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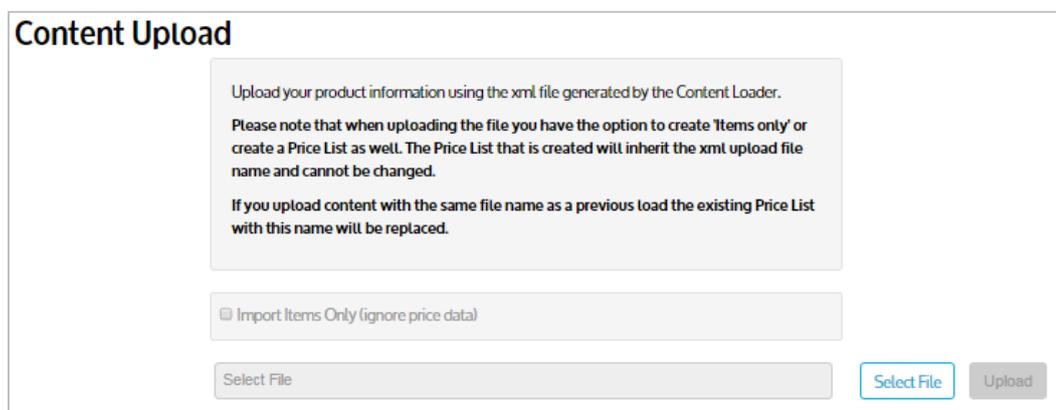
Summary

Price Lists are used to link your Items to an Agreement and provide your customers with specific prices. Price Lists can be specific to each customer or re-used many times. A Price List contains the item ID with a unit of measure, increment, price, quantity, price breaks and currency.

There are two ways of creating a Price List:

1. XML Upload

Product Manager allows you to upload an XML file with item content and price information. This creates the items in your Item Directory and a Price List based on the data in the file.



Note that when you upload a Price List the system will create a name for it using XML filename, and the name cannot be changed once it has been uploaded. To ensure your Price List has a meaningful name in the system, ensure you name your

file appropriately. See the **Product Manager Upload** guide for more information on how to create XML content and upload this to Product Manager.

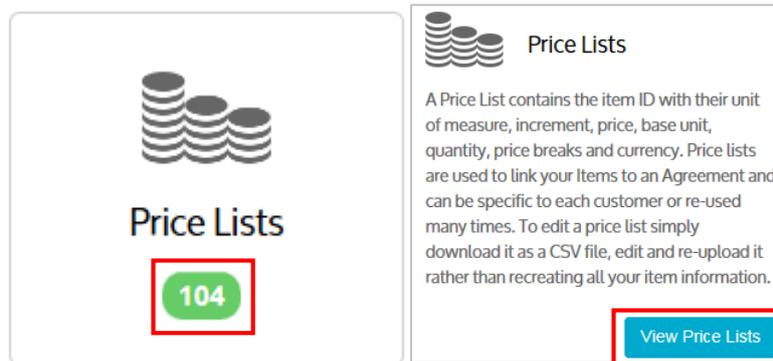
2. In Product Manager

You can create a Price List via the Product Manager user interface.

To create a Price List or access existing ones navigate to Product Manager and click 'Price Lists' in the menu bar.



