



Simplify Operations, Spend Smarter.

QUICK GUIDE

Basware Marketplace Standalone for Buyers
(Version 22.9)

Table of Contents

1 Ordering items	3
1.1 Find and view items on Marketplace.....	3
1.2 Order items from Marketplace.....	4
2 Agreements and items.....	6
2.1 Create agreements.....	6
2.2 Agent agreements.....	7
2.2.1 Create standard items.....	8
2.2.2 Create delivery items.....	10
2.3 Framework agreements.....	11
2.3.1 Create items for framework agreements.....	11
2.4 Add suppliers to agreements.....	12
2.5 Add approval schemes to agreements.....	12
2.6 Approve agreements and price lists.....	13
2.7 Publish agreements.....	14
3 Uploading content.....	15
3.1 Upload content.....	15
3.2 Use Super Content Loader to upload content.....	16
3.3 Upload item stock levels manually.....	17
3.4 View and commit your upload.....	17
4 Views.....	19
4.1 Create views.....	19
4.2 Add agreements to a view.....	20
4.3 Add users to a view.....	20
4.4 Add organization lists to a view.....	21
5 Approvals.....	22
5.1 Default Approval Scheme.....	22
5.2 Create approval schemes.....	23
6 Supplier registration.....	25
6.1 Invite new suppliers to Basware Network.....	25
6.2 View all suppliers.....	25

1 Ordering items

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

You can order items from two sources:

- [Order items from Marketplace](#)
-

Marketplace

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

For information on how item visibility is configured, see [Views](#).

External sites

Unlike Marketplace content, external sites let you order from supplier-managed catalogs on their own websites, using a process called supplier punchout. External sites are created using punchout agreements. For more information on creating punchout agreements, see [Agreements and items](#).

If you have access to external sites through punchouts, a section is displayed on the Marketplace dashboard that contains the logos of suppliers who are available for punchouts. If you cannot use punchouts, this section is not visible.

It is possible to use Amazon Business as a punchout site. However, only items that are fulfilled by Amazon can be ordered using the external webshop. Items fulfilled by third-party vendors are not supported.

Delivery charges

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



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

1.1 Find and view items on Marketplace



1. Click **Shopping > Marketplace**.
2. Type one or more relevant search terms in the search box, and click **Search**.

Marketplace searches for your terms in the following fields:

- **Item ID**

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

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



It is not possible to use expressions in search, such as AND, BUT NOT, or double quotes. The search tool removes conjunctions and other common words from the search terms.

3. On the search results page, you can sort and filter the results in several ways.
 - Sort by **Relevance**, **Date**, **Price**, **Name**, and **Item ID**.
 - Click **Categories** to see the list of all available categories and filter by category.
 - Select **Show Expired Items** to also see items in your search results that have expired and can no longer be ordered.
 - Select **Match all keywords** to see only items that include all of the words you searched with.
 - Select **Show Preferred Items** to see only items that are marked as preferred by your organization. For more information on preferred items, see .
 - In the **Price** field, type a minimum and maximum number to see only items in that price range.
 - Select a check box on the **Filters** pane to only see items with that attribute. Filters are dynamic - the available attributes vary depending on the available items.
4. To view the details of an item, click the item's title.

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

1.2 Order items from Marketplace




1. Click **Shopping > Marketplace**.
2. [Search for the item](#) that you want to order.
3. For each item that you want to order, type the item quantity that you want and click **Add**. The default quantity for each item is its minimum order quantity.

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



For items with different currencies, you must create a new basket for each currency. Only items that use the same currency can be in one basket.

4. Click  to open your basket.
5. Make any changes needed, such as adjusting item quantity or removing items.
6. Click **Checkout**.

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

2 Agreements and items

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

Agreement Process

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

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

Items

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

2.1 Create agreements

To create an agreement, follow these steps.



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

Organization agreement	An agreement available only to your organization. This agreement type uses supplier-managed content.
Punchout Agreement	An agreement in which the supplier provides punchout information to their externally-managed webshop. This information can then be shared to other organizations.
Agent Agreement	An agreement available only to your organization. This agreement type uses buyer-managed content.
Framework Agreement	An agreement in which the buyer defines items available from several suppliers. Buyers must send items through the Quick Quote process to select the best supplier before purchasing the items.

