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1

Basware Contracts Directory
1 Basware Contracts Directory

1.1 Contracts Introduction

The Contracts Directory provides buying organisations with information on contracts and frameworks that have been made available to them. Within the contracts directory module, users will be able to quickly identify who the lead organisation is, the start and end date of the contract, a brief description of what the contract is, who the suppliers are on the contract and how they can buy from the contract or framework.

A feature of the Contracts Directory enables the buyers to complete a Request for Quote (RfQ) exercise to the suppliers on the contract or framework, should there be a need to run a competitive process.

This guide will take the user through the journey of using, updating and maintaining Contracts Directory and troubleshooting any common queries which may be encountered.
1.2 User Roles

There are 3 roles to be aware of when using the contracts directory:

1. **Community Contract Manager** – The role enables the user to administer contracts for the community. This user is typically the Community Administrator as well. So in the case of a Hybrid community, the Community Contract Manager would be a user in that community.

2. **Buyer Contract Manager** – The buyer contract manager role is assigned to a user in the buying organisation to enable them to validate the contract before subscribing to it to allow other users to use it. This user typically also has the Buyer Administrator role as well.

3. **Advanced Buyer** – The advanced buyer role is assigned to a user in the buying organisation to enable them to run a mini-competition via a Request for Quote off a contract or a lot on a framework. These users can only see contracts that have been subscribed to by their organisation.
1.3 Creating a contract or Framework

Within the Basware Commerce Network, organisations have the ability to create, view and manage contracts which have either been shared with them or that they have created themselves. Users will then be able to purchase through these contracts using the suppliers stipulated.

This section will take users through the initial steps required to manage their contracts directory module for their users including: creating a contract, creating a framework, creating csv files for upload, uploading contracts and uploading frameworks.
1.3.1 Creating a contract or Framework

Adding a new contract or Framework

1. Click on the ‘Contracts’ Icon at the top of the page

2. The Contracts directory landing page is displayed

3. The contracts Directory landing page allows the user to create contracts or frameworks within the user interface or by uploading via the upload feature. The page also enables management of contracts via the filter capabilities on the left hand side of the page.

4. To create a contract or Framework click on ‘Create’ button
1.3.1.1 Creating a Contract

1. Select 'Contract' from the drop-down list

2. Complete the 'Add new Contract' page and ensure that the mandatory fields are completed. Mandatory fields are marked with an asterisk and are shown below marked in red.

   **Note:** When creating framework or contract please ensure that there are no spaces before or after your contract reference

3. Complete the mandatory fields
   - Contract Name
   - Contract Reference
   - Start Date
   - Expiry Date
   - Description

   It is at this stage in the process that the Contract header details have been completed. The choice now is to edit the framework or move onto the next stages for creating or loading items, suppliers and so on. To upload suppliers please go to the Contract landing page section.
1.3.1.2 **Creating a Framework**

1. Select framework from the drop down list
2. The ‘Add a new Framework’ page is displayed

3. Complete the mandatory fields. Mandatory fields are marked with an asterisk and are shown below marked in red.

**Note:** When creating frameworks or contracts please ensure that there are no spaces before or after your contract reference

4. Click on the ‘Save’ button
5. The framework page will be displayed

![Framework Page]

6. Click on the ‘Lots’ button

7. To add Lots, click on the ‘Add lot’ button
8. Complete the mandatory fields

9. Click on ‘save’

10. The below page is displayed and you have now successfully added a framework with lots included.

11. It is at this stage in the process that the Framework header details and assigned lots have been completed. The choice now is to edit the framework or move onto the next stages for creating or loading items, suppliers and so on. To upload suppliers please go to the Framework landing page section.
1.4 Uploading Contracts and Frameworks

It may also be the case that a buying organisation has multiple contracts or frameworks that they wish to create, rather than just a single contract. In this scenario, rather than simply loading contracts one by one, the user is able to utilise an upload functionality which allows multiple contracts or frameworks to be uploaded at once. This saves the user time and effort when uploading multiple contracts. This section outlines how to upload multiple contracts at once.
1.4.1 Creating CSV Files for Upload Contracts

Contracts can be uploaded via a CSV (Comma Separated Values) CSV is a delimited text file that uses a comma to separate values. The following section explains how to create a CSV file for uploading contracts.

