

Catalog Manager User Guide For Suppliers

Released April 2024

Please contact catalog@ofs-portal.com for any questions.

❖ **Catalog Process Overview**

❖ **Prepare Price Book for Upload**

- ▶ Request New Catalog Header
- ▶ Validating the Price Book

❖ **Import Price Book**

- ▶ Logging into the Catalog Manager
- ▶ Home Page
- ▶ Process Catalogs
- ▶ Process List – Catalog Tracking

❖ **Email Notifications**

❖ **Additional Features**

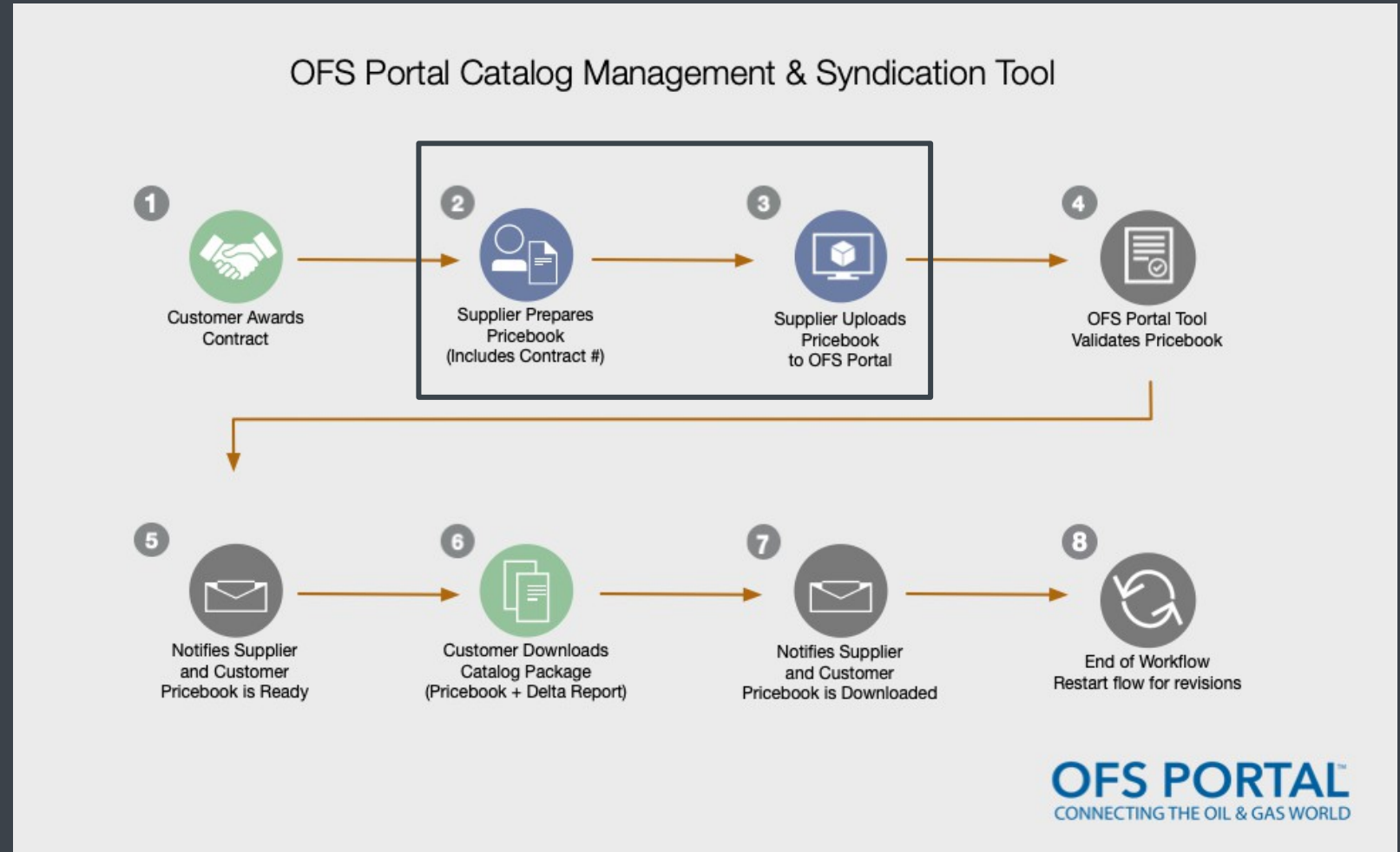
- ▶ Withdraw Price Book
- ▶ Compare Catalog Versions (Delta Report)
- ▶ Catalog Report

