

Self Service Catalog Workflows

Grab & Go for Supplier updates to catalog content. This document is intended for Supplier users who have been invited to edit their own catalogs within Vroozii Catalog.

Depending on the type of changes required, there are two paths to service your catalog(s).

1. Direct Item Update

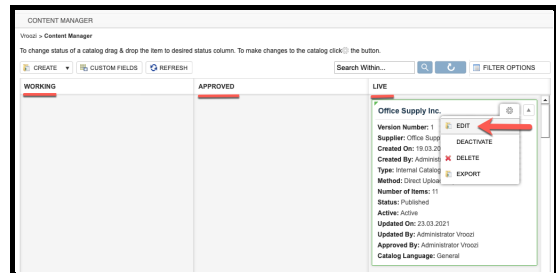
- Best for editing a handful of items.

2. File Upload (CSV)

- Only option for adding new items.
- Best for the upload of a larger quantity of changes including the addition or removal of items.

Helpful Hints

- ✓ The 'Live' Column of the *Content Management* view lists catalogs currently accessible to shoppers based on their content assignment.
- ✓ Editing a 'Live Catalog will create a new version of the catalog found in the 'Working' column.
- ✓ Editing will not disrupt shopping in the current 'Live' Catalog.
- ✓ Edits will only go live once approved and pushed to the 'Live' column by the customer organization.
- ✓ Shoppers with cart items affected by catalog changes will not be able to purchase the outdated items. They will instead be notified of the update and directed to remove the item(s) & re-added to their cart.

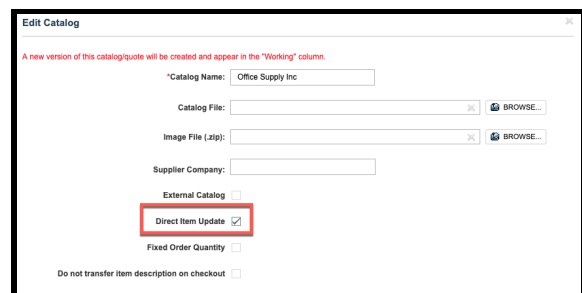


EDIT A CATALOG (DIRECT ITEM UPDATE)

Update item details; pricing, approvers, groups, etc.

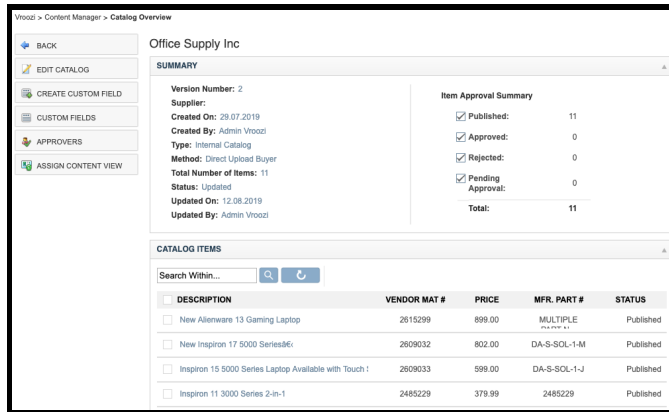
*See your customer procurement team for login, password and url.

1. Locate the catalog in the 'LIVE' column and select the gear icon. (shown above)
2. Check the box for 'Direct Item Update

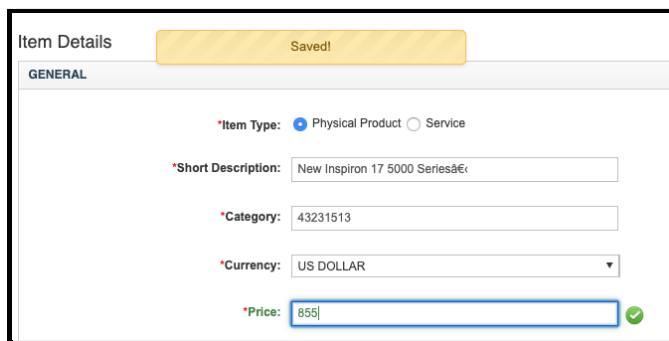


Update.’ (shown on right)

3. Editing a ‘Live Catalog will create a new version which will be relocated to the ‘Working’ column.
4. Updates will not disrupt shopping in current ‘Live’ Catalog.
5. Locate the ‘Working’ catalog and click the catalog name.
6. Click on a line item to open and view details.



7. Make the appropriate change(s)
 - Changes will be validated and saved immediately.

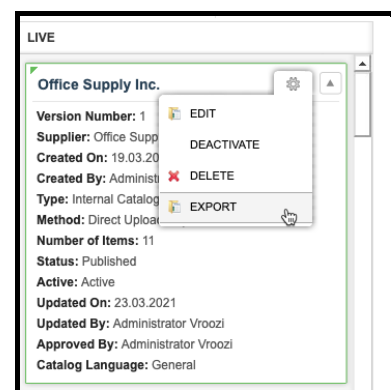


EDIT A CATALOG (FILE UPLOAD)

Begin with the Catalog Template

If you do not already have a copy of the current live catalog, the editing process should begin by downloading the current file and format. Depending on whether you want to overwrite or merge data (see step 4 for further details on this) the downloaded file will serve both purposes but the content will vary.

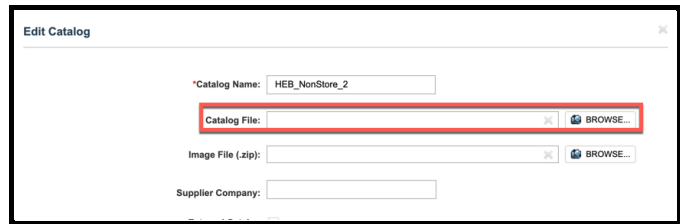
- From the live Catalog, select to ‘Export’.
- The Export



Upload File(s)

- The process for a file upload begins like that of a direct item update; by locating the catalog in the 'Live' column and selecting the gear icon. (shown on page 1)

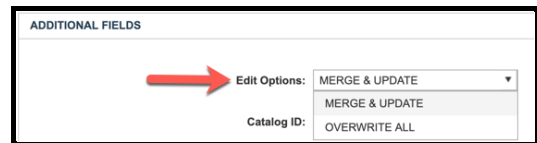
- Editing a 'Live Catalog will create a new version in 'Working'.
- Updates will not disrupt shopping in current 'Live' Catalog.



- Select 'Edit.'
- Upload the saved file under 'Catalog File.'
 - Select 'Browse' to upload the saved file from your device.
 - If the Images are not embedded in the image column for the template, you'll need to attach a separate image file and upload to that specific field.

- Under 'Additional' section, select:

- Merge & Update:** *Default Setting. Select if the file *only includes new or updated items*. These items would then be merged with the current "Master List" of items for that catalog.
- Overwrite All:** Uploads the new of your new file, replaces ALL previous content, becoming your new "Master List".



APPROVAL

Changes to your catalog(s) will require approval by the customer organization. With this in mind, once changes have been saved in our 'Working' catalog, the customer approvers will be notified.

