Catalog Manager User Guide For Operators

Released April 2024 Please contact <u>catalog@ofs-portal.com</u> for any questions.

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- Catalog Export
- Delta Report

OFS Portal Support

Catalog Process Overview

Catalog Process Overview

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This guide will walk you through the Buyer processes from receiving the initial OFS Portal workflow email alert to downloading the price book. We will also provide you steps on how export a catalog after it has been downloaded.

Test Account used for this User Guide: Buyer ID: TESTBUYER Buyer Name: TEST BUYER OFS Portal Catalog Management & Syndication Tool



Catalog Process Overview Operator Email Alert

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- An email notification is sent out as soon as a price book has successfully syndicated and uploaded to your account.
- The email alert should look similar to the example shown here.
- The notification will provide you the Catalog ID and a link for easy access to the catalog application.



Catalog is ready to download

The catalog CATALOGDEMO_MIGRATION is ready for you to download. Please check your open deliveries for it. Details are available here.

This mail was automatically generated by Marketplace Catalog Portal.

- The OFS Portal price book is syndicated in a single standard format as shown below to all Operators in the OFS Portal Community.
- Fields to help identify the price book are found as the Catalog ID, Name, Buyer ID, Supplier ID. You will find in this example below.

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Catalog Process Overview Operator's Review Package – Delta Report (2/2)

- Along with the price book .csv file that is provided with the Operator's Review Package, an excel file delta report is included.
- This report captures the changes from the previous uploaded version.
- You can pull this report separately from the All Catalog Deliveries webpage in your account.



Downloading the Operator's Review Package



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Downloading the Review Package Log into the Catalog Manager

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Log into the OFS Portal Catalog Manager

You are able to reset your password if needed via the Forgot Password link found on this login page.

	Signini	o your ac	LCOUNT
Username or	email		
Password			
			Forgot Passwo
		Sign In	

Downloading the Review Package Operator's Dashboard

- Your account dashboard provides an overview of the catalog deliveries and statuses as well as links to your buyer guide.
- OFS Portal logo redirects to this page for easy access.

Welcome to Marketplace The Marketplace Catalog Portal lets Members s their organization. The Marketplace Catalog Po	e Catalog Portal securely distribute contract specific price lists (catalogs) to th rtal ensures secure upload and download of this sensitive price	eir Buyers. Access to catalogs is restricted so that users see only catalogs assigned to e information.	Useful Links Catalog Manager Buyer Guide → The Catalog Manager Buyer Guide contains comprehensive documentation and instructions for the processes on the buyers end regarding catalog delivery.
Open Catalog Deliveries Here you can view all open tasks related to your cu CATALOGDEMO_GCP1 CATALOGDEMO_GCP1	rrent catalogs that are necessary for successful catalog delive TESTSUPPLIER Test Supplier	ery. Manage	Open Catalog Deliveries by Statuses 1 Image: Statuse of the status of the
All Catalog Deliveries Access information about delivered catalogs and th	heir history here.	Show All Catalog Deliveries	

Downloading the Review Package Catalog Manager Buyer Guide Reference Link

- This Catalog Manager Buyer Guide can be found under Useful Links on your dashboard. Additional information including the OFS Portal application and OFS Portal export file can also be found here.
- Please contact <u>catalog@ofs-portal.com</u> if you have any questions.

Welcome to Marketplace Catalog Portal By Bortal Securely distribute contract specific price lists (catalogs) to their Buyers. Access to catalogs is restricted so that users see only catalogs assigned to their organization. The Marketplace Catalog Portal ensures secure upload and download of this sensitive price information.		Useful Links Catalog Manager Buyer Guide → The Catalog Manager Buyer Guide contains comprehensive documentation and instructions for the processes on the buyers end regarding catalog delivery.
Open Catalog Deliveries Here you can view all open tasks related to your current catalogs that are necessary for successful catalog delivery. There are no open Catalog deliveries right now	anage	
All Catalog Deliveries Access information about delivered catalogs and their history here. Show All Catalog Delivered	veries	

Downloading the Review Package Open Catalog Deliveries

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To view the catalogs that are ready to be downloaded, navigate to the Open Catalog Deliveries link either on the left side menu or by clicking Manage on your dashboard.

