

QUICK START USER GUIDE

**CREATING,
ADDING AND
LOADING
CONTENT**

INTRODUCTION

This guide is aimed at suppliers who are not familiar with Basware and who wish to load their products and services to the Marketplace, allowing buyers to access and purchase the content.

The focus is on getting content uploaded quickly and does not cover advanced features such as price breaks and item bundles. Please see dedicated guides for detailed information on advanced features.

Why do I need to upload content?

Instead of sending a buyer a static catalogue with pricing information, Basware allows the supplier to upload and manage their own content using **Basware Product Manager**. This provides suppliers with the following benefits:

- Content provided to multiple buyers can be managed in a single place
- Prices can be changed without reloading an entire catalogue
- The content can be enriched with multiple images and PDF attachments
- Price breaks, bundles, and other advanced features are supported

Providing high quality content is likely to increase buyer engagement and make the content stand out in the Marketplace.

The following table shows the actions involved in getting content into the Basware Marketplace:

Step	Who	Action
1	Supplier	Register for the Basware service, after receiving invitation email from Buyer
2	Buyer	Send Agreement to the Supplier
3	Supplier	Upload content into Product Manager
4	Supplier	Link Price List to Agreement
5	Supplier	Send Agreement back to Buyer
6	Buyer	Review content for approval
7	Buyer	Publish content into Marketplace

The remainder of this guide provides detailed steps for the supplier to upload content and send to the buyer for approval.

The final section contains links to further guides.

Key concepts

The following diagram gives an overview of the system:

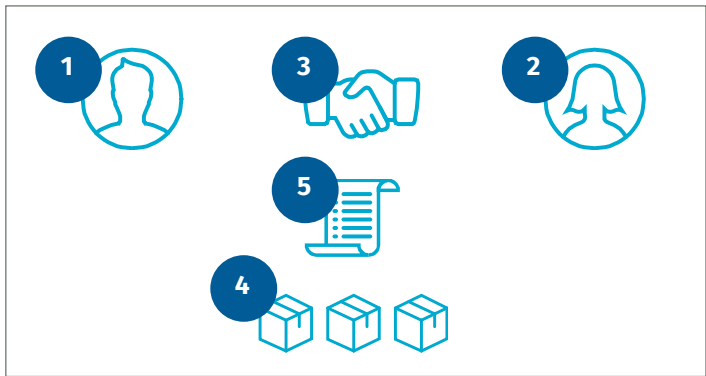
The **Buyer**, who initiates the process by sending the Agreement.

The **Supplier**, who receives the Agreement.

The **Agreement**, which is the request for content, and acts as a container for content and prices.

Items uploaded by the supplier.

Price List, the list of item prices. This is linked to the Agreement.





STEP 1

CHECK FOR

AGREEMENT

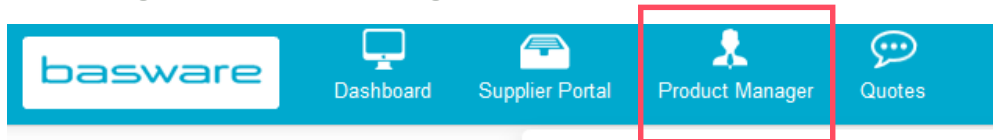
STEP 1: CHECK FOR AGREEMENT

Welcome to the Basware Product Manager. This is where your content is uploaded, managed, and shared with the your buyers.

