OregonBuys Agency Admin IV: Linking Contract Items Guidance

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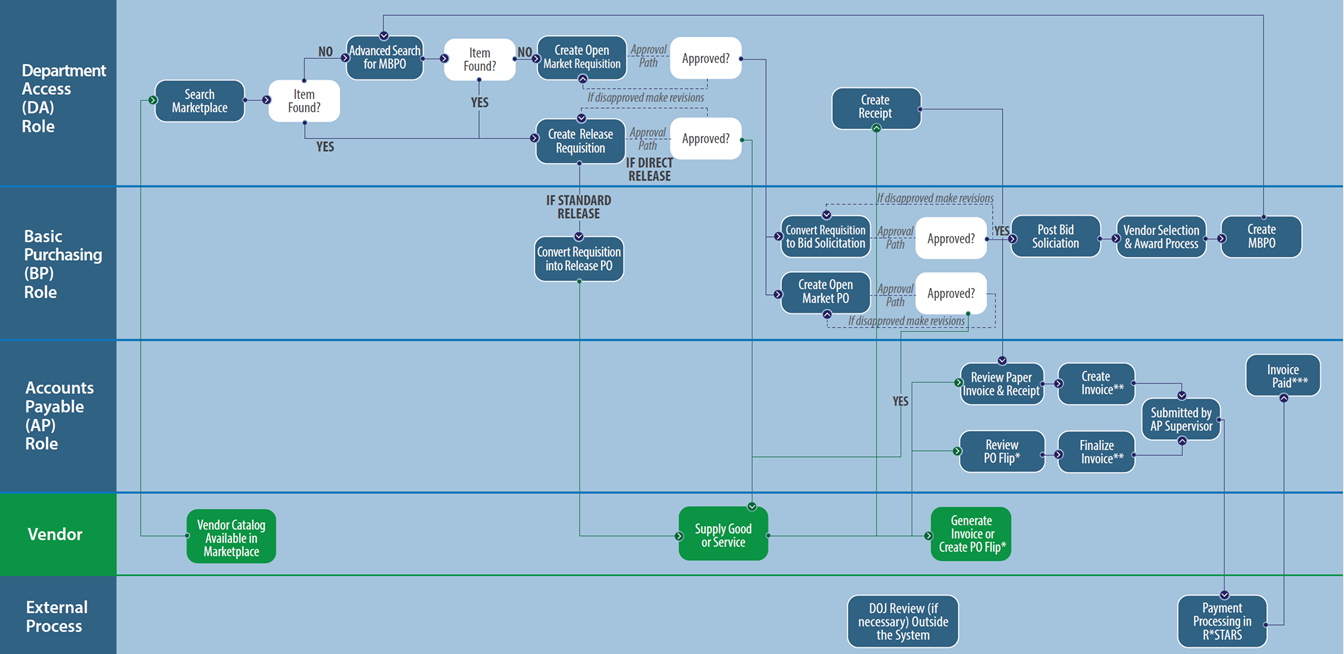
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# Introduction

This guidance document will cover the best way for a Department Access or Basic Purchasing user with Catalog Manager privilege how to access the *Catalog Link Manager* for both *Externa****l*** and *Internal**Catalog*s, how to match and link *Contract Line Items* on a *Master Blanket Purchase Order* to Products or Services on a *Catalog* using automatic and manual matching, how to use the search and filter features and how to link a single *Contract Line* *Item* to an entire *Catalog.*

Figure 1: High Level Process Flow



# Scenario

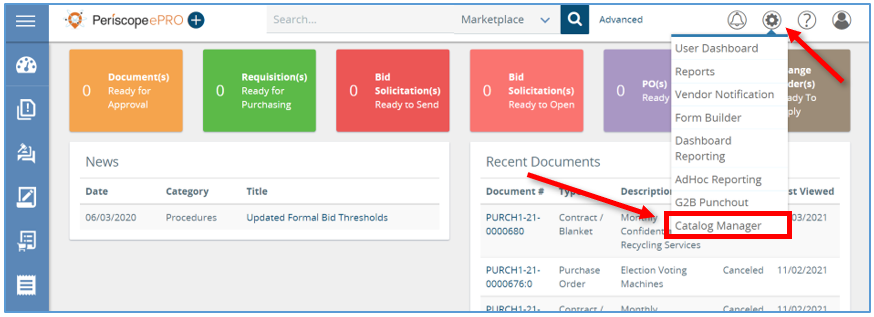
A Master Blanket Purchase Order (MBPO) has been established in the Agency. The Product or Service list related to that MBPO has been uploaded in OregonBuys, either by the vendor or on behalf of the vendor. In order to link the uploaded catalog and the MBPO, the user must go into Catalog Manager to link the items together, so they appear correctly in Marketplace.

