Vroozi Catalog

Content Administrator Guide

Vroozi Catalog provides buying organizations with a powerful and simple web-based tool to create product and service catalogs. Functions, such as drag-and-drop approval processes and pre-defined templates, empower procurement professionals and keep the catalog management process simple.

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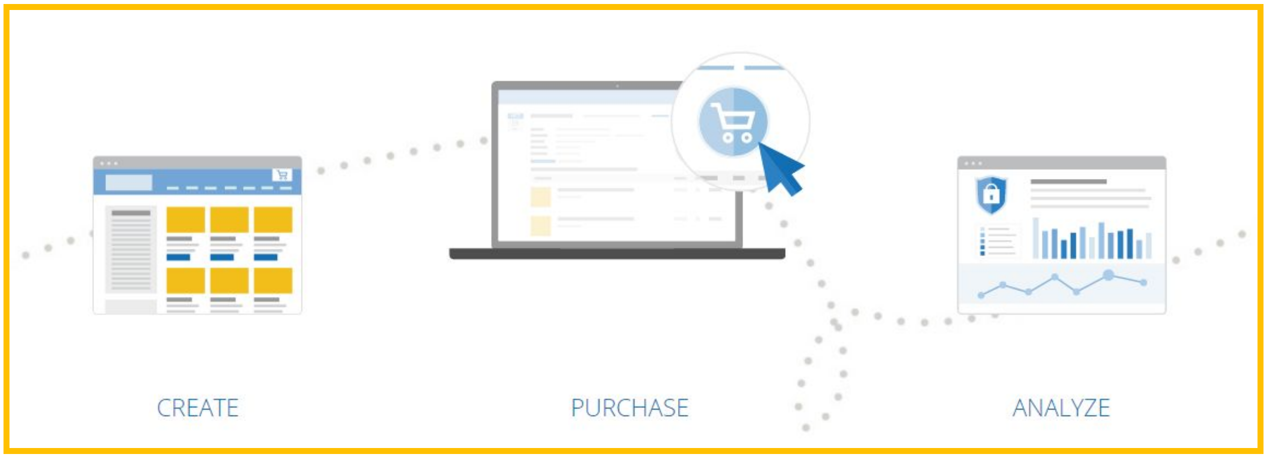
Introduction

What is Vroozi Catalog?
Vroozi Catalog is a web-based content management system and catalog search engine. It allows corporate buyers and shoppers to search for products and services. More simply, Vroozi Catalog is the first step in your e-procurement process, as this is where you build shopper catalogs.

Customers leveraging the *Vroozi Marketplace* shopping experience, products and services are stored within the supplier catalogs and then sent to your organization's external system where it will convert to a Requisition. All information regarding approvals and resulting Purchase Order(s) are stored within that external system.

Customers leveraging the Vroozi Purchase shopping experience, products and services are stored within the supplier catalogs. Requested items are converted into a Requisition within Vroozi. Upon approval the Purchase Order is electronically sent to the supplier(s). All information related to the PO is stored within Vroozi.



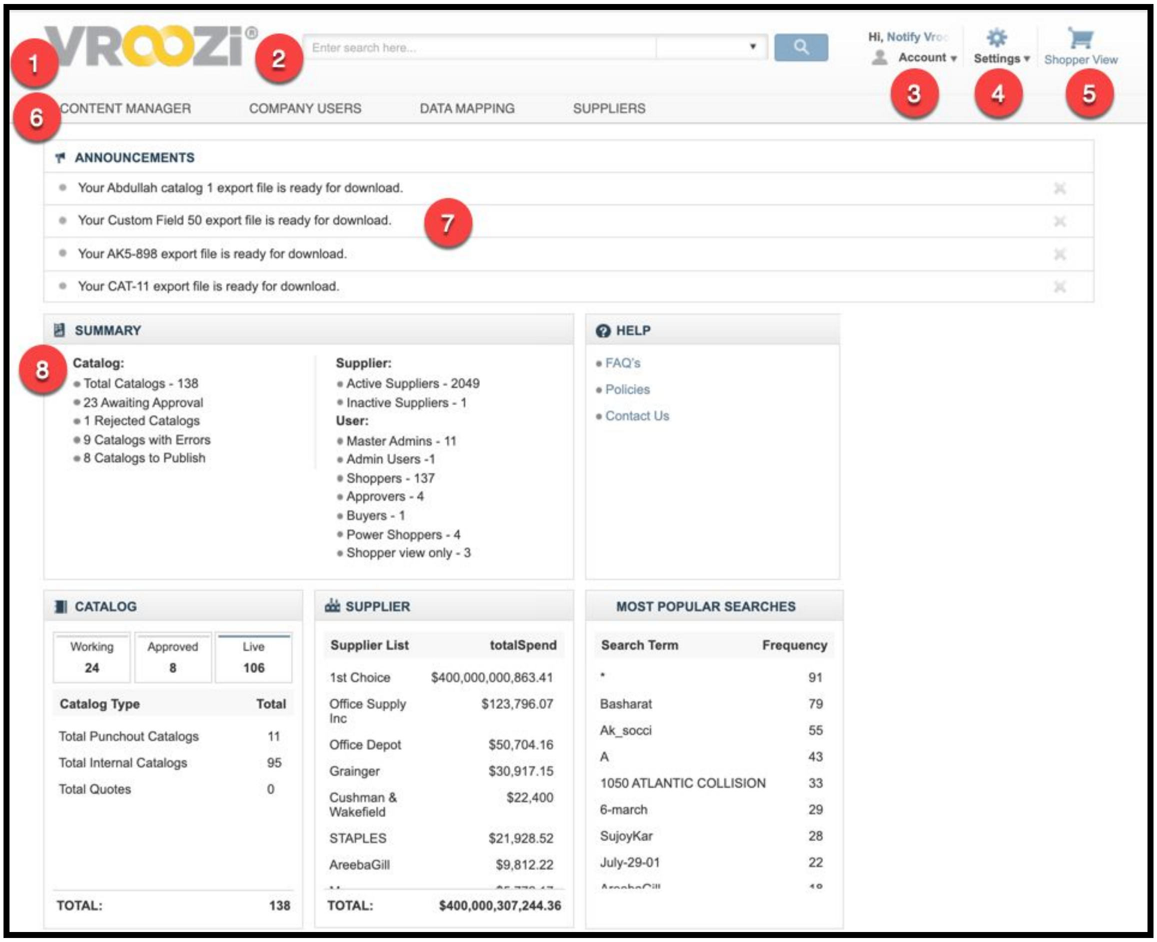
Key Terms

During the setup process, you will configure several items in *Catalog* , including:

- ✓ **Suppliers**: To specify basic information about the suppliers that you company orders from.

- ✓ **<u>Catalogs</u>**: Inventory of supplier items or services available to shoppers or requesters.
- ✓ **<u>Categories</u>**: To determine how the suppliers' product information is categorized and presented to shoppers in your system.
    - Ex: Furniture, IT, Electronics, Uniforms.
- ✓ **<u>Users</u>**: The term "user" when seen in this guide refers to the individuals initiating the request of items or goods process.
    - Users within a Buying Organizations leveraging the full *Catalog* to *Vroozi Purchase* workflow are referred to as *Requesters*.
    - Users within a Buying Organizations utilizing *Catalog* content that is then sent to an ERP, are referred to as *Shoppers.*
- ✓ **<u>Content Views</u>**: Grouping of catalogs and suppliers into logical sets.
    - Ex: Region, Commodity, Division, Content groups are then assigned to Content Views.
    - A single Content View can belong to multiple Content Groups.
- ✓ **<u>Content Groups</u>**: Users assigned to a Content View(s). This assignment determines with catalogs and suppliers users will have access to.
    - Content Groups may be assigned to multiple Content Views
- ✓ **<u>External ERP Systems</u>**: To specify which external *Enterprise Resource Planning (ERP)* systems shoppers will use to access your *Marketplace* instance.
- ✓ **<u>Unique System ID</u>**: *Identifies the Shopper's originating ERP system*
- ✓ ***<u>Unique Supplier ID:</u>*** *The unique code generated by Vroozi Catalog to identify the supplier within Catalog .*

Administrator Homepage Anatomy



1. **<u>Your Logo Icon</u>**: Clicking on it brings you back to the landing page of Vroozi Catalog
2. **<u>Search Bar</u>**: You are able to search across catalogs and catalog content.
3. **<u>Your Name/Account</u>**: Your account gives you access to your personal *Preferences*, *Messages*, and *Help*. This is also where you are able to and sign out.
4. **<u>Settings</u>**: Allows you to configure your *Company Settings* for items such as *Homepage Cards* and images.
5. **<u>Shopper View</u>**: Clicking on the *Shopper View* button will take the *Administrator* to the *Shopper User Interface (UI)*. This user will be subject to their assigned Content Views, which determine what content they are able to see. Users can use this functionality to review loaded catalog content as it would appear to a *Shopper*. This *Shopper View* is meant to be used as a read-only function, as users are not able to check out their *Shopping Cart* contents to an external ERP system.
6. **<u>Navigation Tabs:</u>**

- **Vroozi Catalog**: Gives access, creation and editing rights to *Catalog Management* and *Content Views*.
- **Company Users**: Where all *User Management* activities take place, like user creation, activation, deactivation, and deletion.
- **Data Mapping**: This is a module that is used to configure the *Data Mapping* for external ERP from *Catalog* . Only *Master Administrators* have access to this area.
- **Suppliers**: Where all *Supplier Management* activities take place like defining *Attributes* and uploading suppliers.

7. **Homepage Cards/Announcements**: There are several types of *Homepage Cards* available and must be created by the *Master Administrator*. These cards provide the user with insight into various sections of *Marketplace*
8. **Summary**: An overview of your company's catalog, supplier, and user statistics. (Further reporting available through Vroozi Analytics)

My Account: Account Preferences

The *My Account* area allows you to customize your profile information, update your password and amend your default settings all in one place.

User Information

Before you get started using the system, it is recommended to set your information. Follow the steps below to personalize your account.

1. Hover over the area that has the *Account* drop down menu and your name. Select *Preferences* off the drop-down menu by clicking on it.
2. Fill out all the required information indicated by a red asterisk*. *Fax* is optional.
3. Save.

Password Change

You may update your password from the account 'Preferences' area. Follow the instructions below if you currently know your password or have a temporary password and would like to change it to a new one.

1. Also, in 'Preferences', scroll down to the bottom of the page and expand the *Password Change* section by clicking on the carrot.
2. Input your *Old Password*.
3. Type in your *New Password*, then confirm the same password. Your *New Password* must be different from your *Old Password* in order to be valid.
4. Save.

Forgot Password (for Administrators)

If you are an *Administrator*, but not the *Master Administrator*, you are able to take care of this internally by contacting your company's *Master Admin* and asking them to reset your password for you.

As a *Master Administrator, Marketplace* does not allow you to reset your own password. Another *Master Admin* (on the same level) has to reset your password for you. See the *Reset a User's Password* section for step by step instructions.

If you are the only *Master Admin* for your organization, and you forgot your password, *Submit a Request* on the *Vroozi Zendesk* website at https://vroozi.zendesk.com. There are instructions on how to do this in the *Help* section.

Default Settings

Before you get started using the system, it is recommended to enter your *Default Settings*. Follow the steps below to update this section.

1. Near the top right of the screen, hover back to *Account* and *Preferences* off the drop-down menu by clicking on it.
2. Scroll down to and expand the *Default Settings* section by clicking on the carrot.
3. Fill out all of the default information to your specifications using the drop-down menus. *Note: The Records per Page area pertains to lists displayed throughout the system like Users, Suppliers, etc.*
4. Save. You will receive a success notification.

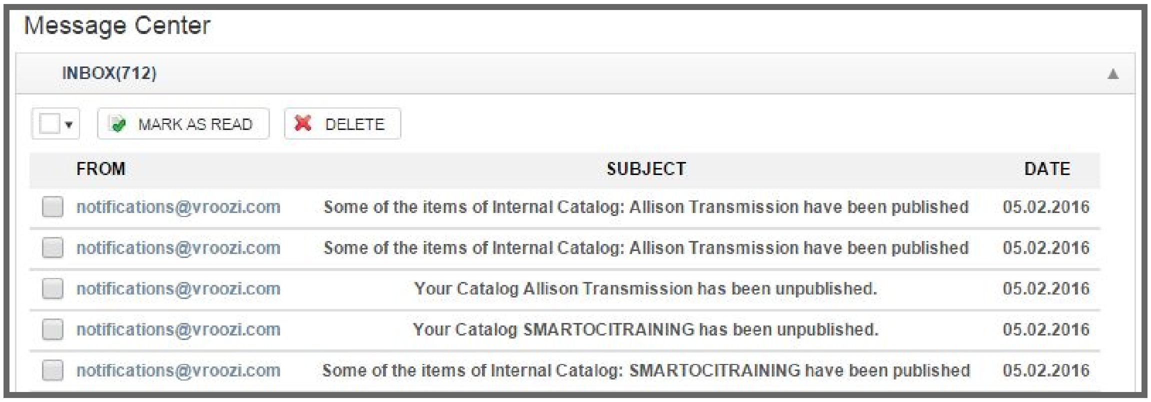
My Account: Message Center

Vroozi Catalog has an internal messaging system for users to communicate with each other that can be accessed from the *My Account* drop down menu.

