Create a Supplier Catalog

This document shows suppliers how to do the following:

- Create a Catalog
- Design a Catalog Cover
- Create a Product/Service List
- Upload and Map a Product/Service List
- Activate and Share a Catalog

Create a Catalog

1. Log in to OregonBuys, then from the home screen click the Gear icon and then click “Catalog Manager”.

2. This opens a new tab displaying the Catalog Manager and the Catalog Library. Here you’ll see any of your existing Catalogs that you’ve completed or are in the process of working on.
3. In this example, the supplier works in IT Hardware and Computer Supplies, and they need to create a new Catalog for laptops. To begin, click “Create Catalog”.

4. Taking a moment to review this page, you’ll notice the three steps at the top of the page which indicate where you are in the Create Catalog process. In Step 1, “Design Your Catalog Cover”, the page is divided in two sections. On the left, you have “Add Catalog Details”. This is where you will fill out the required fields, adding details to your Catalog cover. On the right is the Catalog Cover Preview. As you add information to the section on the left, you can see the results in real time on the right.
5. As a note, next to Add Catalog Details is an Instructions icon. Anytime you see an Instructions icon, you can hover over it to read more about best practices.

**Design Catalog Cover**

1. The first option here is to Add Image. Typically, suppliers use a company logo or an image representing the contents of the catalog. Click “Add Image” to add an image.
Navigate to the image that you’d like to add and click “Open”. You can see your image display in the Cover Preview.
2. Now fill out the required fields, marked with an asterisk. The first required field is Catalog Name. Organizations use this field to search for Catalogs and to search in Marketplace.

3. For this example, the Catalog is associated with NASPO and is for laptops. You can see the preview updating as you type.
4. Next, update the description, which will display whenever someone hovers over the Tooltip icon.

<table>
<thead>
<tr>
<th>IT Hardware and Computer Supplies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Name *</td>
</tr>
<tr>
<td>NASPO Catalog: Laptops</td>
</tr>
</tbody>
</table>

**Catalog Description:** this information will display on the tooltip icon

This is a NASPO Catalog that contains laptops.
5. Next, you can add a link. In this example we add a link to the company website.

6. Next is Categories, another required field. You can search for Categories by typing criteria in the search bar and hitting enter. In this example we’ve searched for Computers. Choose at least one option for your catalog. For this example we will select “Computers”.
7. Then there’s Tags. Use this field to enhance the searchability of your Catalog.

8. Next is the Catalog Type. This field is a dropdown where you can indicate whether this Catalog is for a Product, Service or both.

9. Next is the Start Date. The date you choose is the first day that organizations can view your catalog. Once its activated, shoppers can see the products in Marketplace. Click the calendar icon and choose a date.

10. You can also add an Expiration Date or choose to have no Expiration Date.
11. If you’re done working on your for now and would like to work on it later, click “Save & Exit”. If you’d like to continue, click “Save & Next” which brings you to the next screen where you can upload your products.

Create a Product/Service List

1. As you can see from the progress bar at the top of the screen, you’ve moved on to Step 2 of the process. To begin, click “Create List”.

2. First, enter the name of your list.
3. Next, download the catalog template.

4. Now you’ll make changes to the template for your catalog. There are six required fields. Product/Service Unique Number (must be alphanumeric), Product/Service Name (displays for shoppers, 500 character limit), Product/Service Description (4000 character limit, you can use HTML in this field), Product/Service Price (use only numbers, decimals and dollar signs), NIGP (class and class item may or may not be separated by a dash), UOM (unit of measure, must use approved abbreviation). There are also non-required fields such as the Primary Image field, where you can link an image for your catalog item. You must use public URLs and they must end in .jpg.

5. When you’re done filling out your template, you’ll want to delete any unused columns. Save the template to your computer using your own file name, choosing the .csv format.

**Upload and Map a Product/Service List**

1. Once your catalog template is complete and saved to your computer, you can navigate back to the catalog manager and click “Add File” under Step 3 of the Add Product/Service List form. Locate and select the file, then click “Open”. You should see your file under the Add File button if it uploads successfully. Click “Next” to move on.
2. This brings you to the mapping screen. Here you can map each column on the product list to the correct field in marketplace. On the left, you can see the available fields in marketplace, which are laid out in a similar format to marketplace. On the right, you can see the fields from your template. Drag and drop the template columns from the right to the corresponding fields on the left. You may need to scroll toward the bottom to find some of the fields.
3. Scroll to the bottom of the page once you’re done mapping all your fields.
   Click “Preview” to see a Preview of the Catalog.
   Click “Save & Exit” to come back to it later.
   Click “Save & Validate” if you’re done and ready to move on.
4. When you click “Save & Validate”, you’ll be able to see the status of your upload. When its done, click “Close”.

5. Now you’re able to see your uploaded Product/Service List.
Activate and Share a Catalog

1. Now that we have uploaded and mapped our product list, we have to activate it. First, check the box next to your desired Product/Service List and click “Save & Next”.

2. To activate your catalog, utilize the “Activate” toggle. From there you can specify which organizations are able to view your catalog or choose “Available to all Marketplace shoppers” to choose all organizations. Then click “Save & Next”.

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**UPLOAD AND SELECT PRODUCTS OR SERVICES LISTS**

- Laptops

**ACTIVATE AND SHARE YOUR CATALOG WITH AGENCIES**

- Available to all Marketplace shoppers
  - Georgia
  - State of Arizona
  - State of Arkansas
  - Department of Finance
  - MMCAP Infuse
  - Hawaii
  - OregonBuys

**SAVE & EXIT** **SAVE & NEXT**
3. This brings you to the catalog summary screen, letting you know your catalog is now available. From here click “Exit” which will bring you back to the Catalog Library where you can see the Catalog you’ve just created.