

## Contents

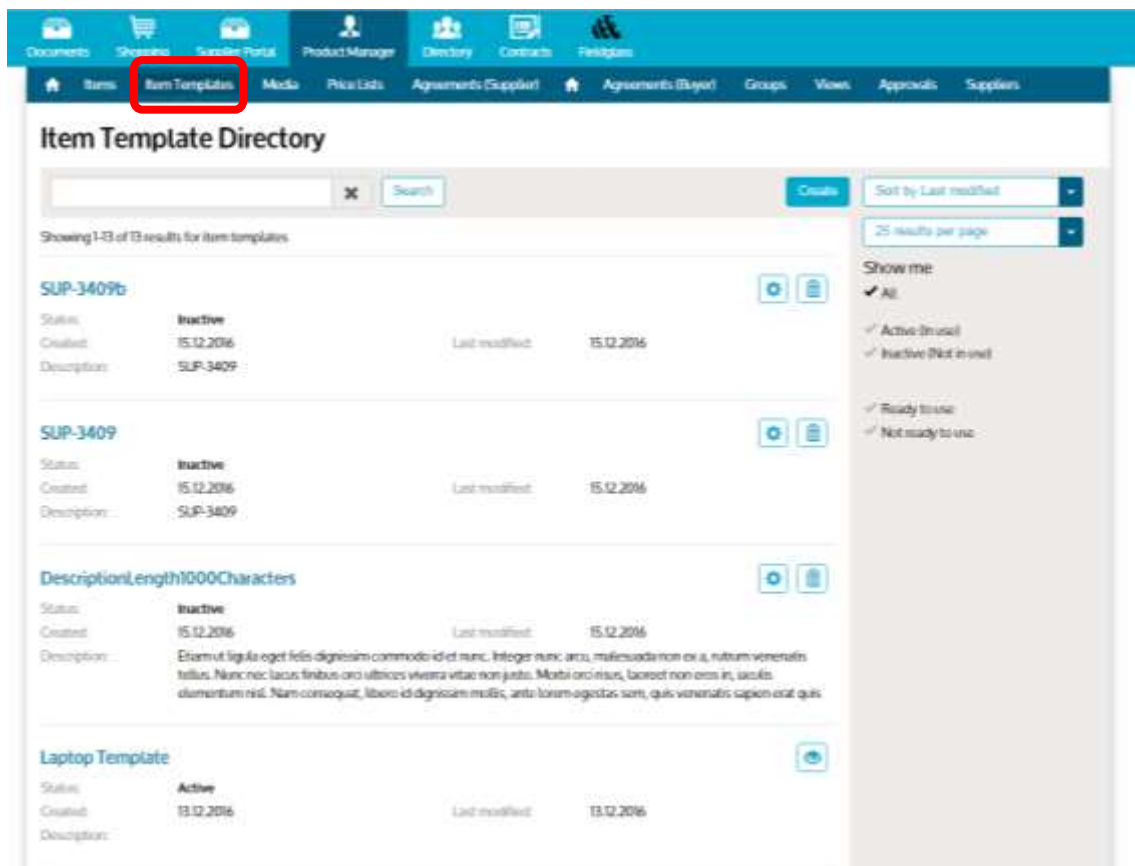
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## 1. What is an Item Template?

