QUICK GUIDE

Basware Marketplace Standalone for Suppliers
(Version 22.11)

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1 About Basware Marketplace Standalone

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

2 Getting started

With Basware Marketplace Standalone, 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.

2.1 Register to Basware Marketplace Standalone

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

> [i] 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 Standalone .

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.

> [i] 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 Standalone 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 Standalone.
   d) Click **Next**.
   e) Read and accept the terms of service.

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

> [i] If you do not log in within 90 days, your user account is disabled, but you can unlock the account by resetting your password.

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

Next, the customer creates an agreement for the Basware Marketplace Standalone 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 Standalone .
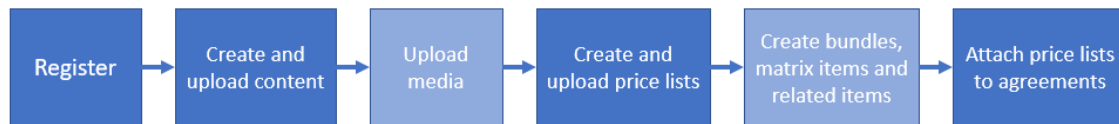
2.2 Log in

1. On the login page, enter your username and password
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 Working with Basware Marketplace Standalone

Figure 1: Overall workflow on Basware Marketplace Standalone

Step	Description	Further information
Register to Basware Marketplace Standalone	Register to Basware Marketplace Standalone when you receive an invitation to Basware services from your customer.	• Register to Basware Marketplace Standalone
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.	• Uploading content
Create and upload price lists	Create price lists and attach your items to them.	• Price lists • Create price lists • Add items to a price list
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 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

4 Uploading content

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

Basware Marketplace Standalone 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 Standalone.

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.

4.1 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 .

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.
	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 Standalone, 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 Standalone).

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

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

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

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

Date Format	Change the information in the selected column to date format.
Copy Field	Copy a value from another column of your source file.
Map	Convert the source value into another value in the destination field. For example, if the value in the source file is "EACH", and you want to convert it to "EA", enter `EACH` in the first field and `EA` in the second field.
Header	For CSV and Excel files only. Replaces the value of this field with a specified column header, determined by an index. The column index starts at 0 (zero). For example, to use the header from the first column of your spreadsheet, enter `0`. To use the header from the second column, enter `1`.
Organization Value	Returns the organization's tax territory code, such as GBR.
Upper Case	Change the text in this column to use only UPPER CASE.
Replace	Find all instances of a value in the source field and replace with a different value.
Split	Splits the current value into parts based on a specified delimiter, then returns only the part requested with part number. Part numbers start from 0 (zero).
Substring	A set of characters in a phrase. For example, if you want to pick the word "tax" from the phrase "valid tax information", enter `6` in the field **Enter start index** and `8` in the field **Enter end index**. Note that the first character's number is 0 (zero), which is why the character "T" in the above example is number 6, although it is the seventh character in the phrase. If you do not add any value to the **Enter end index** field, the substring will contain all of the characters starting from the value defined in **Enter start index**.
Copy from 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**.

8. Click **Save Mapping**.

You can now use this mapping when you upload content.

4.2 Upload 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.

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.

4.3 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**.

   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.

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.

4.4 Download and use templates for uploading content

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

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

   The list of all available templates opens.

3. If needed, narrow the list by **Type of Content** and **Format** using the filters to the left.
4. Click the name of the template you want to download.
   A dialog box opens with details about the selected template.
5. Click the version that you want to download, typically **Latest**.
6. If required, select the location on your computer where you want to save the template file.
7. Open the template file from your computer.
8. Fill in your own content information in the template and save your changes.
9. Upload your content using the appropriate mapping in the Loader tool.

4.5 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.

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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 type	UNSPSC and eCl@ss are supported.
Item template	Add the name of the that you want to be applied to the item. The template must already exist in the system. After adding the template to items using the Super Content Loader file, you must define the template data.
Availability	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: • Each • Hour • Kilogram • Liter • Meter • Sheet • Square Meter

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5 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.
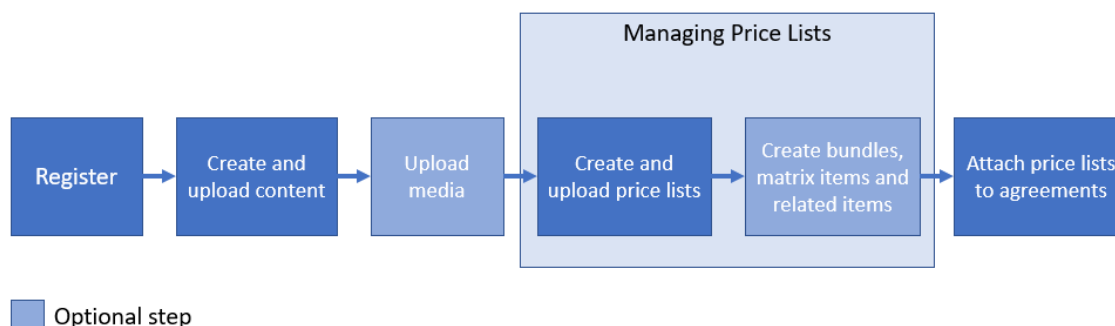

Optional step

Figure 2: Price lists as part of the overall workflow on Basware Marketplace Standalone

Price list types

You can use two types of price lists:

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

Punchout A punchout price list links your punchout configuration to a punchout agreement, which allows your customer to access your sales order website from Basware Marketplace Standalone.

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

5.1 Create price lists

When you have added items on Basware Marketplace Standalone 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.

5.2 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.

   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.

5.3 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.
7. Click **Save**.
8. Click **Done** to return to the price list.

5.4 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 Standalone 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.

5.4.1 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".

    > 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.

5.4.2 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.

5.4.3 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.

   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.

   ℹ️ 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**.

5.5 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.

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**.

6 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.
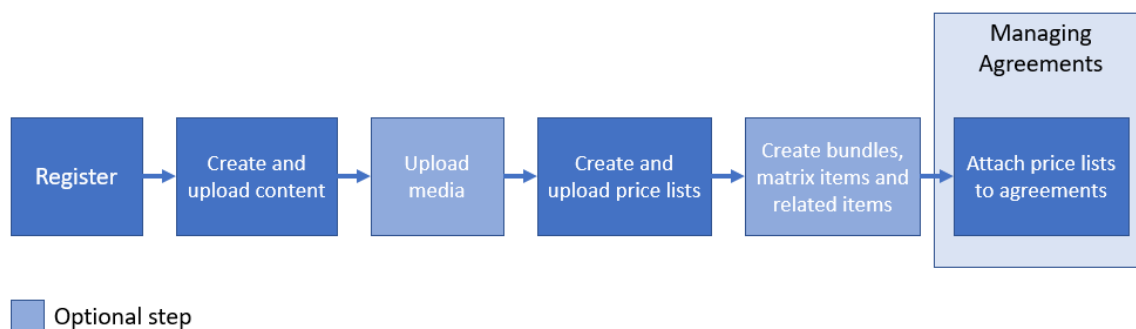

Figure 3: Agreements as part of the overall workflow on Basware Marketplace Standalone

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.
Punchout Agreement	An agreement for items on your website that the buyers will punch out to. This is not sharable outside of the buyer's organization.

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.

6.1 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**.

   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.

6.2 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.