



Informatica MDM – Product 360

Supplier Portal - User manual, Administrator

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1 Informatica MDM - Product 360 - Supplier Portal

The Informatica MDM - Product 360 - Supplier Portal portal solution from Informatica Corporation is part of the overall solution Informatica PIM and makes it easier for you to import supplier catalogs into your Informatica PIM - Desktop product management system. With a simple user interface similar to Facebook, you can communicate conveniently with your suppliers. Messages can contain links and attachments. This means that it is possible to communicate using only the portal where everything is documented accordingly. This makes product launches much faster, particularly with extremely large assortments – including quality assurance on all supplier data.

The portal defines a data acquisition process for the suppliers. Descriptions, format definitions, and example data can be stored for the individual PIM organizations, enabling suppliers to become productive quickly. Once a supplier has uploaded its catalog data to the portal, it is automatically checked and the supplier has the opportunity to correct any errors. You then have the option of inspecting the data again before you transfer it to the product management system.

You can invite your suppliers to use the portal. The relevant main contact at the supplier receives the invitation by e-mail. As soon as this user logs in to the portal, he/she can create additional users and thus provide more employees in the organization with the opportunity to upload catalog data into the portal.

1.1 Typographic conventions

This documentation uses the following conventions:

1. Instructions are numbered step by step.
2. This is the second step in the instructions.
 - ⇒ System responses are indicated by an arrow.
 - Names of screen items appear in quotation marks: "User name".
 - Names of buttons are highlighted in color: **Delete**.
 - Paths, file names and console entries are shown in a different font to make the distinction clear immediately: C:\Program Files\.

Text markings at various points indicate special instructions, tips, or warnings, as the following examples show:



Note: You will find information about special features here.



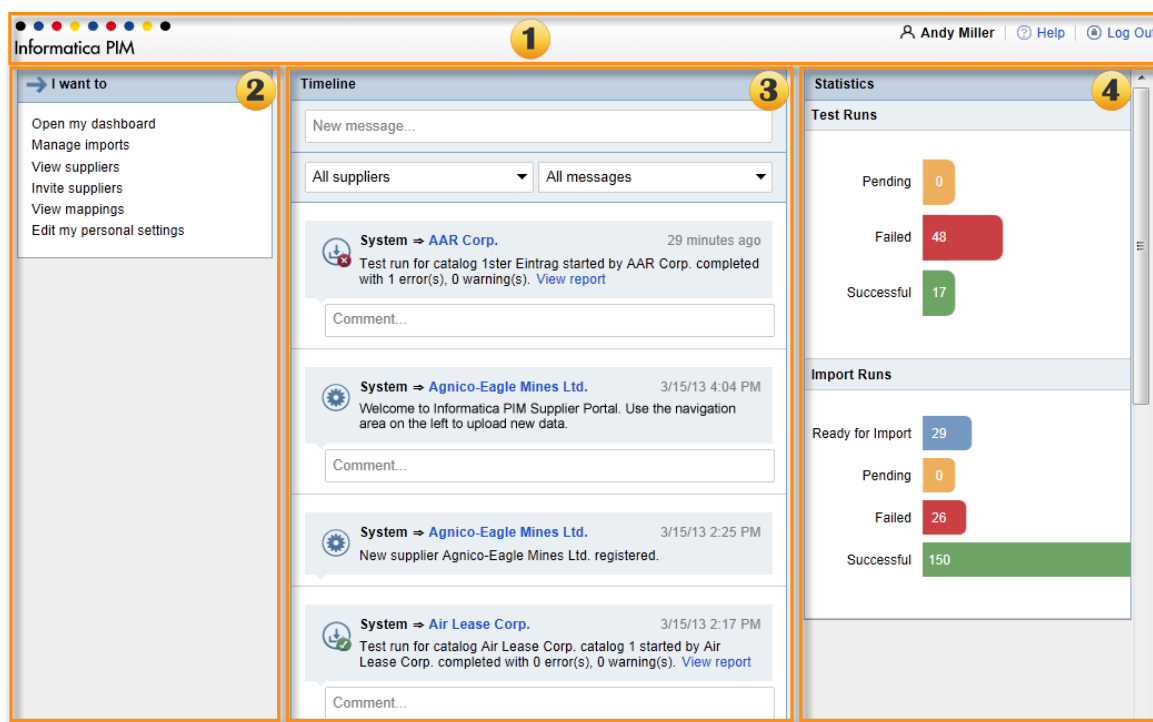
Tip: You will find tips and assistance here.



Caution: Warnings about sources of errors and how to avoid them appear here.

1.2 Operating instructions


Once you have successfully logged in, Product 360 - Supplier Portal is displayed with the following standard configuration:



The user interface

The program interface is divided into the following areas:

Area	Description
1	At the top is the header area . The header area provides information about the user name under which you are logged in and allows you to log out of the system. You can also call up the online help from the header area.
2	On the left is the menu area . Here, you can select which actions you want to perform.
3	In the center is the action area . Depending on which action you have selected in the menu area, this is where the corresponding information is displayed or where you can perform the selected action.

Area	Description
	Under " Statistics " on the right, you will find statistical reports on the test runs ^[43] and imports that have been completed. The statistics relate to operations managed under " Manage imports " ^[41] . Click on one of the bars to open this area with the corresponding filtering.