Accessing the Message Center

The *Vroozi Catalog Message Center* provides users with the ability to communicate with other users of the application from their organization. It also serves as a central repository of all standard system-generated notifications, like catalog approval or publishing messages also received via email. This section shows how to view items in the *Message Center*.

1. Near the top right of the screen, hover over the area that has the *Account* drop down menu and your name. Select *Messages* off the drop-down menu by clicking on it.
2. Select the *Message* option from the drop-down menu. You will be navigated to the *Message Center*.
3. Click on the notifications email link in the *From* column to view the message details. Just like email applications, the *Vroozi Catalog Message Center* has *Mark as Read* and *Delete* functionalities.



Message Center

INBOX(712)

MARK AS READ | DELETE

FROM	SUBJECT	DATE
notifications@vroozi.com	Some of the items of Internal Catalog: Allison Transmission have been published	05.02.2016
notifications@vroozi.com	Some of the items of Internal Catalog: Allison Transmission have been published	05.02.2016
notifications@vroozi.com	Your Catalog Allison Transmission has been unpublished.	05.02.2016
notifications@vroozi.com	Your Catalog SMARTOCITRAINING has been unpublished.	05.02.2016
notifications@vroozi.com	Some of the items of Internal Catalog: SMARTOCITRAINING have been published	05.02.2016

Company Settings

As the *Master Administrator*, you will configure your *Company Setting Defaults*. This section outlines how to view and manage this information.

Add & Delete Images (Logo Upload & Removal)

Master Admins can upload company logos so that they are visible to the community of users. Near the top right of the screen, hover over the *Settings* area with a *Cog Wheel*. Select 'Company Settings' off the drop-down menu by clicking on it.

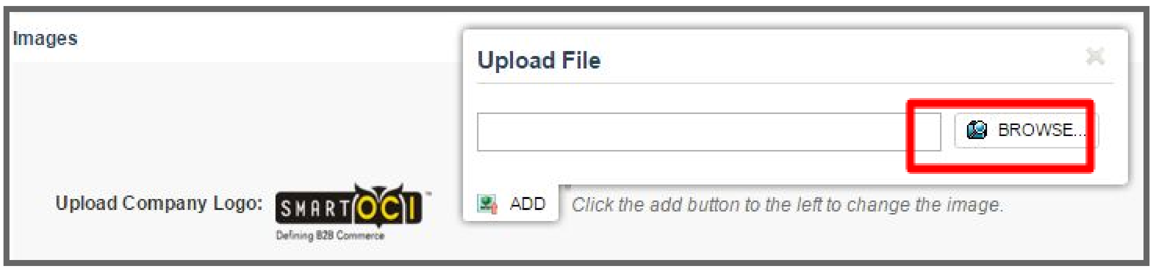
1. Navigate to the middle of the screen. There is an *Images* section displaying three kinds of logos to upload in Vroozi Catalog.

Company Logo: This is your company logo that is visible to users from the home screen. When users click on this, it will navigate them back to the landing page.

No Image Logo: Picture associated with a listed item which is not available.

Find Vendor Logo: When uploaded, this logo can be accessed from the *Find a Vendor Supplier Card* on the *Shopper User Interface (UI)* landing page. When Shoppers can't find what they need in internal catalogs, they can click on the *Find Vendor Widget* in the *Homepage* supplier area to create *Free Text Requests*.

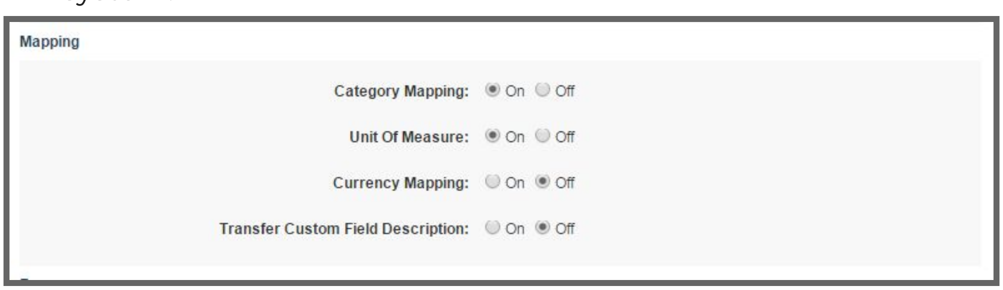
1. To add or update the logos, click the *Add Image* button.
2. Click the *Browse* button.
3. Make the image selection from a file you have saved on your computer and click *Open*. (not pictured)
4. Scroll down to the bottom of the screen. 



5. To delete the *No Image* and *Find Vendor Logos*, simply click the red **X**.
6. Save.

Mapping Configuration

Navigate to the Mapping section of the Company Settings area. You may click inside On or Off areas to make your selections. Turning these options On or Off, enables or disables the 4 functions (listed below) within Catalog . If this option is turned Off, the application will not execute when a Shopper checks out of their Shopping Cart to an external ERP system.

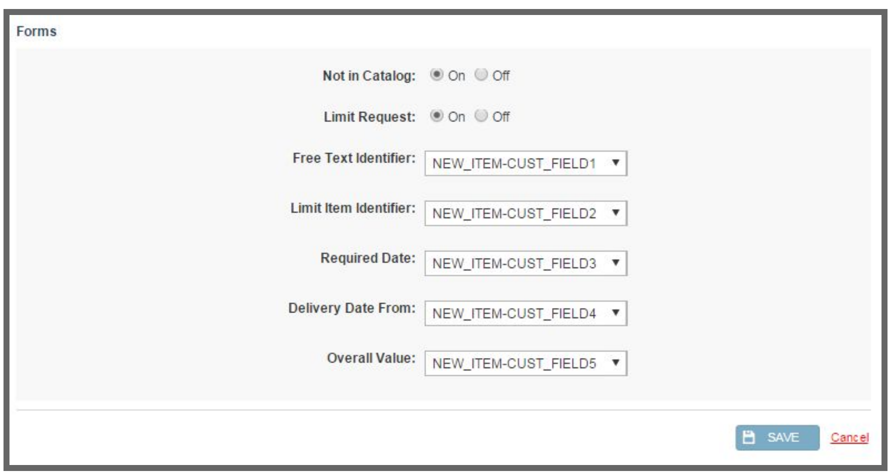


Category Mapping: Turning this option *On* or *Off*, enables or disables *the Category Mapping* function within *Catalog* . If this option is turned *Off*, the application will not execute *Category Mapping* when a *Shopper* checks out of their *Shopping Cart* to an external ERP system.
Unit of Measure: Turning this option *On* or *Off*, enables or disables the *Unit of Measure Mapping (UoM)* function in *Catalog* . If this option is turned *Off*, the

application will not execute the *UoM Mapping* when a *Shopper* checks out of their *Shopping Cart* to an external ERP system.
Currency Mapping: Turning this option *On* or *Off*, enables or disables the *Currency Mapping* function in *Catalog* . If this option is turned *Off*, the application will not execute the *Currency Mapping* when a *Shopper* checks out of their *Shopping Cart* to an external ERP system.
Transfer Custom Field Description: *Vroozi Catalog supports* extending the catalog template with *Custom Fields*. This *Custom Field* name and data can be transferred to the external ERP system when the *Shopper* checked out of the *Shopping Cart*. Turning *on* the *Transfer Custom Field Description* sends over the *Custom Field* name and data.

Forms Configuration

1. Navigate to the *Forms* section of the *Company Settings* area. You may click inside *On* or *Off* areas to make your selections. In order to send data from the *Not in Catalog* form fields, you can map them to the NEW_ITEM-CUST_FIELD1 through 5.



Not in Catalog: Selecting *On* allows for end users to create *Free Text Requests*, meaning that they may place requests outside of the uploaded catalog contents.

Limit Request: Selecting *On* allows for end users to use the *Not in Catalog* form to create *Limit Orders*. A *Limit Order* is consisting of a requirement that will be delivered over a period of time.

Free Text Identifier: When a *Shopper* adds a request from the *Not in Catalog* form to their cart, the data needs to be transferred from that order to the external ERP system upon checkout. There are certain fields that are part of a *Free Text Request* that are not included in the standard OCI schema of catalog fields that *Vroozi Catalog automatically* recognizes. To work around this limitation, these fields are mapped from the *Free Text Request* to OCI fields that are part of *Vroozi* standard catalog schema but are mostly unused. These fields are the NEW_ITEM-CUST_FIELD1 to 5. This particular field is an identifier that can be utilized within the external ERP system to tell if the order is a *Free Text Request* or not. This field and the *Limit Item Identifier* are usually mapped to the same OCI field.

Limit Item Identifier: When a *Shopper* adds a request from the *Not in Catalog* form to their cart, the data needs to be transferred from that order to the external ERP system upon checkout. This particular field is an identifier that can be utilized within the external ERP system to tell if the order is a *Free Text Request* or not. *Limit Item* and *Free Text Identifier* fields are usually mapped to the same OCI field. *(see Free Text Identifier description above for more information)*

Required Date: When creating a *Free Text Request* with the *Not in Catalog* form, *Shoppers* must provide a date that they require the product or service to be delivered. This date is specified in the *Date From* field. This field's data can be mapped into an OCI field and sent over to the external ERP system.

Delivery Date From: When creating a *Limit Item* request with the *Not in Catalog* form, *Shoppers* must provide a date that they require the product or service to be delivered. This date is specified in the *Date From* field. This field's data can be mapped into an OCI field and sent over to the external ERP system.

System Definitions

This section allows the *Master Administrator* to configure the external ERP systems. The user will need to provide the external system's name and communication method to be used—this is either OCI or cXML.

Add A System

An organization can setup *Vroozi Catalog to* allow *Shoppers* to access the marketplace from multiple ERP systems. This area allows *Master Administrators* to configure these external ERP systems and their *Unique Identifiers*, so that *Vroozi Catalog can* recognize what system the *Shopper* is using to login and access the marketplace.

Vroozi Catalog can utilize this knowledge of the shopper's originating ERP system to execute custom data mapping that is different from the standard mapping (that the *Master Admin* has previously set up), upon checkout.

1. Select '*Settings'* > '*Company Settings*'
2. Scroll down to the *System Definitions* section of the *Company Settings* area.
3. Expand the *System Definitions* area by clicking on the carrot.

4. Click the *Add* button. (not pictured)
5. Type in the *System Name*.
6. Select the *Communication Method* from the drop-down menu—either OCI or cXML.
7. Save. Your new system will appear in the *System Definitions* list.

Remove a System

This section outlines how to delete a system from *Catalog* . Removing a system will stop any transfer of data from *Vroozi Catalog to* that particular external ERP system for all users.

1. Check the box next to the *System Name* you would like to remove.

2. Click the *Remove* button.
3. You will receive a *Deletion Confirmation* pop up. Click the *Delete* button.

Homepage Cards

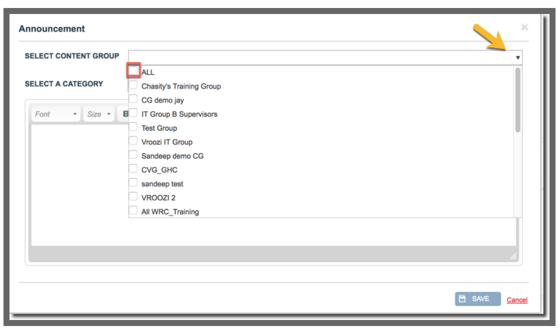
The *Homepage Cards* area of the system allows *Master Administrators* to create welcome messages for their organization's *Marketplace Shoppers*, and to publish *Announcements*.

Add an Announcement

This section outlines how to add an *Announcement* to the *Homepage*. Unlike other *Homepage Cards*, *Announcements* can be dismissed by clicking the X, and there can be more than one *Announcement* published at the same time.

All *Announcements* are displayed for *Administrators*; however, *Shoppers* only see *Announcements* that are assigned to their specific *Content Group*.

1. Back in 'Company Settings', scroll down to the 'Homepage Cards' section of the *Company Settings* area.
2. Expand the *Homepage Cards* area by clicking on the carrot. (not pictured)
3. Click the *Add Announcement* button on the right side of the screen. You may need to scroll down in order to see this.
4. Using the drop down, select the *Content Group* you would like to publish to.