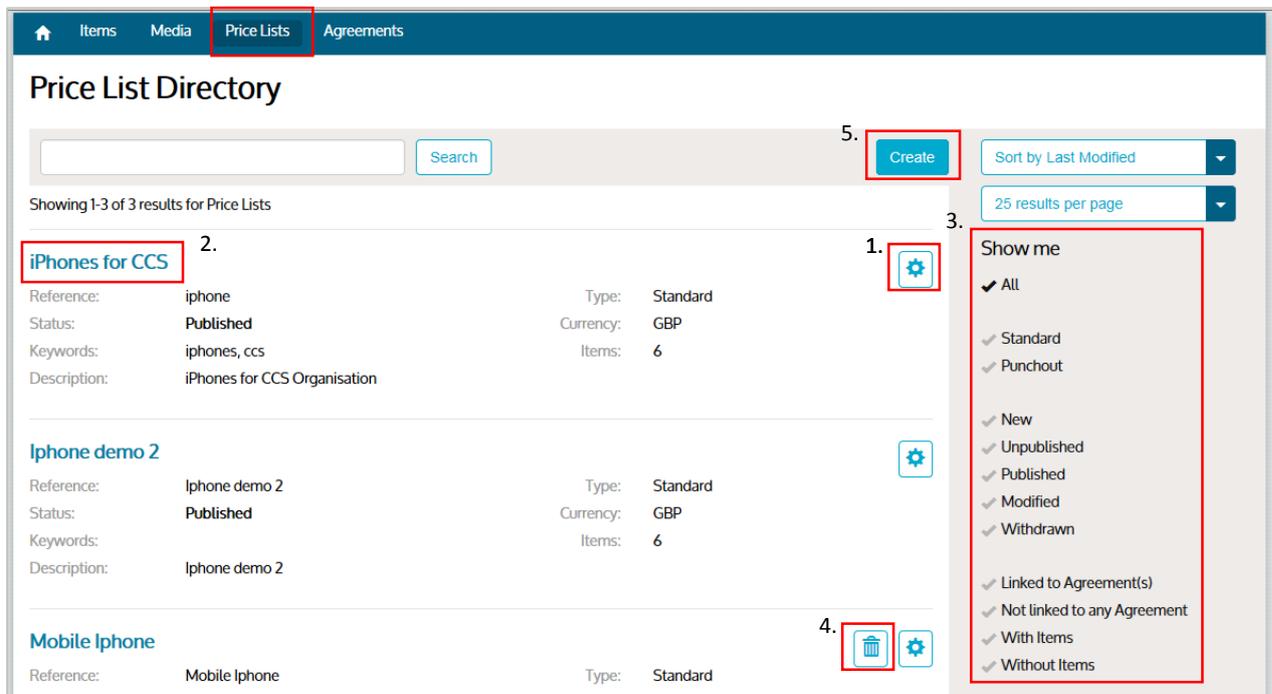
Alternatively, on the Product Manager Dashboard click the 'View Price List' button as shown below:



All the Price List links above take you to the Price List Directory (see below).

Price List Directory

The Price List Directory displays a list of all of your Price Lists and summary details of each including key words, description, reference, currency and number of items contained in the Price List.