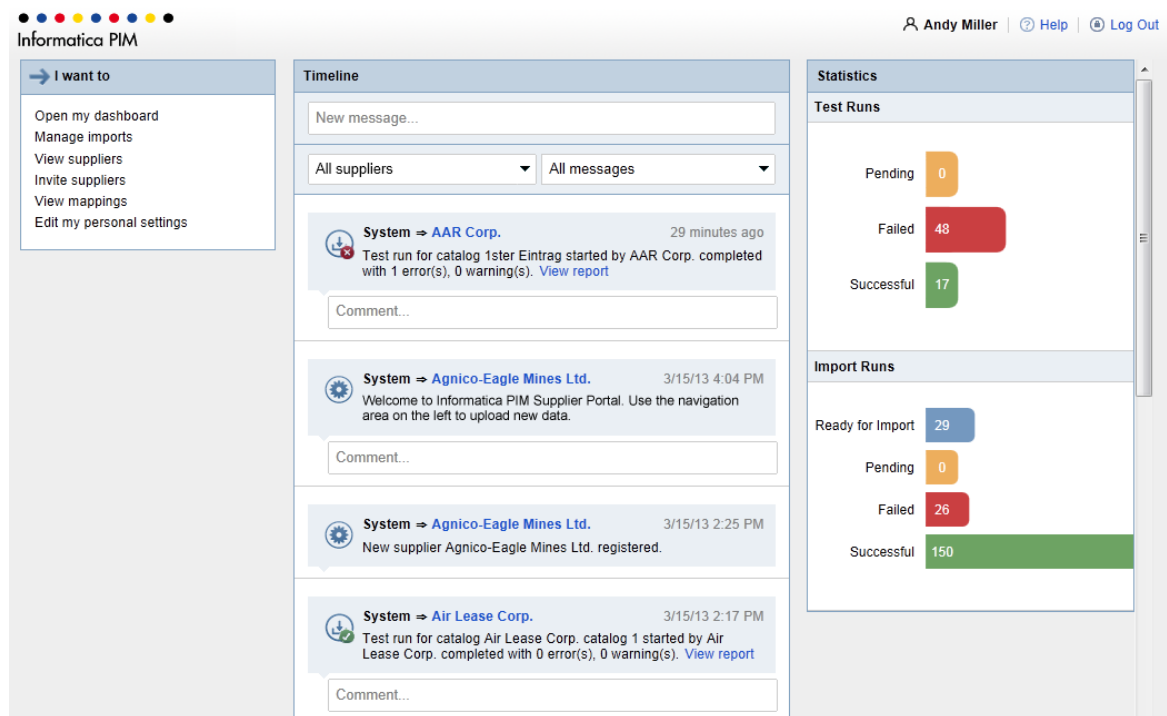
Note: The dashboard view is updated automatically.

2 Dashboard

The "dashboard" provides a central reference point. You can navigate to it at any time by clicking on **Open my dashboard** in the menu area.

The "**Timeline**" contains messages and system messages. From here, you can communicate with your suppliers.

Under "**Statistics**" on the right, you will find statistical reports on the [test runs](#)⁴³ and imports that have been completed. The statistics relate to operations managed under "[Manage imports](#)⁴¹". Click on one of the bars to open this area with the corresponding filtering.