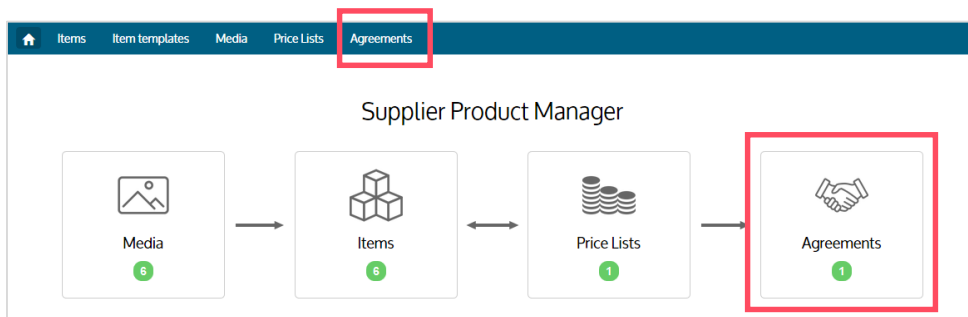
In order to access the service, you will need to be invited by the buyer to register an account. Once you have been invited, you should receive two separate emails providing a username and password (check your spam folder if no emails have been received). Organisations are identified using a DUNS number, so you may need to provide this to the buyer if available.

Before creating content, check that a buyer has sent an Agreement (a request for content).


First, navigate to 'Product Manager':



On the Product Manager homepage, click on a link for Agreements. The green badge icon in the Agreements panel displays the number of Agreements available.



If a new Agreement has been sent, it will be visible in the Agreement Directory, and will have a status Awaiting response:

Cricket supplies 2018 summer		
Buyer:	517 buying org	Last modified: 01-Mar-18
Status:	Awaiting response	Start date: 01-Mar-18
		Expiration Date: 01-Jun-18
Information :	Please provide items and prices for the summer catalogue	

Now that we know an Agreement has been sent, we can create some content to send the buyer.

CHECK FOR AGREEMENT

CREATE CONTENT

UPLOAD CONTENT

REVIEW CONTENT

ADD TO AGREEMENT

SEND FOR APPROVAL



STEP 2

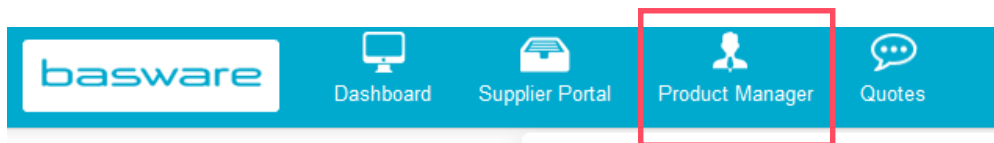
CREATE

CONTENT

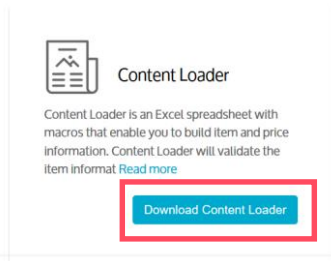
STEP 2: CREATE CONTENT

The simplest way for a new user to upload content is via the Content Loader spreadsheet. Other options are covered in separate user guides (linked at the end of this guide).

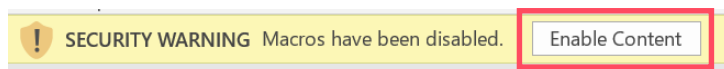
The first step is to download the Content Loader spreadsheet. Navigate to the Upload Content page from the Product Manager homepage:



Click on the Download Content Loader button and save the file to your computer.



Open the Content Loader in Excel, you will need to click the 'Enable Content' button after opening:



Your catalogue data will be inputted into this spreadsheet. This guide will show you how to load a basic catalogue, however, more detailed instructions can be found by clicking the 'i' button:



To begin entering your data, click on the 'shopping trolley' button:



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You will be presented with a blank worksheet with data field names displayed in the top row (cells with a blue background are required fields). Hovering the mouse cursor over the field names will show a tooltip providing guidance for filling in each field (indicated with a small red triangle in the corner of the cell).

Item ID	Item Name	Item Type	Delivery Item ID	Delivery Type	Unit of Measure	Unit Price	Minimum Order Quantity	Quantity Interval	UNSPSC	Goods or Service?	Long Description	Keywords
aa01	Cristal Ballpoint Pen	Standard	NA	NA	BX	10.00	1	1	44121704	Goods	The Cristal Original is the classic affordable, high-quality ballpoint pen	pen biro

For the **Unit of Measure** field, click on the ‘bottle’ icon for a list of valid codes.

