

## Catalog Manager User Guide For Operators

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Please contact [catalog@ofs-portal.com](mailto:catalog@ofs-portal.com) for any questions.

### ❖ **Catalog Process Overview**

- ▶ Begins with receiving workflow email alert
- ▶ Operator's Review Package

### ❖ **Downloading the Operator's Review Package**

- ▶ Logging into the Catalog Manager
- ▶ Open Catalog Deliveries Page
- ▶ Download Review Package

### ❖ **Additional Features**

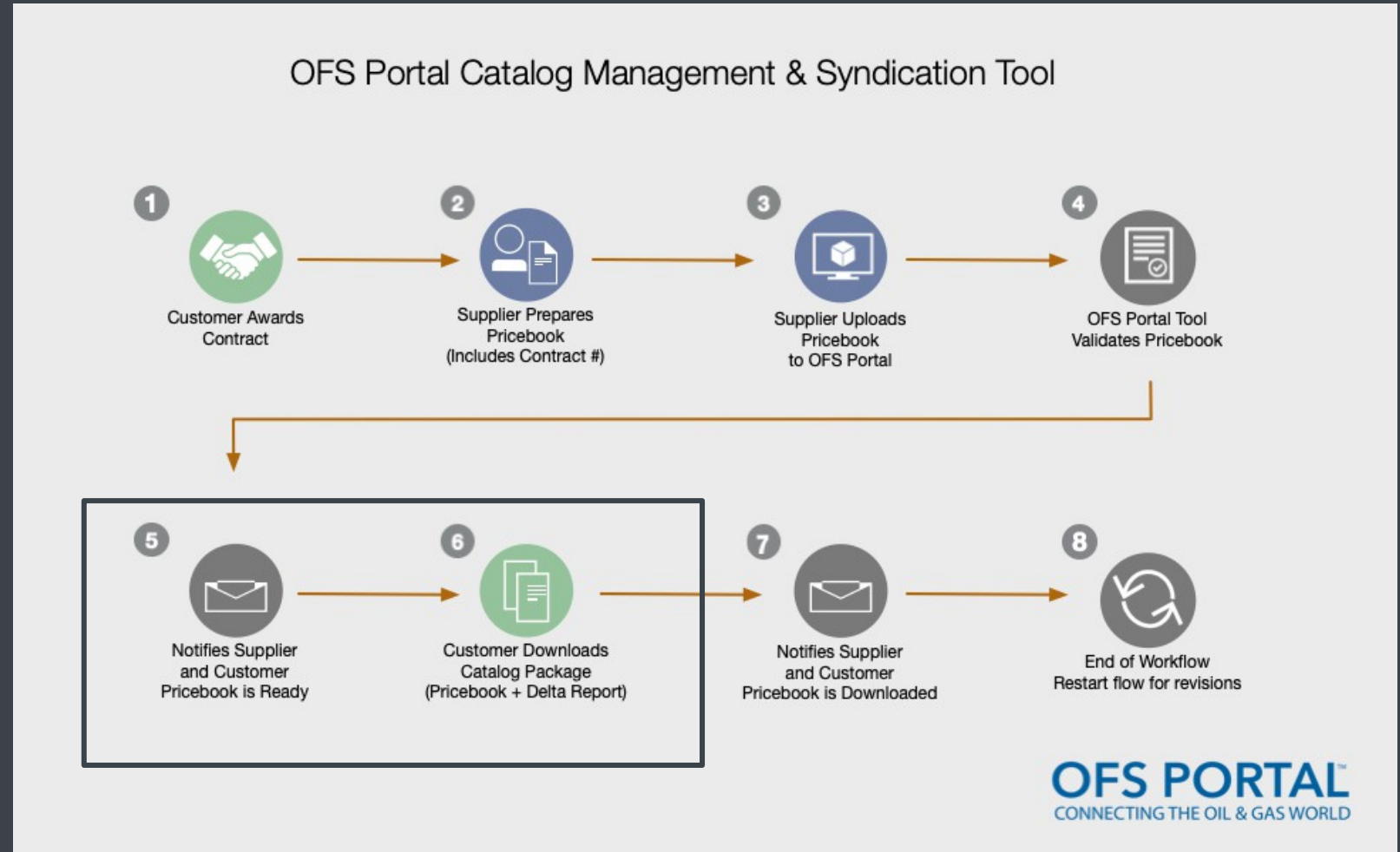
- ▶ Catalog Export
- ▶ Delta Report

### ❖ **OFS Portal Support**


## Catalog Process Overview

❖ 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



- ❖ 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.

 support@prodcatalog.ofs-portal.com  
to catalog ▾

## 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.

# Catalog Process Overview

## Operator's Review Package - Price Book (1/2)

- ❖ 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.