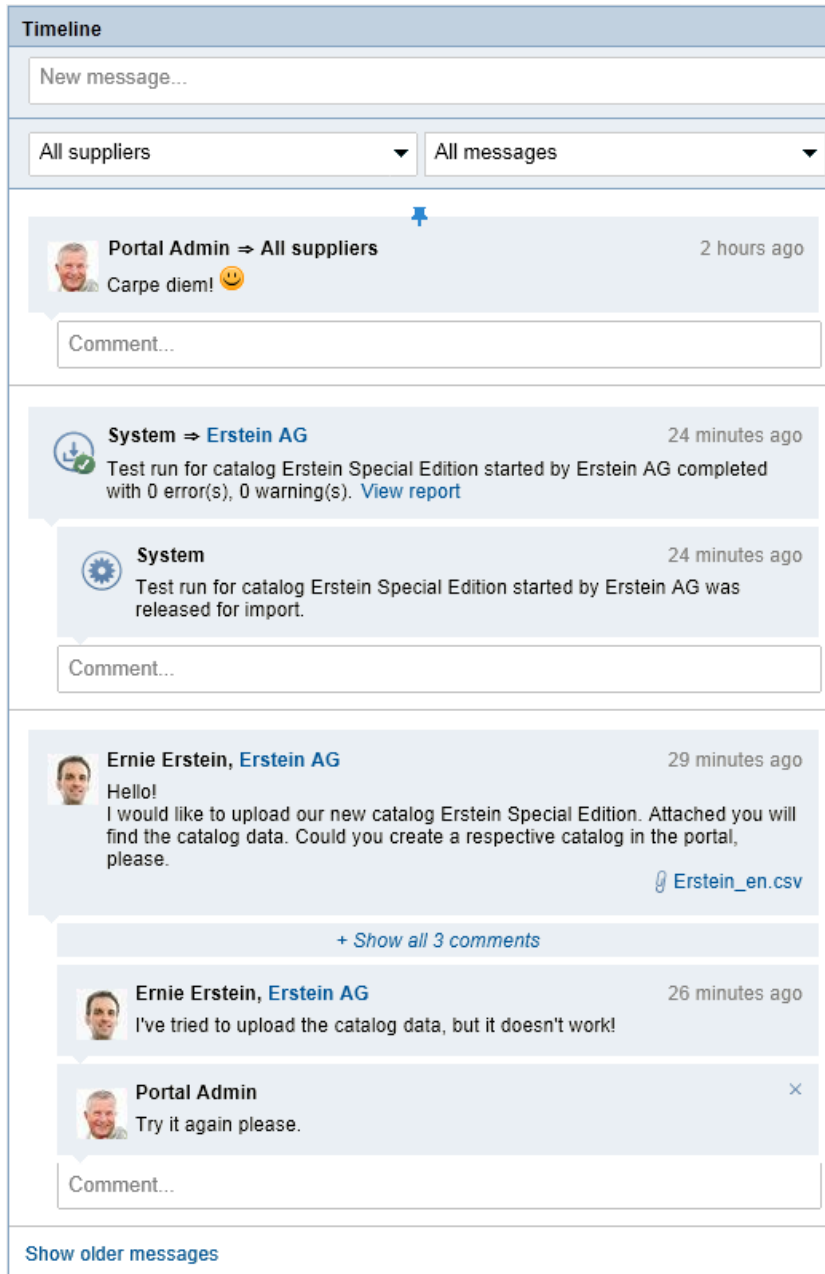


The dashboard

3 Timeline

The "Timeline" is located on the "[dashboard](#)"^[8] and is used as the central communication hub. This is where you will find messages and system messages about user registrations and the [progress of test runs](#)^[43] and [import runs](#)^[44]. From here, you can communicate with your suppliers by:

- [Sending messages to suppliers](#)^[10]
- [Replying to messages](#)^[11]



Timeline

New message...

All suppliers ▼ All messages ▼

Portal Admin ⇒ All suppliers 2 hours ago
Carpe diem! 😊

Comment...

System ⇒ Erstein AG 24 minutes ago
Test run for catalog Erstein Special Edition started by Erstein AG completed with 0 error(s), 0 warning(s). [View report](#)

System 24 minutes ago
Test run for catalog Erstein Special Edition started by Erstein AG was released for import.

Comment...

Ernie Erstein, Erstein AG 29 minutes ago
Hello!
I would like to upload our new catalog Erstein Special Edition. Attached you will find the catalog data. Could you create a respective catalog in the portal, please.
[Erstein_en.csv](#)

[+ Show all 3 comments](#)

Ernie Erstein, Erstein AG 26 minutes ago
I've tried to upload the catalog data, but it doesn't work!

Portal Admin 26 minutes ago
Try it again please.

Comment...

[Show older messages](#)

The Timeline

The "Timeline" displays messages, sorted by when they were received. Older messages are hidden and can be shown by clicking on **Show older messages** in the lower section of the Timeline.

You can also pin a message at the top of the Timeline. This message can then be seen at the top by all users.

You can also [filter](#)^[13] messages by the supplier they were sent to and by the message type.

You can also [delete](#)^[15] messages after sending them.

The view is updated automatically. The system searches in the background for changes and displays these immediately.

In the case of system messages relating to the [progress of test runs, import releases](#)^[43], and [import runs](#)^[44], corresponding logs are also sent. You can view these by clicking on **Open result** in the relevant system message.



Tip: You can also choose to receive [e-mail notification](#)^[52] of the messages displayed in the "Timeline".

3.1 Sending messages to suppliers

This section describes how to send messages to suppliers.

Prerequisites

You have opened the "dashboard".

Procedure








Perform the following steps in order:

1. Click in the top input box in the "Timeline".
 - ⇒ A message editor opens.
2. To send the message to a particular supplier, click in the "To" field and enter the name of the relevant supplier.
 - ⇒ When you start entering the supplier name, Product 360 - Supplier Portal browses the list of supplier names entered for the character string entered and offers any supplier names found for selection.



Note: If you do not select a supplier name, the message is sent to all suppliers.

3. Click in the input box underneath and enter your message text. When entering the message text, you can also use the following emoticons:

Emoticon	Character string to enter
	:) or :-)
	:(or :-(
	:P or :-P
	:D or :-D
	;) or ;-)
	:y:
	:n:

4. If you want to attach a file to your message, click on **Attachment** and select the relevant file.

⇒ A corresponding file attachment is generated. You can delete this by clicking on **Remove**.

5. Click on **Send**.

Result

The message is sent to the supplier(s). They can then reply to your message.

You can still see the message, which is added to the top of the "Timeline".

You can also [delete](#)¹⁵⁾ messages after sending them.

You can refresh the display at any time by clicking on **Refresh** in the top right corner.



Tip: Your personal avatar is shown next to your message. You can change this in your [personal settings](#)⁵²⁾.

3.2 Replying to messages

This section describes how to reply to messages.

Prerequisites

You have opened the "dashboard".








Procedure

Perform the following steps in order:

1. In the "Timeline", find the message you want to reply to.
2. Click in the input box below the message.

⇒ A message editor opens.

3. Enter the required text for your reply. When entering the reply text, you can also use the following emoticons:

Emoticon	Character string to enter
	:) or :-)
	:(or :-(
	:P or :-P
	:D or :-D
	;) or ;-)
	:y:
	:n:

4. If you want to attach a file to your reply, click on **Attachment** and select the relevant file.

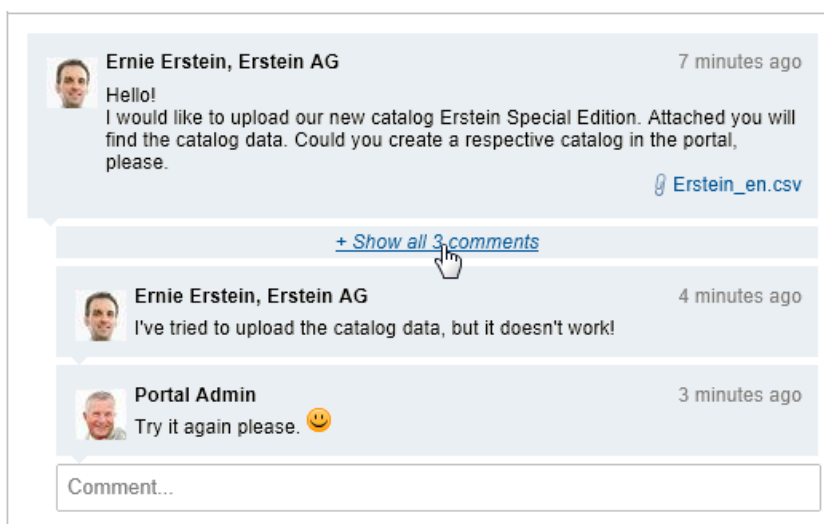
⇒ A corresponding file attachment is generated. You can delete this by clicking on **Remove**.

