products:
   a) In the **Requested Product Details** section, next to a product, click ➕.

      The information on the product appears in the **Quote Lines** section.

   b) Add and edit the information:

| | |
|---|---|
| **Item name** | Name of the item. |
| **Description** | Description to provide additional information. |
| **Quantity** | Quantity of the items. |
| **Order unit** | Unit in which the item can be ordered. Start typing the unit, and select it from the list of proposed matches. |
| **Unit price** | Price of one item. |
| **Total price** | Total price calculated based on the **Unit price** and **Quantity** fields. |
| **Classification** | UNSPSC classification. Click ⚙, and define the classification. |

4. In the **Quote Header** section, do the following:
   a) If necessary, in the **Quote ID** field, edit the identifier. This is the number that identifies the quote.
   b) To add an attachment, next to the **Attachment** field, click ➕ and browse to the file that you want to attach. You can repeat this step to add multiple attachments.
   c) In the **Delivery cost** drop-down list, select if the delivery costs are included in the quoted price or not.

      If you select **Not included**, to provide the delivery information, click ➕ next to the drop-down list. The delivery information appears in the **Quote Lines** section. Add and edit the information in the same way as in step 3.b.

5. To send the quote to the buyer, click **Send**.

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You will be notified if the buyer awards your quote, if your quote was unsuccessful, or if the RFQ is withdrawn.

## 11.3 Edit a submitted quote

After submitting a quote to a buyer in response to an RFQ, you can edit the quote. Editing is possible if the RFQ is not yet expired or awarded.

1. Find and open the RFQ for which you want to edit the quote.
2. Click ⚙ to open the RFQ.
3. Next to the quote line that you want to edit, click ✎ and edit the information. To delete the line instead, click 🗑.
4. To add a new line to the quote, click ✚.
5. To send the quote to the buyer, click **Send**.

## 11.4 Withdraw a submitted quote

If you have submitted a quote to an RFQ, you can withdraw it and leave the RFQ process during the RFQ period or after the RFQ has expired, but before it is awarded.

1. Find and open the RFQ from which you want to withdraw your quote.
2. Click ⚙ to open the RFQ.
3. Click **Withdraw**.
4. In the confirmation message, click **Withdraw**.

Your submitted quote for the RFQ is withdrawn.

## 11.5 Send messages to buyers

If you have questions about an RFQ that you have received, you can contact the buyer to ask for more information.

1. Find the RFQ that you want to ask the buyer about.
2. Click **Contact**.
3. Type your message.
4. Click **Send**.

## 11.6 Find the most important RFQs easily

Start watching your most important open RFQs to find them easily.

1. Find the RFQ that you want to watch.
   Use the **Open** filter to only view your open RFQs.
2. To open the RFQ, click ⚙.

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3. Click **Watch**.

When you view your RFQs in the RFQ Directory view, select the **Watched** check box to find the RFQs that you are watching.

## 11.7 Close RFQs

If you do not want to respond to an RFQ with a quote, you can close the RFQ. You can also close an RFQ after it has been awarded, or after it has expired.

1. Find the RFQ that you want to close.
2. Click ⚙ next to the RFQ.
3. Click **Close**.

The status of the RFQ becomes **Closed**.

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# 12 Contracts

From **Contracts**, suppliers can register for buyers' tactical dynamic procurement systems (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.

## 12.1 Register for a DPS contract

1. Click **Contracts**.
2. Find the contract that you want to open and click . Contracts that you can register for have a status of **Unregistered**.

   You can use the search bar or the filters to more easily find the contract you are looking for.
3. In the **Contact Email**field, type the email address that the buyer can contact you at.
4. Fill out the questionnaire. Questionnaires are built by the buying organizations and will vary.
5. Click **Submit**.

The contract now has a status of **Pending**. The buyer will review your answers. If you are approved for the DPS contract, you will receive an email notification. You can click the link in the email to then add your item to the DPS contract.

## 12.2 Add items to DPS contracts

1. Click **Contracts**.
2. Find the contract that you want to open and click . Contracts that you can create item for have a status of **Approved**.

   You can use the search bar or the filters to more easily find the contract you are looking for.
3. Click **Create**.
4. In the **Name** field, type a name for the item.
5. In the **SKU** field, type the item's SKU or other supplier ID.
6. In the **Description** field, type a description that will sell your item.
7. In the **Keywords** field, type aliases, synonyms, or names of the key features of the item to help buyers find it.

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8. If the item is currently unavailable or out of stock, select **Unavailable**.
9. In the **Contact Email**field, type the email address that the buyer can contact you at.
10. Fill out the questionnaire. Questionnaires are built by the buying organizations and will vary.
11. Click **Submit**.

Your item is added to the DPS contract. When catalog users select the DPS contract item in the catalog, your and your item will display as an option that they can select.

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# 13 User management

If your user account has the Supplier administrator role, you can manage the users of your organization.

**User account types**

There are three types of user accounts:

| | |
|---|---|
| **Standard** | Standard user account to which you can assign different roles. |
| **System** | This type of user account is for connecting between Basware Marketplace Standard and external systems such as FTP. It is not applicable for using Basware Marketplace Standard. |
| **Punch in** | This type of user is automatically created when a buyer organization enters (punches into) Basware Marketplace Standard from their external Purchase-to-Pay (P2P) or Enterprise Resource Planning (ERP) system. |

## 13.1 Find and view users

You must have the Supplier administrator role to be able to manage user accounts.

1. Click **Settings** > **User Management**.
2. To search for a specific user, do the following:
   a) Type any part of the user's name, email address, or username in the search box.
   b) Click **Search**.

   The users that match your query are displayed. The column shows if the user is enabled, and the column shows if the user account is locked.
3. To sort the results, click the **Order By** drop-down list and select the sort criteria that you want to use.

   You can sort users based on relevance, name, and by the date when the user account was last modified.
4. To filter the results, select the filters that you want to use under **Show me**.

   You can filter users based on their user account types and based on whether the users are enabled or locked.

   To remove the filters, click **All**.

## 13.2 Create user accounts

You must have the Supplier administrator role to be able to manage user accounts.

1. Click **Settings** > **User Management**.
2. Click **Create**.
3. Type the name of the user in the **First name** and **Last name** fields.
4. In the **Type** drop-down list, select the user account type:
   - **Standard**: User account for using Basware Marketplace Standard.

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- **System**: User account for connecting between Basware Marketplace Standard and external systems.

5. Type the email address of the user.
6. Click **Create**.
7. Check the information and make the necessary changes.
8. If you are creating a standard user account, next to **Roles**, click > to expand the menu, and enable one or more roles for the user:
   - If you want the user to be able to use Product Manager, set the toggle switch for **Product Management** to on.
   - If you want the user to be able to manage users, organization information, and catalog settings, set the toggle switch for **Supplier administrator** to on.

   All roles can also access their own user profile.
9. Click **Save**.

## 13.3 Edit user accounts

You must have the Supplier administrator role to be able to manage user accounts.

1. Click **Settings** > **User Management**.
2. Find the user that you want to edit.
3. Next to the user, click ⚙.
4. Make the necessary changes, and click **Save**.

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# 14 Organization management

If your user account has the Supplier administrator role, you can manage the information of your organization.

## 14.1 Update organization information

You must have the Supplier administrator role to be able to manage your organization.

1. Click **Settings** > **Organization management**.
2. Next to any of the headings, click > to view the information in that category.
3. Make sure that all of the information under each heading is up to date, and update if necessary.
   For example, you can change your organization's contact person under **Contact information**.
4. When you have made the necessary changes, click **Save**.

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