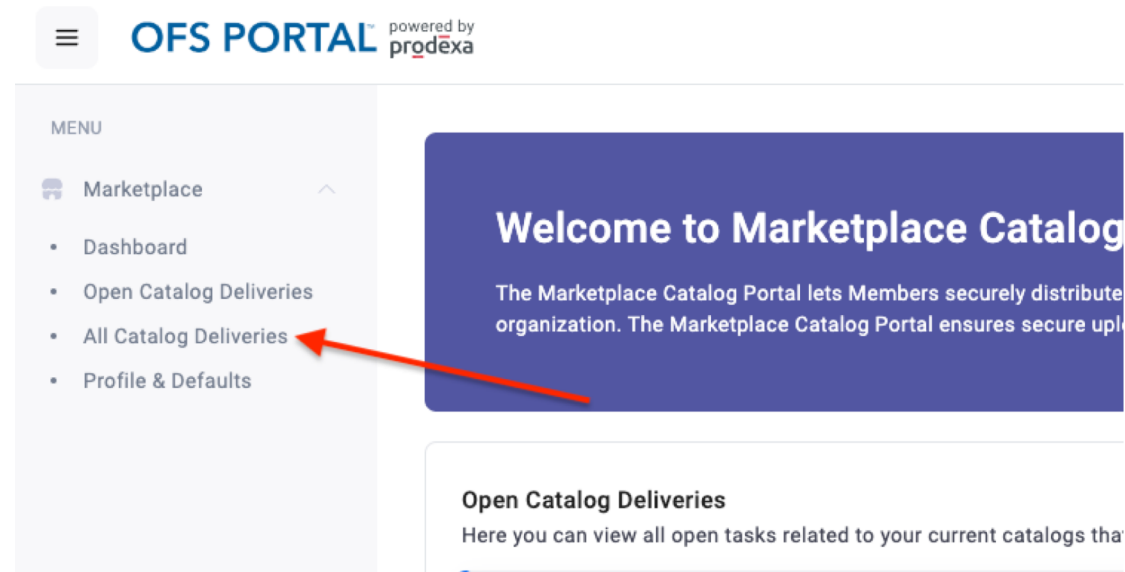
The screenshot shows an Excel spreadsheet with the following data:

Catalog Identifier	Catalog Name	Contract Number	Language	Buyer Identifier	Buyer Name	Supplier Identifier	Supplier Name	DUNS (Supplier)	Currency	Territory
CATALOGDEMO1	Catalog Demonstration	CATALOGDEMO1		TESTBUYER	Test Buyer	TESTSUPPLIER	Test Supplier		USD	US

Type of Change	Unique Supplier PN	Part Number	Part Number Ext	Parameter A	Parameter B	Old UOM	New UOM	Old Short Description	New Short Description	Old Contract Price	New Contract Price
5 Addition	10014546\ZBSB\08\01	10014546	ZBSB	08	01		EA		BULL PLUG 2in LP W/1/2 NPT X 3.750in		1.123456
6 Addition	10015093\ZBSB\08\01	10015093	ZBSB	08	01		EA		BULL PLUG 2in LP W/1/2 NPT X 3.750in		1.123456
7 Addition	10016964\ZBSB\08\01	10016964	ZBSB	08	01		EA		BULL PLUG 2in LP W/1/2 NPT X 3.750in		1.123456
8 Addition	10012814\ZBSB\08\01	10012814	ZBSB	08	01		EA		BULL PLUG 2in LP W/1/2 NPT X 3.750in		1.123456

- ❖ 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.