❖ **OFS Portal Support**

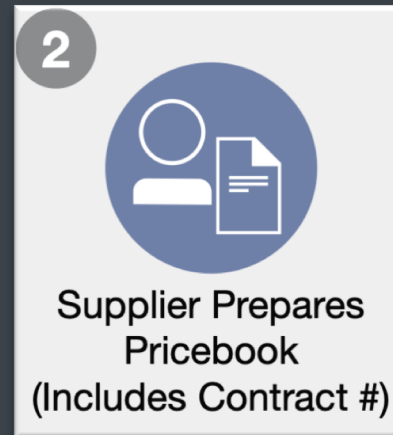
Catalog Process Overview

❖ This guide will walk you through the Supplier processes in blue - from preparing the price book to importing the file inside the catalog tool. Additional functionalities, such as catalog withdrawal and delta reporting will also be included.

Test Account used for this User Guide:
SUPPLIER ID: TESTSUPPLIER
Supplier Name: Test Supplier



Prepare Price Book for Upload



Prepare Price Book

Request New Catalog Header

- ❖ For new catalogs, complete and send the “Header” table found in the OFS Portal Price book template to catalog@ofs-portal.com
- ❖ For syndicating revisions and/or updating existing catalogs a new header request will not be needed.
- ❖ Field Names in blue are required fields to create a header.
- ❖ Spaces are not allowed in the Catalog ID.
- ❖ Please see the ‘Instructions’ tab found in the template for additional requirements.

FIELD_NAME	DATA	COMMENTS
Catalog ID	-	*Format: =B9&"_"&B6 Concatenate B9 and B6 fields
Catalog Name		*Catalog Description
Buyer Code		
Buyer ID		*Buyer or Customer ID
Contract Number		
Supplier Code		
Supplier ID		*Supplier ID
Locale		
DUNS		
Currency Code		*USD
Territory		*US
UOM		*ANSI or UNECE

- ❖ You will receive the following email confirmation from OFS Portal Support once the price book header is created.

The following price book header has been created for Buyer ID: TESTBUYER

CATALOG_ID: CATALOG_DEMO
CATALOG NAME: CATALOG DEMO NAME

ACCESS:
Supplier Organization: TEST SUPPLIER
Buyer Organization: TEST BUYER

PROCESS PROFILE (Catalog Tasks and Email Notifications)
Supplier Responsible Person: NANCY SMITH
Buyer Responsible Person: JOHN JONES

AUTOMATED PROCESSING ENABLED
IMPORT FORMAT: Excel with Schema OFSP – Toolset_Parm_A_B (English)
EXPORT FORMAT: CSV with Schema OFS_CSV_Parms

Currency Code: USD
Territory: US
UOM: ANSI / UNECE

NOTE: In the Template, the Catalog ID will automatically be generated when you complete the Buyer ID and Supplier ID header fields. The Catalog ID must match the Catalog ID used in the Catalog Manager or the catalog data will not import.

PLEASE USE ALL CAPS FOR HEADER DATA. All header data must match exactly what is above and in the Catalog system.

- ❖ Validation macros are embedded in the OFS Portal Pricebook Template. This will check for required fields, validate currency, UOM's, locate duplicate items.
- ❖ The full list of validations are listed on the next slide and also within in the 'Validation Rules' of the template.
- ❖ To run the macros, run the 'Report' tab of the template. Errors will be listed cell by cell.