- **Contract Reference** (Mandatory Field)
- **Contract Name** (Mandatory Field)
- **Contact Owner** (Optional)
- **Contract Eligibility** (Mandatory Field)
- **Start Date** the date format must be Day/Month/Year (Optional)
- **Expiry Date** the date format must be Day/Month/Year (Mandatory Field)

Below shows an example of the CSV file which can be downloaded from the Basware Commerce Network.
1.4.2 Uploading Contracts

This section will take users through the initial steps required to manage their contracts directory module for uploading contract in bulk via CSV File.

1. Select Contract from the drop-down list

2. The ‘Upload contract’ page is displayed

3. Click on the Upload Contracts CSV link to download the file
4. Click on Open

![Image of Internet Explorer dialog box]

5. The below CSV will be displayed

![Image of CSV table]

**Note:** The following fields are mandatory
- Contract Reference
- Contract Name
- Contract Eligibility
- Expiry Date

6. View the contract by clicking on the 'View Contract'

![Image of View Contracts button]

7. Once the contracts have been uploaded successfully and once you are happy with the uploaded content, you can then move onto the contract landing page section to start adding suppliers
1.4.3 Uploading Frameworks

1. Select 'Framework' from the drop-down list

   ![Select Framework](image)

2. The ‘Upload Framework’ page is displayed

   ![Upload Framework Page](image)

3. Click on the Upload Frameworks CSV link to download the file

   ![Download CSV Link](image)

   - Please upload your contracts from a standard .csv file.
   - Please follow the link below to see the sample file demonstrating the format the .csv file should follow.
   - **UploadFrameworks.csv**
   - Please ensure the upload file has the data for mandatory fields Framework Reference, Framework Name, Framework Eligibility, Expiry Date, Lot reference, Lot Name & Lot description.
4. Click on Open

5. The below CSV will be displayed

<table>
<thead>
<tr>
<th>Framework Reference</th>
<th>Framework Name</th>
<th>Framework Eligibility</th>
<th>Expiry Date</th>
<th>Lot reference</th>
<th>Lot Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARMS</td>
<td>Agile Route to Marketing &amp; Communications Services</td>
<td>Class Through</td>
<td>PUBLIC SECTOR</td>
<td>02/02/2012</td>
<td>02/02/2014</td>
</tr>
</tbody>
</table>

**Note**: The following fields are mandatory
- Framework Reference
- Framework Name
- Framework Eligibility
- Expiry Date
- Lot reference
- Lot Name

6. View the contract by clicking on the 'View Contract'
1.5 The Contract Landing Page

The contract page enables the management for the content of the contract such as Suppliers, Items, attachments and categories. From this page you can also subscribe or unsubscribe to the contract.
1.5.1 Add Suppliers

1.5.1.1 Creating CSV Files for Upload Suppliers to a Contract_3

Contracts can be uploaded via a CSV (Comma Separated Values) CSV is a delimited text file that uses a comma to separate values. The following section explains how to create a CSV file for uploading contracts.

**Supplier DUNS** number, which is a 9 digit number (Mandatory Field)
**Contact email** (Mandatory Field)
**Contract Phone** number (Mandatory Field)
**Contract Name** (Mandatory Field)
**Post Code** (Mandatory Field)

Below shows an example of the CSV file which can be download from the Basware Commerce Network.
1.5.1.2 Uploading Suppliers
The uploading of Suppliers can be completed by clicking on the supplier button

1. Click on the ‘Suppliers’ button

2. The supplier page is displayed

3. Click on the upload suppliers button

4. The ‘Select file’ upload page will be displayed

5. Select the ‘Select File’ upload button

6. Navigate to the file you wish to select
7. Click on the ‘Upload Supplier’ Button

![Select file](image)

**Note:** that a progress bar will be displayed, and a message informing you that the upload is in progress

**Note:** Should you receive an error then please check the file and contact your system administrator

8. Once the upload has successfully been completed the below success message will be displayed

![The upload completed successfully](image)

9. Following the successful upload, you can then select to upload more items or view contract

10. Click on ‘View Contract’

**Note:** Please see that the suppliers have been added to the contract and the Registration process has gone up by one

11. The contract management page will be displayed
12. Click on ‘Suppliers’ button for managing the supplier list of uploaded suppliers

**Note:** Suppliers who are not registered will need to be registered via Basware supplier registration
Note: The view of suppliers can be edited to show All, Registered or not registered suppliers
1.5.1.3 **Adding suppliers from supplier directory**

Those suppliers who are on the Basware Network can be added directly from the Supplier Directory.