5. In the **Start date** field, select the first day the agreement is in effect.
6. In the **Expiration Date** field, select the day the agreement is no longer in effect.

The expiration date is shown to users on the item details page for all items that are part of the agreement.

7. In the **Contract Reference** field, enter any information about related contracts. Users of **Product Manager** can search by this information to find agreements.
8. In the **Language** field, select the language in which the agreement information is written.
9. In the **Currency** field, select the currency in which all price lists in the agreement must be provided.
10. In the **Keywords** field, type search terms end users can use to find this agreement's items on Marketplace. The keywords are not shown on the items themselves.
11. In the **Description** field, enter a description of the agreement. Only you and other users of Product Manager can see the description. It is not visible on Marketplace and is not sent to suppliers.
12. Click **Save**.

The agreement is created in **Draft** status. If you have created an organization, shared, or punchout agreement, you must now add a supplier. See [Add suppliers to agreements](#).

If you have created an agent or framework agreement, you must now add items. See [Upload content](#) to upload many items at once using a data file.

2.2 Agent agreements

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

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

To add items to agent agreements, you can [add items individually](#) by managing the agreement or [upload content](#) through the Loader tab.

Item pricing in agent agreements

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

Agent agreement items in many languages

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

Stock levels

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



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

2.2.1 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. Click **Product Manager > Agreements**.
2. Find the agent agreement to which you want to add standard items and click .
3. In the Items section, click .
4. Click **Create**.
5. In the **Item type** drop-down list, select **Standard item**.
6. In the **Supplier item ID** field, type an identification code for the item.
7. If necessary, add a template to the item. For instructions on creating and adding templates, see .
8. To set the item's supplier set the toggle switch for **Set item supplier** to on. You must then complete the following fields:
 - a) In the **Supplier Name** field, enter the name of the supplier.
 - b) In the **Supplier code** field, enter the supplier's code, such as a DUNS number.
 - c) In the **Supplier email** field, enter the supplier's email address.
9. In the **Name** field, type a name for the item.


The name is the most prominent field in your user's search results. Make sure that you use a name that is both relevant and concise.
10. In the **Description** field, type a description that will sell your item.

An abstract of this field is shown on the Marketplace search results. You can use formatting to call out key features of the item.
11. In the **Keywords** field, type aliases, synonyms, or names of the key features of the item to help buyers find it.
12. In the **Content Tags** field, select a tag to be assigned to the item.

For tags to be available, you must first add tags to the agreement.
13. In the **Item attributes** section, enter additional information about the product.

Manufacturer name	Manufacturer of the product or the provider of the service, if not yourself.
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Manufacturer product ID Manufacturer's or service provider's unique identifier for the product or service.

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

An example set of price breaks could be:

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

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

21. To define the classification of the item, click  next to **Classification** and select the correct classification.
22. In the **Linked media** section, add your user guides and other media files. For instructions, see . You can also skip this now and go back later.
23. In the **External Links** section, click  to add a link to an external website.
24. Add images to the item. For instructions, see . You can also skip this now and go back later.
25. Click **Save** to save the item.



Once you have created standard items, you can:

- [Create delivery items](#) to define the delivery charges for the products.

- Upload media and add them to your items.

After you have finished creating standard items, the items may need to be [approved](#) based on the agreement's approval scheme.

2.2.2 Create delivery items

1. Find the agent agreement to which you want to add standard items and click .
2. In the **Items** section, click .
3. Click **Create**.
4. In the **Item type** drop-down list, select **Delivery Item**.
5. In the **Delivery Type** drop-down list, select whether you want to apply the delivery item for each item, or for the entire shopping basket.

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

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

6. In the **Supplier item ID** field, type an identification code for the item.
7. To set the item's supplier set the toggle switch for **Set item supplier** to on. You must then complete the following fields:
 - a) In the **Supplier Name** field, enter the name of the supplier.
 - b) In the **Supplier code** field, enter the supplier's code, such as a DUNS number.
 - c) In the **Supplier email** field, enter the supplier's email address.
8. Fill in the **Name**, **Description** and **Keywords** fields.