5. Click on **Send**.

Result

The reply is sent to the relevant supplier. The supplier can then reply to your message in turn.

You can still see the reply, which is appended to the original message. If this produces a long history of communication, the older replies are hidden. To view more replies, click on **Show all comments**. Click on **Hide comments** to restrict the display again.



Message with numerous replies

You can also [delete](#) ¹⁵ messages after sending them.



Tip: Your personal avatar is shown next to your message. You can change this in your [personal settings](#)⁵².

3.3 Filtering messages

The messages displayed in the "Timeline" can be filtered by the supplier they are sent to and by the message type. The following **message types** are distinguished:

Message type	Meaning
"All Messages"	All messages
"User generated messages"	Messages sent by users.
"Supplier registration"	Messages sent when users are registered.
"Data upload messages"	Messages sent when uploading catalog data.

Prerequisites

You have opened the "Dashboard".

Procedure

Perform the following steps in order:

1. To filter by a supplier:
 - a. Click in the left-hand combo box.
 - b. Select the relevant supplier or enter the name of the supplier.
2. To filter by a message type:
 - a. Click in the right-hand drop down list.
 - b. Select the desired message types.
 - c. Click on **Apply**.

Result

The messages are filtered by the specified criteria and displayed in the "Timeline". Under some circumstances, not all messages that meet the filter criterion may be visible, only the most recent. To view older messages, click on **Show older messages** in the lower section of the timeline.

3.4 Pinning messages



As a portal administrator, you have the option of pinning a message at the top of the Timeline. All users will then see this message at the top.

Prerequisites

You have opened the "dashboard".

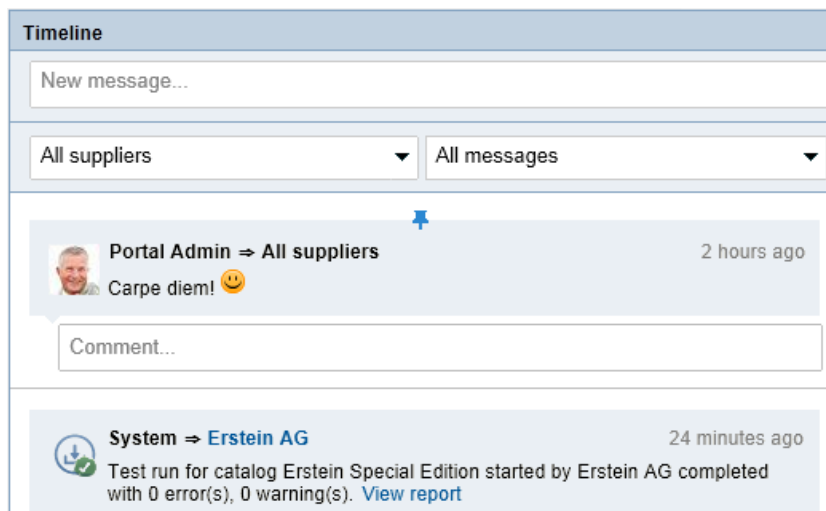
Procedure

Perform the following steps in order:

1. In the "Timeline", find the message you want to pin.
2. Position the mouse pointer on the top edge of the message window.
⇒ The  button is displayed.
3. Click on the  button.

Result

The message is pinned at the top of the Timeline, where it can be seen by all users. Later messages are displayed below this message.



Pinned message

If you pin more messages in the same way, all pinned messages are displayed at the top of the Timeline, sorted by date.



Note: Pinning can be canceled by clicking on the  button.

3.5 Deleting messages



You can also delete messages after sending them. This is described in this section.

Prerequisites

You have opened the "Dashboard".

Procedure

Perform the following steps in order:

1. In the "Timeline", find the message you want to delete.
2. Position the mouse pointer on this message.
 - ⇒ The  button is displayed next to the message on the top right-hand side.
3. Click on .
- ⇒ You are then prompted to confirm the action.
4.
Confirm with **Yes**.
 - ⇒ The message is deleted.


4 Suppliers

To get an overview of all suppliers in the portal, click on **View suppliers** in the menu area. All suppliers will then be listed in the action area.

Supplier overview					
<input type="text"/>		Search	All suppliers ▼	1-50 od 1645 Back Next Refresh	
Supplier name ▲	Admin name	Admin e-mail	Admin state	Users	Action
Ernst Ernsting GmbH	Ernst Ernsting	ernst@ernstin...	Active	2	Choose action ▼
Erstein AG	Ernie Erstein	ernie@ernstei...	Active	3	Open supplier
ESA Technologies Inc.	Resa Esa	resa@esa-tech..	Registered	1	Open supplier

Supplier overview

In addition to the company name, the "Supplier Overview" shows the e-mail address, name, and status of the supplier administrator. The **administrator** is the main contact at the relevant supplier. The status of the administrator or the supplier can have the following values:

Status	Meaning
"Registered"	The main contact at the supplier has registered in the portal. However, before they can log in to the portal, they must be accepted ²⁰ by the portal administrator.
"Invited"	The supplier has been invited by e-mail to use the portal. They can connect to the portal, set their password, log in to the portal, and thus activate their access.
"Not invited"	The supplier is entered in Product 360 Desktop but has not yet been invited to use the portal.
"Active"	The supplier has active access to the portal and can perform actions there according to their rights.
"Deactivated"	The supplier's access to the portal has been deactivated ³² . The supplier and all assigned users cannot log into the portal. The  symbol is used as a prefix to communicate this information more quickly.