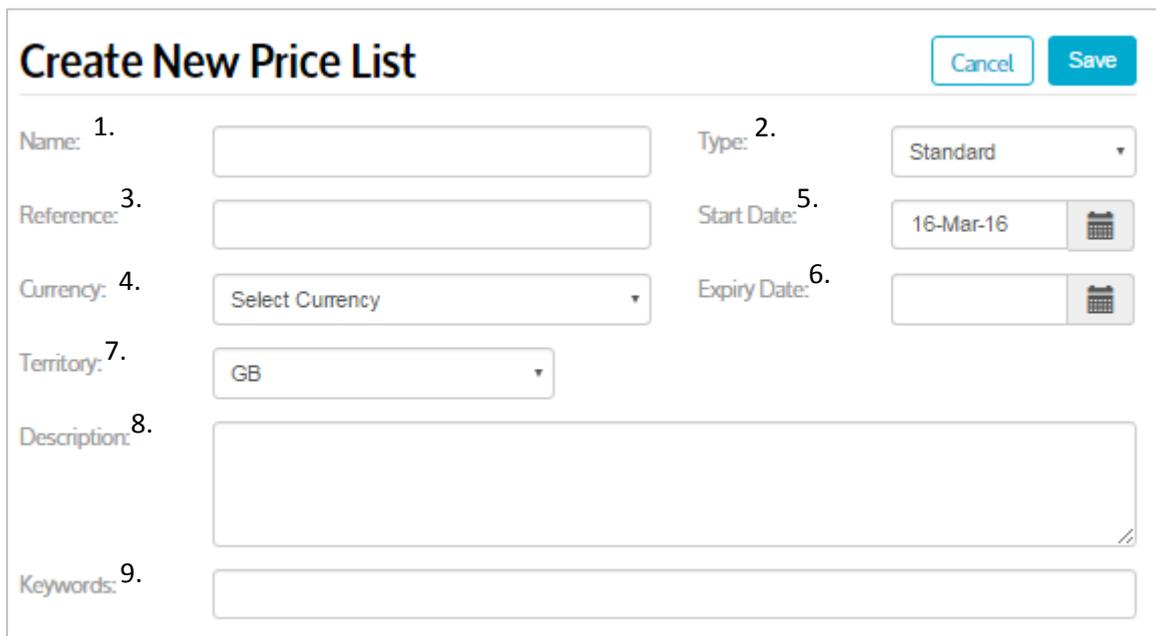


1. Click the 'manage' icon to access the Manage Price List page
2. You can also click the Price List name to access the Manage Price List page
3. On the right hand side of the page you will see different filter options:
 - a. **All:** Displays all Price Lists.
 - b. **Standard:** Displays only standard Price Lists (those where items are published in the Basware marketplace).
 - c. **Punchout:** Displays all your Price Lists for punchout items.
 - d. **New:** Displays newly created Price Lists where items have not yet been added.
 - e. **Unpublished:** Displays Price Lists that you have attached to an agreement, but not yet published.
 - f. **Published:** Displays all Price Lists that have been sent to the buyer.
 - g. **Modified:** Displays Price Lists that have changes applied that affect the items.
 - h. **Withdrawn:** Displays all Price Lists that were once attached to an Agreement but are no longer.
 - i. **Linked to Agreement(s):** Displays all Price Lists that are on one or

- more Agreements.
 - j. **Not linked to any Agreement:** Displays all Price Lists that are not linked to any Agreements.
 - k. **With Items:** Displays all Price Lists that contain Items.
 - l. **Without items:** Displays all Price Lists that do not contain any items.
4. Delete a Price List by clicking the trash can
 5. Create a new Price List

Create a Price List

To create a Price List via the Product Manager user interface navigate to the Price List Directory and click the 'Create' button at the top right of the page. The Create Price List page will load.



The screenshot shows the 'Create New Price List' form with the following fields and controls:

- Name:** Text input field (1).
- Reference:** Text input field (3).
- Currency:** Dropdown menu with 'Select Currency' (4).
- Territory:** Dropdown menu with 'GB' (7).
- Description:** Large text area (8).
- Keywords:** Text input field (9).
- Type:** Dropdown menu with 'Standard' (2).
- Start Date:** Date picker with '16-Mar-16' (5).
- Expiry Date:** Date picker (6).
- Buttons:** 'Cancel' and 'Save' buttons in the top right corner.

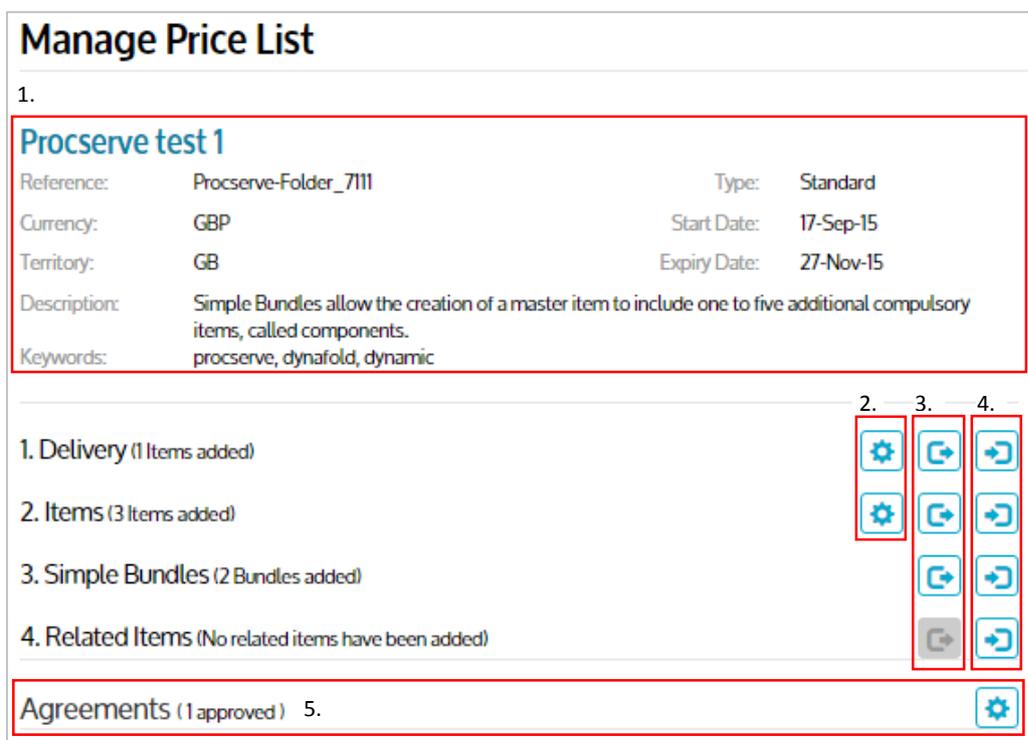
Name, Currency and Description are mandatory fields.