9. In the **Price Breaks** section, enter the delivery charge per item or per order.

If the delivery type is set to **Item**, the price breaks define the delivery price per item depending on the number of items in the basket. If the delivery type is set to **Basket**, the price breaks define the delivery price for the basket depending on the value of the basket.


- a) In the **Number of units** field, enter the minimum number of items OR minimum total basket value the buyer must order to get the specified delivery price. The first price break listed should always be 1, but many additional levels can be added.
- b) In the **Price** field, enter the price per unit when the buyer orders at least the specified number of items or total basket value.

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

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

Number of units	Price
100	0 GBP

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






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

After you have finished creating delivery items, the price list may require [approval](#). Once the delivery items are approved, you can apply them to standard items while [creating](#) or editing the standard items.

2.3 Framework agreements

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

2.3.1 Create items for framework agreements

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




- c) Repeat for each supplier you want to add to the item.
 - d) When all suppliers are added, click **Close**.
10. Add images to the item. You can also skip this now and go back later.
11. Click **Save** to save the item.

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

2.4 Add suppliers to agreements

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

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

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

The supplier is notified with your request for information. After you receive the information, you can approve the price list. See [Approve agreements and price lists](#).

2.5 Add approval schemes to agreements



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




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

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

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

To add an approval scheme to an agreement:

- 
1. Click **Product Manager > Agreements**.
 2. Find the agreement you want to add an approval scheme to and click .


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



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

2.6 Approve agreements and price lists

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



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


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

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

2.7 Publish agreements

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



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

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

3 Uploading content

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

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.

3.1 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 agreement, and the content that is not included in the file remains untouched.
 - **Replace existing items:** The file that you upload overwrites the current agent agreement content, that is, all previous items are deleted and the items on the imported file take their place.
6. Under **Output Type**, select the content that you want to upload:
 - **Agent Stock:** Upload stock levels for items on agent agreements.
 - **Products and Price List:** Upload items and price information.
7. Under **Language**, select the language.
8. Under **UNSPSC version**, select the version of UNSPSC classification that you use.
9. Under **Currency**, select the correct currency.
10. Click **Upload**.

After uploading content, [commit it](#).

3.2 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 agent agreement, you can also export your agent agreements as a Super Content Loader file and use that instead of an empty template.

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

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

Note the following columns:

Classification Scheme	UNSPSC and eCl@ss are supported.
Template Name	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.
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).
Comparison UOM	<p>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:</p> <ul style="list-style-type: none"> • Each • Hour • Kilogram • Liter • Meter • Sheet • Square Meter

3.3 Upload item stock levels manually


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



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



1. Enable stock on an agent agreement.

- a) Find an existing agent agreement and click  to open it, or [create a new one](#).
- b) On the Manage agreements page, set the toggle switch for **Stock Levels** to on.

2. Prepare the stock CSV file.

The CSV file must have the following columns: SKU, Location, and Quantity.

If you need to download a file template for stock upload, go to the information panel on the right side of the page, scroll to the Stock Levels section, and click the **here** link.

3. Next to **Stock Levels**, click .

The Loader page opens and the **Agreement ID** field is automatically filled in with the agreement's information.

4. In the **Mapping** field, select **Agent Stock CSV**.

5. In the **Source File** field, click **Choose a File** and select the CSV file with the stock information. You can also drag and drop the file into the **Upload** box.

6. In the **Enter an Action** field, select **Merge with existing items**.

This action will match the CSV data to items already in the agreement based on the items' SKU. The stock data will be added to the items, and any existing stock data for the items will be overwritten. Other item information will remain unchanged.

7. In the **Output Type** field, select **Agent Stock**.

8. Click **Upload**.

9. After the file is uploaded, check the content for errors on the Staging page.

10. When the data is correct, click **Commit**.

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

Stock levels are automatically cleared 30 days after upload.

3.4 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**.

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**.

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

4 Views

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

Two types of views are available:

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

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

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

4.1 Create views

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



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

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

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

For information the types of views, see [Views](#).