1. The supplier upload page is displayed

2. Click select supplier

3. From the supplier directory select the suppliers you wish to add, using the left hand side column to refine the search criteria and once the required suppliers have been located, they can be added to the contract.
4. Once you have made your selection click contract / framework button to navigate back
1.6 The Framework Landing Page

The Framework page enables the management for the content of the contract such as Suppliers, Items, attachments and categories. From this page you can also subscribe or unsubscribe to the Framework.
1.6.1 Add Suppliers

1.6.1.1 Creating CSV Files for Upload Suppliers

Contracts can be uploaded via a CSV (Comma Separated Values) CSV is a delimited text file that uses a comma to separate values. The following section explains how to create a CSV file for uploading contracts.

**Supplier DUNS** number, which is a 9 digit number (Mandatory Field)
**Contact email** (Mandatory Field)
**Contract Phone** number (Mandatory Field)
**Contract Name** (Mandatory Field)
**Post Code** (Mandatory Field)

Below shows an example of the CSV file which can be downloaded from the Basware Commerce Network:

```
<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Duns number</td>
<td>Contact email</td>
<td>Contact phone</td>
<td>Contact Name</td>
<td>Post code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>123456789</td>
<td><a href="mailto:admin@procserve.com">admin@procserve.com</a></td>
<td>7944909901</td>
<td>Admin Proc</td>
<td>SW1E 5RS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```
1.6.1.2 **Uploading Suppliers**

The uploading of Suppliers can be completed by clicking on the supplier button

1. Click on the ‘Suppliers’ button

2. The supplier upload page is displayed

3. Click on the upload suppliers button

4. The ‘Select file’ upload page will be displayed

5. Select the ‘Select File’ upload button

6. Navigate to the file you wish to select

7. Click on the ‘Upload Supplier’ Button

**Note:** that a progress bar will be displayed, and a message informing you that the upload is in progress

**Note:** Should you receive an error then please check the file and contact your system administrator
8. Once the upload has successfully been completed the below success message will be displayed

9. Following the successful upload, you can then select to upload more items or view contract

10. Click on ‘View Contract’

Note: Please see that the suppliers have been added to the contract and the Registration process has gone up by one

11. Click on ‘Suppliers’ button for managing the supplier list of uploaded suppliers

Note: Suppliers who are not registered will need to be registered via Basware’s supplier registration
**Note:** The view of suppliers can be edited to show All, Registered or not registered suppliers

<table>
<thead>
<tr>
<th>SHOW ME</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All Suppliers</td>
<td>▶️</td>
</tr>
<tr>
<td>Registered Suppliers</td>
<td>▶️</td>
</tr>
<tr>
<td>Not Registered</td>
<td>▶️</td>
</tr>
</tbody>
</table>
1.6.1.3 **Adding suppliers from supplier directory**

Those suppliers who are on the Basware Network can be added directly from the Supplier Directory.

1. The supplier upload page is displayed.

2. Click select supplier.

3. From the supplier directory.

4. Once you have made your selection click contract / framework button to navigate back to the supplier registration page.
1.7  Items

1.7.1  Creating CSV Files for Items

Contracts can be uploaded via a CSV (Comma Separated Values) CSV is a delimited text file that uses a comma to separate values. The following section explains how to create a CSV file for uploading contracts.

SKU is the Stock Keeping Unit (Mandatory Field)
Supplier DUNS number, which is a 9 digit number (Mandatory Field)
Price unit price of an item is (Optional)

Note: That you can add as many attributes as you require and that all attributes will be added from left to right (A,B,C,D...) and so on, and then displayed from top to bottom on the left hand side of the page.

Below shows an example of the CSV file which can be download from the Basware Commerce Network

Semicolons can be used to separate the values within each column

Below can be viewed and example CSV file containing attributes which has been created using the above template.
- note that the SKU, Supplier Duns have been completed for each attribute
- The Price column is blank as isn't required for this document

Once Uploaded, please view how the above CSV file will be displayed within contract manager
1.7.2 Uploading Items

1. On the Items page click on the 'Upload Items’ button

2. The Upload items page is displayed
3. The CSV file can be downloaded from the link provided