Example codes would be **EA** for ‘each’ or **BX** for ‘box’.



For the **UNSPSC** field, click on the ‘UNSPSC Codes’ button for assistance (version 19 and 8 are supported). Due to the large number of codes, detailed instructions on how to search the codes are provided in the worksheet. Codes can also be found online using a search tool:

<https://www.unspsc.org/>



Once you have entered all your data, it must be validated to ensure no errors are present. Click the ‘check’ button to run the validation:



If errors are found, they will be displayed in a report. All errors will need to be addressed and resolved before the data can be exported.

Once the validation check has passed, click on the file export button:



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An XML file will be created on your computer.

Important: make sure to give the file a meaningful name that can easily be identified, as the filename will be used to name the Price List in the system:

File name:	cricket_helmets
Save as type:	XML files

Save the file on your computer in a convenient location.

CHECK FOR AGREEMENT

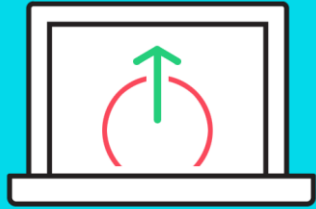
CREATE CONTENT

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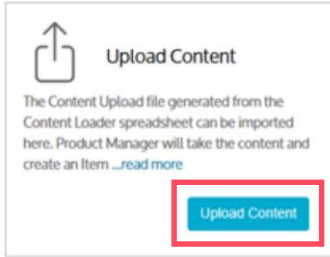
STEP 3

UPLOAD

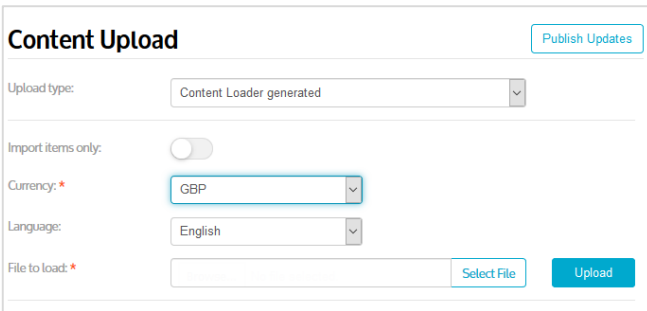
CONTENT

STEP 3: UPLOAD CONTENT

The content is now ready to be uploaded into Basware Product Manager. Click on the 'Upload Content' button on the Product Manager homepage:

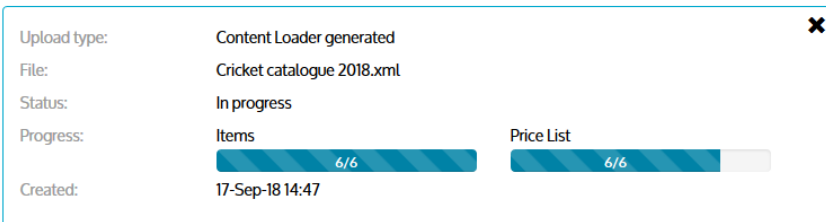


On the Content Upload page, select Content Loader Generated as the upload type. Select the currency and click on the 'Select File' button to locate the XML file that you have created using the Content Loader in the previous step of this guide.

A screenshot of the 'Content Upload' form. The form has a title 'Content Upload' and a 'Publish Updates' button. The form contains several fields: 'Upload type:' with a dropdown menu set to 'Content Loader generated'; 'Import items only:' with a toggle switch; 'Currency:*' with a dropdown menu set to 'GBP'; 'Language:' with a dropdown menu set to 'English'; and 'File to load:*' with a text input field, a 'Select File' button, and an 'Upload' button.