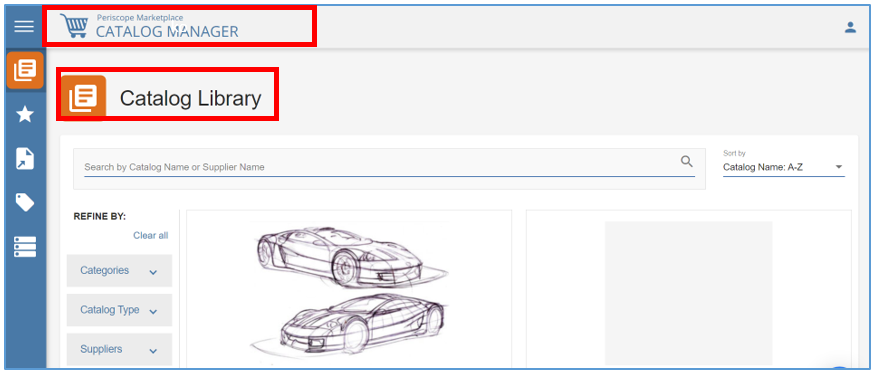
# Prerequisites

1. ***Catalog Manager*** user role is assigned to your user.
2. A Product or Service list from the vendor is uploaded in OregonBuys.
3. Information on the specific Master Blanket Purchase Order to be linked is available.

# Catalog Manager

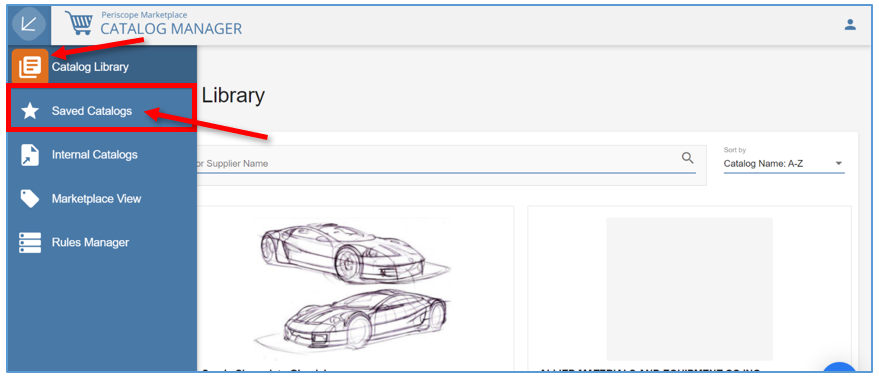
1. To begin, navigate to an***External******or Internal Catalog*** in ***Catalog Manager***.
2. Starting from the ***Home***page, click the ***gear icon***, and select ***Catalog Manager*** from the **drop-down menu**.
3. The page will redirect to the ***Catalog Library*** in ***Catalog Manager*.**