4. Click on open to view the CSV
5. The below CSV will be displayed

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>Supplier DUNS</td>
<td>Price</td>
<td>Attribute1 Name</td>
<td>Attribute2 Name</td>
<td>AttributeN Name</td>
</tr>
<tr>
<td>PROD-234</td>
<td>987654321</td>
<td>1.22 Attr1</td>
<td>Op1;Op2</td>
<td>Op1;Op2;Op3</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The following fields are mandatory
- SKU
- Supplier DUNS
- Price

6. Click on the 'Select File' button

7. Navigate to the document you wish to upload

8. View the contract by clicking on the 'View Contract'
1.7.3 Adding Items

Note: To view the item details, click on the below options

1. View item details
1.8 Adding Attachments

The contracts or frameworks may require supporting documentation such as PDFs, Word and Excel can be added. These documents can all be added within the following section

1. Click on the add attachments button

2. The add attachments page will be displayed

3. Click on the ‘Add Attachments’ button

4. Click on the ‘Browse’ button

5. Navigate to the file you wish to select

6. Click on the ‘Upload Supplier’ Button
7. Click on the ‘Add’ button

![Add and Cancel buttons]

8. The document will then be displayed along with a success message

![Changes successfully saved]

9. The document can be removed by selecting the ‘Remove Selected’ option

![Remove Selected]

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1.9 Selecting Categories

The contracts or framework can have categories assigned covering levels 1 to 4. Level 1 and 2 must be select but then 3 and 4 are optional.

1. Click on the add ‘Categories’ button

2. Click on the ‘Add Categories’ Button

3. The Categories page will be displayed

4. Select the required Categories

5. Click on the ‘Add’ button
6. The Categories will be added and displayed

![Category List Example]

7. The Categories can be removed by selecting the ‘Remove Selected’ option
1.10 Publish

The Publishing feature enables the contract or framework to be published to the buying organisations or users who will shop off the contract.

1. It is at this point that the contract can be published.

2. Click on the Publish button.

3. A pop up message will ask you to confirm if you wish to ‘Publish’ the contract.

4. The Contract status will be updated from status ‘Draft’ to Status ‘Published’.
1.11 **Sharing a Contract**

The ability to share a contract or Framework with buying organisations enables the contract to be shared with organisation and communities. Please note that each organisation must first subscribe to the contract before they can buy off the contract.

1. It is at this point that the contract can be shared with other organisation.

2. Click on the ‘Sharing’ button.

3. The below page will be displayed.

4. From the drop down select the community/buying organisation you wish to share with.

5. Click on the ‘Add’ button.
6. The organisation will be added as shown below

![Sharing Contract: New Contract](image-url)
1.12 **Subscribe**

1. Click on subscribe

![Subscribe button](image)

2. The organisations you wish to subscribe will be displayed from the drop down

![Subscribe options](image)

3. The below success message will be displayed

![Success message](image)
Buying Organisations using Contracts Directory
2 Buying Organisations using Contracts Directory

1. Click on the ‘Contracts’ Icon at the top of the page.

2. The Contracts page will be displayed
2.1 Viewing Contracts

2.1.1 View the contracts details

1. To view the contract details, Click on the links under the ‘Ref’ or ‘Name’ headings

2. This will then display the contracts page from which the framework can be managed

3. The contract Attributes can be viewed via the buttons provided at the top of the page
2.1.2 View Suppliers

1. Click on the ‘Supplier’ button to view suppliers

2. View the supplier that has been uploaded against the contract
2.1.3 View Items

1. Click on items to filter, create line items and raise RFQs against items

2. The items page will be displayed

3. The fields on the left hand side of the page, displays filters that enable the user to sort the supplier’s products or services attributes which are then displayed within the view
4. The displayed results can be refined by selecting categories from the left hand column.
5. The filters can be cleared by clicking the clear filters.

6. Once you have the results that you are looking for, you can ‘Create line Item’ by clicking on the link provided.

7. A message is displayed asking if you have added all the ‘Line items’ you require.

8. The ‘Line Item’ and Supplier are then added to the RFQ.
9. The added line item can be viewed in the example below

11. The only remaining task on the form is to complete the reference, and date fields, add attachment and any special instructions if required.