	A	B	C	D	E
1	Report				
2	<i>Cell</i>	<i>Rule</i>	<i>Warn/Error</i>	<i>Message</i>	
3	HEADER - B3	H1	Catalog ID	Cannot be empty	<input type="button" value="Validate"/>
4	<u>Header - B4</u>	H1	Catalog Name	Cannot be empty	
5	<u>Header - B6</u>	H1	Buyer ID	Cannot be empty	
6	<u>Header - B9</u>	H1	Supplier ID	Cannot be empty	
7	<u>Header - B12</u>	H1	Currency Code	Cannot be empty	
8	<u>Header - B13</u>	H1	Territory	Cannot be empty	
9	<u>Header - B14</u>	H6	UOM	UOM must be ANSI or UNECE	
10	<u>Item Data - A2</u>	ID1	Action	Can not be empty	
11	<u>Item Data - B2</u>	ID1	PartNum	Can not be empty	
12	<u>Item Data - H2</u>	ID1	UOM	Can not be empty	<input type="button" value="Clear"/>
13	<u>Item Data - I2</u>	ID1	ShortDesc	Can not be empty	
14	<u>Item Data - T2</u>	ID1	ContractPrice	Can not be empty	
15	<u>Item Data - X2</u>	ID1	QtyMin	Can not be empty	
16	<u>Item Data - Z2</u>	ID1	Class_Code	Can not be empty	
17	<u>Item Data - AA2</u>	ID1	Class_Version	Can not be empty	
18	<u>Item Data - A3</u>	ID1	Action	Can not be empty	
19	<u>Item Data - B3</u>	ID1	PartNum	Can not be empty	
20	<u>Item Data - H3</u>	ID1	UOM	Can not be empty	
21	<u>Item Data - I3</u>	ID1	ShortDesc	Can not be empty	
22	<u>Item Data - T3</u>	ID1	ContractPrice	Can not be empty	
23	<u>Item Data - X3</u>	ID1	QtyMin	Can not be empty	
24	<u>Item Data - Z3</u>	ID1	Class_Code	Can not be empty	
25	<u>Item Data - AA3</u>	ID1	Class_Version	Can not be empty	
26					
27					
28					

Ready General Instructions Header Item Data ANSI UNECE UOM

❖ Full List of Data Validation Macros of the Template

Header Information (Header Tab)

- H1 All required fields populated - Catalog ID, Catalog Name, Supplier ID, Buyer ID, Currency Code, Territory
- H2 Validate currency code in B10 against list on Sheet 'Currency'
- H3 Validate Territory code in B11 against list on Sheet 'Territory'
- H4 Catalog Name cannot contain commas
- H5 Catalog ID Max Length = 30 char, Catalog Name Max Length = 128 char

Line Item Information (Item Detail Tab)

- ID1 All required fields populated - PartNum, UOM, Short Desc, Contract Price, Qty_Min, Class_Code, Class_version
- ID2 ContractPrice contains valid prices to 6 decimal places
- ID3 Validate UOM against list on Sheet 'UOM'
- ID4 Validate Class_version against list on Sheet "Class_version"
- ID5 Validate Class_code against list on appropriate sheet based on Class_version
- ID6 QtyMin contains numeric only (Optional)
- ID7 EffectiveDate contains valid date (Optional)
- ID8 ExpireDate contains valid date that is greater than EffectiveDate if EffectiveDate is populated (Optional)
- ID9 ListPrice contains valid prices to 6 decimal places (Optional)
- ID10 Make sure all columns exist, A to BL (Executed with Header Macros)
- ID11 MinOrder contains numeric only (Optional)
- ID12 Maximum Order Quantity contains only numeric (Optional)
- ID13 Lot Size contains numeric only (Optional)
- ID14 Check for duplicate items (without UOM)

Import Price Book



- ❖ Log into the OFS Portal Catalog Manager
- ❖ You are able to reset password if needed via the [Forgot Password?](#) link found on this login page.

prodēxa

Sign in to your account

Username or email

Password

[Forgot Password?](#)

Sign In

- ❖ Your dashboard provides an overview of open catalog deliveries including catalog statuses, Supplier reviews needed and catalogs waiting on Buyer download.
- ❖ Template download and Supplier Guide links are available for Supplier convenience

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.