A progress bar will show the status of the uploading:

Activity

A screenshot of an 'Activity' window showing the upload progress. The window has a title bar with a close button (X). The content includes: 'Upload type: Content Loader generated'; 'File: Cricket catalogue 2018.xml'; 'Status: In progress'; 'Progress: Items' with a progress bar showing 6/6; 'Price List' with a progress bar showing 6/6; and 'Created: 17-Sep-18 14:47'.

CHECK FOR AGREEMENT

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The Activity section will display the status of the file upload. The upload may be queued for a short time before it is processed. Once completed, the status will be updated in the Activity section.

Activity

Upload type:	Content Loader generated	✓
File:	Cricket catalogue 2018.xml	
Status:	Succeeded	
Created:	17-Sep-18 14:47	

CHECK FOR AGREEMENT

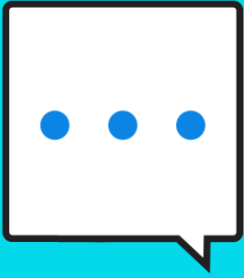
CREATE CONTENT

UPLOAD CONTENT

REVIEW CONTENT

ADD TO AGREEMENT

SEND FOR APPROVAL



STEP 4

REVIEW

CONTENT

STEP 4: REVIEW CONTENT

Once the content has been successfully uploaded, it can be reviewed in the Price Lists directory.

A Price List is a list of prices for items that have been uploaded.

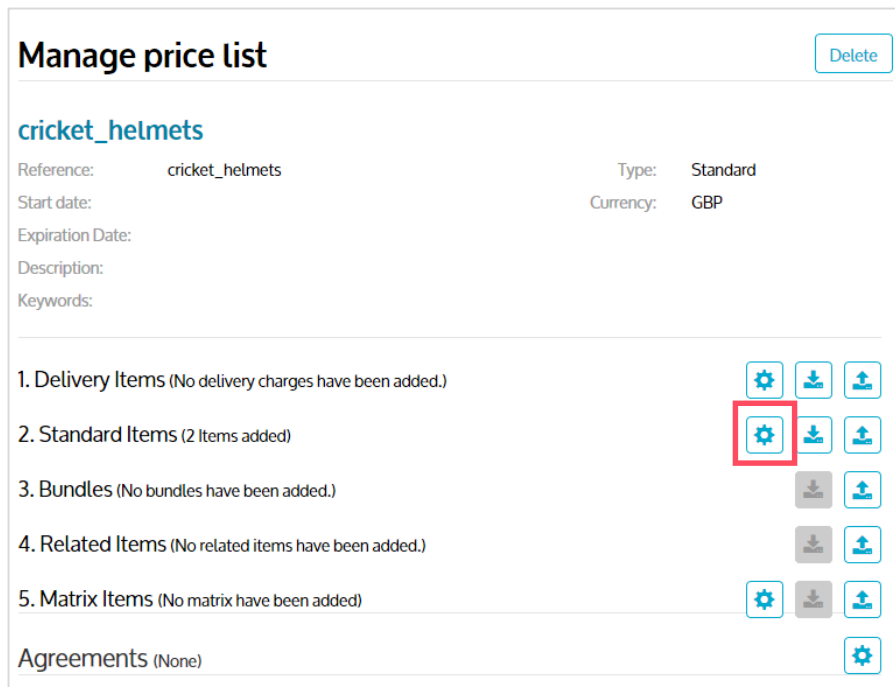


The title of the Price List is taken from the name of the csv file used.

Clicking on the name of the Price List will allow you to review the items and prices:



Click on the 'cog' button to show the items included in the Price List (image below):



CHECK FOR AGREEMENT

CREATE CONTENT

UPLOAD CONTENT

REVIEW CONTENT

ADD TO AGREEMENT

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Each item can be reviewed, and price information can be amended by clicking on the 'pencil' button:

Test cricket helmet - Blue

Supplier Item ID: HEML02 Order unit: Each

Status: **Added** Price: 42.99 GBP (1 Price Break)

Item is available:



CHECK FOR AGREEMENT

CREATE CONTENT

UPLOAD CONTENT

REVIEW CONTENT

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STEP 5

ADD TO


AGREEMENT

STEP 5: ADD TO AGREEMENT



Once you are satisfied with the content, it can be sent to the requesting buyer.