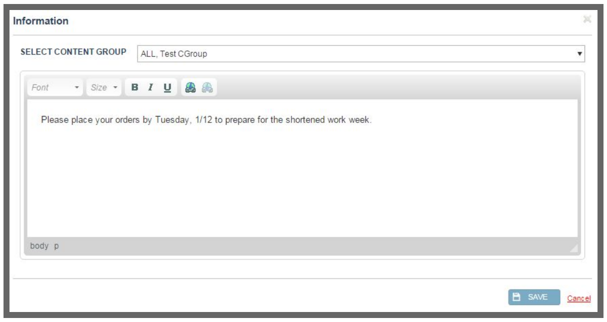
5. Select the *Category Color* that the users see using the drop-down menu.
6. Type the *Announcement* in the text box. Custom font and hyperlinking are available.

Announcements will be displayed on the *Homepage* immediately. The user is able to dismiss the *Announcement* after reading it.

Add Information

Information Cards cannot be dismissed by the user. Only one *Information Card* can be published at a time.

1. In *Company Settings* scroll down to the *Homepage Cards* section of the *Company Settings* area.
2. Expand the *Homepage Cards* area by clicking on the carrot. (not pictured)
3. Click the *Add Information* button on the right side of the screen. You may need to scroll down in order to see this.
4. Using the drop down, select the *Content Group* you would like to publish to.
5. Type the *Information* in the text box. Custom font and hyperlinking are available.
6. The *Information* will be displayed for users like the last picture.



Edit Welcome Message

This section outlines how to edit the *Welcome Message* to the *Homepage*. This image for the *Shopper User Interface (UI)* should not exceed 505 pixels by 200 pixels (i.e. 505 x 200).

1. Scroll down to the *Homepage Cards* section of the *Company Settings* area.
2. Expand the *Homepage Cards* area by clicking on the carrot. (not pictured)
3. Scroll down to the *Shopper Welcome* area.
4. Select the *Welcome Type*—either *Text* or *Image*. Only one type can be displayed at a time.
5. Depending on your *Welcome Type* selection, click the *Edit Welcome Message* button for *Text*, or upload a *Welcome Image* by clicking the *Add* button.

Edit a Homepage Card

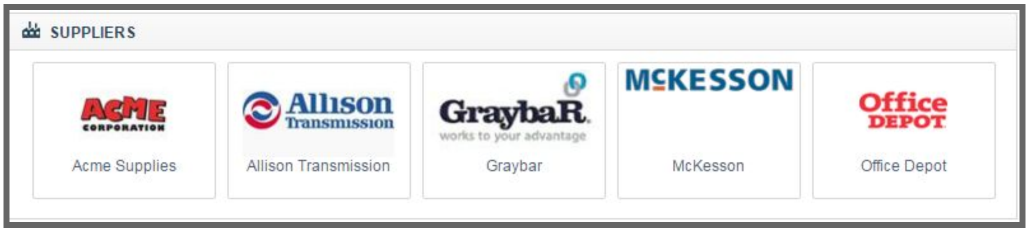
1. Expand the *Homepage Cards* area by clicking on the carrot.
2. Locate the existing *Information* or *Announcement* that needs updating.
3. Click on the text of the *Homepage Card* you would like to edit—do not click the X unless you want to delete the entire card. A pop-up window will appear.
4. Here, the assigned *Content Group(s)*, the *Category* color, and the text can be updated.
5. Your *Homepage Card* has been successfully updated and will immediately take effect for user

Delete a Homepage Card

1. Locate the existing *Information* or *Announcement* that needs deleting.
2. Click the X on the right-hand side. Your *Homepage Card* will be deleted immediately and taken out of your view and user view.

Supplier Card Preferences (Icon Order)

Suppliers can be sorted by ascending and descending alphabetical order or date of when the catalog was created. The picture below is an example of what the icons look like on the *Shopper View* landing page.



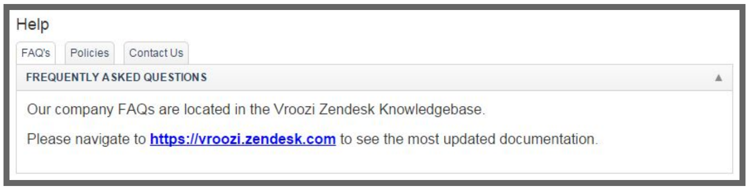
1. In *Settings* select *Company Settings* off the drop-down menu by clicking on it.
2. Scroll down to the *Homepage Cards* section of the *Company Settings* area.
3. Expand the *Homepage Cards* area by clicking on the carrot.
4. Scroll down to locate the *Supplier Card* area immediately above *Help Content*.
5. Use the *Order By* drop down menu to make the selection of how the supplier icons will be viewed. The changes will take effect immediately in the *Shopper View*.

Help Content

The *Help Content* is accessible to *Vroozi Catalog users* by navigating into their *Account* area below their name. It contains *FAQ*, *Policies*, and *Contact information*. These areas can be managed and updated from the *Company Settings* area by the *Master Administrator*.

Manage FAQs

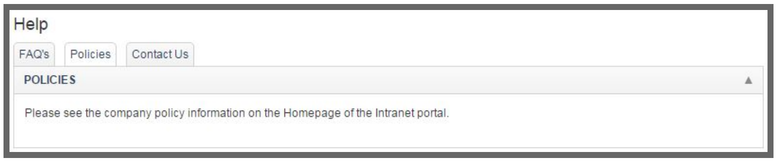
Personalized company *FAQs* (*Frequently Asked Questions*) can be viewed by both *Administrators* and *Shoppers* in the *Help* section under their *Account* drop down menu. This is not mandatory; however, the *FAQ* area will be blank for users if no information is entered. This section outlines how to enter and edit the *FAQ* information in the *Company Settings*.



1. Scroll down to the *Help Content* section of the *Company Settings* area.
2. Expand the *Help Content* area by clicking on the carrot.
3. Click the *Add FAQ* if the *FAQ* is blank. If there is an existing *FAQ*, this button will read *Edit FAQ* instead. The same pop up box will appear for both *Add* and *Edit* functions.
4. Input your organization's *FAQ* information using the comprehensive *Rich Text Editor* to customize content.
5. *Save*.

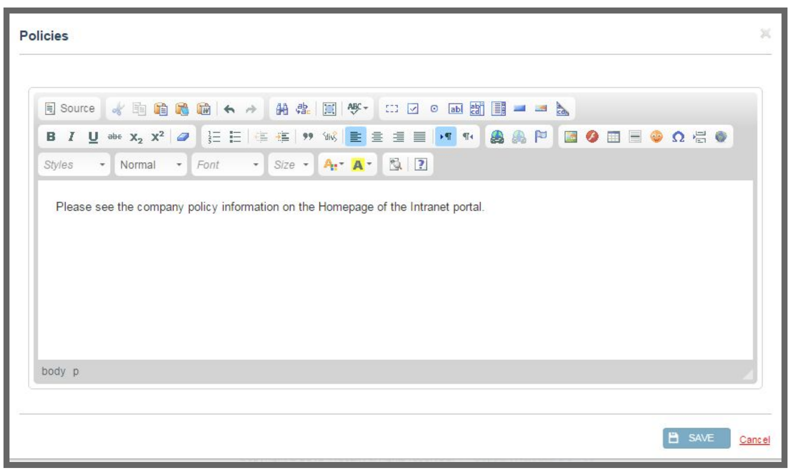
Manage Policies

Personalized company *Policies* can be viewed by both *Administrators* and *Shoppers* in the *Help* section under their *Account* drop down menu. This is not mandatory; however, the *Policy* area will be blank for users if no information is entered. This section outlines how to enter and edit the *Policy* information in the *Company Settings*.



1. Scroll down to the *Help Content* section of the *Company Settings* area.
2. Expand the *Help Content* area by clicking on the carrot.
3. Click the *Add Policies* button if the *Policy* section is currently blank. If there is an existing *Policy*, this button will read *Edit Policy* instead. The same pop up box will appear for both *Add* and *Edit* functions.

4. Input your organization's *Policy* information using the comprehensive *Rich Text Editor* to customize content.
5. Click Save. To view your updated *Help* information, see *Viewing Help Content* section for instructions.



Manage Contact Information

Personalized company *Contact Information* can be viewed by both *Administrators* and *Shoppers* in the *Help* section under their *Account* drop down menu. This is not mandatory, however the "*Contact Us*" area will be blank for users if no information is entered. This section outlines how to enter and edit the *Policy* information in the *Company Settings*.

1. Expand the *Help Content* area by clicking on the carrot.

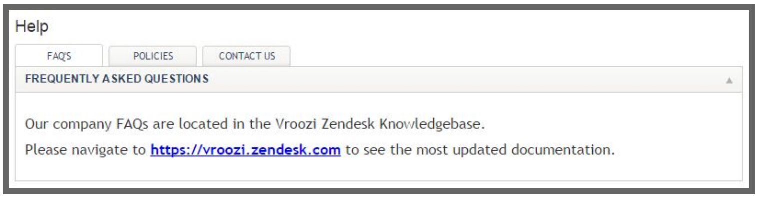
2. Click the *Add Contact Info* button if the *Contact Us* section is currently blank. If there is existing *Contact Info*, this button will read *Edit Contact Info* instead. The same pop up box will appear for both *Add* and *Edit* functions.

3. Input your organization's *Contact Information* using the comprehensive *Rich Text Editor* to customize content.

View Help Content

Where the *Help Content* is created and where it can be viewed is located in two areas of *Catalog* . This section describes how to view the *Help Content* by starting from the *Administrator Homepage*.

1. Click on the *Help* option on the drop-down menu. You will be navigated to the *Help Content*.
2. You are able to select *FAQs*, *Policies* and *Contact Information* by clicking on the corresponding tab.



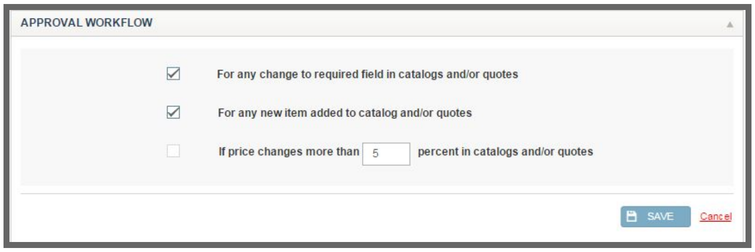
Approval Workflow Preferences

Configure when the system should generate email notifications for content *Approvers* to review and approve or reject catalog updates. These notifications are triggered when an existing catalog is edited or updated. *Master Admins* can use any combination of these settings.

If none of these are checked (enabled) then the system will not generate these email notifications for content approvers to review changes.

1. Select *Company Settings* off the drop-down menu by clicking on it.
2. Scroll down to the *Approval Workflow* of the *Company Settings* area.
3. Expand the *Approval Workflow* area by clicking on the carrot.

4. *"For any change to required field in catalogs and/or quotes"* If there is a change to the mandatory fields of an item that already exists in the previous version of the catalog, then an email notification will be sent to the assigned *Approver* to approve or reject this type of change if this box is checked.
5. *"For any new item added to catalog and/or quotes"* If there is a new item being added to the catalog or quote, then an email notification will be sent to the assigned *Approver* to approve or reject if this box is checked.
6. *"If price changes more than X percent in catalogs and/or quotes" Master Administrators* can specify a percentage (%) value if the price of an existing item changes by more than the specified percentage value. An email notification will be sent to the assigned *Approver* to approve or reject if this box is checked.
7. If you check the last box, you may choose to update the percentage value.
8. Save.



Suppliers

There are multiple ways to add suppliers in *smartOCI*—as a single supplier or as a *Bulk Upload* with a template.

Create a Supplier

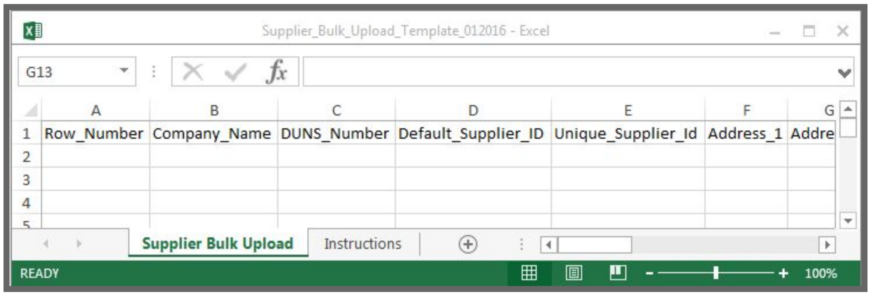
Please see Create a Supplier Grab & Go documentation for further details.