1. **Name:** Name your Price List. It must be unique and will also be visible to your customer. Ensure this is relevant to them.
2. **Type:** Type of Price List you want to create:
 - a. A Standard Price List is one that is published in the Basware marketplace for your customers to buy from.
 - b. A Punchout Price List is used to link your Punchout configuration (from a Punchout Item type) to a Punchout Agreement and allows your customer to access your sales order website from the Marketplace.
3. **Reference:** Is your own description of the Price List and will not be visible to your customer.

4. **Currency:** Select the currency that you provide your products/services in. To attach this Price List to an agreement it must match the currency requested by the buyer.
5. **Start Date:** When the products/services on the Price List are available to the customer.
6. **Expiry Date:** When the Price List will expire from an Agreement.
7. **Territory:** Set the geography that you offer your products/services in.
8. **Description:** Provide additional information about the Price List for the buyer.
9. **Keywords:** Add alternative phrases and words that can be used to search for your Price List in the Price List Directory

Manage Price List

Once you have created the Price List, you will navigate to the Manage Price List page. Or you can click the Price List name on the Price List Directory page.



The screenshot shows the 'Manage Price List' interface. At the top, the title 'Manage Price List' is displayed. Below it, the price list name 'Procserve test 1' is shown. A red box highlights the header information, which includes: Reference: Procserve-Folder_7111, Type: Standard, Currency: GBP, Start Date: 17-Sep-15, Territory: GB, Expiry Date: 27-Nov-15, Description: Simple Bundles allow the creation of a master item to include one to five additional compulsory items, called components, and Keywords: procserve, dynafold, dynamic. Below the header, there are four sections: 1. Delivery (1 Items added), 2. Items (3 Items added), 3. Simple Bundles (2 Bundles added), and 4. Related Items (No related items have been added). To the right of these sections are three columns of icons labeled 2., 3., and 4., each containing a gear icon and a refresh icon. At the bottom, there is a section for 'Agreements (1 approved)' with a gear icon next to it. A red box highlights the 'Agreements' section.

1. The page shows the Price List name and header information. The Price List name is not editable. The header details of the Price List can be amended on this page by moving your cursor over the field you wish to amend and click it to edit the field.
2. The 'Manage' icons link you to the Delivery items or Standard items pages. From these pages you can easily see the list of items already on the Price List.
 - a. You can add additional items from your Item Directory to your Price List. See the '*Supplier Guide – Items*' for more information on Items.

- b. You can remove items from your Price List
 - c. More information on this process follows later in the User guide
 - 3. The 'Export' function will export Delivery Items, Standard Items, Bundled Items or Related Items in a CSV file.
 - a. Each export file will contain details of that particular item type only.
 - b. You can use the export files to add, remove or amend items linked to your Price List.
 - c. More information on this process follows later in the User guide
 - 4. The 'Import' feature allows you to update your Price List with a large number of items or item links (Bundles or Related Items).

The benefit of using the export / import files is it allows you to re-use existing Price Lists to make new Price Lists or make updates to a large number of items on the Price List without having to re-build content from scratch.
 - 5. The Agreements section displays how many Agreements the Price List is linked to. Click the 'Manage' icon to access the list of Agreements the Price List is linked to.

