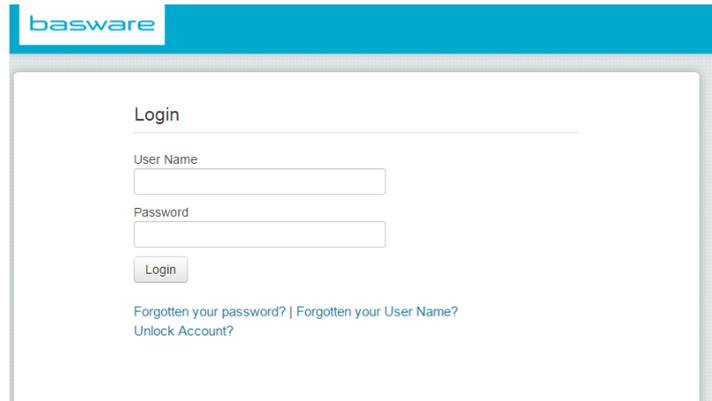


Updating Content in Product Manager

1. Log in to the system at https://buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB, entering username and password. If you have forgotten your username or password, you can select the appropriate link to issue a reminder to your email address.



The screenshot shows the basware login interface. It features a blue header with the 'basware' logo. Below the header is a white login form with the following elements: a 'Login' heading, a 'User Name' input field, a 'Password' input field, and a 'Login' button. At the bottom of the form, there are three links: 'Forgotten your password?', 'Forgotten your User Name?', and 'Unlock Account?'.

2. Select Product Manager.



You will be able to view all your listed content within Product Manager from the available tabs:



Agreements = a list of requests from customers and/or framework managers to load content. You must receive an agreement before you can publish any content, e.g. CCS (the customer in this instance) will create agreements for your content on the catalogue.

Price Lists = a list of price lists you have either manually created, or that have been auto-created following the load of a BMEcat file. A price list must be attached to an agreement in order for it to be seen by a customer. You can find standard guidance on attaching and publishing price lists [here](#).

Items = a list of all of your line items, irrespective of whether they have been added to a price list or an agreement. You can also see the customer view of your content, i.e. all information you provide here will be displayed to the customer, including images and media files.

Media = a list of your media files, including logos, pdf attachments, product images etc. Guidance on how to upload media files can be found [here](#).



All content is managed within your account, and you can update this content as often as your framework allows, please check this with your framework manager if you are unsure. Content can be amended in the following ways:

- Amending descriptions, keywords, manufacturer part ID etc
- Amending the attached files linked to specific Items, i.e. removing an image or amending a pdf attachment
- Amending the price of an item, in most cases requiring the update to be re-approved before the update will take effect
- Adding/removing items from the system
- Adding/removing items from the specific framework view
- Adding/removing media files altogether

There are a number of ways to manage your content. You can do so by amending and re-uploading the content loader, which generates an xml file for upload, you can create your own xml file providing it is in the same format so the system can load your content, or you can log into the system and amend content directly within the User Interface. Suggested use of the different methods are:

1. For minor amends, or low volume of changes you should log in to the system and amend, see guidance for (small number of items).
2. For bulk amendments the content loader is the best way to update content, see guidance for (large number of items).
3. If you are already using your own xml extract you should follow the guidance for (large number of items) from the step that a BMECAT file has been created, to ensure updates are made to your content.

The below guidance will describe how to carry out the actions required.

How Do I?

[Add an Additional Item to my Item List and update Existing Content \(small number of items\)](#)

[Add Multiple Additional Lines to my Item List and Update Existing Content \(large number of items\)](#)

[Amend a Single Line of Existing Content \(small number of items\)](#)

[Amend Multiple Lines of Existing Content \(large number of items\)](#)

[Update a Single Price against Existing Content \(small number of items\)](#)

[Update Multiple Prices against Existing Content \(large number of items\)](#)

[Remove Live Line Item\(s\)](#)

Add an Additional Item to my Item List and update Existing Content (small number of items)

1. Select Items from the menu
2. Select Create button



3. Select the Item Type from the drop down list, i.e. Standard Type for an Item, or Delivery Item for a delivery line.
4. Enter Supplier Item ID, this is the unique identifier for your item.
5. Enter item details as below:
 - Name – title/name of the item
 - Description – Long description of item, including any additional details
 - Keywords – any words not already captured in the above fields that users may enter to search for the item
6. Select the Item Class from the drop down menu, Service, or Goods
7. Enter the standard attributes as below:
 - Lead Time – the length of time required for delivery
 - Manufacturer Name – name of the manufacturer of the item
 - Manufacturer Product ID – product ID number
8. You can also add any additional custom attributes to help filter/search for your product, i.e. colour, size, spec. To add a custom attribute:

- a. Select the green plus button

Custom Attributes

Name Value



- b. Enter the attribute name, i.e. colour
- c. Enter the attribute value, i.e. red in the second box
- d. You can add as many attributes as required, by repeating this process.
- e. You can also remove an attribute by selecting the minus icon

Name Value



Colour



Red

9. Enter the final information required as below:
 - Comparison UOM – dropdown, default is Each

- Comparison Scale – must be a number

10. Select Add Classification button

Add Classification

11. Enter four levels of classification using the drop down lists. This will help customers filter the products in the search engine

12. Once complete select Save button

Save

Once you click save the page may require changes in order to fully save, these will be highlighted with red text.

Product Name ...

Please provide a Name for this Product

Standard Item

Please provide a Supplier Item ID for this Product

13. Add any media files/images as appropriate by:

- a. Drag and drop the file into the appropriate area on the page
- b. Select the Select Image from Media Directory to choose an existing image from your directory

Select Image from Media Directory

Drop file here to upload

Drop file here
to upload

Drop file here
to upload

Drop file here
to upload



14. Add any linked media/attachments as appropriate by selecting the + button



15. Select the appropriate files, you can select multiple attachments for each item
16. Once you have found and highlighted all relevant files select the Add X Items, where X will show how many have been highlighted.

Add 0 Items

17. Select Save button to save the new item

Save

Once the item has been created you must still add this item to the price list in order for it to be updated in the Marketplace.

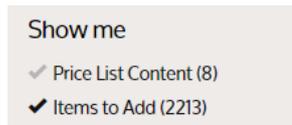
1. Select Price Lists from the menu



2. Open the relevant price list for the content you wish to add the new item to
3. Select the Manage button against 2. Items



4. Select the Items to Add filter (the numbers in brackets will correspond to the number of items you have)



5. Select the relevant item you wish to add, you can do this by using the search bar or scrolling through your item list
6. Select the + button to add the item



7. Repeat steps 5 & 6 for other items as necessary
8. Select the Done button to confirm the additions

Done

9. Select the Publish button to send the price changes for approval

Publish



Once you select publish you will see the following message:

Price List Directory > Prod Mana Guidance Cat v1

Editing has been temporarily disabled whilst the price list is being processed.

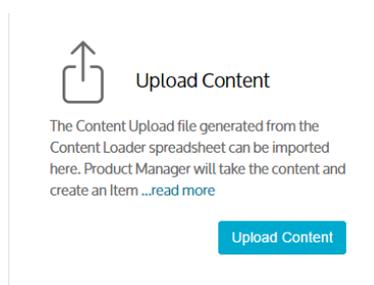
You'll notice some of your buttons at the bottom are now grey and will not become available again until your updated price list is approved or rejected by the buyer.

Add Multiple Additional Lines to my Item List and Update Existing Content (large number of items)

1. Access the content loader, you may wish to use your latest version, or you can download a new one [here](#). Alternatively you can also download this from the system, on the Product Manager dashboard page.
2. Ensure macros have been enabled to allow you to add content
3. Follow the instructions within the content loader to add the new item lines. During catalogue creation you should complete "Your Content" and the "Header Data" sheets.
4. Using the "Check Data" function from within the Add Ins, run a check on your content. Any errors will be displayed which you should amend prior to running this script again.
5. Once the check has completed successfully create you BMECAT file and save locally
6. Select Product Manager to display the dashboard



7. Select Upload Content button



8. Under Content Loader Files you can expand the instructions for further details.

Content Upload

Content Loader Files

[Instructions](#) ▶

- a. Select the Currency from the drop down list.
- b. Select the Select file button and locate your locally saved BMECAT file

Select File

- c. Select the Upload button

Upload

9. Once the file has loaded you will see the status change to Upload Succeeded. If there are any errors details will be displayed here for correction and re-upload.

Once the items have been created you must still add these items to the price list in order for it to be updated in the Marketplace.