Supplier Bulk Upload

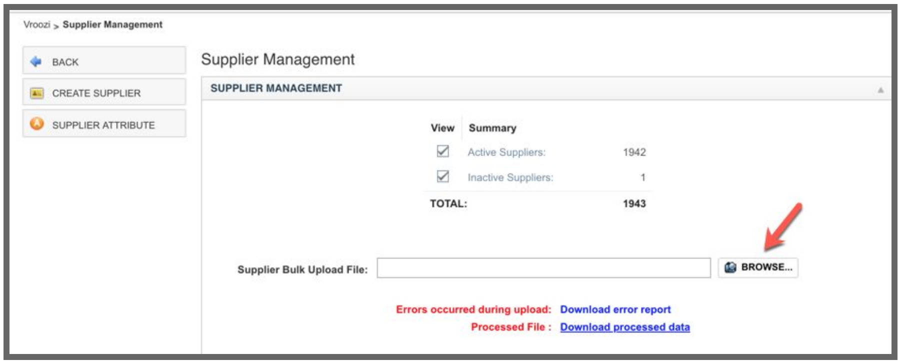
Upload multiple suppliers at the same time into *Vroozi Catalog using* a template. Suppliers have to be uploaded or created before *Supplier Data Mapping* can occur.

1. If you don't already have it, download the *Supplier Bulk Upload Template* from the *Vroozi Catalog Upload File Templates* section of the Vroozi Helpdesk at **https://vroozi.zendesk.com**.

2. Fill out the template with supplier information. For more details of how to enter data correctly, click the *Instructions* tab. From this tab you will be able to see if s column is required (green) or optional (orange).



3. Save the completed supplier template file to your computer.
4. Log in to *smartOCI*.
5. Click on the *Suppliers* tab.
6. In the *Supplier Management* area, Click the *Browse* button and follow the prompts to select and open a file on your computer.



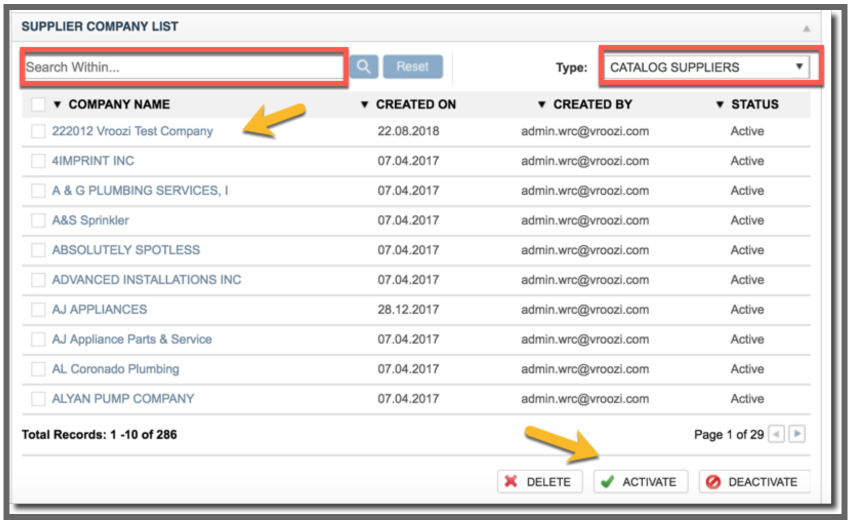
7. If there is anything that is wrong with the template data, you will receive an error notification describing what needs to be fixed.

Supplier Company List

Where *Master Administrators* can search and manage suppliers in *Catalog* .

Search

1. Click on the *Suppliers* tab and navigate to the *Supplier Company List* area.
2. Type in the name or partial name of the supplier, or the *Unique Supplier ID*, then click the *Search* magnifying glass icon.
3. You may filter by using the *Type* drop down menu. *Type* filter options include *All*, *Catalog Suppliers*, and *Non-Catalog Suppliers*.
4. To see the supplier details, click on the linked *Company Name*.
5. The search area can be cleared by clicking on the Reset button.

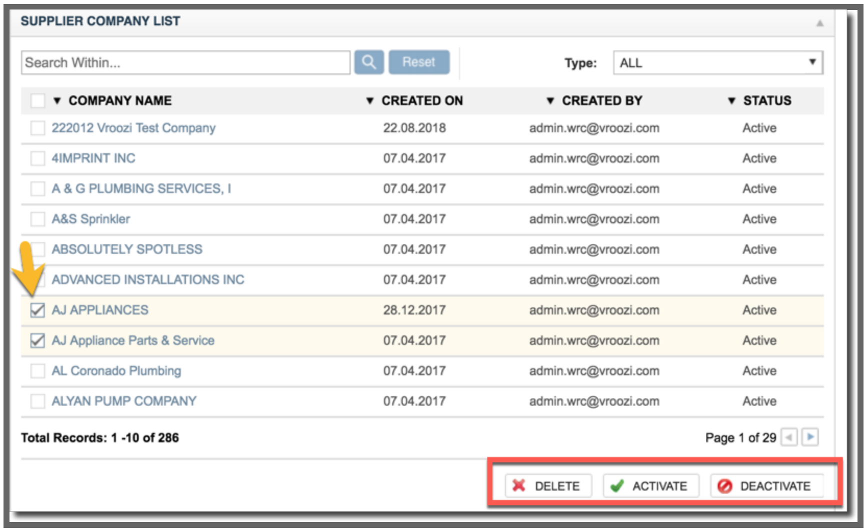


Edit an Existing Supplier

1. Navigate to the *Supplier Company List* area.
2. Search for the supplier you would like to edit.
3. Click on the linked *Company Name* that you would like to edit.
4. Make any necessary changes to the supplier details. The image below has been condensed to only show the header level of each editable category.
5. Save.

Activate, Deactivate or Delete a Supplier

1. Navigate to the *Supplier Company List* area.
2. Search for the supplier you would like to *Activate*, *Deactivate* or *Delete*.
3. Check the box next to the *Company Name(s)*. More than one supplier can be *Activate*, *Deactivate* or *Delete*.at the same time.
4. Click the *Activate*, *Deactivate* or *Delete*. button. Your changes will be saved.

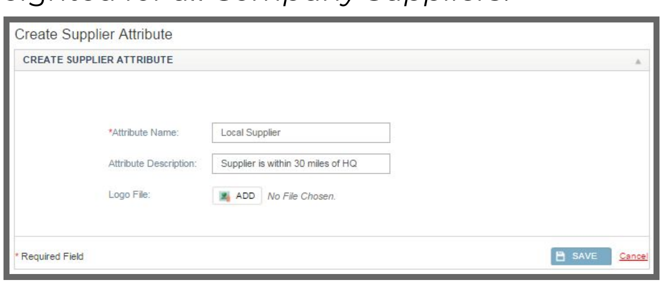


A pop up will appear with a *Deletion Confirmation*. Click the *Delete* button. The supplier will be deleted from the *Supplier Company List* and for all users.

Create a Custom Attribute

Items with certain *Company Attributes*, like a "*Green*" or "*Minority Owned*" can be ranked higher or lower in the search results for *Shoppers* and can be demarcated by different attribute icons. This section shows how to create a *Custom Company Attribute*. There is a set of default *Company Attributes*, but *Administrators* are able to make up their own *Custom Attributes* in addition to the default list.

1. From the *Supplier Attributes Management* page, click 'Add Attribute'.
2. Enter an *Attribute Name* into the text box. This field is required.
3. Type in an *Attribute Description*. This is optional.
4. Click the *Add* button to upload a *Logo File*. *Vroozi Catalog will* automatically resize the *Logo File*. Follow the prompts to browse for a file and open it. This is optional but recommended.
5. Click Save. The newly created *Attribute* will be available to be checked and weighted for all *Company Suppliers*.



Activate or Deactivate a Custom Attribute

1. From the *Supplier Attributes* area, use the check boxes to select the *Attribute Name(s)*. More than one *Attribute* can be selected at a time.
2. Click the *Activate* or *Deactivate* button.
3. A yellow notification will flash across the top as a reminder to republish the associated catalogs for the changes to take effect. (not pictured)

Delete a Custom Attribute

This section shows how to delete an existing *Custom Company Attribute*. Default *Attributes* that are already available in *Vroozi Catalog cannot* be deleted, only *Custom Attributes* that a *Master Administrator* creates can be deleted.

An alternative to deleting, is to *Deactivate* the *Custom Attribute*. Deactivating also hides the *Attribute* from the *Shopper*, but unlike deleting, the deactivated *Attribute* can be made *Active* again. See the *Activate or Deactivate a Custom Attribute* section for more information.

1. From the *Supplier Attributes* area, use the check box to select the *Custom Company Attribute Name(s)* to be deleted. More than one *Attribute* can be selected at a time.
2. Click the *Delete* button.
3. A *Deletion Confirmation* will appear. Click the *Delete* button to continue.

Content Views & Groups

Content Views

Grouping of suppliers and supplier catalogs into logical sets. All types of supplier catalogs can be included.

- Region
- Commodity
- Division
- Groups of users

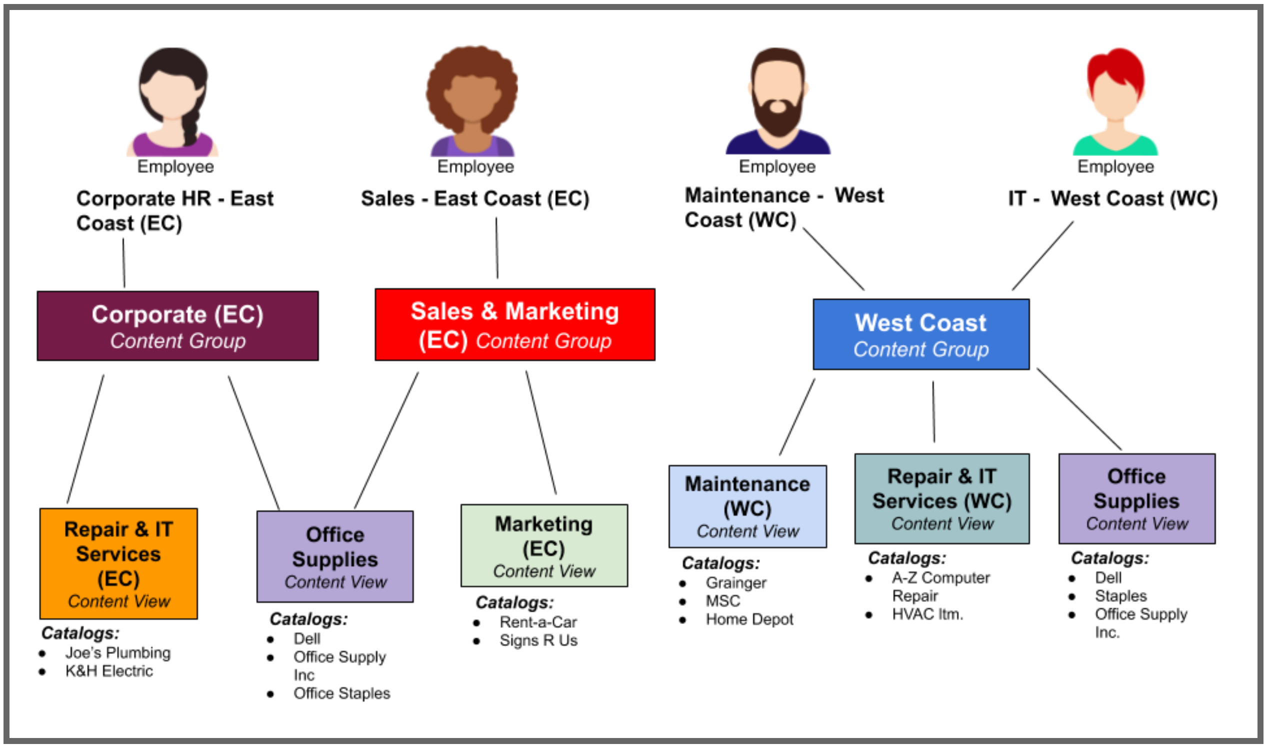
A single Content View can belong to multiple Content Groups.

Content Groups

Used to determine which Content Views and catalogs a Shopper will have access to when logging in.

- Users are assigned to Content Groups in the Vroozi Purchase module in *Master Data > Users*.

The diagram below shows an example of how *Shoppers* are associated with different *Content Views* and *Groups*.

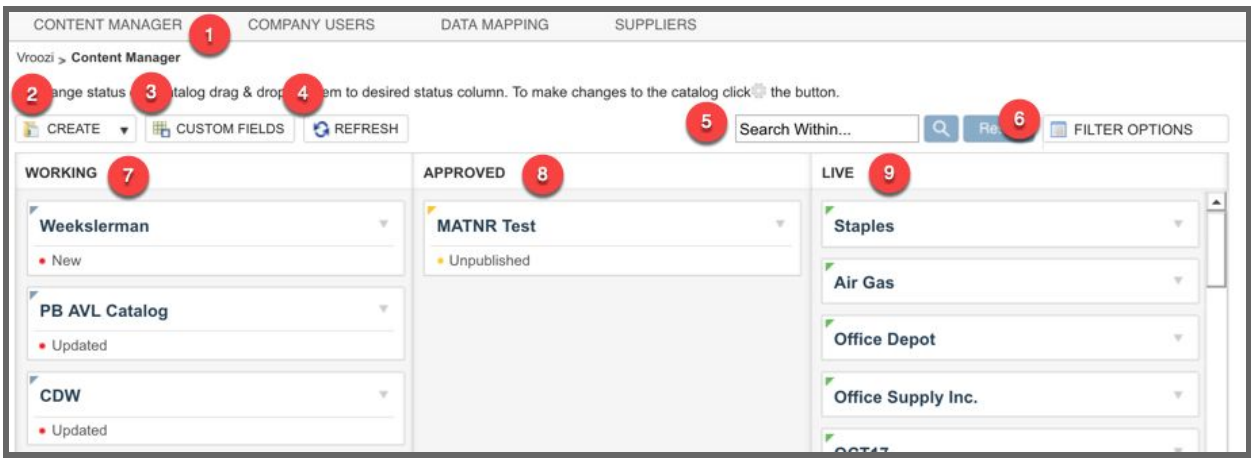


Configuration

See [training materials](#) on Content Group & View management for details on how to add, delete or edit Views/Groups.