Welcome to Marketplace The Marketplace Catalog Portal lets Members se organization. The Marketplace Catalog Portal en	Catalog Portal curely distribute contract specific price lists (catalogs) to their sures secure upload and download of this sensitive price inform	Buyers. Access to catalogs is restricted so that users see only catalogs assigned to their nation.	Useful Links Catalog Manager Buyer Guide → The Catalog Manager Buyer Guide contains comprehensive documentation and instructions for the processes on the buyers end regarding catalog delivery.
Open Catalog Deliveries Here you can view all open tasks related to your curr	ent catalogs that are necessary for successful catalog delivery	Manage	Open Catalog Deliveries by Statuses 1 a Waiting for download by Buyer
TEST_SUPP Testing Catalog Creation	TESTSUPP2 TEST SUPPLIER2	2 Waiting for download by Buyer	
All Catalog Deliveries Access information about delivered catalogs and the	eir history here.	Show All Catalog Deliveries	

- On your Open Catalog Deliveries webpage, you can see a list of all catalogs successfully sent to your Operator account and waiting for download. Catalogs downloaded will be removed from this page but will remain on your All Catalog Deliveries page.
- Click on the Download file to complete button to download the file to your computer
- ✤ The workflow will remain unfinished unless the price book is downloaded from this page.

Open Catalog Deliveries

Find all actions for your open catalog deliveries here.

During the customer-defined workflow for published catalogs, manual interactions may be needed. Please perform the necessary actions by clicking on the corresponding action button.





- The Review Package is now downloaded to your local drive.
- The downloaded review package zip file will contain two files:
 - 1. Catalog Export (Price Book)
 - 2. Delta Report
- Locate the downloaded file:

~ ReviewPackage-CATALOGDEMO1

- CatalogExport-CATALOGDEMO1.csv
- DeltaReport-CATALOGDEMO1.xlsx

Downloading the Review Package Price Book Download

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Examples of the Catalog Export and Delta Report shown below.

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	А	В	с	D	E	F	G	н	1	J	к	L	м
1	Catalog Identifier	Catalog Name	Contract Number	Language	Buyer Identifier	Buyer Code	Supplier Identifier	Supplier Code	DUNS (Supplier)	Currency	Territory	UOM	
2	CATALOGDEMO_OL_2020	CATALOGDEMO NAME		EN	OLLIE		SAMMY			USD	US	ANSI	
3	Action	PartNum	PartNumExt	ParameterA	ParameterB	UOM	ShortDesc	PartNum Extension Description	Parameter A Description	Parameter B Description	MfrName	MfrPartNum	HazMatF
5	UPDATE	7067	test	CONTR01	testparb	EA	TCP MECHANICAL EXTENDED, /JOB	testpartnumextdes	testparades	testparbdes	test	1	YES
6 7 8	UPDATE	7068	test	CONTR01	testparb	EA	TCP MECHANICAL EXTENDED, /JOB	testpartnumextdes	testparades	testparbdes	test	1	YES

Changes found from the previously uploaded version will be displayed in the Delta Report. You will find they are identified by ADDITION, CHANGES, DELETION.

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	А	В	С	D	E	F	G
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2 3	CATALOGDEMO_OL_2020	CATALOGDEMO NAME	CATALOGDEMO_OL_2020	EN	OLLIE	Ollie's Operating Company LLC	SAMMY
4	Type of Change	Unique Supplier PN	Part Number	Part Number Ext	Parameter A	Parameter B	Old UOM
5	Addition	7068\test\CONTR01\testparb	7068	test	CONTR01	testparb	
6	Changes	7067\test\CONTR01\testparb	7067	test	CONTR01	testparb	
7	Deletion	7066\test\CONTR01\testparb	7066	test	CONTR01	testparb	EA
8							
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10							
44							

Additional Features

- Catalog Export
- Delta Report

- You are able to export a new catalog in the Open Catalog Deliveries link.
- If the catalog has been downloaded it will be removed from your Open Catalog deliveries page. You can find it in the All Catalog Deliveries page and use the filter provided to find it.



Additional Features Catalog Export

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- Find the All Catalog Deliveries page by using the left side menu
- Filter as needed
- Click on View Details to download the review package again.

All Catalog Deliveries

Access information about delivered catalogs and their history here.