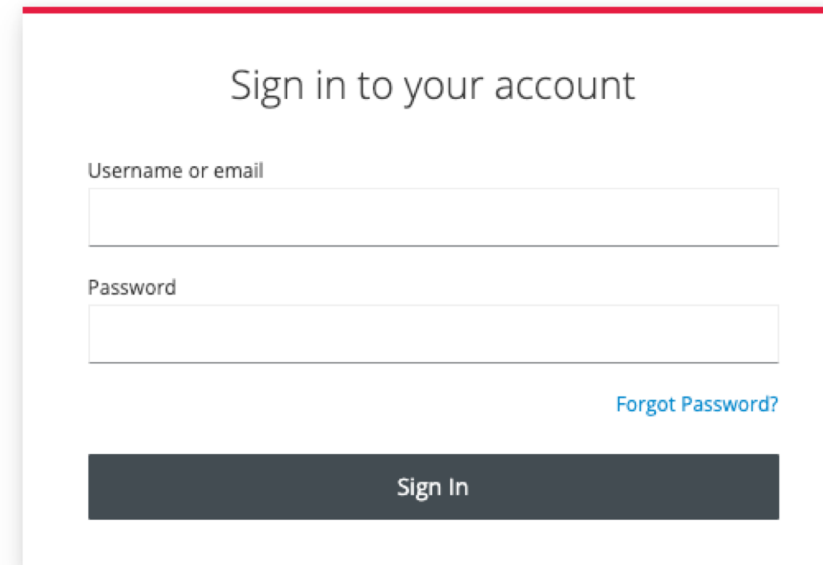
## Downloading the Operator's Review Package





- ❖ 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.

prodēxa



The screenshot shows a login form for the prodēxa portal. At the top, it says "Sign in to your account". Below this are two input fields: "Username or email" and "Password". To the right of the password field is a blue link that says "Forgot Password?". At the bottom of the form is a dark grey button with the text "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 Catalog Portal

The Marketplace Catalog Portal lets Members 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.

#### Open Catalog Deliveries

Here you can view all open tasks related to your current catalogs that are necessary for successful catalog delivery.

Manage

CATALOGDEMO\_GCP1  
CATALOGDEMO\_GCP1

TESTSUPPLIER  
Test Supplier

 Waiting for download by Buyer

#### All Catalog Deliveries

Access information about delivered catalogs and their history here.


Show All Catalog Deliveries

#### 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 by Statuses

1  Waiting for download by Buyer

# 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 [catalog@ofs-portal.com](mailto:catalog@ofs-portal.com) if you have any questions.

## Welcome to Marketplace Catalog Portal

The Marketplace Catalog Portal lets Members 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.

### Open Catalog Deliveries

Here you can view all open tasks related to your current catalogs that are necessary for successful catalog delivery.

Manage

There are no open Catalog deliveries right now

### All Catalog Deliveries

Access information about delivered catalogs and their history here.

Show All Catalog Deliveries

### 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.

# Downloading the Review Package

## Open Catalog Deliveries

- ❖ 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 Catalog Portal

The Marketplace Catalog Portal lets Members 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.

#### Open Catalog Deliveries

Here you can view all open tasks related to your current catalogs that are necessary for successful catalog delivery.

Manage

TEST\_SUPP  
Testing Catalog Creation

TESTSUPP2  
TEST SUPPLIER2

 Waiting for download by Buyer

#### 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 by Statuses

1

 Waiting for download by Buyer



#### All Catalog Deliveries

Access information about delivered catalogs and their history here.

Show All Catalog Deliveries

# Downloading the Review Package


## Open 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.

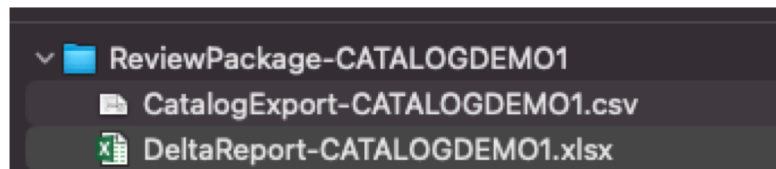
During the customer-defined workflow for published catalogs, manual interactions may be needed. Please perform the necessary actions by clicking on the corresponding action button.