Catalog Management

The *Vroozi Catalog Manager* provides an interface with a three-column layout that *Administrators* can search and filter catalogs of all statuses.



Catalog Manager Anatomy

1. **Content Manager Tab**: How to navigate to the *Catalog*
2. **Create**: This button is located both at the top and bottom of the screen. Click on it and a window appears with a *Catalog Creation* page.
3. **Custom Fields**: This button is located both at the top and bottom of the screen. Clicking on it navigates the user to the *Custom Fields Management* page.
4. **Refresh**: The *Refresh* button refreshes the screen and reflects any new changes by the user.
5. **Search Within**: This *Search* bar allows searching across *Working*, *Approved*, and *Live* catalogs. Use it in combination with the *Filter Options* for a more specific search.
6. **Filter Options**: Users are able to filter company catalogs by *Supplier Name* and *Catalog Type*. *Catalog Types* include *Internal* and *External Catalogs* and *Quotes*.

7. **Working Column**: These are catalogs that have been uploaded or updated. The *Working Column*, unlike the *Approved* or *Live Columns*, allows *Administrators* to edit catalog content. They will not be visible to *Vroozi Catalog Shoppers* until they are approved, then published to the *Live Column*.
8. **Approved Column**: These are catalogs that have already been approved by the designated approvers for that catalog. However, they will still not be available to *Marketplace Shoppers* until they are published to the *Live Column*.
9. **Live Column**: These are catalogs that have both approved and published. They are available to use and view by *Marketplace Shoppers*.

Catalog Search & Filter

1. Click the carrot next to the filter selection to expand either the *Supplier Name* or *Catalog Type* area. Only one of these areas can be expanded at the same time but are able to filter results simultaneously if selections are made in both.
2. Use the check boxes to make the filter selections.
3. To clear all *Filter Options* and search terms, click the *Reset* button. This will repopulate all catalogs that were previously excluded from view.

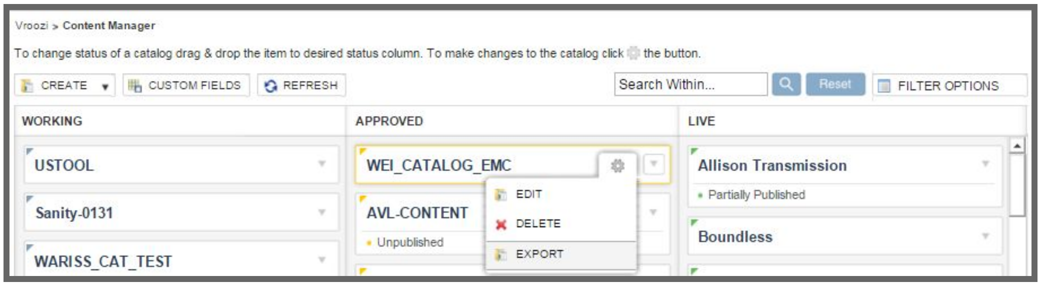
TIP! *When navigating away from the Catalog Management page, the search and filter functions will automatically reset, and the view of all catalogs will be restored.*

Export Catalog Content

At any time, uploaded catalog items can be exported from the *Catalog Management* screen into a CSV file.

1. Within the *Content Manager* tab and select *Catalog Management*.

2. Find the catalog you would like to export. (Working, Approved or Live)
3. Hover over the catalog. Then, click the *Cog Wheel* icon and select the *Export* option.



4. A notification will flash at the top of the screen to let you know the export is in progress
5. An email will be sent to from notifications@vroozi.com. Open the email and click the *Download File* link. Alternatively, you can copy and paste the URL into your browser to begin the download.
6. Open the downloaded file to view and save it.

Create an Internal Catalog

Administrators are able to create different types of catalogs with *Vroozi Catalog*, including *Internal Catalogs*, *External Catalogs*, and *Level 2 Punchout Catalogs*. Specific configurations may be used for *Internal Catalogs*, like *Tiered Pricing* and *Policy Items (Find a Vendor)* functionality.

Internal Catalog Definition

Where *Shoppers* can search across a pre-loaded, pre-approved list of items within the *Marketplace* application.

Catalog Creation

Catalogs can be assigned to the *Content View* at the time of creation. *Vroozi Catalog Manager* supports catalogs formatted with .XLSX (Excel) and .CSV files. The Vroozi provided Internal Catalog template can be accessed here.

Required Internal Catalog Fields: When uploading an *Internal Catalog* file, certain fields are mandatory. These *Required Fields* are:

1. #Item Number
2. NEW_ITEM-DESCRIPTION *or* NEW_ITEM-MATNR
3. NEW_ITEM-VENDORMATE
4. NEW_ITEM-PRICE
5. NEW_ITEM-CURRENCY
6. NEW_ITEM-UOM
7. NEW_ITEM-MATGROUP

See Internal Catalog training materials for further details on Internal Catalog creation.

Internal Catalog Images

There are two ways to attach images.

By entering urls in the image column of the Internal Catalog Template.

By entering the name of the image in the image column and uploading a .zip folder of images along with the sheet. The image names must match the names listed in the Image Column. The system then automatically picks the image from the zipped folder which is mapped against the item. Please see the screenshots below for better understanding.

1. To upload a .ZIP (zipped) *Image File*, click the *Browse* button and follow the prompts to select and open an image to associate with the new catalog.
2. Type in the *Supplier Company* (vendor) name in the text field.
3. <u>Do not check the *External Catalog* </u>*(Punchout Catalog)* check box. See the *Create a Punchout Catalog* section if you are creating a *Punchout Catalog*.

Use Tiered Pricing

Tiered Pricing is a way to encourage *Shoppers* to buy larger quantities of a product by applying discounts based on the quantity ordered. These discounts may be "tiered" so that they increase as the order amount is raised.
Administrators are able to define different tiers of price against each item in order to give discounts on high volume purchases within *Internal Catalogs*. *Tiered Pricing* can either be defined through an Excel spreadsheet or through the *Direct Item Update* function within an individual line item. For more information, see the *Edit a Catalog Item* section.
When entering information into the *Supplier Catalog* template, there is a column called ITEM-TIERED_PRICING. Fill in the data for *Tiered Pricing* items. For items that do not have *Tiered Pricing*, the NEW_ITEM-PRICE column must be filled out instead—one or the other needs to be populated with data, but not both. *Tiered Pricing* also cannot be applied on *Bundle* and *Quote*, meaning that the *Tiered Pricing* discount cannot be used in combination with a "bundle" discount.
The ITEM-TIERED_PRICING field must be filled out in a specific way. Use the tips and example below to enter the data correctly.

ITEM-TIERED_PRICING
49.99 [1-50]; 45.99 [51+];

In this example, the first 50 of the items purchased are $49.99, and 51 or more of the items will cost $45.99.

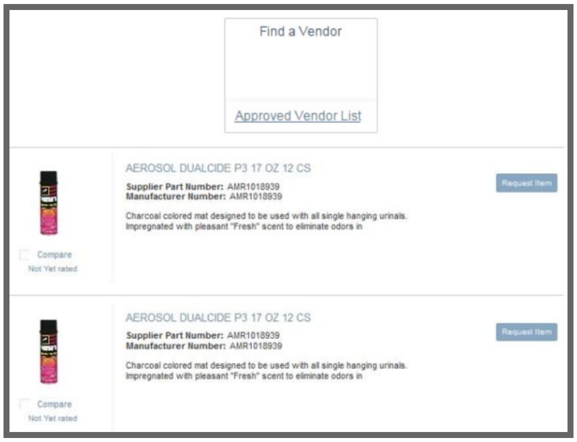
1. **<u>Brackets</u>**: Values entered in the square brackets [] indicate the quantity, whereas the values entered before the brackets indicate the price of the

quantity. Depending on the quantity entered by the *Shopper*, the respective price will be reflected in the *Shopping Cart*.

2. **Semicolons (;)**: A closing semicolon; is required after each closed bracket containing the quantity.
3. **Plus, Sign (+)**: The plus sign + after the largest listed quantity indicates that this is the lowest tiered price and any additional volume will not result in a lower price.

Policy Items (Find a Vendor)

By marking the *Policy Item* field in the catalog template, *Shoppers* are able to quickly look up the *Approved Vendor Item List* on the *Homepage* using the *Find a Vendor* widget.



When uploading the catalog template, make sure to populate the following fields to utilize the *Policy Item Approved Vendor List*. These columns, although they are associated, may not be next to each other on the template.

NEW_ITEM-DESCRIPTION	NEW_ITEM-LONGTEXT	MATGROUP	NEW_ITEM-VENDOR	ITEM-POLICY
WHITE Unisex Poly Cotton Cook Shirt with Gripper Closure	5028WH-WHITE Unisex	42130000	23327531	X
Multipurpse Cleaner, 21 Ounce Ajax Powder	21 Oz Ajax Soft Powde	76110000	N-12394586	X
Laundry Detergent, 134 Ounce Ajax Liquid	134 Oz Ajax Dual Action	76110000	N-36475765	X

1. **NEW_ITEM-DESCRIPTION:** A short description of the item requested.
2. **NEW_ITEM-LONGTEXT:** A long, detailed description of the item requested.
3. **NEW_ITEM-MATGROUP:** To ensure proper categorization of the *Policy Item*, you must input your desired *Product Category* code in the NEW_ITEM-MATGROUP field. This will allow Shoppers to also browse this

Policy Item from the *Category Tree* represented on the left side of the *Shopper Homepage*.

4. **NEW_ITEM-VENDOR:** This field must contain the *Vroozi Unique Supplier ID* that is associated to the supplier records in your account to ensure the items are properly associated with the desired vendor
5. **ITEM-POLICY:** When filling out the catalog template, put an "X" in the *Policy Item* column if you would like the *Shoppers* to browse this vendor using the *Approved Vendor List* widget. If there is a blank lift in the *Policy Item* column, the item will not be considered a *Policy Item* and won't be visible when the *Shopper* clicks on the *Vendor List*.

Create a Punchout Catalog

To use *Punchouts*, *Shoppers* click on the supplier card and are redirected to the vendor website. Once items are placed into the cart, *Shoppers* check out of the vendor website and the items are transferred into the *Marketplace* cart.

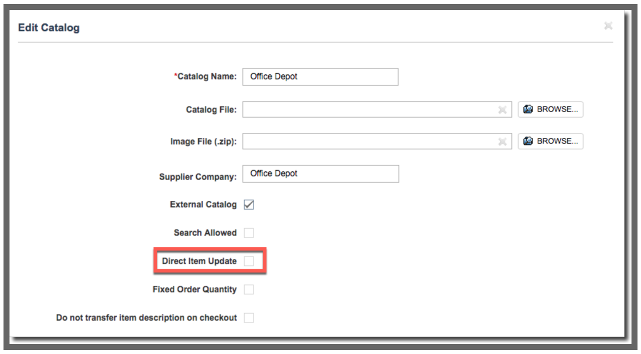
All content and pricing is hosted and therefore managed by the supplier.

Catalog Creation

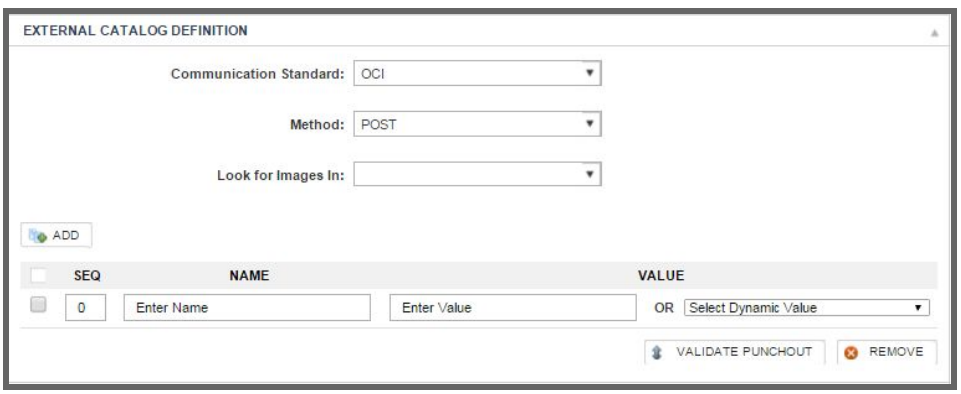
1. Select *Catalog Management*.
2. Click the *Create* button near the top right of the *Catalog Management* screen.
3. Select the *Catalog* option from the drop down. A *Create Catalog* window will appear.
4. Enter the *Catalog Name*. This is a required field.
5. Because this is a *Punchout Catalog*, there is no need to add a *Catalog File* or *Image File*.
6. Type in the *Supplier Company* (vendor) name in the text field.
7. When creating a *Punchout Catalog*, it is mandatory to check the *External Catalog* box.
8. After checking the *External Catalog* box, an option appears to allow a search. (not pictured) Selecting *Search Allowed*

- **Search Allowed:** Allows *Shoppers* to search for *Punchout* items using the *Marketplace* search bar and the results will be pulled in from the vendor's website. This functionality depends on whether the vendor supports *OCI Background Search*.

