

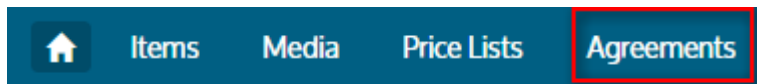
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## Summary

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

To access your Agreements click the Product Manager tab and then click Agreements:



Buyers can create three types of agreements:

- Standard Agreement: Buyers share your products within their organisation only.
- Shared Agreement: Buyers can share your products with a Group of organisations within the Basware Commerce Network.
- Punchout Agreement: An agreement for items on your website that the buyers will punchout to. This is not sharable outside of the buyer's organisation.

More information on Agreement Type is provided below on the Agreement Detail Page guide.

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

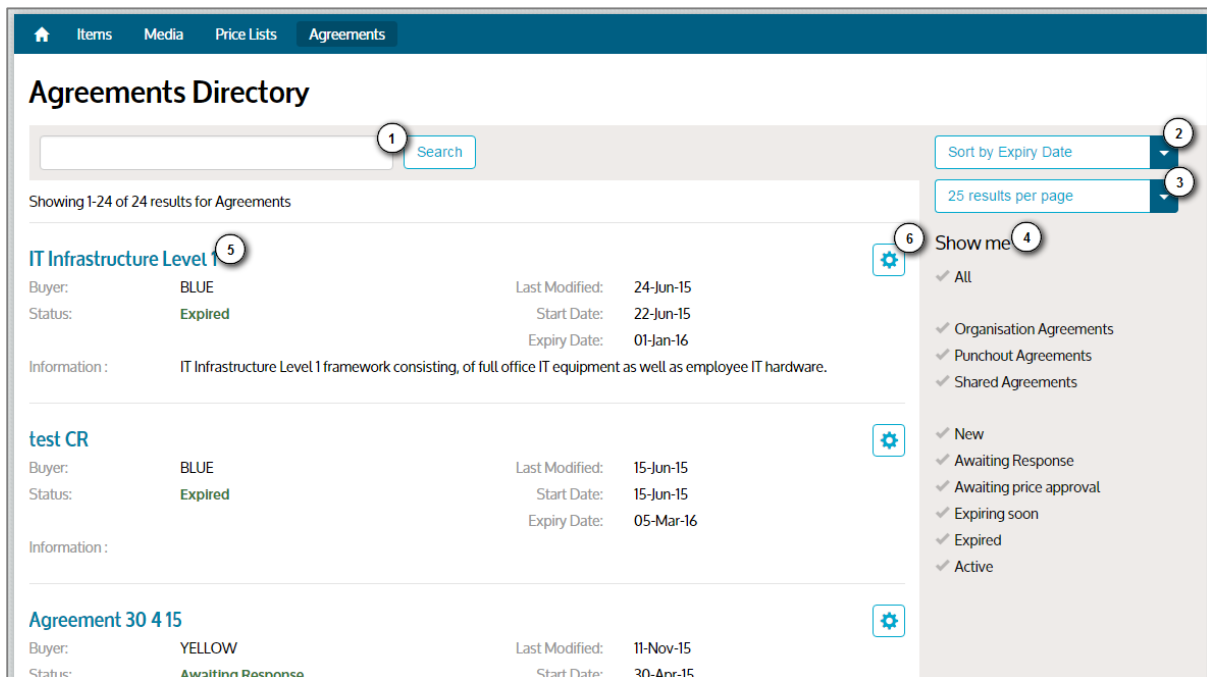
- New: new agreements from buyers.
- Awaiting Response: agreements waiting for you to add content (including New ones) and send it to the buyer.
- Awaiting Price Approval: agreements that have been sent back to the buyer for them to review & approve.
- Expiring Soon: agreements that will expire within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

The above states and the agreement types are also filters on the Agreement Directory so you can quickly filter and find the agreement you need.


In the Agreements section you can:

- Find and view your customers' agreements.
- Add or update price lists and send them to buyers.
- View the history of updates to the agreements.