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

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

For agreement views:

- [Add agreements to a view](#)
- [Add users to a view](#)
- [Add organization lists to a view](#)
-

For a sourcing view:



- [Add users to a view](#)

4.2 Add agreements to a view

Before adding agreements to a view, you must have an [agreement view created](#). You must also have at least one [agreement](#) that is not expired.

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



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

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



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

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

4.3 Add users to a view

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




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

5. When you have selected all the users that you want to access the content in the view, click **Done**.

4.4 Add organization lists to a view

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



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

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

5 Approvals

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

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

Levels

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

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

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

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

Rules

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

Item added	Any item is added to the price list.
Item removed	Any item is removed from the price list.
Base price increased	The base price of any item is increased by a defined percentage.
Base price decreased	The base price of any item is decreased by a defined percentage.
Base units	The number of base units in the price list changes.
Base unit of measure	The base unit of measure for any item changes.
Price on request	An item in the price list is set to use Price on Request.

5.1 Default Approval Scheme

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

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

5.2 Create approval schemes

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

To create an approval scheme:



1. Click **Product Manager > Approvals**.

2. Click **Create**.

3. Type a name and description for the approval scheme. Make sure the scheme name is easily recognizable to you and your administrative team.

4. To have the agreements that go through this approval scheme auto-exported every time they are updated or approved, select the check box for **Auto export**. You will choose the trigger for auto-export later.



5. Click **Save**.

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



6. If you selected **Auto export** on the previous page, select an option for **Auto Export Trigger**:

- **On Update**
- **On Approval**

7. Configure the following options for the **Default level**:

- **Auto** switched to on: all changes made the the agreements are automatically approved and updated on Marketplace. Click  to select one or more buyer administrators who will be notified by email if a price list changes. The selected administrators do not need to take any action, since the changes are automatically approved.
- **Auto** switched to off: Click  to choose at least one buyer administrator who can approve changes to the agreements' price lists. One of the selected administrators must approve any price changes, added items, or removed items.







8. If needed, click **Add level** to add an additional level of approvals. You can add up to four additional approval levels. To configure an approval level:

- a) Click  in the **Rules** section to display all possible rules. Rules are changes to the price list for which an administrator's approval can be required.
- b) Click  to select a rule. The available rule options are:

Item added	Any item is added to the price list.
Item removed	Any item is removed from the price list.
Base price increased	The base price of any item is increased by a defined percentage.
Base price decreased	The base price of any item is decreased by a defined percentage.
Base units	The number of base units in the price list changes.

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

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

- c) To add more rules to the level, click  again and add an additional rule.
 - d) Click  in the **Approvers** section to display all possible approvers.
 - e) Click  to select an approver. To add more approvers, click  in the **Approvers** section again and add an additional approver.
 - f) To remove any rules or approvers, click .
9. In the **Quality scoring rules** section, click  to add a quality scoring rule.
10. When all configurations to the approval scheme are complete, click **Save**.

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

6 Supplier registration

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

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

6.1 Invite new suppliers to Basware Network











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

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

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

6.2 View all suppliers



1. Click **Directory**.
The list shows all suppliers in your community and the following information for each supplier:
 - Registered name and location
 - D-U-N-S number
 - Capabilities: Suppliers can have the following capabilities:
 - : A supplier that has submitted at least one quote to an RFQ
 - : A supplier that has submitted one or more electronic invoices to one or more buyers
 - : Environmentally Certified
 - : Government eMarketplace Certified
 - : LVP Certified
 - : Supplier can be paid electronically with Basware ePayment
 - : Punchout (this supplier can be contacted to set up punchouts easily)
 - : A supplier who is backend integrated using the Basware Network
 - Active: Whether or not each supplier has been active on Marketplace in the past six months.
2. If necessary, sort and filter the list as follows:

- To view suppliers that have been either active or inactive on Marketplace in the past six months, click **Active**.
 - To view suppliers in specific categories, click a category name in the **Categories** group.
 - To view all suppliers in a specific location, click a location name in the **Locations** group.
 - To view suppliers that have punchout content available, click **Punchout**.
 - To view suppliers with which your organization has previous or current orders, click **Traded with**.
3. To see more details and contact information for a supplier, click their name on the list.
-



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