9. <u>Do not check the *Direct Item Update* box,</u> as it only applies to creating *Internal Catalogs*.



10. Click the carrot to expand the areas you would like to update for the catalog being created. All of the fields in these areas are not considered mandatory for catalog creation and can be updated at a later time. See the *Edit a Catalog* section for more information.
11. Skip the *Additional Fields* area, as this is only relevant to *Internal Catalogs*.
12. Expand the *External Catalog Definitions* area.
13. Select the *Standard Communication Method* using the drop-down menu. This is either OCI or CXML.
14. Select the HTTP request *Method* for a request-response. The options are *Post* and *Get*.
15. **Look for Images in:** Use the drop-down menu to indicate where to Item images are not part of the standard OCI. Make this selection if the vendor may send over images have been uploaded.
16. Click the *Add* button to specify at least one *Punchout* parameter (i.e. a URL). *Vroozi Catalog* uses these parameters to construct the *Punchout* web service request. The number of parameters needed depends on the vendor authentication requirements for *Shoppers* to use their website.
17. Click the *Validate Punchout* button to validate the parameters entered. This verifies the *Punchout* is working correctly. If the parameters are incorrect, there will be a standard error message from the vendor's website. (not pictured/variable)



18. After expanding the *Content Views* area, select all the relevant *Content Views* to be associated with this catalog by checking the box next to the *Name*.
19. After expanding the *Approvers* area, select the people that have approval rights for this catalog before it can be published *Live* to *Shoppers*. Only one of the selected *Approvers* needs to *Approve* the catalog before it can be moved to the *Live* column by an *Administrator*.
20. Click the *Create* button at the very bottom right of the page to create the new catalog in the system. No changes will be saved until the *Create* button is clicked.

Create a Level II Punchout

Level II Catalog Definition

A *Level II Punchout* has both an uploaded *Internal Catalog* for the vendor within the application, *and* an external *Punchout Catalog*. *Shoppers* given access to this type of catalog will be able to use both methods of shopping in tandem to find items for the vendor.

Catalog Creation

1. *Create a Catalog*
2. Enter the *Catalog Name*. This is a required field.
3. Click the *Browse* button next to *Catalog File* area and follow the prompts to select and open the saved catalog template. See the **TIPS!** below for fields relevant to *Level II Punchouts*. For additional details about where to find and fill out the catalog template, see the *Create an Internal Catalog* section.

TIP! *There is a Configurable Item Flag column in the catalog template (ITEM-CONFIG). When marking this field with an X, an Order from Supplier button will be visible for Shoppers instead of the typical Add to Cart button. What the Order from Supplier button does is punches the Shopper out to the Vendor's website to see the most up to date pricing information for that particular item. An example of when this is useful is when the item price changes often and a static price uploaded in the catalog wouldn't be accurate.*

TIP! *Any mandatory Custom Fields listed in the template that have to do with Configurable items, like size or color selections, will result in having a Configurable Item button available to Shoppers. This button allows the Shopper to make choices before adding the item into the cart. This is different from the Configurable Item Flag mentioned above, even though both include the term "configurable," different columns are used.*

4. To upload .ZIP (zipped) *Image File*, click the *Browse* button and follow the prompts to select and open an image to associate with the new catalog.
5. Type in the *Supplier Company* (vendor) name in the text field.
6. When creating a *Punchout Catalog*, it is mandatory to check the *External Catalog* box.
7. Expand the *External Catalog Definitions* area.
8. Select the *Standard Communication Method* using the drop-down menu. This is either OCI or CXML.
9. Select the HTTP request *Method* for a request-response. The options are *Post* and *Get*.
10. Use the drop-down menu to indicate where to *Look for Images*. Item images are not part of the standard OCI. Make this selection if the vendor may send over images have been uploaded.
11. Click the *Add* button to specify at least one *Punchout* parameter (i.e. a URL). *Vroozi Catalog uses* these parameters to construct the *Punchout* web service request. The number of parameters needed depends on the vendor authentication requirements for *Shoppers* to use their website.
12. Click the *Validate Punchout* button to validate the parameters entered. This verifies the *Punchout* is working correctly. If the parameters are incorrect, there will be a standard error message from the vendor's website. (not pictured/variable)
13. After expanding the *Content Views* area, select all the relevant *Content Views* to be associated with this catalog by checking the box next to the *Name*.
14. After expanding the *Approvers* area, select the people that have approval rights for this catalog before it can be published *Live* to *Shoppers*. Only one of the selected *Approvers* needs to *Approve* the catalog before it can be moved to the *Live* column by an *Administrator*.
15. Click the *Create* button at the very bottom right of the page to create the new catalog in the system. No changes will be saved until the *Create* button is clicked.

Edit a Catalog

Existing catalogs and items can be edited in *Vroozi Catalog* while listed in the *Working* column. When catalog changes are made, there is also a catalog version functionality to keep track of the updates.

Edit a Catalog (Direct Item Update)

Catalogs can be edited in two ways in *Vroozi Catalog*. By selecting *Direct Item Update*, *Admins* are able to edit the catalog items directly from the *User Interface* by duplicating an already *Approved* or *Live* catalog into the *Working* column to make amendments. Alternatively, catalogs can be edited by uploading an Excel file. See the *Edit a Catalog (File Upload)* section for instructions.

See Direct Item Update materials for further details.

Edit a Catalog (File Upload)

Uploading the catalog template is the only way to add *new* items to an existing catalog.

See File Upload materials for further details.

Catalog Version Management

Vroozi Catalog automatically stores new catalog version information. Any catalogs that are in the *Approved* or *Live* columns are locked in read-only mode. A new version of the catalog is created whenever the *Administrator* edits the catalog details (i.e. item price).
Unlike editing catalog details, changing the catalog header level information does not create a new version of the catalog. Below is a list of what is considered header data that doesn't create a new catalog version:

- **Catalog Name**
- **Catalog ID**
- **Start Date**
- **End Date**
- **External Catalog Definition**

New catalog versions when *Approved* or *Published* as *Live*, replace the original catalog. There can only be one new version of an existing catalog in the system at any given time.

1. Select *Catalog Management*.
2. If needed, use the *Search Within* and/or *Filter* functions to find the desired catalog(s).
3. Click on the carrot(s) next to the catalog name to reveal the summary information.
4. You will be able to view the *Version Number* in addition to other creation data.

Approve, Reject & Publish Catalogs

Approve a Catalog

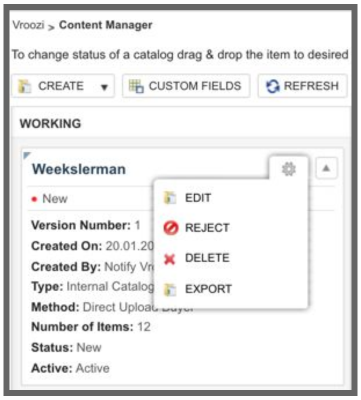
Vroozi Catalog has “drag and drop” functionality for designated users to approve catalogs. This section shows how to approve a newly edited or uploaded catalog. *Administrators* and *Approvers* of a catalog will be notified via email when there is a pending catalog awaiting approval. After approval, a notification is sent out to *Administrators* and the other *Approvers* assigned to that particular catalog. Only one *Approver* needs to approve in order for the catalog to have an *Approved* status.

1. Select *Catalog Management*.
2. Find the catalog in the *Working* column you would like to *Approve*. You may choose to use the *Search Within* or *Filter* functions to find it.
3. If needed, review the catalog details. (not pictured)
4. Drag and drop the catalog from the *Working* column to the *Approved* column.
5. An *Approve Confirmation* message will appear. Click the *Approve* button. The catalog will now appear in the *Approved* column.

Reject a Catalog

Administrators and *Approvers* of a catalog will be notified via email when there is a pending catalog awaiting their approval. If rejected, the catalog will be listed in the *Working* column with a *Rejected* status. This section outlines how to reject a catalog that is pending approval in the *Working* column.
Approvers and *Administrators* are also able to reject catalogs that are in the *Approved* column by dragging and dropping them back into the *Working* column.

1. Select *Catalog Management*.
2. Find the catalog in the *Working* column. You may choose to use the *Search Within* or *Filter* functions to find it.
3. If needed, review the catalog details. (not pictured)
4. Hover over the catalog to reveal the *Cog Wheel*. Then, click the *Reject* option from the drop-down menu.



5. A *Reject Confirmation* message will appear. Click the *Reject* button.

Publish a Catalog

Approvers and *Administrators* will be notified via email when a catalog is *Approved* and is waiting to be published.

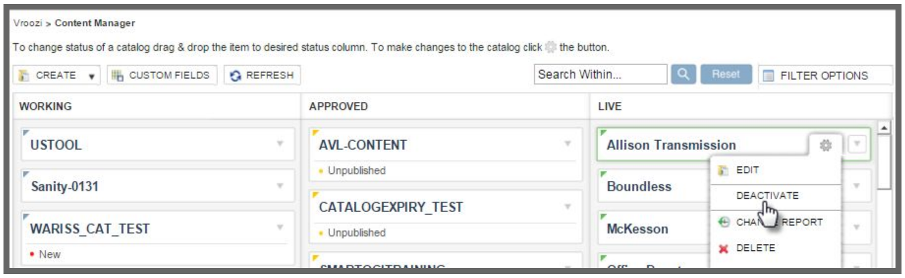
1. Select *Catalog Management.*
2. Find the catalog in the *Approved* or column. You may choose to use the *Search Within* or *Filter* functions to find it.
3. Drag and drop the catalog from the *Approved* column to the *Live* column.
4. A *Publish Confirmation* message will appear. Click the *Publish* button. The catalog will now appear in the *Live* column. An email will be sent notifying *Approvers* and *Administrators* that the catalog has been published.

TIP! *If the same catalog has been published previously, the newly published version will replace the old version in the Live column.*

Deactivate a Catalog

1. Find the catalog you would like to *Deactivate* in the *Live* column. You may choose to use the *Search Within* or *Filter* functions to find it.

2. Hover over the catalog and click on the *Cog Wheel*. Then, select the *Deactivate* option from the drop-down menu.



3. A *Deactivate Confirmation* will appear. Click the *Deactivate* button.
4. The catalog will remain in the *Live* column, now with an *Offline* (deactivated) status.

Activate a Catalog

1. Find the catalog you would like to *Activate*.
   - Deactivated catalogs will have an *Offline* status. You may choose to use the *Search Within* or *Filter* functions to find it.
2. Hover over the catalog and click on the *Cog Wheel*. Then, select the *Activate* option from the drop-down menu.
3. An *Activate Confirmation* will appear. Click the *Activate* button. The catalog will be activated and remain in the *Live* column.

Delete a Catalog

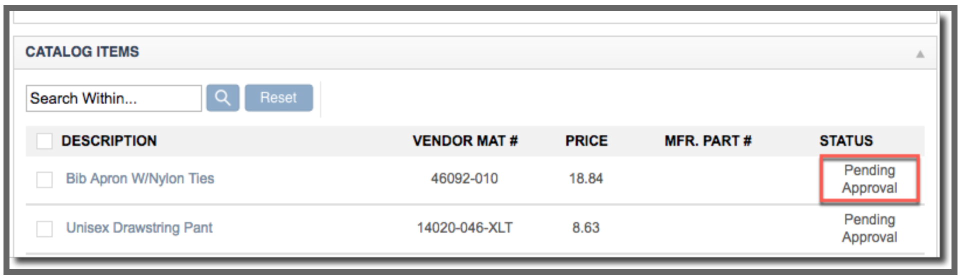
An alternative to deleting, is to *Deactivate* the catalog. Deactivating also hides the catalog from the *Shopper's* view, but unlike deleting, an *Inactive* supplier can be made *Active* again. See the *Deactivate a Catalog* section for more information.