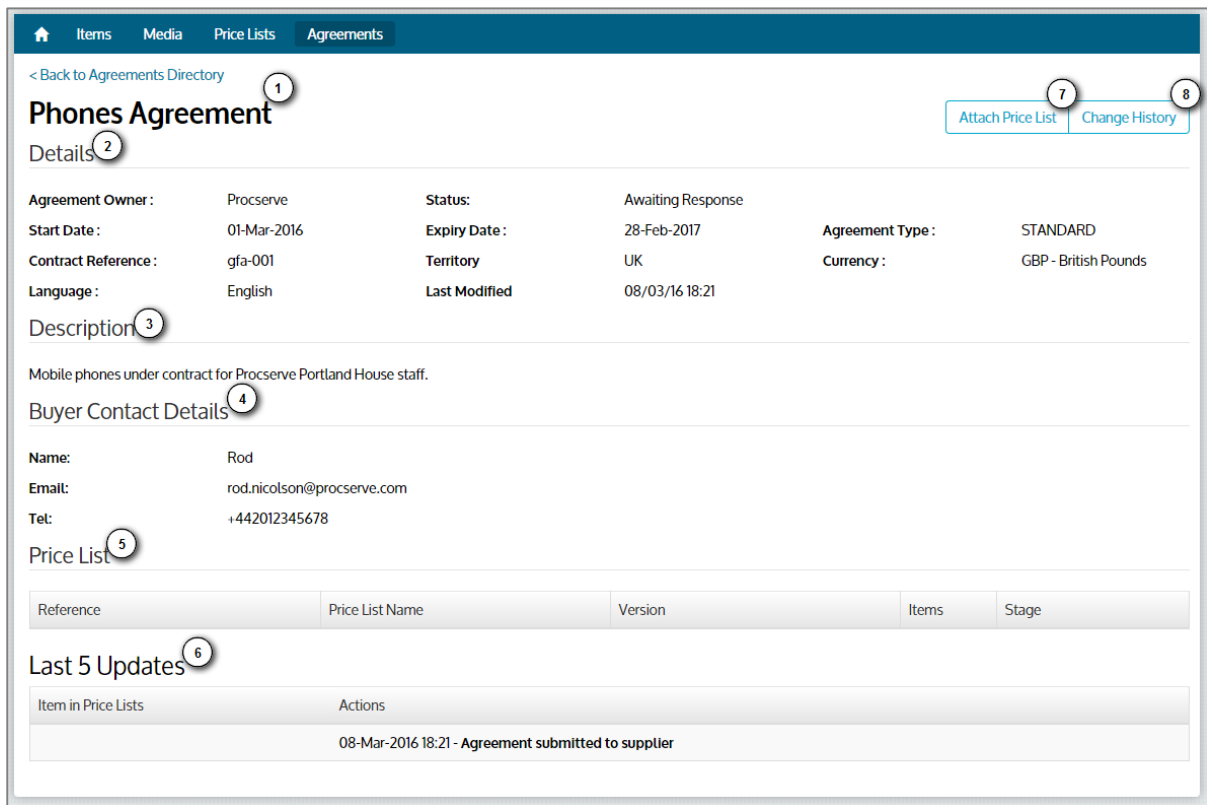
## Agreements Directory



The screenshot shows the 'Agreements Directory' page. At the top, there are navigation tabs for 'Items', 'Media', 'Price Lists', and 'Agreements'. Below the tabs is a search bar (1) and a 'Search' button. To the right of the search bar, there are dropdown menus for 'Sort by Expiry Date' (2) and '25 results per page' (3). The main content area displays a list of agreements. The first agreement is 'IT Infrastructure Level 1' (5), with details: Buyer: BLUE, Status: Expired, Last Modified: 24-Jun-15, Start Date: 22-Jun-15, Expiry Date: 01-Jan-16, and Information: IT Infrastructure Level 1 framework consisting, of full office IT equipment as well as employee IT hardware. The second agreement is 'test CR', with details: Buyer: BLUE, Status: Expired, Last Modified: 15-Jun-15, Start Date: 15-Jun-15, Expiry Date: 05-Mar-16. The third agreement is 'Agreement 30 4 15', with details: Buyer: YELLOW, Status: Awaiting Response, Last Modified: 11-Nov-15, Start Date: 30-Apr-15. On the right side, there is a 'Show me' (4) filter panel with a gear icon (6) and a list of filters: All, Organisation Agreements, Punchout Agreements, Shared Agreements, New, Awaiting Response, Awaiting price approval, Expiring soon, Expired, and Active.