1 catalog deliveries <span>Filters</span>				
Started On	Catalog	Supplier	Status	Actions
11:57 AM Feb 16, 2024	TEST_SUPP Testing Catalog Creation	TESTSUPP2 TEST SUPPLIER2	 Waiting for download by Buyer	<a href="#">View Details</a> <a href="#">Download file to complete</a>

# Downloading the Review Package

## Price Book Download

- ❖ 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:



# Downloading the Review Package

## Price Book Download

- ❖ Examples of the Catalog Export and Delta Report shown below.

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													
4	Action	PartNum	PartNumExt	ParameterA	ParameterB	UOM	ShortDesc	PartNum Extension Description	Parameter A Description	Parameter B Description	MfrName	MfrPartNum	HazMatr
5	UPDATE	7067	test	CONTR01	testparb	EA	TCP MECHANICAL EXTENDED, /JOB	testpartnumextdes	testparades	testparbdes	test		1 YES
6	UPDATE		7068	CONTR01	testparb	EA	TCP MECHANICAL EXTENDED, /JOB	testpartnumextdes	testparades	testparbdes	test		1 YES
7													
8													
9													
10													

1	Catalog Identifier	Catalog Name	Contract Number	Language	Buyer Identifier	Buyer Name	Supplier Identifier
2	CATALOGDEMO_OL_2020	CATALOGDEMO NAME	CATALOGDEMO_OL_2020	EN	OLLIE	Ollie's Operating Company LLC	SAMMY
3							
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							
9							
10							
11							
12							
13							
14							

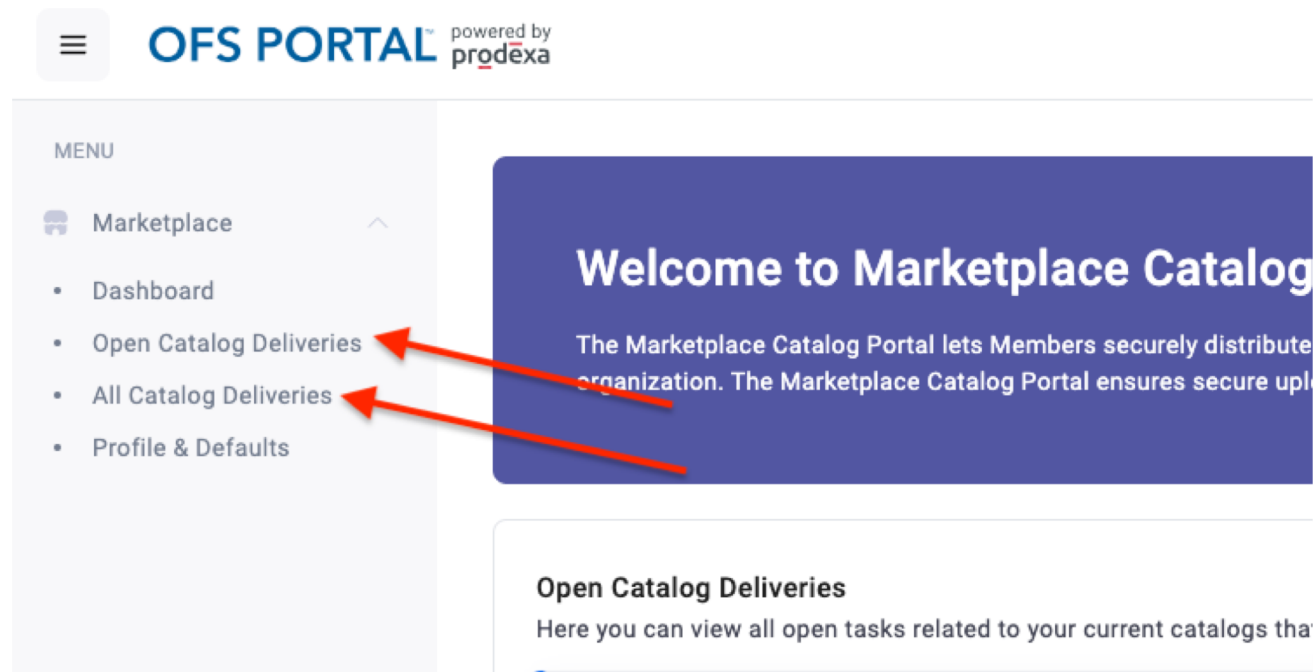
- ❖ Changes found from the previously uploaded version will be displayed in the Delta Report. You will find they are identified by **ADDITION**, **CHANGES**, **DELETION**.