1. Find the catalog you would like to *Delete*. You may choose to use the *Search Within* or *Filter* functions to find it.
2. Click on the *Cog Wheel*. Then, select the *Delete* option from the drop-down menu. (shown above)
3. A *Deletion Confirmation* will appear. Click the *Delete* button. The catalog will be removed.

Approve a Catalog Item

Administrators and *Approvers* of a catalog will be notified via email when there are pending catalog items awaiting approval. This section describes how to approve items within a catalog.

1. In the *Working* column, click on the *Catalog Name* link of the catalog with items you would like to approve. You may need to use the *Search Within* and/or *Filter* functions to find the catalog.
2. You will be navigated to the *Catalog Item* screen with a list of catalog items.
3. Updated items will have a *Pending Approval Status*.
4. If needed, click on the item *Description* link to see the *Item Details* screen. (not pictured)
5. Select the items to approve by using the checkbox in grey next to the *Description*.
6. Click the *Approve* button. The items will be approved.



Reject a Catalog Item

Approvers and *Administrators* will be notified via email when there are pending catalog items awaiting their approval.

1. In the *Working* column, click on the *Catalog Name* link of the catalog with items you would like to approve or reject. You may need to use the *Search Within* and/or *Filter* functions to find the catalog.
2. You will be navigated to the *Catalog Item* screen with a list of catalog items.
3. Updated items will have a *Pending Approval Status*.
4. If needed, click on the item *Description* link to see the *Item Details* screen. (not pictured)
5. Select the items to reject by using the checkbox in grey next to the *Description*.
6. Click the *Reject* button. The items will be rejected, and the catalog will remain in the *Working* column with a *Partially Rejected* or Partially Approved status.

Publish a Catalog Item

Administrators and *Approvers* of a catalog will be notified via email when there are pending catalog items awaiting approval. This section shows how *Admins* can publish only selected catalog items within the catalog, without publishing the entire catalog item list.

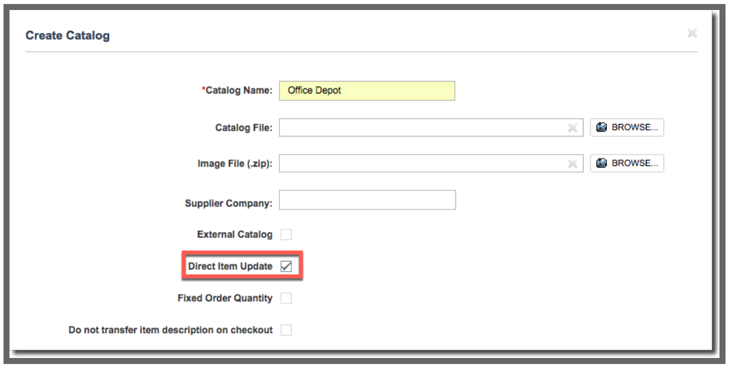
1. Select *Catalog Management*.
2. Find the name of the catalog containing the items you would like to publish. You may need to use the *Search Within* and/or *Filter* functions to find the catalog.
3. Click on the *Catalog Name* containing items you would like to publish in the *Approved* or *Live* column. You will be navigated to the *Catalog Item* screen with a list of catalog items. See the **TIP!** below for additional information.

> **TIP!** *If the unpublished items are in the Approved column, it will have an Unpublished status. If some but not all the catalog items are already Live (and visible to Shoppers), the catalog will be in the Live column with a Partially Published status.*

4. Find the item(s) you would like to publish. You may choose to use the *Search Within* function, or page through the catalog list.
5. Check the box next to the item's *Descriptions* to select them.
6. Click the *Publish* button. The item's statuses will change from *Approved* to *Published*. An email notifying *Admins* and *Approvers* will be sent notifying them of the newly published items.
7. Click the *Back* button in the navigation bar on the left to return to the *Catalog Management* screen. (not pictured)
8. The catalog will be in the *Live* column with a *Partially Published* status. Until *all* the items in the catalog are published, it will continue to be labeled as *Partially Published*.

Delete a Catalog Item

Administrators can delete individual line items while the catalog is in the *Working* column in *Catalog* . *The catalog must have Direct Item Update checked.* See the *Edit a Catalog (Direct Item Update)* section for more information.

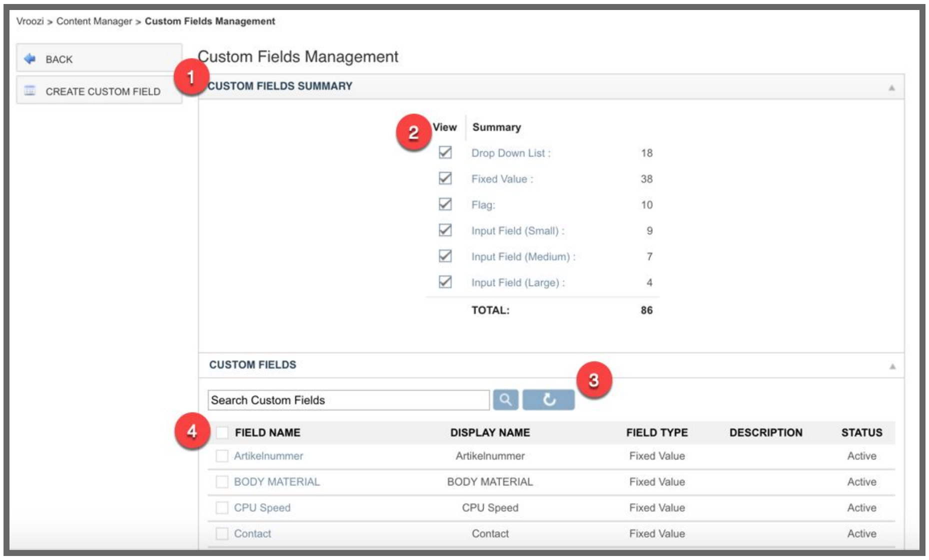


Vroozi Catalog does not allow individual items to be added directly from the *User Interface (UI)*. To add items, the catalog template must be updated with the changes and uploaded. See the *Edit a Catalog (File Upload)* section for instructions on how to do this.

1. Select *Catalog Management*.
2. Click on the *Catalog Name* link in the *Working* column. *The catalog must be in the Working column for an item to be deleted.*
3. Find the items you would like to delete. You may use the search function to do this.
4. Check the box next to item(s) you would like to delete.
5. Click the *Delete* button.
6. A *Deletion Confirmation* window will appear. Click the *Delete* button. The item will be removed from the catalog.

Custom Fields

In *Vroozi Catalog*, *Administrators* have the option of defining custom characteristics for the vendor catalog and/or line items within a catalog called *Custom Fields*.

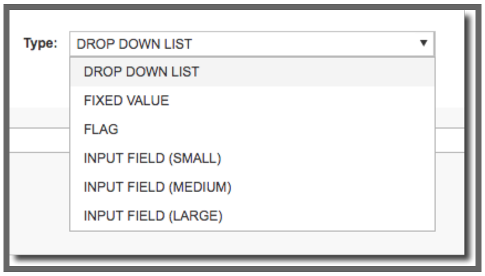


1. Select 'Create Custom Field'
   - Attach to specific catalogs
2. Sort Custom Fields View
3. Search by keyword or click name to view
4. Check the box next to the name then Delete, Activate or Deactivate selected Views or Groups.

Custom Field Types

Custom Fields allow *Administrators* to tailor catalog and line item characteristics for system users. These fields are able to be created and managed by amending and uploading the catalog template in the system. This section defines the different types of customizable fields.

There are four types of *Custom Fields* available in *Catalog* : *Input Field*, *Fixed Value*, and *List/Drop Down*.



6. **<u>Input Field (Text)</u>**: The *Input Field* data type is an editable area that is available on the item detail screen for the *Shopper*. This free text area may be used by the *Shopper* to add comments to the item before adding it to the cart. An example of this is shipping information. There are three font sizes of *Input Fields*—small, medium, and large. In order to associate these fields with an item in the catalog, enter an “X” in the item’s input type custom field cell.
   i. Input Field—Field Declaration: TEXT
   ii. Input Medium Field—Field Declaration: MEDIUMTEXT
   iii. Input Field Large—Field Declaration: LARGETEXT

7. **<u>Fixed Value</u>**: The *Fixed Value* appears as a label on the item details screen. This field may contain any information that the supplier or purchasing company would like to display other than the default catalog fields. This is a fixed body of text and can be used for things like address information.

8. **<u>List/Drop Down</u>**: The *List* or *Drop-Down* field allows the Shopper to select from a list of options, like size or color choices. This supports *Dynamic Part Numbering* and *Price Modification* based on the Shopper’s selections. This catalog field accepts | | (vertical bars) to indicate selection. For example, this field accepts *Price Adders* and *Subtractors*. The list items are separated by semicolons, and if there are associated *Price Adders/Subtractors*, this is designated by adding a numerical value after a colon, prior to the semi-colon separator. When a user selects a value with a *Price Adder* or *Subtractor*, the price of the item dynamically will change. If the value is positive, then the updated price will be the value plus the original price. If it is a negative value, then the updated price will be the value subtracted from the original amount.

9. **<u>Flags</u>**: A *Flag* field can be associated with items and can be used as item attributes that can be used by the *Shopper* to filter search results. In order to associate these fields with an item in a catalog, an "X" must be entered in the item's corresponding *Flag Custom Field* cell. They work like *Supplier Attributes*, except these are associated with individual items in a catalog, as opposed to all items associated with a supplier. Unlike the *Supplier Attribute* weight functionality, *Flags* don’t affect the ranking of search results.

An icon image can be uploaded for a *Flag* field. This icon will appear with the item on the search result and product detail page for *Shoppers*.

Create a Custom Field

1. Select *Catalog Management*.
2. Near the top left of the *Vroozi Catalog* screen, click the *Custom Fields* button.
3. Click on the *Create Custom Field* button.
4. Enter the *Field Name* that will be listed on the catalog template to associate with the *Custom Field*. This is a required field.
5. Enter the *Display Name*, which is how the field will appear to *Shoppers*. This is a required field.
6. Enter a *Description* if needed. Only *Administrators* are able to view this information.
7. Choose the field *Type* from the drop-down menu. See the *Custom Field Types* section for more information.
8. The *Custom Field Defaults* area will update based on the field *Type* selection made above. Fill this section out accordingly.
9. Save.
10. Click the *Add Catalogs* button to associate catalogs.
11. Find the catalogs that you would like to associate with the *Custom Field* being created. You may choose to use the *Search Catalogs* function.
12. Check the box next to the *Catalog Name* to select it.
13. Click Save. Your selected catalogs will be listed. (not pictured)
14. Click the *Back* button to return to the *Custom Fields Management* screen. (not pictured)

Activate or Deactivate Or Delete a Custom Field

An alternative to deleting, is to *Deactivate* the field. Deactivating also hides the *Custom Field* from the *Shopper's* view, but unlike deleting the field is listed as an *Inactive* record that can be made *Active* again.

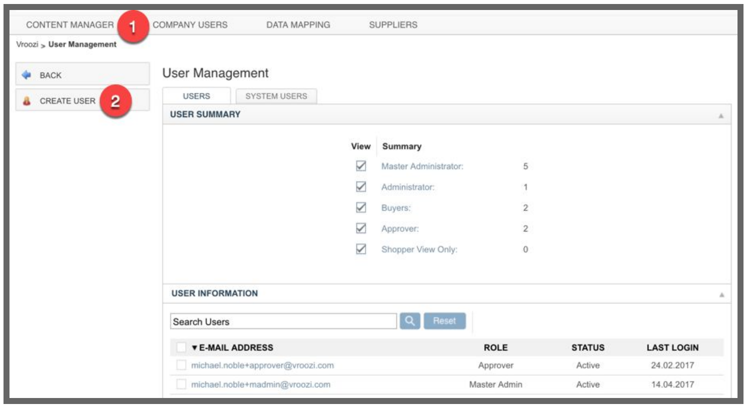
1. Select *Catalog Management*.
2. Near the top left of the *Vroozi Catalog* screen, click the *Custom Fields* button.
3. Find the *Custom Field Name* you would like to *Activate*, *Deactivate or Delete*. You may choose to use the *Search Custom Fields* bar to find it.
4. Check the box to select it.
5. Click the *Activate* or *Deactivate* button.

Company Users

See *User Roles with Definitions and Quick Reference Guide* for user role descriptions and permissions.

Create a User

Users are created in the Company Users tab. Further details on creating a user can be accessed here.



TIP! A user can have multiple roles. A user can be any combination of an Administrator, Approver and Buyer. Depending on what roles a user is assigned, they will be granted specific privileges within Catalog. However, if a user is assigned the role of Master Administrator, they will be assigned the other three roles at the same time.
Only *Master Admins* have the rights to create other *Master Admins* and *Administrators.*

Edit a User

Once the user has been created, they receive a "*Welcome to Catalog* " email with a username, temporary password, and a link to *Vroozi Catalog*. For more information about getting started with the welcome email, see '*Logging in for the First-Time'* section.