12. Once you are happy with the content the Contract can be published by clicking on the "Publish" button as shown below
2.1.4 View Attachments

1. To view attachments then click on the attachments button

2. The attachments page is displayed

<table>
<thead>
<tr>
<th>Filename</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PrePri.UploadItems.csv</td>
<td></td>
</tr>
<tr>
<td>PrePri.UploadSuppliers.csv</td>
<td></td>
</tr>
</tbody>
</table>

3. Click on the file link to download the file

<table>
<thead>
<tr>
<th>Filename</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PrePri.UploadItems.csv</td>
<td></td>
</tr>
</tbody>
</table>

4. The downloaded file will be displayed

5. Click on the file to display the file
2.1.5  Request a Quote

This section explains how to raise and manage Requests for Quote through the product. Contracts Directory enables the management of contract and framework agreements and the ability for the buyer to purchase from a contract by raising RFQs which have preassigned suppliers assigned.

1. Click on the ‘Request a Quote’ button

2. The Request for quote form is displayed

![Request a Quote form]

3. Complete the mandatory fields

4. Add line items

![Add a Line Item]

5. The add line items page is displayed

6. Complete the mandatory fields
7. Select the categories that you require

8. Once the categories have been selected, select the ‘Add’ or ‘add another line item’

9. The line item is added

10. Click on the ‘Publish’ button
2.1.6 View Categories

1. Click on the Categories

The categories will be displayed as view only
2.2 Viewing Framework

2.2.1 View Suppliers for a Framework

1. Click on the ‘Supplier’ button to view suppliers

2. View the supplier which are uploaded against the contract
2.2.2 View Items for a Framework

1. Click on the 'Items' button to view items on the Framework

2. The items page is displayed
3. The fields on the left hand side of the page, display filters that enable the user to sort the supplier’s products or services attributes which are then displayed within the view.

<table>
<thead>
<tr>
<th>LINE ITEMS</th>
<th>7 suppliers to choose from</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Database Specialist</td>
</tr>
<tr>
<td>Junior Developer</td>
</tr>
<tr>
<td>Junior Network Specialist</td>
</tr>
<tr>
<td>Junior Security Specialist</td>
</tr>
<tr>
<td>Senior Database Specialist</td>
</tr>
<tr>
<td>View More</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PHASE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpha</td>
</tr>
<tr>
<td>Beta</td>
</tr>
<tr>
<td>Discovery</td>
</tr>
<tr>
<td>Live</td>
</tr>
<tr>
<td>View More</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CAPABILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software Engineering and Ongoing Support</td>
</tr>
</tbody>
</table>
4. The displayed results can be refined by selecting categories from the left hand column

5. Once you have the results that you are looking for, you can ‘Create line Item’ by clicking on the create link button

6. A message is displayed asking if you have added all the Line items you require, If yes the select OK, if No cancel and amend the line items
7. The ‘Line Item’ and Supplier are then added to the RFQ

8. Click on publish
2.2.3 View Attachments for a Framework

Frameworks may need additional supporting documentation such as PDFs, Word or excel documents to support the supplier’s products and services.

1. To view attachments then click on the attachments button

2. The attachments page is displayed

<table>
<thead>
<tr>
<th>Filename</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>uploadSuppliers12.csv</td>
<td></td>
</tr>
</tbody>
</table>

3. Click on the file link to download the file

<table>
<thead>
<tr>
<th>Filename</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>uploadSuppliers12.csv</td>
<td></td>
</tr>
</tbody>
</table>

4. The downloaded file will be displayed

5. Click on the file to display the file
2.2.4  Request a Quote for a Framework

The Request For Quote feature enables the buyer to raise an RFQ off the contract or framework which is sent to the suppliers on the contract.

1. Click on the ‘Request a Quote’ button

3. The Request for quote form is displayed

4. Complete the mandatory fields
5. Add line items

6. The add line items page is displayed

7. Complete the mandatory fields

8. Select the categories that you require

9. Once the categories have been selected select the ‘Add’ or ‘add another line item’

10. The line item is added
11. Click on the ‘Publish’ button

**Note:** Once the RFQ has been published, the RFQ will be sent to all the suppliers listed within the contract or Framework.
2.3 Adding Attachments for a contract