Add or Edit Items on Your Price List

There are two ways you can add or edit Delivery or Standard items on your Price List. You can do this via the user interface, or by importing the items in a CSV file.

Add Items via the User Interface

Manage Price List

Procsolve test 1

Reference:	Procsolve-Folder_7111	Type:	Standard
Currency:	GBP	Start Date:	17-Sep-15
Territory:	GB	Expiry Date:	27-Nov-15

Description: Simple Bundles allow the creation of a master item to include one to five additional compulsory items, called components.
Keywords: procsolve, dynafold, dynamic

1. Delivery (1 Items added)	  
2. Items (3 Items added)	  
3. Simple Bundles (2 Bundles added)	 
4. Related Items (No related items have been added)	 

Agreements (1 approved)	
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Supplier's Guide to Price Lists



To add a Delivery item or Standard item that already exists in the Item Directory click the 'Manage' icon to the right of either section.

A list of items on the price list will be shown. To find the items not yet on your price list, click the 'Items to add' filter (see below).

The screenshot shows the 'Standard Item Directory' interface. At the top, there is a search bar (labeled 2.) and a 'Done' button. Below the search bar, it says 'Showing 1-25 of 26,659 results for Item Directory'. The main area displays a list of items: 'PRODUCT_101', 'PRODUCT_1011', and 'PRODUCT_1012'. Each item has a '+', 'Edit', and 'Delete' icon to its right (labeled 1.). A 'Show me' filter panel is open on the right (labeled 2.), showing various filters with checkboxes, including 'Price List Content (0)', 'Items to Add (26659)', 'All (26659)', 'New (19030)', 'Unpublished (7172)', 'Published (454)', 'Updated (0)', 'Withdrawn (3)', and 'Without Image (26234)'. The 'Items to Add' filter is highlighted with a red box (labeled 2.).

1. Click the '+' button to add the items to the Price List.
2. You can refine the list using the filters on the left hand side, or the search field at the top of the page.
3. Click the item name for more details on the item.

Edit Items via the User Interface

When you click through to the list of Delivery or Standard Items from the Manage Price List page the directory will display the items already on the Price List.

The screenshot shows the 'Standard Item Directory' interface with two items displayed: 'Amaze All-in-One Wireless Printer' and 'Carrot cake'. The search bar (labeled 1.) is at the top. The 'Amaze All-in-One Wireless Printer' item has a pencil icon (labeled 2.) and a trash icon (labeled 3.) to its right. The 'Carrot cake' item also has a pencil icon (labeled 3.) and a trash icon (labeled 3.). The 'Show me' filter panel is open on the right (labeled 1.), showing filters such as 'Price List Content (2)', 'Items to Add (26657)', 'All (2)', 'Published (2)', 'Added (0)', 'Removed (0)', 'Modified (0)', 'Unavailable (0)', and 'Without Image (0)'. The 'Price List Content (2)' filter is highlighted with a red box (labeled 1.).

1. To find the item you wish to edit, search or filter the list.
2. Click the pencil button to edit your item. In the edit page you can make the item available or unavailable as well as make basic edits to the item including linking a

delivery charge, price breaks, order unit, increments and base unit.

- Remove the item from the Price list by clicking the 'Trash can' button.

Add or Edit Items via CSV Import

The second method of managing items on a Price List is to import a list of them in a CSV file. If wish to edit existing items you can export the items from an existing Price List, modify the items and then upload the CSV onto the Price List, or to a new Price List. This is particularly useful when having to update or load a large number of items.

Manage Price List

Proserve test 1

Reference: Proserve-Folder_7111 Type: Standard
 Currency: GBP Start Date: 17-Sep-15
 Territory: GB Expiry Date: 27-Nov-15
 Description: Simple Bundles allow the creation of a master item to include one to five additional compulsory items, called components.
 Keywords: proserve, dynafold, dynamic

1. Delivery (1 Items added)

2. Items (3 Items added)

1. 3. —



- Click the export button to download the Delivery items or Standard items. This will include **all** items in your Delivery or Item Directory if the Price List is empty.
 - If it has existing items linked to it the export will only contain those Price List items.
- The screenshot below shows the basic item pricing information contained in the CSV file. Modify the file until you have all the Delivery or Standard items listed in the csv. Save it for importing back in to the system against your Price List

Item Name	Supplier Item ID	Order UOM	Increment	No. of Base Units	Quantity	Price	Delivery Item
Amazing All-in-One Wireless Printer	Amaze-P1	EA	1	1	1	11.15	Delivery00022

- Click the 'Import' icon  on the Manage Price List page and the Import Price List page will load (below).