The "Users" column displays the number of registered users in the supplier's organization.

You can sort the list alphabetically by the criteria shown in the columns. To do this, click on the title of the relevant column. The list is then sorted in ascending order of the entries in this column. Clicking on the column title again sorts the list in descending order.

You can use the **Next** and **Back** buttons to scroll through the list.

You can refresh the display at any time by clicking on **Refresh** in the top right corner.

In the "Supplier Overview", you can also [search for suppliers and filter by supplier status](#)^[17].

The "Action" column can be used to perform various actions involving the relevant supplier, depending on the status of the supplier:

- [Invite a supplier](#)^[18]
- [Recall an invitation](#)^[19]
- [Resend an invitation](#)^[20]
- [Accept a supplier](#)^[20]
- [Reject a supplier](#)^[22]
- [View supplier details](#)^[23]



Note: New suppliers must be entered in Product 360 Desktop before they can be [invited to use the portal](#)^[18].

4.1 Searching for and filtering suppliers

In the "Supplier Overview" you can also browse for specific suppliers and filter by [supplier status](#)^[16].

The search function searches for the search criterion in the "Supplier Name", "Admin Name" and "Admin E-mail" fields.

Prerequisites

You have opened the "[Supplier Overview](#)"^[16].

Procedure

To perform a **search** proceed as follows:

1. Enter the character string you want to search for in the input box above the supplier list.
2. Click on **Search**.
 - ⇒ The fields specified above are searched for the character string. The search result is displayed in the supplier list.

To **filter** the results, proceed as follows:

1. Click in the combo box on the right.
2. Select the status you want to use as a filter criterion.
 - ⇒ The supplier list is filtered on the basis of the status selected.



Tip: The search and filter functions can also be combined.

4.2 Inviting suppliers

This section describes how you can invite suppliers by-email to use Product 360 - Supplier Portal.

Prerequisites

The relevant suppliers must already have been created as suppliers in Product 360 Desktop. The name and e-mail address of the main contact at the relevant suppliers must be known. The main contact acts as the administrator for the relevant supplier in the portal.

Procedure

There are several ways to invite suppliers.

Using the menu area:

1. Click on **Invite suppliers** in the menu area.
 - ⇒ All suppliers entered in Product 360 Desktop that do not yet have portal access are listed in the action area.



Note: The list is sorted in ascending order by supplier name. You can sort the list in descending order by clicking on the title of the "Supplier Name" column.

You can use the **Next** and **Back** buttons to scroll through the list.

2. In the list, select the suppliers you want to invite and then follow the instructions displayed in the action area.

Using the "[Supplier Overview](#)"¹⁶:

1.
 - Find the relevant supplier in the "Supplier Overview".
2. In the "Action" column, select the "Invite supplier" option.
 - ⇒ The "Complete Supplier Details" dialog box opens in the action area.
3. Follow the instructions displayed in the action area.

Result

Portal access is created for the selected suppliers. The supplier administrators are invited by e-mail to log in to the portal and set their password. The user name to be entered at login is the e-mail address of the main contact. The suppliers can then be found in the "[Supplier Overview](#)"¹⁶ and have the [status](#)"¹⁶ "Invited".



Note: If you subsequently notice that you have specified the wrong person as the main contact when sending invitations or you have entered the incorrect e-mail address, you can [recall the invitation](#)"¹⁹.

4.3 Recalling an invitation

If, for example, you discover that you have specified the wrong person as the main contact when [sending an invitation](#)"¹⁸ or entered the wrong e-mail address, you can recall the invitation. This is described in this section.

Prerequisites

The relevant supplier or user must still have the status "Invited".

Procedure

There are two ways to recall invitations.

Using the "[Supplier Overview](#)"¹⁶:

1.

Find the relevant supplier in the "Supplier Overview".

2. In the "Action" column, select the "Revoke invitation" option.

⇒ You are then prompted to confirm the action.

3.

Confirm with **Yes**.

⇒ The person entered as the main contact is deleted as the supplier administrator. In the "Supplier Overview", the supplier's status is now reset to "Not invited". As soon as you know the correct main contact and their e-mail address, you can [re-invite the supplier](#)"¹⁸.

Using the "Supplier Details":

1. Find the relevant user under "Users".

2. In the "Action" column, select the "Revoke invitation" option.

⇒ You are then prompted to confirm the action.

3.

Confirm with **Yes**.

⇒ The invitation is recalled and the user is deleted.

4.4 Resending an invitation

If you have invited a supplier or user and they have not yet logged in to the portal after a certain period of time, you can send that supplier another invitation. This is described in this section.

Prerequisites

The relevant supplier must still have the status "Invited".

Procedure

There are two ways to resend invitations.

Using the "[Supplier Overview](#)"¹⁶¹:

1.

Find the relevant supplier in the "Supplier Overview".

2. In the "Action" column, select the "Resend invitation" option.

⇒ You are then prompted to confirm the action.

3.

Confirm with **Yes**.

⇒ The invitation is resent to the supplier administrator.

Using the "Supplier Details":

1. Find the relevant user under "Users".

2. In the "Action" column, select the "Resend invitation" option.

⇒ You are then prompted to confirm the action.

3.

Confirm with **Yes**.

⇒ The invitation is resent to the user.

4.5 Accepting suppliers

When a new supplier has registered on the portal using the login screen, as a portal administrator you will receive a system message to notify you of this. Before this supplier can log in to the portal, that supplier must first be accepted.