1. Click on the add attachments button

2. The add attachments page will be displayed

3. Click on the ‘Add Attachments’ button

4. Click on the ‘Browse’ button

5. Navigate to the file you wish to select

6. Click on the ‘select the file’ Button
7. Click on the ‘Add’ button

![Add Cancel](image)

8. The document will then be displayed along with a success message

![Changes successfully saved](image)

<table>
<thead>
<tr>
<th>Remove Selected</th>
<th>Filename</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>Guidance_on_Dynamic_Purchasing_System.pdf</td>
<td></td>
</tr>
</tbody>
</table>

9. The document can be removed by selecting the ‘Remove Selected’ option
2.4 Selecting Categories for a Contract

1. Click on the add ‘Categories’ button, which then displays the add categories button

2. Click on the ‘Add Categories’ Button

3. The Categories page will be displayed

4. Select the required Categories

5. Click on the ‘Add’ button

6. The Categories will added and displayed

7. The Categories can be removed by selecting the ‘Remove Selected’ option
2.5 Sharing a Contract

1. It is at this point that the contract can be Shared

2. Click on the ‘Sharing’ button

3. The below page will be displayed

4. From the drop down select the community / buying organisation you wish to share with

5. Click on the ‘Add’ button

6. The organisation will be added as shown below
2.6 Subscribe

1. Click on subscribe

2. The organisations you wish to subscribe will be displayed from the drop down

3. The below success message will be displayed
2.7 Request a Quote

1. Click on the ‘Request a Quote’ button

   ![Request a Quote button]

2. The Request for quote form is displayed

   ![Request a Quote form]

3. Complete the mandatory fields

4. Add line items

   ![Add a Line Item button]

5. The add line items page is displayed

6. Complete the mandatory fields

   ![Request a Quote form with line items]

7. Select the categories that you require
8. Once the categories have been selected select the ‘Add’ or ‘add another line item’

9. The line item is added

10. Click on the ‘Publish’ button
2.8  Items Duplicate

2.8.1  Creating CSV Files for Items for a contract

SKU is the Stock Keeping Unit (Mandatory Field)
Supplier DUNS number, which is a 9 digit number (Mandatory Field)
Price unit price of an item is (Optional) and could represent a preferred rate

Note: That you can add as any attributes as you require and that all attributes will be added from left to right (A,B,C,D...) and so on, and then displayed from top to bottom on the left hand side of the page.

Below shows an example of the CSV file which can be downloaded from the Basware Commerce Network:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>Supplier DUNS</td>
<td>Price</td>
<td>Attribute1 Name</td>
<td>Attribute2 Name</td>
<td>AttributeN Name</td>
</tr>
<tr>
<td>PROD-234</td>
<td>987804321</td>
<td>1.22</td>
<td>Attr1</td>
<td>Op1;Op2</td>
<td>Op1;Op2;Op3</td>
</tr>
</tbody>
</table>

Semicolons can be used to separate the values within each column.

Below can be viewed an example CSV file containing attributes which has been created using the above template.
- note that the SKU, Supplier Duns have been completed for each attribute
- The Price column is blank as isn’t required for this document

Once Uploaded, please view how the above CSV file will be displayed within contract manager.
2.8.2 Uploading Items for Contacts

1. On the Items page click on the 'Upload Items' button.

2. The Upload items page is displayed.
3. The CSV file can be downloaded from the link provided

```
Please upload your items from a standard .csv file.
Please follow the link below to see the sample file demonstrating the format
the .csv file should follow
Please note that when upload a new item list, all of your previous items
will be replaced with the current list

Upload_Items.csv

Please ensure the upload file has the data for mandatory fields SKU, Supplier
DUNS & Price
```

4. Click on open to view the CSV

```
What do you want to do with UploadItems.csv?
Size: 124 bytes
From: pluto-buyers.procserveonline.com

Open
The file won't be saved automatically.

Save

Save as

Cancel
```
5. The below CSV will be displayed

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>PROD-234</td>
<td>Supplier DUNS</td>
<td>987654321</td>
<td>Price</td>
<td>1.22</td>
<td>Attr1</td>
</tr>
</tbody>
</table>

**Note:** The following fields are mandatory
- SKU
- Supplier DUNS
- Price

6. Click on the 'Select File' button

7. Click on the 'Select File' button
8. Navigate to the document you which to upload

9. View the contract by clicking on the 'View Contract'
2.8.3 Adding Items for a Contract

Note: To view the item details, click on the below options

1. View item details