NOTE: You must add the Delivery items to your Price List before adding standard items. This is because the Standard Items may have delivery charges linked to them and your Standard Items upload will fail if the Delivery Items do not exist on the Price List.

4. From the drop down menu select the relevant import action.
 - a. Replace existing items on this price list: This will overwrite existing item information on the Price List. Use this for a new Price List or when updating existing item prices.
 - b. Merge with existing items on this price list: This will combine the new item information from the csv file with the existing Price List items.
5. Click the 'Select File' button and browse to where your CSV file has been saved.
6. Open the file then click the 'Upload' button. A progress bar will indicate the file is loading. Once completed successfully, a success message will appear, as shown below:



If items fail to upload, you will be shown error messages for each item advising what is wrong with it.

Simple Bundles

Simple bundles allow you to group mandatory items together in the Marketplace so when the customer adds the 'master' item to the shopping basket all the items are added to the order. You can link up to 5 items to a 'master.'

Note that all items in a bundle must be in the same price list as the master item.

To add bundles to a price list or edit them, navigate to the list's Manager Price List page:

- a) Click Product Manager
- b) Price Lists
- c) Find the price list in the Price List Directory
- d) Click the Price List name or  button to access the Manage Price List page (below)

Manage Price List

Proserve test 1

Reference:	Proserve-Folder_7111	Type:	Standard
Currency:	GBP	Start Date:	17-Sep-15
Territory:	GB	Expiry Date:	27-Nov-15
Description:	Simple Bundles allow the creation of a master item to include one to five additional compulsory items, called components.		
Keywords:	proserve, dynafold, dynamic		

1. Delivery (1 Items added)	  
2. Items (3 Items added)	  
3. Simple Bundles (2 Bundles added)	 
4. Related Items (No related items have been added)	 

Agreements (1 approved)	
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1. Click the  'Export' button to download a bundle template.
2. Alternatively, click the  'Import' button and from the Import Simple Bundles page click the template link in the help panel. If the Price List already has bundled items linked it will download the bundled items information in the CSV file.

3. Make changes to the CSV. A sample Bundled items CSV file is shown below:

Bundle Master Item	Bundle Additional Items	Fixed or Linked Quantity
ItemID99	ItemABC	FIXED
ItemID99	ItemDEF	LINKED

- Bundle Master Item: for every component or additional item in the bundle enter the ID of the master item.
- Bundle Additional Items: enter the ID of the additional items.
- Fixed or Linked Quantity: enter FIXED or LINKED
 - i. FIXED will fix the quantity of the additional items ordered to whatever their minimum order quantity is. For example, if the MOQ for ItemABC is 5, the quantity will remain 5 whatever the quantity of the master item.
 - ii. LINKED will link the quantity of the additional items ordered to the quantity of master item. For example, if the MOQ for ItemDEF is 10, and the buyer orders 7 of ItemID99, the order will contain 70 units of ItemDEF.

4. Import the CSV. On the Manage Price List page click the Import button.

Manage Price List

Procservice test 1

Reference: Procservice-Folder_7111 Type: Standard
 Currency: GBP Start Date: 17-Sep-15
 Territory: GB Expiry Date: 27-Nov-15
 Description: Simple Bundles allow the creation of a master item to include one to five additional compulsory items, called components.
 Keywords: procservice, dynafold, dynamic

1. Delivery (1 Items added)

2. Items (3 Items added)

3. Simple Bundles (2 Bundles added)

4. Related Items (No related items have been added)

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- 5. On the Import Simple Bundle Links page:
 - a. Click the 'Select File' button and browse to where your CSV file has been saved.
 - b. Open the file then click the 'Upload' button.