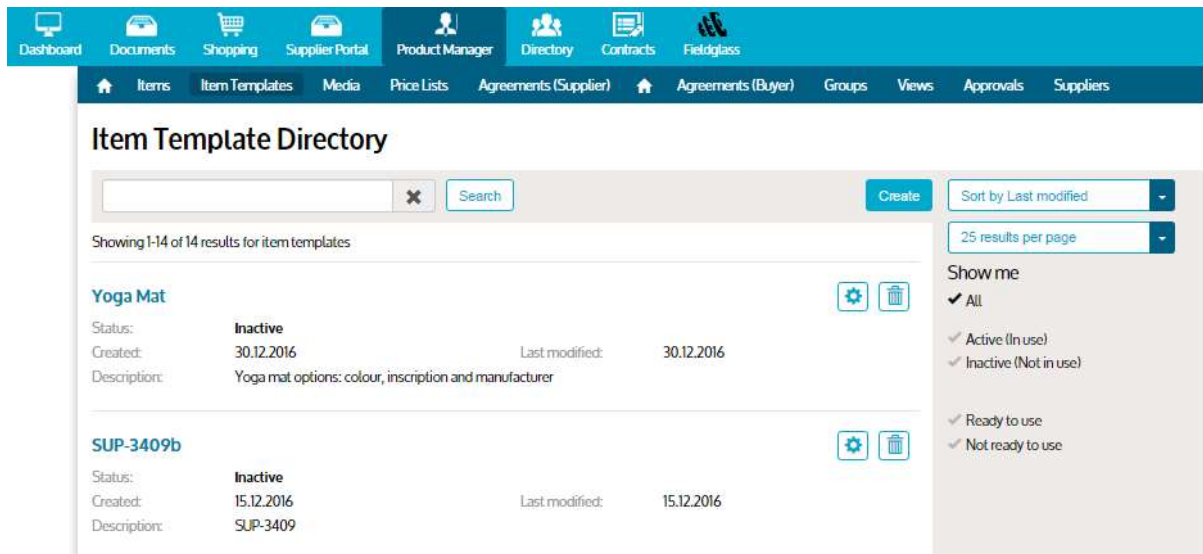
It is a form which you provide with your standard items to collect additional information from the Buyer to customise such products. The Buyer complete this form in Marketplace and can checkout these templated items with the additional information like and alongside any standard items.

## 2. The Item Template Directory

The directory stores your Item templates. You can access it via Product Manager.



### 3. How to create an Item Template?



The screenshot shows the 'Item Template Directory' page in the Basware system. It features a search bar at the top with a 'Search' button and a 'Create' button. Below the search bar, it indicates 'Showing 1-14 of 14 results for item templates'. The main content area lists two item templates:

| Item Name | Status   | Created    | Last modified | Description  |
|-----------|----------|------------|---------------|--|
| Yoga Mat  | Inactive | 30.12.2016 | 30.12.2016    | Yoga mat options: colour, inscription and manufacturer |
| SUP-3409b | Inactive | 15.12.2016 | 15.12.2016    | SUP-3409   |

On the right side, there are filters for 'Show me' with the following options:

- All
- Active (In use)
- Inactive (Not in use)
- Ready to use
- Not ready to use

### 4. Item Template – Form Items

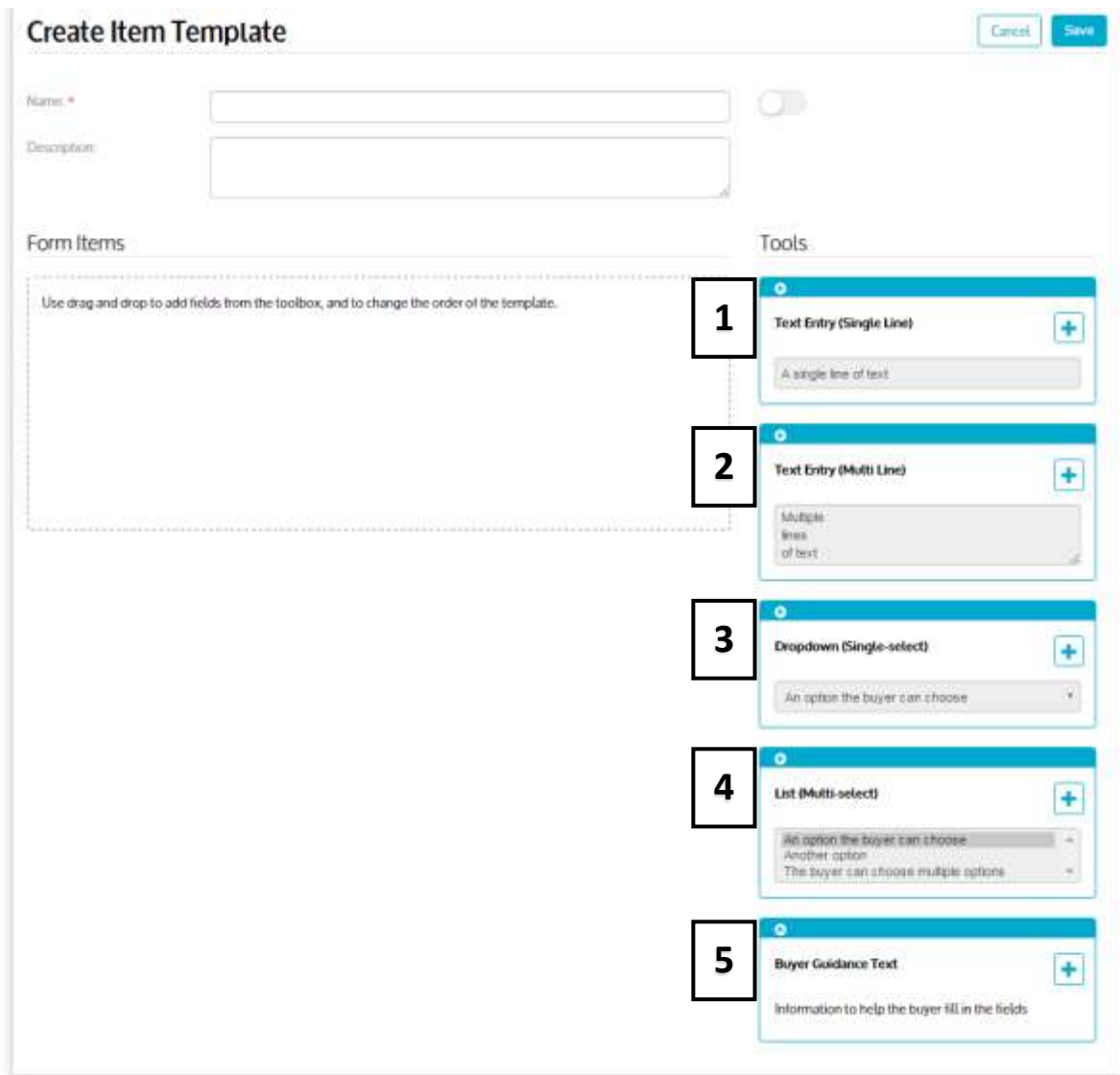
It is mandatory to provide a name for your form.