1. Search for agreements using the agreement name or the information from the buyer.
2. Your search results can be sorted by:
  - a. Relevance
  - b. Name
  - c. Agreement Owner
  - d. Start Date
  - e. Expiry Date
  - f. Last Modified
3. You can view between 25 and 100 items per page.
4. You can apply the following filters to the agreements:
  - a. Filter by type of agreement, Standard, Punchout or Shared
  - b. Filter by the state of the agreement
    - i. New
    - ii. Awaiting Response
    - iii. Awaiting Price Approval
    - iv. Expiring Soon
    - v. Expired
    - vi. Active
  - c. Clicking "All" removes all the filters
5. The search results show the agreement name in large blue text, then the following fields:
  - a. **Buyer** name
  - b. Agreement **Status**
  - c. When the agreement was **Last Modified**
  - d. The **Start and Expiry Dates** of the agreement
  - e. **Information** from the buyer about the agreement
6. To view all the information about the agreement, and to manage your price lists on it, click the  button.

## Agreements Details



The screenshot shows the 'Phones Agreement' details page. At the top, there is a navigation bar with 'Items', 'Media', 'Price Lists', and 'Agreements'. Below this, a breadcrumb trail leads to '< Back to Agreements Directory'. The main title is 'Phones Agreement'. To the right, there are two buttons: 'Attach Price List' and 'Change History'. The 'Details' section provides the following information:

- Agreement Owner:** Procserve
- Status:** Awaiting Response
- Start Date:** 01-Mar-2016
- Expiry Date:** 28-Feb-2017
- Agreement Type:** STANDARD
- Contract Reference:** gfa-001
- Territory:** UK
- Currency:** GBP - British Pounds
- Language:** English
- Last Modified:** 08/03/16 18:21

The 'Description' section contains the text: 'Mobile phones under contract for Procserve Portland House staff.' The 'Buyer Contact Details' section lists:

- Name:** Rod
- Email:** rod.nicolson@procserve.com
- Tel:** +442012345678

The 'Price List' section contains a table with the following columns: Reference, Price List Name, Version, Items, and Stage.

The 'Last 5 Updates' section shows a table with columns 'Item in Price Lists' and 'Actions'. The update record is: '08-Mar-2016 18:21 - Agreement submitted to supplier'.

Return to the Agreements Directory by clicking the 'Back to...' link.

1. The title of the Agreement Details page is the name of the agreement
2. The **Details** section of the page provides the following information about the agreement:
  - a. **Agreement Owner** – the name of the buyer organisation who maintains the agreement.
  - b. **Status** – what state the agreement is in (see above for details).
  - c. **Start Date** and **Expiry Date**. These combine with the price list start and expiry dates to set the period during which the items are shown in the Marketplace. The latest start date and the earliest expiry date are used.
  - d. **Agreement Type** – the type of agreement (see above for details).
  - e. **Contract Reference** – the buyer's contract reference.
  - f. **Territory** – the primary territory of the buyer.
  - g. **Currency** – the currency required for all the items on the agreement.
  - h. **Language** – the preferred language for all the content on the agreement.
  - i. **Last Modified** – when the agreement last changed.
3. **Description** – information about the agreement provided by the buyer.
4. The **Buyer Contact Details** provides the name, email address and phone number of the buyer.
5. Once you have added a price list, the details are shown in the **Price List** section. For example:

Reference	Price List Name	Version	Items	Stage
CRICKET v3.0.	CRICKET v3.0.	01-Jul-2015 15:47 (Published)	81	Current

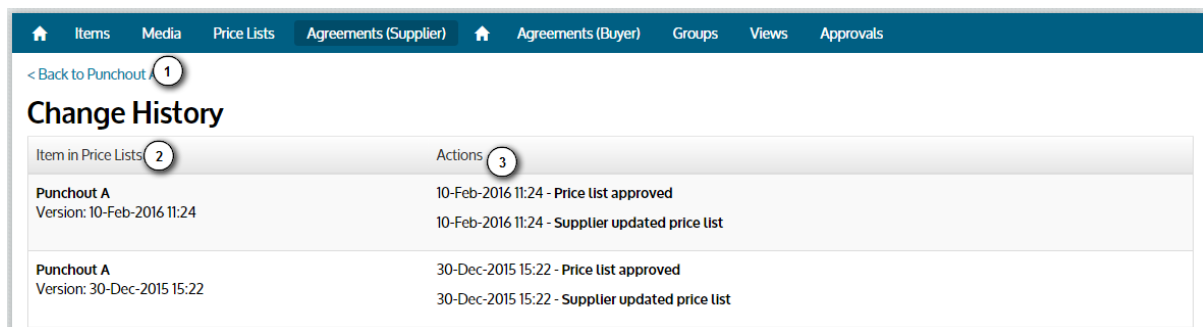
- a. **Reference** – your reference for the price list.
  - b. **Price List Name** – the name of the price list that is shown to the buyer.
  - c. **Version** – the current version of the price list and whether the price list is published.
  - d. **Items** – how many items are on your price list.
  - e. **Stage** – where your price list is in the approval process. Possible states are
    - i. **Attached** – the list has been attached, but not yet sent to the buyer
    - ii. **Awaiting Approval** – the list has been sent to the buyer
    - iii. **Declined** – the list has been rejected by the buyer
    - iv. **Current** – the current list on the agreement
6. **Last 5 Updates** provides a snapshot of the changes to the agreement, with the price list name, date & time and type of change, e.g.

## Last 5 Updates

Item in Price Lists	Actions
PM-BMEcat_UPLOAD_Core_01 Version: 21-Jan-2016 17:03	21-Jan-2016 17:03 - Price list approved 21-Jan-2016 17:03 - Supplier updated price list
PM-BMEcat_UPLOAD_Core_01 Version: 20-Jan-2016 11:23	20-Jan-2016 11:24 - Price list approved 20-Jan-2016 11:23 - Supplier updated price list
PM-BMEcat_UPLOAD_Core_01 Version: 20-Jan-2016 11:15	20-Jan-2016 11:20 - Price list approved 20-Jan-2016 11:19 - Supplier proposed new price list
Amaze Tech PL 001 Version: 27-Oct-2015 14:29	27-Oct-2015 14:39 - Price list approved 27-Oct-2015 14:29 - Supplier updated price list
Amaze Tech PL 001 Version: 25-Sep-2015 14:12	25-Sep-2015 14:13 - Price list approved 25-Sep-2015 14:12 - Supplier updated price list

7. When you wish to send a buyer your price list, click **Attach Price List**.
8. The **Change History** button takes you to the full history of changes for this agreement (See Below).

## Change History page



Item in Price Lists	Actions
<b>Punchout A</b> Version: 10-Feb-2016 11:24	10-Feb-2016 11:24 - Price list approved 10-Feb-2016 11:24 - Supplier updated price list
<b>Punchout A</b> Version: 30-Dec-2015 15:22	30-Dec-2015 15:22 - Price list approved 30-Dec-2015 15:22 - Supplier updated price list

1. You can get back to the agreement using the 'Back to...' link at the top of the page.
2. The first column in the Change History page shows the name of your price list and the version. Versions are based on the date and time of date & time you attach the list to the agreement.
3. The Actions columns lists the actions taken by you and the buyer, with the latest action shown first. Actions are grouped by price list version.