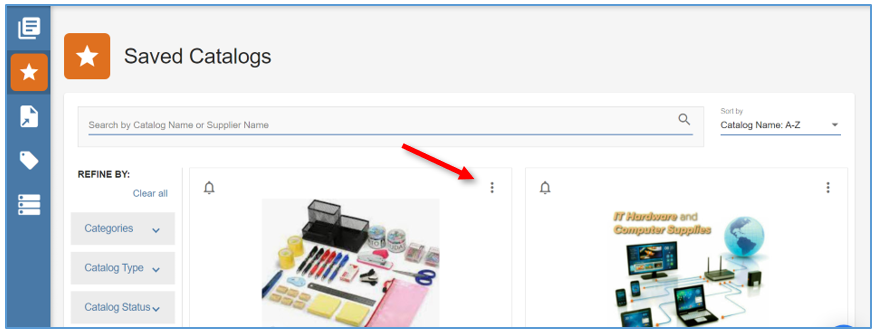


# External Catalogs

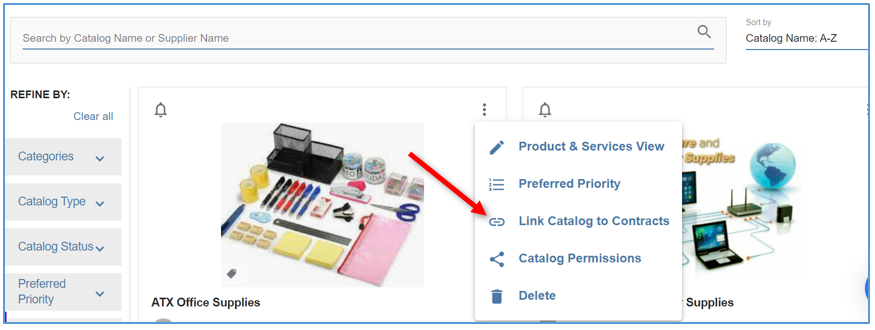
1. For an **External Catalog** hover your mouse over the **left navigation bar** and click ***Saved Catalogs*.**
2. This will take you to an ***External Catalog*** that is already in the process of being activated for Shoppers.
   1. Remember***External Catalogs*** are loaded by the ***Supplier*** themselves.