You have various form items available to put your form together.

You can choose and arrange from the following:

1. Single-line text entry for the Buyer to complete (free form option)
2. Multi-line text entry for the Buyer to complete (free form option)
3. Single-select dropdown for the Buyer to select one option
4. Multi-select dropdown for the Buyer to select multiple options
5. Help text/information provided by you to help your buyer complete the form in Marketplace

Each will be displayed to the buyer in the order you choose.



**Create Item Template** Cancel Save

Name: \*

Description:

**Form Items** Tools

Use drag and drop to add fields from the toolbox, and to change the order of the template.

- 1** **Text Entry (Single Line)** +  
A single line of text
- 2** **Text Entry (Multi Line)** +  
Multiple lines of text
- 3** **Dropdown (Single-select)** +  
An option the buyer can choose
- 4** **List (Multi-select)** +  
An option the buyer can choose  
Another option  
The buyer can choose multiple options
- 5** **Buyer Guidance Text** +  
Information to help the buyer fill in the fields

For each form item:

Select the language in which you complete the form item.

- **Label:** This is what your buyer will see. E.g. "Colour"
- **Variable Name / ID:** This is the key that links the data in the item to the control in the Marketplace item. This is also passed back in the basket along with the value selected. E.g. "COL" (for "Colour"). This is hidden from the Buyer.
- **Required:** If you need your buyer to complete this field, please tick. Any values overriding the basket will be "required".
- **Max size:** Maximum characters allowed (for text) and max value for price. (Applicable for free text form items).
- **Basket variable binding / Override basket value:** Select the variable from the dropdown for which you let your buyer override the value in the basket.

The screenshot shows a 'Properties - TEXT' dialog box with two tabs: 'English' and 'German'. The 'English' tab is active. The form contains the following fields and controls:

- 1. Label: \* (text input field)
- 2. Variable name: \* (text input field)
- 3. Required: (checkbox, currently unchecked)
- 4. Max size: \* (text input field)
- 5. Basket variable binding: (dropdown menu, currently set to 'None')

At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

The currency is determined by the agreement and pricelist. Hence these cannot be overwritten. The currency remains unique in one basket.

You have the option to mark your template to be ready for use (i.e. can be attached to an item) by using this toggle.

The screenshot shows the 'Create Item Template' form in a web application. The navigation bar at the top includes: Home, Items, Item Templates, Media, Price Lists, Agreements (Supplier), Agreements (Buyer), Groups, Views, Approvals, and Suppliers. The form has the following fields and controls:

- Name: \* (text input field)
- Description: (text area)
- Ready for use: (toggle switch, currently turned on and highlighted with a red box)

At the top right of the form are 'Cancel' and 'Save' buttons.

You can now go to the Item Directory and select the item you wish to attach this form to.