Useful Links

[Catalog Manager Supplier Guide →](#)

The Catalog Manager Supplier Guide contains comprehensive documentation and instructions for the processes on the suppliers end regarding catalog delivery.

[Catalog Upload Template →](#)

Catalog delivery is exclusively done through a predefined format to ensure secure delivery.

Open Catalog Deliveries

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

Manage

CATALOGDEMO_GCP10 CATALOGDEMO_GCP10	TESTBUYER Test Buyer	Waiting for review of Supplier
CATALOGDEMO_GCP1 CATALOGDEMO_GCP1	TESTBUYER Test Buyer	Waiting for download by Buyer

Deliver new Catalog

To start to deliver new or updated Catalog use Catalog Upload Template.

Deliver new or updated Catalog

All Catalog Deliveries

Access information about delivered catalogs and their history here.

Show All Catalog Deliveries

Open Catalog Deliveries by Statuses

1 Waiting for review of Supplier >

1 Waiting for download by Buyer >

- ❖ This User Guide can be found via the Supplier Guide link provided on the User's homepage. Additional information including the OFS Portal application and OFS Portal Pricebook Template can also be found here.
- ❖ Please contact catalog@ofs-portal.com if you have any questions.

Useful Links

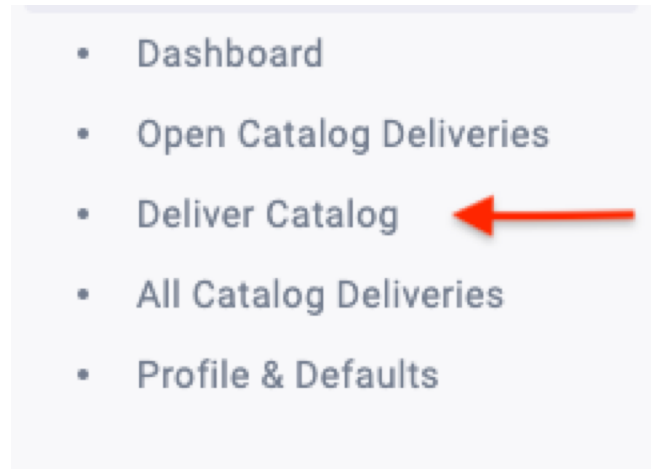
[Catalog Manager Supplier Guide →](#)

The Catalog Manager Supplier Guide contains comprehensive documentation and instructions for the processes on the suppliers end regarding catalog delivery.

[Catalog Upload Template →](#)

Catalog delivery is exclusively done through a predefined format to ensure secure delivery.

- ❖ After validating your price book data within the template, navigate to the **Deliver Catalogs** link to begin importing your price book.



- ❖ Select the **Buyer ID** and **Catalog ID**. The Catalog ID will correspond with the Buyer on the header request sent to OFS Portal.
- ❖ **Select Catalog File** - Select the file you wish to upload. The previously uploaded file will still be available after the new upload.
- ❖ **Supplier Review** – Option to review the price book before publishing to the Customer.
- ❖ **Email for notification** – Separate email option if buyer company email (defaulted for notifications) is insufficient.
- ❖ Click Submit.

Deliver new or updated Catalog

Submit

Considering publishing a new catalog? Ensure it meets buyer requirements for file format, classification, and more. While the Marketplace Catalog Portal handles the catalog delivery process, it is crucial that your data is accurately prepared.