1. Next locate the ***Catalog*** and click the ***ellipsis icon*** in the upper right-hand corner.

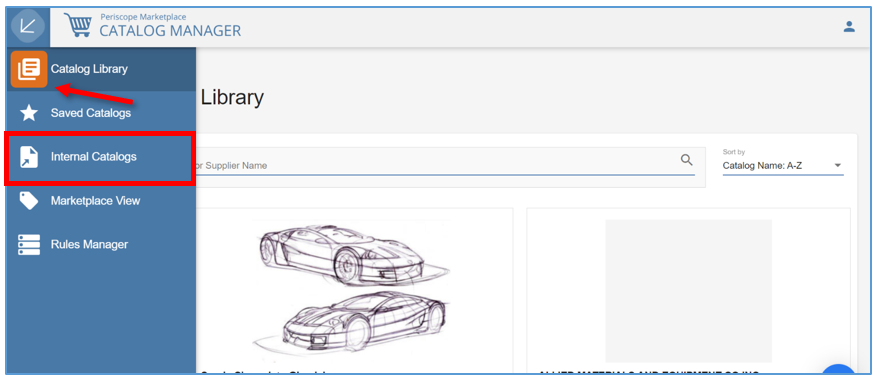


1. Then select ***Link Catalog to Contracts***.

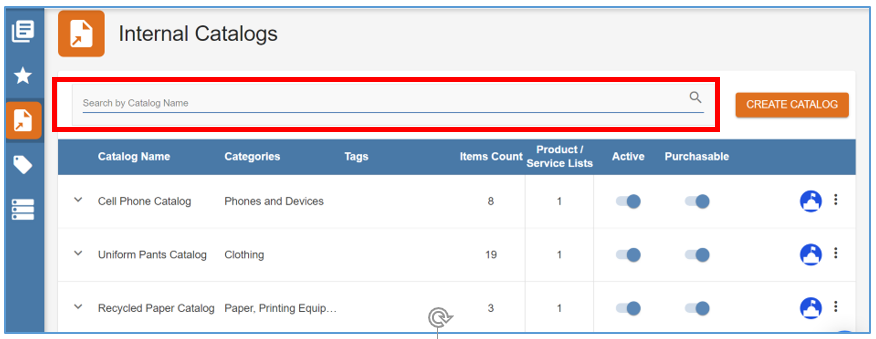


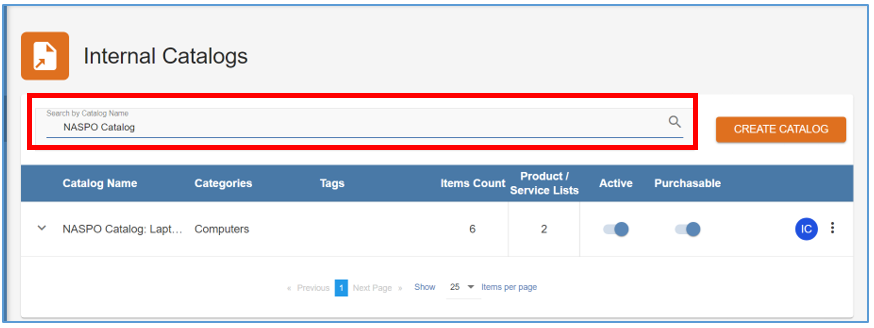
# Internal Catalog

1. For an ***Internal Catalog*** hover the mouse over the left navigation bar and click ***Internal Catalog*s**.

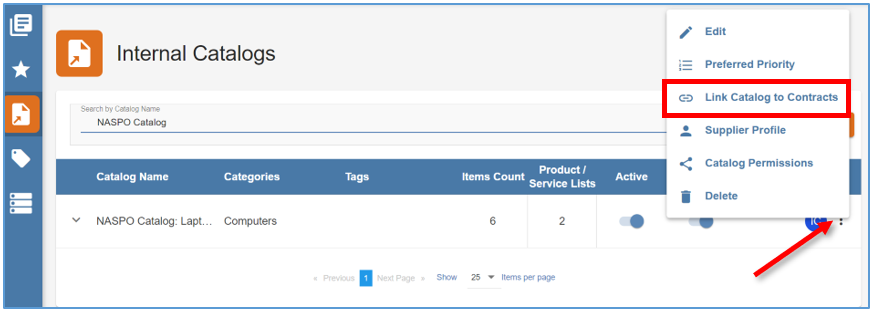


1. Now locate the ***Catalog*** using the search bar to search by ***Catalog Name***.
   1. The system will automatically display the *Catalog* you are searching for.





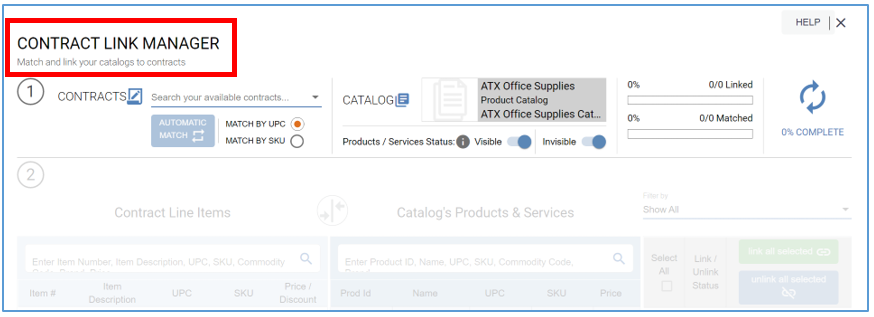
1. Next, click the ***ellipsis icon*** on the right side of the screen and select ***Link Catalog to Contracts***.



1. The page will redirect to the ***Contract Link Manager*** page, this is where you can link the ***Contract Items*** with the ***Supplier’s Products*** for this *Catalog*.

# Contract Link Manager

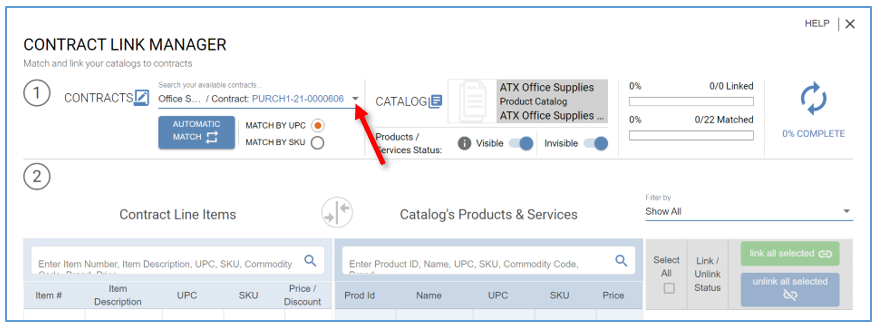
1. Next you will match the ***Items*** and ***Products*** together and then link them.
   1. *Items* can be matched and linked with ***Products*** manually or matched and linked by **UPC** or **SKU** automatically.



# Locate Products and Automatically Match and Link Them

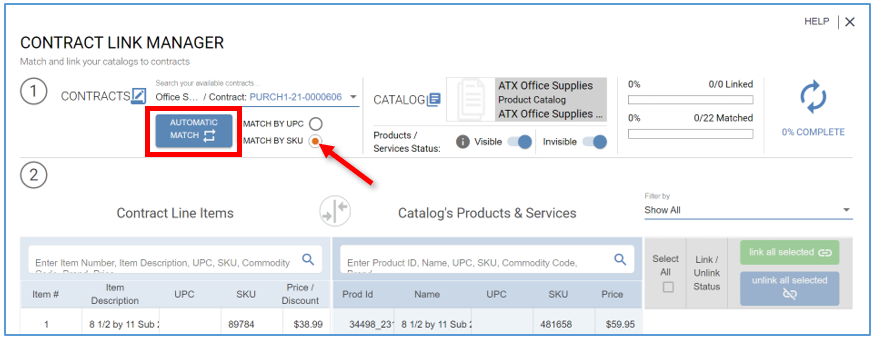
1. Step 1 is the ***Contracts*** section, click the drop-down menu and select the ***Master Blanket Purchase Order*** that you’re linking it to.