1. Select *Company Users*.
2. Use the *Search User* function to find the user you would like to edit.
3. Click on the user's *Email Address* link

4. Near the top the *Administrator Homepage*, click the *Company Users* tab. You will be navigated to the *User Management* screen.
5. Make the necessary edits to the *User Settings* or *Default Preferences* areas. Any field with a red asterisk* cannot be left blank.
6. Click Save. The user will be created and sent the "*Welcome to Catalog* " email.

Activate, Deactivate or Delete a User

1. Find the user you would like to *Activate* or *Deactivate*.
2. Check the box next to the user's *Email Address* to select it.
3. Click the *Activate Deactivate* or *Delete* button.

TIP! You cannot not Activate, Deactivate or Delete your own account.

TIP! Administrators are not able to Activate or Deactivate other Administrators. Only Master Admins can deactivate another Admin.

Reset a User's Password

Administrators are able to reset another user's password in the *User Management* area of *Catalog* . This section shows the steps to take to do a password reset. *Marketplace* does not allow you to reset your own password as an *Administrator*. For more information of resetting an *Admin* or *Master Admin* password, see the *Forgot Password (For Administrators)* section.

1. Find the user you would like to edit.
2. Check the box next to the user's *Email Address* to select it.
3. Click the *Reset Password* link. An email will be sent to the user with a new temporary password. They are then able to log in to *Marketplace* and create a new password. See the *Password Change* section for more information.

Data Mapping

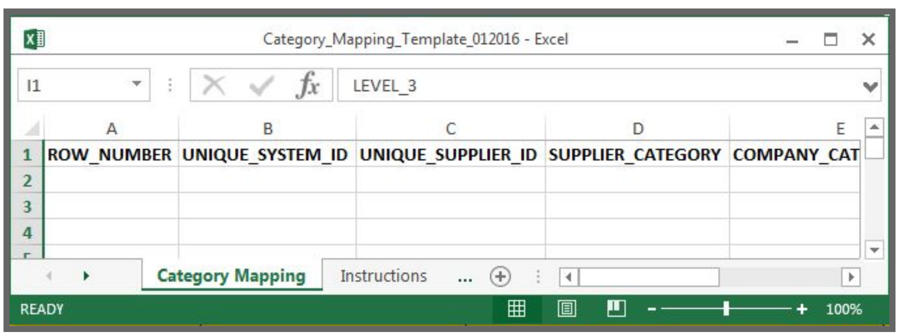
Vroozi Catalog allows for various types of data mapping files to be uploaded.
data mapping is the process of **mapping data** fields from a source file to their related target fields
Each template includes a *Mapping* tab and an *Instructions* tab to assist in filling out the data properly.

Category Mapping

Categories classify products and services in a way that makes sense for your organization. Using *Category Mapping*, *Marketplace* dynamically maps the supplier-provided category codes, to the categories that your organization uses. This section outlines how to upload *Product Category* template files into *Catalog* .

Every time you upload a mapping file, existing mappings will be overridden.

1. If you don't already have it, download the [Category Mapping Template] from the Vroozi HelpDesk.
2. Fill out the template with the *Product Category* information. For more details of how to enter data correctly, click the *Instructions* tab. From this tab you will be able to see if a column is required (peach/light orange) or optional (bold orange).



The *Display* column is used to flag individual rows in these tables, to be visible to the *Shopper*.

For *Category Mapping*, *UoM* and *Currency* mapping tables, unless a particular row is flagged for *Display,* the value is not going to be visible in the *Not in Catalog* form on *Shopper User Interface (UI)*. This assumes that the buying organization is using the *Not in Catalog* form.

Because the *Category* mapping table is used to set up both category mapping behavior upon shopping cart checkout, and the *Category Tree* that *Shoppers* see, the *Display* flag also affects the *Category Tree*. Unless a particular row is flagged to be displayed, it won't show up in the *Shopper* category tree.

UoM and *Currency* mapping tables can also be set up to show their data to *Shoppers*, based on the *Shopper's* associated *Content Group*.

- The *Category Mapping*, *UoM* and *Currency* mapping values can now be associated with *Content Views*.

When the *Shopper* logs in, the system uses the assigned *Content Group* to determine which *Content Views* can access, then only shows the appropriate *Category*, *UoM* and *Currency* codes in the *Not in Catalog* form. This assumes that the buying organization is using the *Not in Catalog* form.

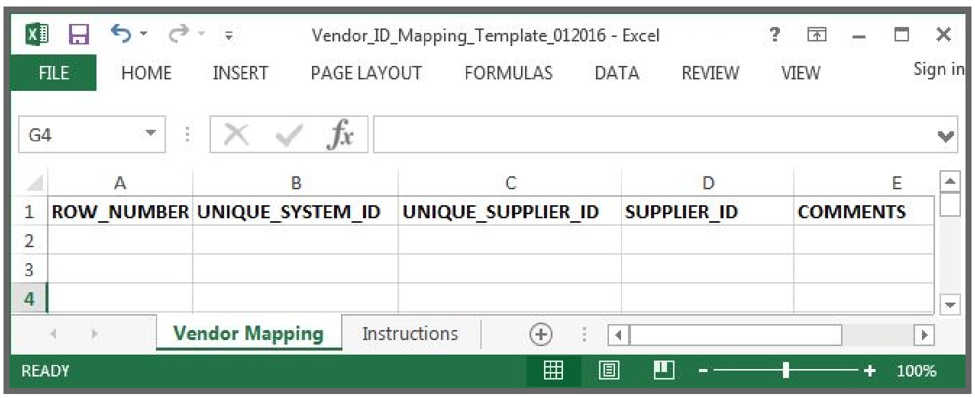
1. Save the completed *Category Mapping* template file to your computer.
2. Log in to *Catalog* .
3. Click on the *Data Mapping* tab.
4. The *Category Mapping* tab is the first of the mapping tabs and will already be selected for you. Click the *Browse* button and follow the prompts to select and open the completed *Category Mapping* file on your computer.
5. If there is anything that is wrong with the template data, you will receive a *Download Error Report* link. Clicking on this will download a PDF file that contains details on a row-by-row basis of the issues in the file.
6. If you would like to download the existing mapping file at any time, click the *Download Processed Data* link.

Supplier ID Mapping

Before *Supplier ID* mapping can be done, the suppliers must first exist in the system. See additional supplier-related sections for more information if you haven't already done this.

Every time you upload a mapping file, existing mappings will be overridden.

1. If you don't already have it, download the *Supplier ID Mapping Template* from the *Marketplace Upload File Templates* section of the knowledge base at https://vroozi.zendesk.com.
    - The template name is **Vendor_ID_Mapping_Template**
2. Fill out the template with the *Vendor ID* information. For more detail of how to enter data correctly, click the *Instructions* tab. From this tab you will be able to see if a column is required (peach/light orange), optional (bold orange).



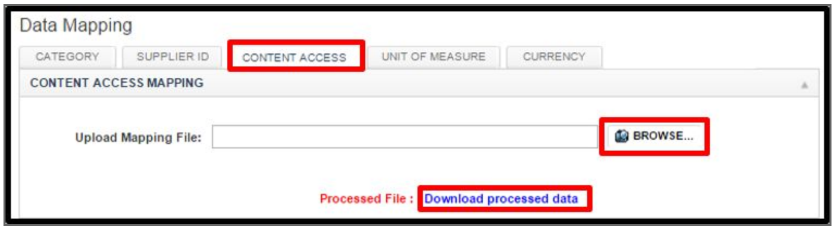
3. Back in Vroozi Catalog, click on the *Data Mapping* tab.
4. Click the *Supplier ID* tab.
5. Click the *Browse* button and follow the prompts to select and open the completed *Currency* file on your computer.
6. If there is anything that is wrong with the template data, you will receive a *Download Error Report* link. Clicking on this will download a PDF file that contains details on a row-by-row basis of the issues in the file.
7. If you would like to download the existing mapping file at any time, click the *Download Processed Data* link.

Content Access Mapping

A *Shopper* logging into *Vroozi Marketplace or Vroozi Purchase* needs to have *Content Views* associated with them in order to be able to access any content in the system. These *Content View* associations are made via the assignment of a *Content Group*.

The default method to determine which *Content Group* should be assigned to the current user requires that the *Content Group's* CGROUPTOKEN or CGROUPNAME be passed to *Marketplace* as a parameter in the URL. This token is unique to a particular *Content Group* and used to identify the *Content Group* to be assigned. *Administrators* can optionally choose to include the *Marketplace* generated token for an external ERP system configured in their account. This token should be provided under the SYSTEMID parameter. This can be used to specify the *Content Group* association if the Shopper is logging in from a particular external ERP system. If the URL does not contain a CGROUPTOKEN or CGROUPNAME, then the user's *Unique Identifier* value (UNAME) is used to assign a mapped *Content Group* to them.

1. If you don't already have it, download the *Content Access Mapping Template* from the *Marketplace Upload File Templates* section of the knowledge base at **https://vroozi.zendesk.com**.
2. Fill out the template with content information. For more detail of how to enter data correctly, click the *Instructions* tab. From this tab you will be able to see if s column is required (peach/light orange) or optional (bold orange)
3. Log in to *Catalog* .
4. Click on the *Data Mapping* tab.
5. Click the *Content Access* tab.
6. Click the *Browse* button and follow the prompts to select and open the completed *Content Access* file on your computer.

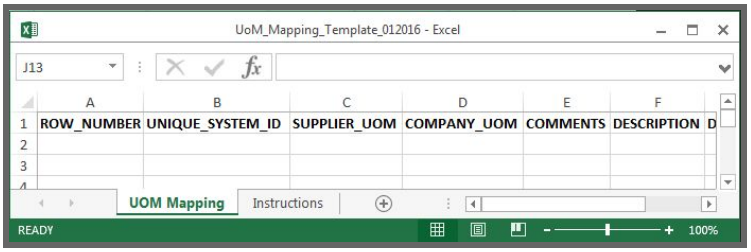


7. If there is anything that is wrong with the template data, you will receive a *Download Error Report* link. Clicking on this will download a PDF file that contains details on a row-by-row basis of the issues in the file.
8. If you would like to download the existing mapping file at any time, click the *Download Processed Data* link.

Unit of Measure (UoM) Mapping

This section shows how to upload a Unit *of Measure (UoM)* mapping into the Marketplace using a template. Every time you upload a mapping file, existing mappings will be overridden.

1. If you don't already have it, download the *UoM Mapping Template* from the *Marketplace Upload File Templates* section of Vroozi Helpdesk at **https://vroozi.zendesk.com**.
2. Fill out the template with content information. For more detail of how to enter data correctly, click the *Instructions* tab. From this tab you will be able to see if a column is required (peach/light orange) or optional (bold orange).



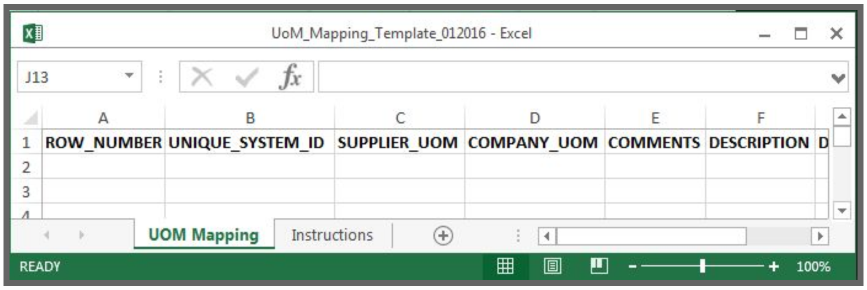
3. Log in to Catalog .
4. Click on the *Data Mapping* tab.
5. Click the *Unit of Measure* tab.
6. Click the *Browse* button and follow the prompts to select and open the completed *Unit of Measure* file on your computer.
7. If there is anything that is wrong with the template data, you will receive a *Download Error Report* link. Clicking on this will download a PDF file that contains details on a row-by-row basis of the issues in the file.
8. If you would like to download the existing mapping file at any time, click the *Download Processed Data* link.

Currency Mapping

This section shows how to upload *Currency* mapping into the Marketplace using a template. Every time you upload a mapping file, existing mappings will be overridden.

1. If you don't already have it, download the *Currency Mapping Template* from the *Marketplace Upload File Templates* section of the knowledge base at **https://vroozi.zendesk.com**.

2. Fill out the template with content information. For more details of how to enter data correctly, click the *Instructions* tab. From this tab you will be able to see if s column is required (peach/light orange) or optional (bold orange.)



3. Log in to *Catalog* .
4. Click on the *Data Mapping* tab.
5. Click the *Currency* tab.
6. Click the *Browse* button and follow the prompts to select and open the completed *Currency* file on your computer.
7. If there is anything that is wrong with the template data, you will receive a *Download Error Report* link. Clicking on this will download a PDF file that contains details on a row-by-row basis of the issues in the file.
8. If you would like to download the existing mapping file at any time, click the *Download Processed Data* link.