1. Select Price Lists from the menu



2. Open the new price list which has been created from your recent content loader.
3. Select the Export button against 2. Items



4. Open the csv file and save locally
5. Repeat steps 1-3 against the current live price list, i.e. the list the new prices need adding to
6. Combine the two price lists together, i.e. add all the lines from the new price list into the existing price list.
7. Save the updated file locally
8. Select the Import button against 2. Items



9. Select the locally saved, updated file
10. Select the Publish button to send the price changes for approval

Publish

Amend a Single Line of Existing Content where the price remains the same (small number of items)

1. Select Items from the menu



2. Select the relevant item you wish to amend, you can do this by using the search bar or scrolling through your item list
3. Select the Edit button



Edit

4. Make amendments to any of the fields as required. **Note** you cannot amend the Supplier Item ID or Item Type as these are fixed identifiers. A new item will need to be created in this instance
5. You can preview the item to see how the customer would see your item in the marketplace by clicking the Preview button

Preview

6. Once all amendments have been made, select the Save button

Save

7. Select the Update to Marketplace button. As this does not require further approval this will automatically update.

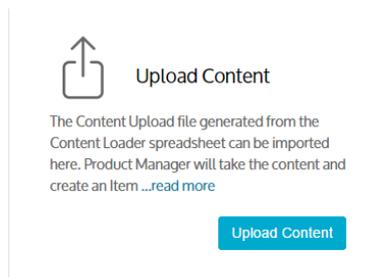
Update to Marketplace

Amend Multiple Lines of Existing Content where the price remains the same (large number of items)

1. Download the content loader at <http://suppliers.procservice.com/pm>. Alternatively you can also download this from the system, on the Product Manager dashboard page.
2. Follow the instructions within the content loader to display the items with amends. **Note** the supplier item ID and product name must match the existing content in order to overwrite the content. If this is different a new item will be created during upload
3. Check the data and create your BMECAT file, saving locally
4. Select Product Manager to display the dashboard



5. Select Upload Content button



6. Under Content Loader Files you can expand the instructions for further details.



Content Upload

Content Loader Files

[Instructions](#) ▶

- a. Change the Import Products Only tab to green so that you only upload the items rather than a new price list as well.



- b. Select the Select file button and locate your locally saved BMECAT file

Select File

- c. Select the Upload button

Upload

7. Once the file has loaded you will see the status change to Upload Succeeded. If there are any errors details will be displayed here for correction and re-upload

8. Select Items from the menu

Home Items Media Price Lists Agreements

9. You can publish all updates at once by selecting the Publish Updates button

Publish Updates

10. Confirm that you wish to publish all updates by selecting the Publish Updates button again

Update Published Products

To update products that already exist in the Marketplace, click OK.
Otherwise, click Cancel.

Cancel Publish Updates

11. Alternatively, you can review the updates and update to the marketplace individually. Items which have been updated will change from a status of published to updated. You can select Updated from the filter, where the number in brackets equals the number of items within the filter.



- a. Select the relevant item
- b. Select the Update to Marketplace button to publish the changes



- c. Repeat Steps 11-12 for each item

Update a Single Price against Existing Content (small number of items)

1. Select Price Lists from the menu



2. Open the relevant price list for the content you wish to add the new item to
3. Select the Manage button against 2. Items



4. Select the pencil icon button on the relevant item to edit



5. Amend the price as required by selecting the + or – icon next to the relevant price under the Price Breaks and entering the new price. If price breaks are not being used only one line should display with a Number of Unit as the minimum order quantity, i.e. 1.

Price Breaks		
Number of Unit	Price	
1.00	2.00	-
		+

6. Select the tick icon to confirm new price



7. Repeat this step for any delivery charges



8. Select the Save button



9. Repeat steps 4 – 7 for any other price changes

10. Select the Done button



11. Select the Publish button to send the price changes for approval



Update Multiple Prices against Existing Content (large number of items)

1. Select Price Lists from the menu



2. Open the relevant price list for the content you wish to add the new item to

3. Select the Export button against 2. Items



4. Open the csv file and update the prices accordingly

5. Save the csv file locally

6. Select the Import button against 2. Items



7. Select the locally saved, updated file

8. Select the Publish button to send the price changes for approval



Remove Live Line Item(s)

1. Select Price Lists from the menu



2. Open the relevant price list for the content you wish to remove item(s) from

3. Select the Manage button against 2. Items



4. Select the bin icon to delete the price from the price list



5. Repeat step 4 for any other price removals
6. Select the Done button



7. Select the Publish button to send the price changes for approval



If you wish to remove all of your content you should contact CCS who will be able to remove all content from the Marketplace to allow you to complete any updates required prior to re-publishing.