1. Step 2 includes the ***Contract Line Items*** section on the left and the ***Catalog’s Products* & *Services*** section on the right. In Step 1:

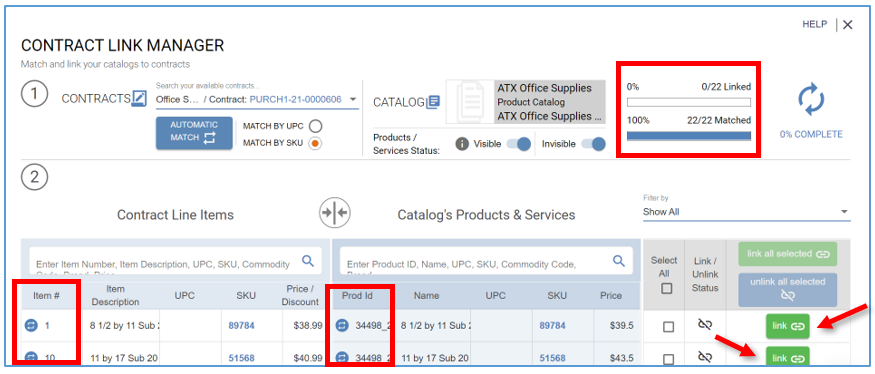


* 1. If you want to match the ***Contract Items*** with ***Products***on the ***Catalog*** based on **SKU**, select the ***radio button*** next to ***Match By SKU*.**
  2. If you want to match the ***Contract Items*** with ***Products*** on the ***Catalog*** based on **UPC**, select the***radio button*** next to ***Match By UPC***.

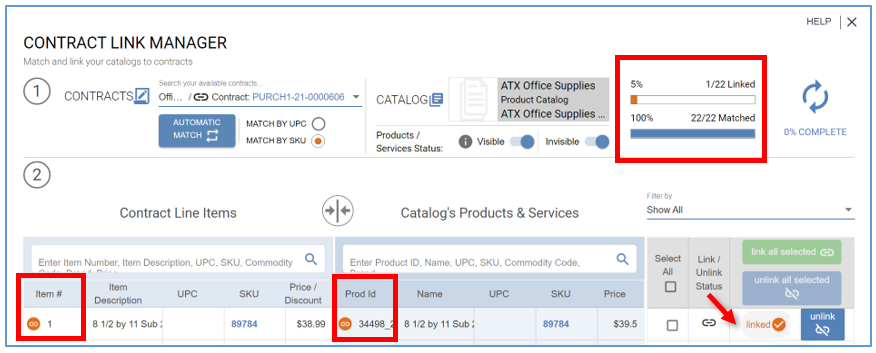
1. Then click ***Automatic Match.***



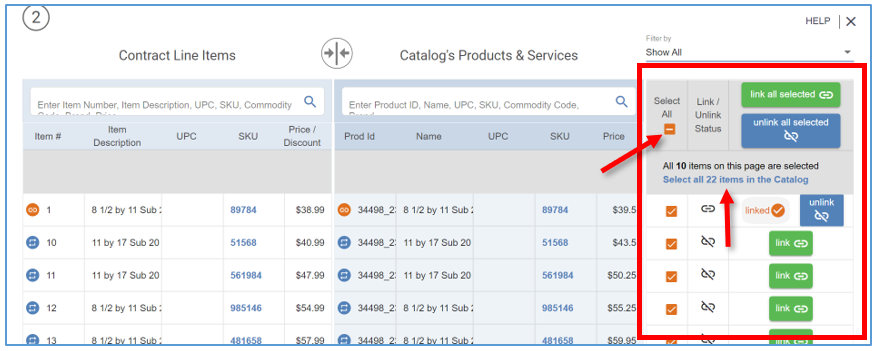
1. The screen will refresh and now you will see all the *Contract Items* with *Products* that have matching SKU’s.
2. In the top right corner of the screen, you will see the number of *Products* in the *Catalog* that have been matched.
   1. The blue icon next to the *Item #* and *Prod ID* columns indicates that item has been matched and can now be reviewed side-by-side.
3. Next confirm the matches are correct and link each one individually by clicking on the *green link* button.



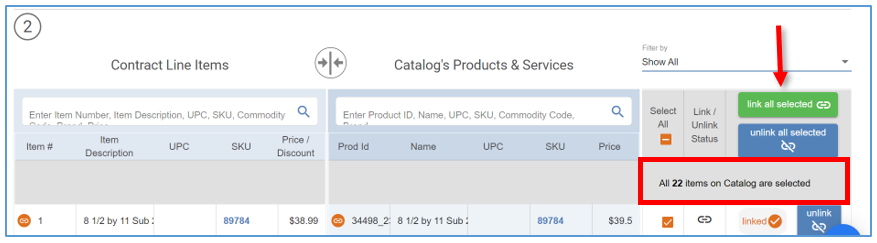
1. In the top right corner of the screen, you will now see the *Products* in the *Catalog* that are linked. The *green link* button and blue button in the *Item #* and *Prod Id* columns will now turn orange.