Use filters to refine results based on catalog, customer, status, or time frame. The process list is initially sorted by started date, and you can change the order by clicking on the table header

102 catalog deliveries				T Filters
Started On	Catalog	Supplier	Status	Actions
12:27 PM Feb 20, 2024	CATALOGDEM01 Catalog Demonstration	TESTSUPPLIER Test Supplier	😖 Waiting for download by Buyer	View Details
12:26 PM Feb 20, 2024	CATALOGDEM01 Catalog Demonstration	TESTSUPPLIER Test Supplier	S Catalog canceled by Supplier	View Details
12:25 PM Feb 20, 2024	CATALOGDEM01 Catalog Demonstration	TESTSUPPLIER Test Supplier	S Catalog canceled by Supplier	View Details
12:23 PM Feb 20, 2024	CATALOGDEMO Catalog Demonstration	TESTSUPPLIER Test Supplier	🕹 Waiting for download by Buyer	View Details

Additional Features

- Catalog Export
- Delta Report

Additional Features Compare Catalog Versions (Delta Report)

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- A Delta Report is provided to the Operator in the Review
 Package along with the price book. This report
 captures the changes from the previous uploaded version.
- You are able to pull the delta report separately on the All Catalog Deliveries page.
- Find the catalog using the filter option
- Click on View Details. This page has the option to download the delta report by itself.

Catalog Delivery Details

Supplier ID	TESTSUPPLIER
luyer ID	TESTBUYER
Catalog ID	CATALOGDEM01
started By	lkimberly@ofs-portal.com
itarted On	02/20/2024 12:27:44 PM
✓ Validating and cleansing upload	ed file 3s
✓ Waiting for review of supplier wi	th warnings 💄 lkimberly@ofs-portal.com 5m 45s
✓ Importing uploaded data 23m	14s
✓ Generating delta report 2m 16	S
New products: 10100	
Updated products: 0	
Deleted products: 9	
Download Delta Report	
 Exporting Catalog 28s 	
🛓 Download Export Result	
✓ Preparing review package < 1s	3

Waiting for download by Buyer | 1h 5m 5s

Additional Features Compare Catalog Versions (Delta Report)

- Changes found from the two selected versions will be displayed in the Delta Report. You will find they are identified by ADDITION, CHANGES, DELETION.
- If you have any further questions regarding the Delta Report, please contact catalog@ofs-portal.com

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(Catalog Identifier CATALOGDEMO1	R Catalog Name Catalog Demonstration	C Contract Number CATALOGDEMO1	D. Language	F Buyer Identifier TESTBUYER	F Buyer Name Test Buyer	G Supplier Identifier TESTSUPPLIER	H Supplier Name Test Supplier	l DUNS (Supplier)	L Currency USD	Territory US	L	
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5	A Catalog Identifier CATALOGDEMO1 Type of Change Addition	R Catalog Name Catalog Demonstration Unique Supplier PN 10014546\ZBSB\08\01	Contract Number CATALOGDEMO1 Part Number 10014546	D Language Part Number Ext ZBSB	E Buyer Identifier TESTBUYER Parameter A 08	F Buyer Name Test Buyer Parameter B 01	G Supplier Identifier TESTSUPPLIER Old UOM	H Supplier Name Test Supplier New UOM EA	UUNS (Supplier)	Currency USD New Short Description BULL PLUG 2in LP W/1/	Old Contract Price 2 NPT X 3.750in	L New Contract Price 1.12:	Old De 3456
5	Catalog Identifier CATALOGDEM01 Type of Change Addition Addition	B Catalog Name Catalog Demonstration Unique Supplier PN 10014546\ZBSB\08\01 10015093\ZBSB\08\01	Contract Number CATALOGDEMO1 Part Number 10014546 10015093	D Language Part Number Ext ZBSB ZBSB	E Buyer Identifier TESTBUYER Parameter A 08 08	F Buyer Name Test Buyer Parameter B 01 01	G Supplier Identifier TESTSUPPLIER Old UOM	H Supplier Name Test Supplier New UOM EA EA	UUNS (Supplier)	Currency USD New Short Description BULL PLUG 2in LP W/1/ BULL PLUG 2in LP W/1/	Old Contract Price 2 NPT X 3.750in 2 NPT X 3.750in	L New Contract Price 1.12 1.12	Old De 3456 3456
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OFS Portal Support

OFS Portal Support

- OFS Portal Support provides additional training for new team members or upon request and can assist with any issues users may have in the Catalog Management System.
- If your access has become inactive or you are needing additional access for your team, please contact Support.
- OFS Catalog Support email: <u>catalog@ofs-portal.com</u>



CATALOG@OFSPORTALCOM

STAY CONNECTED

HTTPS://OFS-PORTAL.COM

MWV.LINKEDIN.COMPANY/OFSPORTAL

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