Procedure

There are two ways to accept suppliers.

Using the "[Supplier Overview](#)"¹⁶:

1.
Find the relevant supplier in the "Supplier Overview".
2. In the "Action" column, select the "Accept supplier" option.
 - ⇒ The "Associate with Supplier in PIM Desktop" dialog box opens.

Using the "[Timeline](#)"⁹:

1. Find the system message about the new supplier registration in the "Timeline".
2. There, click on **Handle request**.
 - ⇒ The "Supplier User Details" dialog box opens.
3. Click on **Accept supplier**.
 - ⇒ The "Associate with Supplier in PIM Desktop" dialog box opens.

The "Associate with Supplier in PIM Desktop" dialog box is used to create a link between the supplier and the corresponding supplier entered in Product 360 Desktop.



Note: The list is sorted in ascending order by supplier name. You can sort the list in descending order by clicking on the title of the "Supplier in PIM Desktop" column.

You can use the **Next** and **Back** buttons to scroll through the list.

Perform the following steps in sequence:

1. Select the corresponding supplier from the supplier list. If the supplier has not yet been entered in Product 360 Desktop, you can add it as follows:
 - a. Click on **Create new organization for the supplier**.
 - ⇒ An input box is displayed.
 - b. Enter the name of the supplier in the input box.
 - c. Click on **Create and associate**.
 - ⇒ The supplier is created in Product 360 Desktop.
 - ⇒ The "Assign catalogs" dialog box opens. This dialog box is used to assign the supplier one or more catalogs from Product 360 Desktop to which the supplier can then upload the data. Proceed to step 3.
2. Click on **Associate and continue**.

- ⇒ The "Assign catalogs" dialog box opens. This dialog box is used to assign the supplier one or more catalogs from Product 360 Desktop, to which the supplier can then upload data.
- 3. Select the relevant catalog(s) from the list. If a catalog does not yet exist in Product 360 Desktop, you can add it as follows:
 - a. Click on **Create new catalog**.
 - ⇒ An input box is displayed.
 - b. Enter the name of the catalog to be created in the input box.
 - c. Click on **Create**.
 - ⇒ The catalog is created in Product 360 Desktop and added to the list.
- 4. Click on **Assign and close**.

Result

The supplier has been accepted. The supplier is notified of this by e-mail. The supplier's [status](#)^[16] changes from "Registered" to "Active".

4.6 Rejecting suppliers

When a new supplier has registered in the portal using the login screen, you can either [accept](#)^[20] or reject the supplier. This is described in this section.

Procedure

There are several ways to reject suppliers.

Using the "[Supplier overview](#)"^[16]:

1.
 - Find the relevant supplier in the "Supplier Overview".
2. In the "Action" column, select the "Reject supplier" option.
 - ⇒ You are then prompted to confirm the action.
3.
 - Confirm with **Yes**.

Using the "[Timeline](#)"^[9]:

1. Find the system message about the new supplier registration in the "Timeline".
2. There, click on **Handle request**.
 - ⇒ The "Supplier User Details" dialog box opens.
3. Click on **Reject supplier**.
 - ⇒ You are then prompted to confirm the action.

4.

Confirm with **Yes**.


Result

The supplier is deleted from the list of suppliers. The supplier is notified by e-mail that access has been refused.

4.7 Viewing supplier details

This section describes how to view supplier details.

Prerequisites

You have opened the "[Supplier Overview](#)" .

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2. In the "Action" column, select the "Open supplier" option.



Tip: You can also use the "Timeline" to view supplier details for a particular supplier. The supplier names are displayed as a link in the message header. Clicking on this link opens the supplier details for the relevant supplier.

Result

The "Supplier Details" are displayed.

Supplier details

[To supplier overview](#)

Supplier name
Erstein AG

Supplier identifier
Erstein AG

Automatic import configuration
Manual approval required [Edit](#)

Supplier state
Inactive [Edit](#)

Data online editing configuration
Online editing of catalog data disabled [Edit](#)

List of Users

Name ▲	E-mail	State	Administra.	Action
Emma Schmidt	eschmidt@erstein.com	Invited	No	Choose action ▼
Ernie Erstein	ernie@erstein.com	Active	Yes	Choose action ▼
John Turner	jturner@erstein.com	Invited	No	Choose action ▼

[Create new User](#)

List of Catalogs

Name ▲	State	Last test run state	Last test run date	Last import state	Last import date	Action
Erstein Special Edition	Active					Open catalog
Erstein_2012	Active					Open catalog

[Create new catalog](#)

Supplier details

In addition to the name, you can see whether the supplier is linked to a supplier in Product 360 Desktop and, if so, which one. You can also see which import configuration is selected for the supplier and whether the supplier is authorized to maintain their catalogs online. You can also see the current status here and, if you have the necessary permissions, [modify it](#) ²⁵.

Under "Users", you will find a list of all users registered by the supplier and their status in the portal.

You can sort the list alphabetically by the criteria shown in the columns. To do this, click on the title of the relevant column. The list is then sorted in ascending order of the entries in this column. Clicking on the column title again sorts the list in descending order.

The **status** of a user can have the following values:

Status	Meaning
"Active"	The user has active access to the portal and can perform actions there according to their rights.

Status	Meaning
"Invited"	The user has been created and invited by e-mail to connect to the portal and set his password. The user's portal access is not yet "Active", i.e. the user has not yet set his password.
"Not invited"	The user is the supplier's administrator. The supplier is entered in Product 360 Desktop but has not yet been invited to use the portal.
"Deactivated"	The user's access to the portal has been deactivated ^[32] . The user cannot log in to the portal.

Under "Catalogs", you will find all catalogs from the supplier that are available in the portal.