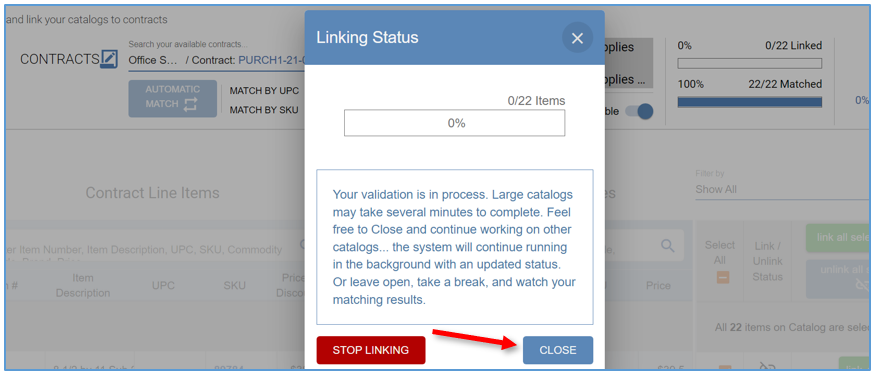
1. You can unlink items by clicking on the *blue* *unlink* button.
2. To link all matches at once instead of one at a time, click the *Select All* header box and click *link all selected* in green.
   1. Only 10 *Items* will show on the page, you will need to click the link *selecting all Items in the Catalog.*



1. Once the link is selected you will now see that all *Items* on the *Catalog* have been selected.
2. From here click ***link all selected****.*



1. A **pop-up window** will appear with the ***Linking Status***.
2. You can allow validation to be completed or click ***Close***and the validation will continue to run in the background.

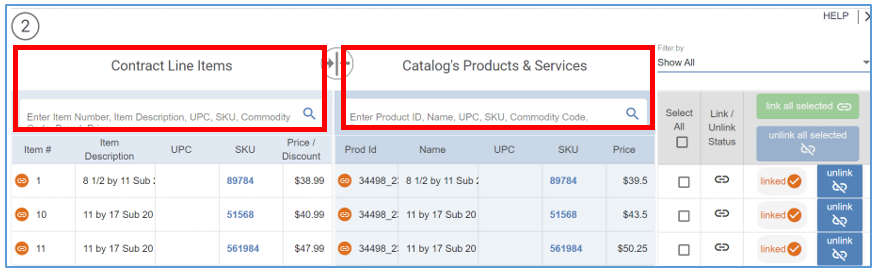


1. All ***Contract Items*** and ***Products*** that have matching SKUs are linked.
2. Shoppers in ***Marketplace*** will now see them with the price of the ***Contract Item*** and it will also show on ***Requisitions*.**

# Locate Products and Manually Match and Link Them

Whether it’s a ***Contract Item*** on a ***Master Blanket* *Purchase Order*** or a ***Product*** *or* ***Service*** in either an internal or external *Catalog* there are several features set in place to help you locate *Items.*

1. Under ***Contract Line Items***, use the search bar to search by ***Line Item #, Item Description, UPC, SKU, Commodity Code, Brand, Price, Discount %, Manufacturer* or *Tags*.**
2. Under ***Catalog’s Products & Services***, use the search bar to search by ***Product Id, Product Name, UPC, SKU, Commodity Code, Brand, Product Description, Tags, Distributor* or *Manufacturers.***

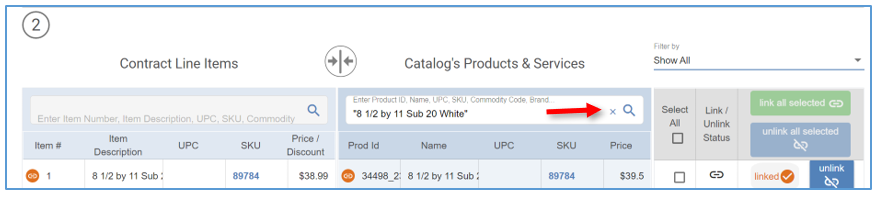


1. Enter in one of those features to locate an ***Item*.** As you type, some *Product* suggestions will appear.
2. Once you see what you are looking for select the name or to see everything that fits your search criteria finish typing your inquiry.
3. Then click **enter** on the keyboard to start search.