Fill in the provided fields and use the [Catalog Upload Template](#) to upload your catalog to the Marketplace Catalog Portal. Upon successful processing, it becomes available to buyers.

Select Buyer and Catalog

Buyer * Catalog *

Select Catalog File *

Drag and drop your file here
or from your computer

The selected file will be uploaded and processed at the submission.

Optional Fields

Email for notification

Supplier Review

To send the catalog directly to the buyer, leave the 'Supplier Review' checkbox unchecked. If the 'Supplier Review' checkbox is checked, the workflow process will be on hold until the catalog has been reviewed and submitted. You can review and submit the catalog through your worklist.

Submit

Supplier's Catalogs

Open Catalog Deliveries – Error Warnings

- ❖ Once your catalog has been submitted – you will be taken to the Catalog Delivery Details page.
- ❖ If there are **Errors** listed they must be corrected before a successful syndication to the customer is possible. The catalog must be reloaded.
- ❖ If there are **Warnings** listed they *will not prevent syndication* but must be **approved** by the supplier on the Open Catalog Deliveries page.
- ❖ If a Buyer has yet to download a price book, it will be available for Supplier withdrawal.

! Validating and cleansing uploaded file | < 1s

Errors on the 'Item Data' sheet: show 10 of total 169

Cell	Column	Error
A1	Action	Column missing/moved
B1	PartNum	Column missing/moved
I1	ShortDesc	Column missing/moved
J1	PartNum Extension Description	Column missing/moved
K1	Parameter A Description	Column missing/moved
L1	Parameter B Description	Column missing/moved
M1	Parameter C Description	Column missing/moved
N1	Parameter D Description	Column missing/moved
O1	MfrName	Column missing/moved
P1	MfrPartNum	Column missing/moved

Warnings on the 'Item Data' sheet: show 10 of total 26

Cell	Column	Warning
Z2	Class_Code	1 is not valid 1000.0000000 code
Z3	Class_Code	1 is not valid 1000.0000060 code
H4	UOM	05 is not a valid ANSI UOM
Z4	Class_Code	1 is not valid 1000.0000060 code
H5	UOM	06 is not a valid ANSI UOM
Z5	Class_Code	1 is not valid 1000.0000060 code
H6	UOM	07 is not a valid ANSI UOM
Z6	Class_Code	1 is not valid 1000.0000060 code
H7	UOM	08 is not a valid ANSI UOM
Z7	Class_Code	1 is not valid 1000.0000060 code

🚫 Uploaded file is invalid | 5m 12s

Open Catalog Deliveries – Catalog Tracking

- ❖ From the left side menu, click on **Open Catalog Deliveries** to view the process details status.
- ❖ The **Open Catalog Deliveries** page is sorted in descending order. Filters are provided to narrow down your results.
- ❖ If **Supplier Review** was selected, you must submit the catalog from this page after reviewing.
- ❖ If a Buyer has yet to download a price book, it will be available for Supplier withdrawal.

Open Catalog Deliveries

[Deliver new or updated Catalog](#)

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.


Started On	Catalog	Buyer	Status	Actions
12:23 PM Feb 14, 2024	CATALOGDEMO_GCP10 CATALOGDEMO_GCP10	TESTBUYER Test Buyer	Waiting for review of Supplier	View Details
02:33 PM Feb 15, 2024	CATALOGDEMO_GCP1 CATALOGDEMO_GCP1	TESTBUYER Test Buyer	Waiting for download by Buyer	View Details

Email Notifications

Email Notifications

Supplier Alerts – Successful Upload

- ❖ The following email alert is sent to the Supplier email list (found in Supplier's profile) notifying when the Catalog has been uploaded and ready for Buyer download.
- ❖ Email Subject: "Propose Download Catalog file"
- ❖ Workflow alerts are sent from the mailbox **support@prodcatalog.ofs-portal.com**

 support@prodcatalog.ofs-portal.com
to lkimberly+1 ▾

Propose Download Catalog file


Catalog CATALOGDEMO_MIGRATION is ready for customer download. Details are available [here](#).