From here, you can also:

- [Change the import configuration for the supplier](#)^[27]
- [Change the configuration for online data editing, depending on the settings](#)^[27]
- [View details for the users listed](#)^[30]
- [Create new users for the supplier](#)^[31]
- [Recall the invitation to the supplier](#)^[19]
- [Resend the invitation to the supplier](#)^[20]
- [Deactivate users](#)^[32]
- [Activate users](#)^[33]
- [Reset a user's password](#)^[33]
- [View and edit details for the catalogs listed](#)^[35]
- [Create new catalogs for the supplier](#)^[35]

4.8 Deactivating suppliers

For this function it is important to realize the difference between deactivating and deleting. Deleting means irretrievably removing the data from the memory. Deactivating always implies that reactivation is possible, and is used to temporarily block data. There are various reasons why you might want to temporarily exclude a supplier from Product 360 - Supplier Portal:

- Imprecise commercial development, possible pending takeover offers
- Vague relocation projects with no possibility to adapt data
- General dissatisfaction etc.



Caution: When you deactivate a supplier, all assigned users are also deactivated. This means that **all** of a supplier's users are **unable** to log into the portal.

This section describes how to deactivate suppliers.

Prerequisites

Only suppliers with the status "Active" can be deactivated.

You have opened the "[Supplier Overview](#)"¹⁶.

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2.

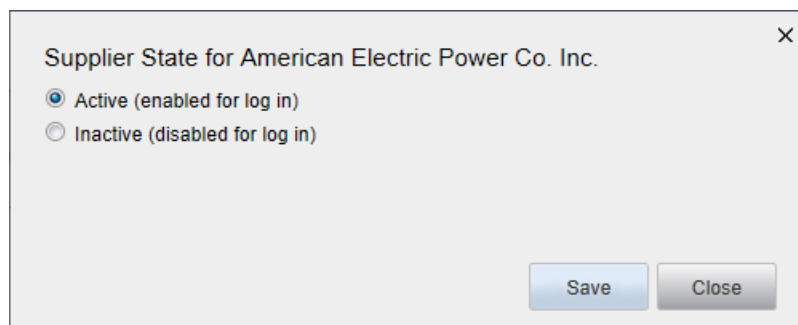
In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)"²³ are opened.

3. Use the [search field](#)¹⁷ to select the supplier you want to deactivate.

4. In the "<%GUI_SUPPLIER_STATE%>" column, select the "Edit" option.

⇒ The following dialog box then prompts you to confirm the action:



Supplier State for American Electric Power Co. Inc.

☒ Active (enabled for log in)

☐ Inactive (disabled for log in)

Save Close

5.

Confirm with **Save**.

Result

The supplier is deactivated. This means that they can no longer log in to the portal. The supplier's status changes to "Deactivated".

4.9 Changing the import configuration

The process for importing catalog data can be automated. This automation can have a different configuration for each supplier. This section describes how to change the import configuration for a supplier.

Prerequisites

You have opened the "[Supplier Overview](#)"¹⁶.

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2. Click on **Edit** next to "Automatic import configuration".

⇒ The "Edit automatic import configuration" dialog box opens.

3. Select the relevant import configuration. You have the following options:

Option	Meaning
"Manual approval required"	If you select this option, each supplier import must be released by a portal administrator and initiated manually.
"Automatic import if no validation errors and no warnings"	If you select this option, the import will start automatically if the preceding test run finishes without any errors or warnings.
"Automatic import if no validation errors (warnings tolerated)"	If you select this option, the import will start automatically if the preceding test run finishes without any errors. Warnings are tolerated with this setting.

4. Click on **Save**.

⇒ The import configuration for the corresponding supplier is changed.

4.10 Changing the configuration for online data editing



Note: Depending on how your Product 360 - Supplier Portal is configured, this functionality may not be available.

You can also grant your suppliers permission to maintain the data in their catalogs online. If you allow this, suppliers can use Product 360 Web to edit their catalogs directly in Product 360 - Supplier Portal. This functionality is disabled for newly invited or registered suppliers by default. However, you can [reconfigure](#) ²⁸ this functionality.

Prerequisites

You have opened the "[Supplier Overview](#)" ¹⁶.

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2.

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)" ²³ are opened.

3. Click on **Edit** next to "Data online editing configuration".

⇒ The "Data online editing configuration" dialog box opens.

4. Select the relevant option. You have the following options:

Option	Meaning
"Online editing of catalog data enabled"	If you select this option, the supplier can edit their catalogs online.
"Online viewing of catalog data enabled"	If you select this option, the supplier can view their catalogs online.
"Online editing of catalog data disabled"	If you select this option, the supplier cannot edit their catalogs online.

5. Click on **Save**.

⇒ The configuration for data maintenance is changed for the relevant supplier.

4.11 Default user settings

Password validation rules

A password is the most common method of user authentication. It is usually the primary means of protecting information processing systems against intruders. In order to protect the system and its data against unauthorized access and misuse, it is necessary to choose "robust" (i.e. sufficiently secure) passwords.

The vast majority of IT security experts have defined minimum requirements for robust passwords. We wish to support you in this regard and have therefore integrated some validation rules (known as our "password policy") into Product 360 - Supplier Portal.

These values serve as guidelines that you can adjust to your requirements. They are stored in the "configuration.properties" file, which is located in the "Configuration" directory. The "passwordBlacklist.txt" exclusion list is also located there. If you do not need this file, you can remove its contents or you can delete the entire file.