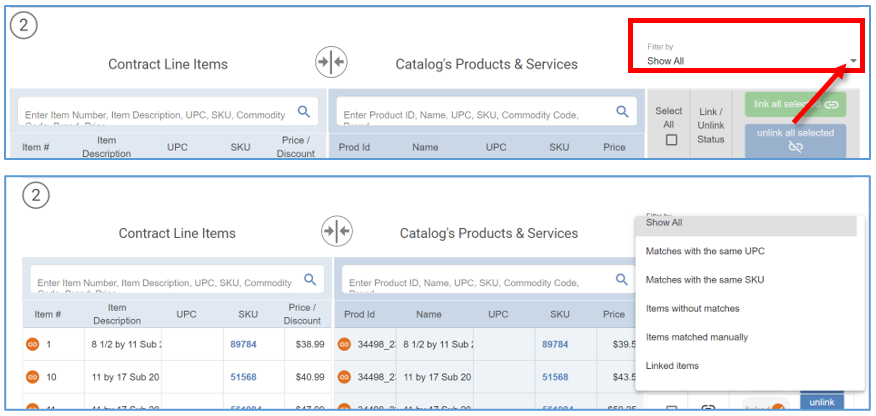
Graphical user interface, text, application, chat or text message

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1. To delete your search and reset the results, click the***X* button** next to the **magnifying glass icon**.



1. To filter results, select the **drop-down menu** under ***Filter by****.* There are several filter options to choose from:
   1. Show all
   2. Matches with the same UPC
   3. Matches with the same SKU
   4. Items without matches
   5. Items matched manually
   6. Linked items
   7. Unlinked items
   8. Broken Automatic Matches

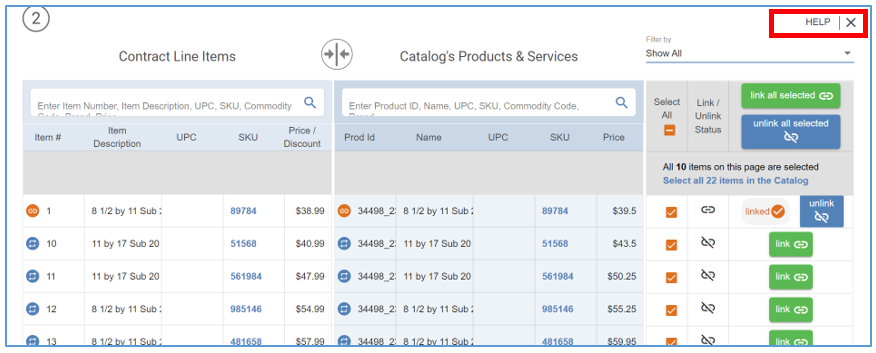


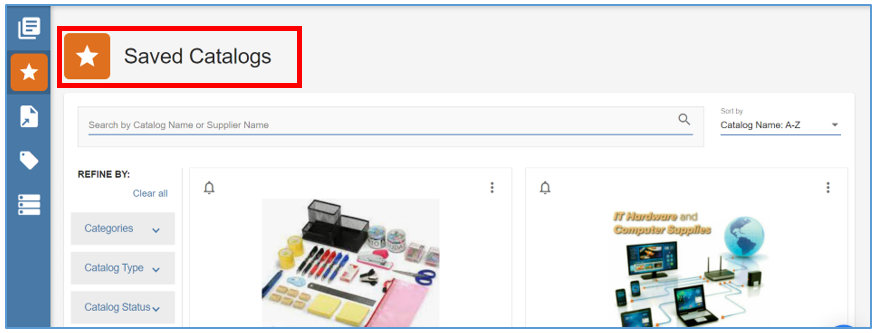
1. To manually link a ***Contract Line Item***, hover mouse over the ***Item Description*** to get the description of the ***Contract Item*.**
2. Then select the ***Contract Item*** by clicking anywhere on it.
3. Next match and select it to the correct ***Product***by clicking anywhere on it.
4. Before selecting, hover over the ***Product Name*** to see the full details and to make sure it is a match.
5. Then click the***green link***button*.*