## 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.



- ❖ 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 Filters

Started On	Catalog	Supplier	Status	Actions
12:27 PM Feb 20, 2024	CATALOGDEMO1 <b>Catalog Demonstration</b>	TESTSUPPLIER <b>Test Supplier</b>	Waiting for download by Buyer	<a href="#">View Details</a>
12:26 PM Feb 20, 2024	CATALOGDEMO1 <b>Catalog Demonstration</b>	TESTSUPPLIER <b>Test Supplier</b>	Catalog canceled by Supplier	<a href="#">View Details</a>
12:25 PM Feb 20, 2024	CATALOGDEMO1 <b>Catalog Demonstration</b>	TESTSUPPLIER <b>Test Supplier</b>	Catalog canceled by Supplier	<a href="#">View Details</a>
12:23 PM Feb 20, 2024	CATALOGDEMO <b>Catalog Demonstration</b>	TESTSUPPLIER <b>Test Supplier</b>	Waiting for download by Buyer	<a href="#">View Details</a>

## Additional Features

- ▶ Catalog Export
- ▶ Delta Report

- ❖ 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
Buyer ID	TESTBUYER
Catalog ID	CATALOGDEM01
Started By	lkimberly@ofs-portal.com
Started On	02/20/2024 12:27:44 PM

✓ Validating and cleansing uploaded file   3s
✓ Waiting for review of supplier with warnings   lkimberly@ofs-portal.com   5m 45s
✓ Importing uploaded data   23m 14s
✓ Generating delta report   2m 16s
New products: 10100
Updated products: 0
Deleted products: 9
Unchanged products: 0
<a href="#">Download Delta Report</a>
✓ Exporting Catalog   28s
<a href="#">Download Export Result</a>
✓ Preparing review package   < 1s
<a href="#">Download Review Package</a>
Waiting for download by Buyer   1h 5m 5s

- ❖ 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](mailto:catalog@ofs-portal.com)

Catalog Identifier	Catalog Name	Contract Number	Language	Buyer Identifier	Buyer Name	Supplier Identifier	Supplier Name	DUNS (Supplier)	Currency	Territory
CATALOGDEMO1	Catalog Demonstration	CATALOGDEMO1		TESTBUYER	Test Buyer	TESTSUPPLIER	Test Supplier		USD	US

Type of Change	Unique Supplier PN	Part Number	Part Number Ext	Parameter A	Parameter B	Old UOM	New UOM	Old Short Description	New Short Description	Old Contract Price	New Contract Price
5 Addition	10014546\ZBSB\08\01	10014546	ZBSB	08	01	EA	EA	BULL PLUG 2in LP W/1/2 NPT X 3.750in	BULL PLUG 2in LP W/1/2 NPT X 3.750in	1.123456	1.123456
6 Addition	10015093\ZBSB\08\01	10015093	ZBSB	08	01	EA	EA	BULL PLUG 2in LP W/1/2 NPT X 3.750in	BULL PLUG 2in LP W/1/2 NPT X 3.750in	1.123456	1.123456
7 Addition	10016964\ZBSB\08\01	10016964	ZBSB	08	01	EA	EA	BULL PLUG 2in LP W/1/2 NPT X 3.750in	BULL PLUG 2in LP W/1/2 NPT X 3.750in	1.123456	1.123456
8 Addition	10012814\ZBSB\08\01	10012814	ZBSB	08	01	EA	EA	BULL PLUG 2in LP W/1/2 NPT X 3.750in	BULL PLUG 2in LP W/1/2 NPT X 3.750in	1.123456	1.123456

## 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: [catalog@ofs-portal.com](mailto:catalog@ofs-portal.com)



STAY  
CONNECTED

[CATALOG@OFS-PORTAL.COM](mailto:CATALOG@OFS-PORTAL.COM)

[HTTPS://OFS-PORTAL.COM](https://OFS-PORTAL.COM)

[WWW.LINKEDIN.COM/PAGE/OFS-PORTAL](https://WWW.LINKEDIN.COM/PAGE/OFS-PORTAL)