To send the Price List to the buyer for approval, it must first be linked to the Agreement that you have received from the buyer.


Locate the Agreement in the Agreement directory (as mentioned in the first section of this guide), and click on the 'cog' button:

Cricket supplies 2018 summer 			
Buyer:	517 buying org	Last modified:	01-03-2018
Status:	Awaiting response	Start date:	01-03-2018
		Expiration Date:	01-06-2018
Information :	Please provide items and prices for the summer catalogue		

In the 'Manage agreements' page, click on the 'add' button to add the new Price List:

Manage agreements				
Cricket supplies 2018 summer				
From:	517 buying org	Status:	Awaiting response	
Type:	Organisation agreement	Start date:	01-Mar-18	
Contract Ref:		Expiration Date:	01-Jun-18	
Currency:	GBP	Language:	English	
Note	Please provide items and prices for the summer catalogue			
Contact	James	Tel:	02077309000	
Email:	james.mitchener@basware.com			
Price List				
	Version	Price List Name	Ref	Stage
History				
	Price List Name / Version	Message		

Select the new Price List and click the 'plus' button to attach to the Agreement:

cricket_helmets 			
Items:	2	Currency:	GBP
Last modified:	22/03/18	Agreements:	0

CHECK FOR AGREEMENT

CREATE CONTENT

UPLOAD CONTENT

REVIEW CONTENT

ADD TO AGREEMENT

SEND FOR APPROVAL



STEP 6

**SEND FOR
APPROVAL**

STEP 6: SEND FOR APPROVAL

Now that the content with pricing has been attached to the Agreement, it can be submitted to the buyer for review and approval.

In the 'Manage agreements' page, click on the 'publish' button to send the Price List to the requesting buyer.

Manage agreements Publish

Cricket supplies 2018 summer

From: 517 buying org Status: Awaiting response
Type: Organisation agreement Start date: 01-Mar-18
Contract Ref: Expiration Date: 01-Jun-18
Currency: GBP Language: English

Note: Please provide items and prices for the summer catalogue
Contact: James Tel: 02077309000
Email: james.mitchener@basware.com

Price List Add

Version	Price List Name	Ref	Stage
Draft 22-Mar-18	cricket_helmets	cricket_helmets	Attached

The status of the Agreement will change to 'Awaiting response' until the buyer has approved it.

Cricket supplies 2018 summer ⚙️

Buyer: 517 buying org Last modified: 22-Mar-18
Status: **Active** Start date: 01-Mar-18
Expiration Date: 01-Jun-18

Information: Please provide items and prices for the summer catalogue

Once it has been approved, the status will change to 'Active', and the buyer will be able to start purchasing your content in the Marketplace.

CHECK FOR AGREEMENT

CREATE CONTENT

UPLOAD CONTENT

REVIEW CONTENT

ADD TO AGREEMENT

SEND FOR APPROVAL

WHAT NEXT?

WHAT NEXT?

This guide has shown how to upload content and provide your first price list to a buyer. With Basware Product Manager and Marketplace, it is also possible to:

- Create or edit existing items in bulk, or via the user interface
- Create multiple Price Lists for the same content
- Make item bundles
- Upload images or PDF files, and link to existing items in bulk
- Use the Matrix items feature to group similar items (such as uniforms with a variable size or colour)
- Add forms to items to allow buyers to select options or enter customer text
- Receive request for quotes (RFQs)
- Create variable price items, using the Price on Request (POR) feature

Additional user guides

For more in-depth guides, please visit <http://suppliers.basware.co.uk/pm/>