Graphical user interface, application

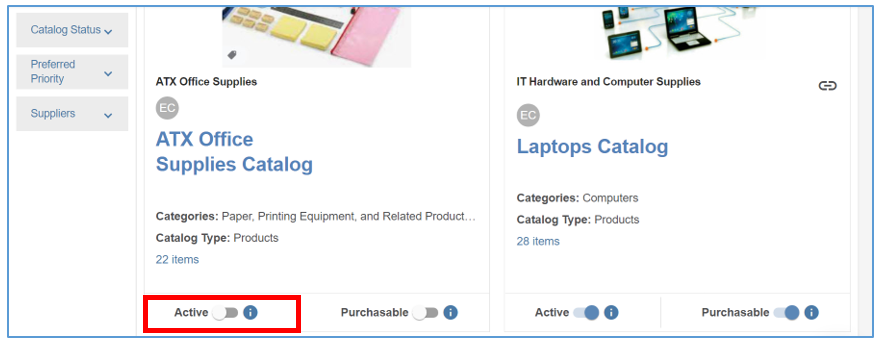
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1. Repeat those steps for any remaining ***Contract Items*** and ***Products***. Once finished the ***Contract Items*** and ***Products*** in the ***Catalog*** will now be linked and you can exit out of the ***Contract Link Manger***.
2. To exit, click the ***X* button** in the top right corner of the screen.
   1. This will bring you back to the ***Saved Catalogs***tab if this is an ***External Catalog***, or the ***Internal Catalog*** list if this is an ***Internal Catalog***.



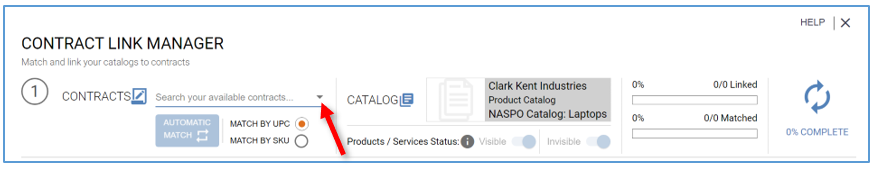


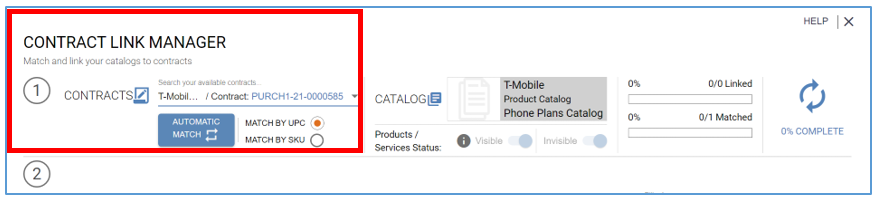
1. Toggle on the ***Active*** button on the ***Catalog Cover*** to make the ***Catalog***active to Shoppers.



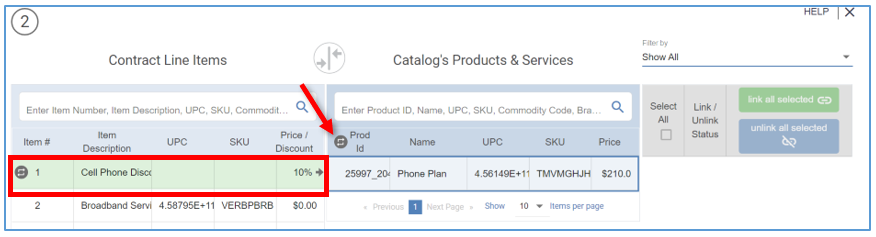
# Applying Discount to Contract for All the Products in A Catalog

1. To do this, click the ***Contracts*** drop-down arrow and select the ***Contract*.**





1. Next click anywhere on the ***Contract Line Item*** that contains the discount and select it.
2. Then on the ***Catalog*** side, next to ***Product ID***, you will find a ***Match/Unmatch All*** icon, click it.
   1. That will match all the visible ***Products*** on this page to the ***Contract Item*.**
   2. To match any remaining ***Products***on the ***Catalog****,* click the ***Match all*** *items* in the ***Catalog*** link.



1. A pop-up will appear displaying the ***Matching Status***.
2. You can allow validation to be completed or click ***Close*** and the validation will continue to run in the background.
3. Click the ***Select All*** *header* checkbox.
   1. If there are more than 10 items on the ***Catalog***, click ***Select all items in the Catalog***.
4. Then, click ***Link All Selected****.* All *Products* have now been linked.
5. You will also see the **orange link** icon next to all the *Products.*
6. The *Products* in the ***Catalog*** will now appear in ***Marketplace*** at a discounted rate from their listed price.
7. Once you are complete, close out of ***Contract Link Manager*** by clicking the ***X* button**, which will bring you back to your ***Internal Catalogs***.

Graphical user interface, application

Description automatically generated