This mail was automatically generated by Marketplace Catalog Portal.

Email Notifications

Supplier Alert – Error Message

- ❖ The following email alert is sent to the Supplier when the workflow has **failed**.
- ❖ Email Subject: **“Uploaded file is invalid”** The below example shows a header error.
- ❖ There will be a link within the email to the webpage with error details. You can also reach this page by logging in and following the Open Catalog Deliveries link to find the error.
- ❖ Contact Support for any questions at catalog@ofs-portal.com.

 support@prodcatalog.ofs-portal.com
to lkimberly+1 ▾

Uploaded file is invalid

File uploaded to catalog CATALOGDEMO_MIGRATION is invalid.


Errors on the 'Item Data' sheet: show 10 of total 10,084

Cell	Column	Error
AA18	Class_Version	PIDX-4.2 is not a valid

Email Notifications

Operator Alerts - Catalog Ready for Download

- ❖ The following email alert is sent to the Operator when a file has reached their account and is available for download.
- ❖ Email subject: **“Catalog is ready for download”**

 support@prodcatalog.ofs-portal.com
to lkimberly+1 ▾

Propose Download Catalog file

Catalog CATALOGDEMO_MIGRATION is ready for customer download. Details are available [here](#).

This mail was automatically generated by Marketplace Catalog Portal.

- ❖ The following email alert is sent to both **Supplier** and **Operator** when the file has been downloaded.
- ❖ Email subject: **“Catalog file was downloaded”**



support@prodcatalog.ofs-portal.com
to lkimberly+1 ▾

Catalog file was downloaded

Catalog CATALOGDEMO_MIGRATION was downloaded. Catalog file was downloaded 05.04.2024 18:03:44.

This mail was automatically generated by Marketplace Catalog Portal.

Additional Features

- ▶ Withdraw Price Book
- ▶ Compare Catalog Versions (Delta Report)

Additional Features

Withdraw Price Book

- ❖ Supplier may withdraw a price book from Buyer's Open Catalog Deliveries list if said Buyer has not yet downloaded the price book.
- ❖ Under **Open Catalog Deliveries**, click **Withdraw** to remove price book from Buyer.

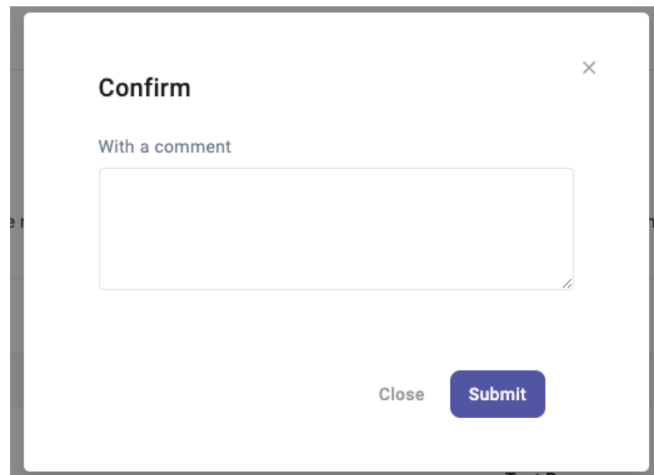
2 catalog deliveries Filters

Started On	Catalog	Buyer	Status	Actions
12:23 PM Feb 14, 2024	CATALOGDEMO_GCP10 CATALOGDEMO_GCP10	TESTBUYER Test Buyer	Waiting for review of Supplier Submit Cancel	View Details
02:33 PM Feb 15, 2024	CATALOGDEMO_GCP1 CATALOGDEMO_GCP1	TESTBUYER Test Buyer	Waiting for download by Buyer Withdraw View Details	View Details



Additional Features

Withdraw Price Book

- ❖ When withdrawing a price book, the Supplier has the option to comment on the withdrawal.



- ❖ The workflow is now open to the Supplier to upload new versions of the price book. The withdrawal will be noted in the All Catalog Deliveries page of both Supplier and Buyer.

Started On	Catalog	Buyer	Status	Actions
02:33 PM Feb 15, 2024	CATALOGDEMO_GCP1 CATALOGDEMO_GCP1	TESTBUYER Test Buyer	 Catalog withdrawn by Supplier	View Details
01:52 PM Feb 15, 2024	CATALOGDEMO_GCP1 CATALOGDEMO_GCP1	TESTBUYER Test Buyer	 Catalog downloaded by Buyer	View Details

- ❖ The email alert below is sent to both Supplier and Buyer to notify them of when a price book has been withdrawn.



support@prodcatalog.ofs-portal.com
to lkimberly+1 ▾

11:33AM (4 hours ago) ▾

Catalog Withdrawn by Supplier

On 05.04.2024 18:32:58, the following catalog CATALOGDEMO_MIGRATION delivery was withdrawn from processing. Please be advised that customer TESTBUYER will no longer be able to receive this version of catalog delivery.

This mail was automatically generated by Marketplace Catalog Portal.

Additional Features

- ▶ Withdraw Price Book
- ▶ Compare Catalog Versions (Delta Report)

Additional Features

Compare Catalog Versions (Delta Report)

- ❖ A Delta Report is provided to both Operators in their Review Package along with the price book .csv file.
- ❖ The delta report captures the changes from the previous uploaded version.
- ❖ Both the Supplier and Buyer can download the delta report from their All Catalog Deliveries webpage by clicking View Details on the catalog needed.
- ❖ These options stay available to both parties regardless of the age of the price book.

Catalog Delivery Details

Supplier ID	TESTSUPPLIER
Buyer ID	TESTBUYER
Catalog ID	CATALOGDEMO_GCP1
Started By	lkimberly@ofs-portal.com
Started On	02/15/2024 2:33:01 PM
Catalog file	📄 CATALOGDEMO_GCP1.xls

✓ Validating and cleansing uploaded file | < 1s

✓ Importing uploaded data | 8s

Processed products:	9
Imported successfully:	9
Skipped with errors:	0
Imported with warnings:	0

✓ Generating delta report | < 1s

New products:	0
Updated products:	0
Deleted products:	0
Unchanged products:	9

[📄 Download Delta Report](#) **Delta Report**

✓ Exporting Catalog | 1s

[📄 Download Export Result](#) **.csv file**

✓ Preparing review package | < 1s

[📄 Download Review Package](#) **Delta Report and .csv file**

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**, and **DELETION**.
- ❖ If you have any further questions regarding the Delta Report, please contact catalog@ofs-portal.com

1	Catalog Identifier	Catalog Name	Contract Number	Language	Buyer Identifier	Buyer Name	Supplier Identifier	Supplier Name
2	CATALOGDEMO_OL_2020	CATALOGDEMO_OL_2020		EN	OLLIE	Ollie's Operating Company LLC	SAMMY	Sammy
3								
4	Type of Change	Unique Supplier PN	Part Number	Part Number Ext	Parameter A	Parameter B	Old UOM	New UC
5	Addition	7067\test\CONTR01\testparb	7067	test	CONTR01	testparb		EA
6	Changes	7066\test\CONTR01\testparb	7066	test	CONTR01	testparb		
7	Deletion	7065\test\CONTR01\testparb	7065	test	CONTR01	testparb	EA	
8								
9								
10								
11								

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 at the email below.
- ❖ OFS Catalog Support email: catalog@ofs-portal.com



STAY
CONNECTED

CATALOG@OFS-PORTAL.COM

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

WWW.LINKEDIN.COM/PAGE/OFS-PORTAL