Parameter passwordPolicy.minimumLength
Value 6
Description The password must be at least 6 characters in length. However, we recommend using between 8 and 12 characters and a combination of uppercase and lowercase letters.
Parameter passwordPolicy.minimumNumberOfDigits
Value 0
Description "0" is the minimum number of digits that must be used. However, we recommend a combination that comprises at least one digit.
Parameter passwordPolicy.minimumNumberOfSpecialCharacters
Value 0
Description "0" is the minimum number of special characters that must be used. However, we recommend a combination that comprises at least one special character. When using umlauts, bear in mind that the user may not always have a German keyboard.
Parameter passwordPolicy.blacklistLocation
Value file:\${hsx.configurationArea}/passwordBlacklist.txt
Description This parameter specifies the storage location for the exclusion list, which contains a list of passwords that suppliers must not use.

Authorization to edit items

The authorization that a user requires in order to edit items is disabled for newly invited or registered suppliers by default. If you want to change this, you can make the following entries in the same file:

Parameter global.permission.itemeditor
Value EDIT
Description Suppliers can edit items online.

Value READ
Description Suppliers can view items online.
Value RESTRICTED
Description Standard setting for new suppliers. Suppliers cannot view or edit items. The relevant authorizations must be explicitly assigned by the administrator.
Value DISABLED
Description The online editing functionality is generally deactivated.

4.12 Viewing and editing user details

This section describes how to open and edit user details.

The "Supplier User Details" can be used to manage user data such as the name and e-mail address. This is also where you can view the user's supplier association, display language, and status. You can also specify which types of notifications are sent to the user by e-mail and what image is to be used as the user's avatar. The avatar is shown in the "Timeline" next to the user's messages and replies.

Prerequisites

You have opened the "[Supplier Overview](#)"¹⁶.

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2.

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)"²³ are opened.

3. Under "Users", find the user whose details you want to view.

4. In the "Action" column, select the "Open supplier user" option.

⇒ The "Supplier User Details" are displayed.

5. If necessary, edit the data in the input boxes.

6. Messages and system messages are displayed in the "Timeline" by default. In addition, these can be sent to the user by e-mail. Make this setting under "E-mail notification settings". A distinction is made between the following message types:

Message type	Meaning
"User generated messages"	Messages sent by portal administrators.
"Test run complete"	Messages sent after completion of test runs.
"Data released for import"	Messages sent when catalog data has been released for import.
"Import complete"	Messages sent after completion of imports.

7. Click on **Change** to integrate an image or graphic as an avatar or to change the avatar, and select the file containing the relevant image. To remove an avatar that has already been embedded, click on **Remove**.

8.

All editing changes are automatically saved when you exit this view.

4.13 Creating users

In addition to the administrator, other users can be created for a supplier. These users can upload catalog data to the portal but, unlike the administrator, they cannot create and manage other users in your organization. This section describes how to create these users.

Prerequisites

You have opened the "[Supplier Overview](#)"¹⁶.

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2.

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)"²³ are opened.

3. Click on **Create new user**.

⇒ The "Create new user" dialog box opens.

4. Enter the first name, second name, and e-mail address of the new user.

5. Select the display language for the user using the drop-down list.

All editing changes are automatically saved when you exit this view.

Result

The user is created with the specified data. The user is assigned the status "Invited" and invited by e-mail to connect to the portal and set a password.



Note: If you subsequently notice that you have created an access for the incorrect person or have entered the wrong e-mail address, you can [recall the invitation you have sent and thus delete the user](#)^[19].



Note: If the user has not yet logged in to the portal after a long period, you can [send another invitation](#)^[20] to that user.

4.14 Deactivating users

This section describes how to deactivate users.

Prerequisites

Only users with the status "Active" can be deactivated.

You have opened the "[Supplier Overview](#)"^[16].

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2.

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)"^[23] are opened.

3. Under "Users", find the user you want to deactivate.

4. In the "Action" column, select the "Deactivate user" option.

⇒ You are then prompted to confirm the action.

5.

Confirm with **Yes**.

Result

The user is deactivated. This means that the user can no longer log in to the portal. The user's status changes to "Deactivated".

4.15 Activating users

This section describes how to reactivate users that have been deactivated.

Prerequisites

You can only activate users that have previously been deactivated, i.e. with the status "Deactivated".

You have opened the "[Supplier Overview](#)"¹⁶.

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2.

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)"²³ are opened.

3. Find the user you want to reactivate under "Users".

4. In the "Action" column, select the "Reactivate user" option.

⇒ You are then prompted to confirm the action.

5.

Confirm with **Yes**.

Result

The user is reactivated. This means that the user can log in to the portal again. The user's status changes to "Active".

4.16 Resetting a user's password

This section describes how to reset a user's password.

Prerequisites

The password can only be reset for users with the status "Active".

You have opened the "[Supplier Overview](#)"¹⁶.

Procedure

Perform the following steps in order:

1.

Find the relevant supplier in the "Supplier Overview".

2.

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)" are opened.

3. Find the user whose password you want to reset under "Users".

4. In the "Action" column, select the "Reset password" option.

⇒ You are then prompted to confirm the action.

5.

Confirm with **Yes**.

Result

The user has been prompted by e-mail to connect to the portal and reset his password.

4.17 Supplier catalogs

In the lower section of the "Supplier Details", the available catalogs of the relevant supplier are displayed in the "Catalog Overview". In addition to the catalog name, the visibility and the status and date of the most recent [test run](#) and most recent import are displayed here also. The **status** of the last test run/import can have the following values:

Status	Meaning
"Scheduled"	Only relates to imports; states that an import is scheduled.
"Runnng"	Test run/import in progress
"Finished"	Test run/import completed
"Canceled"	Test run/import was canceled before completion



Note: If no status is specified, this means that no test run/import has been performed for this catalog yet.

You can sort the list alphabetically by the criteria shown in the columns. To do this, click on the title of the relevant column. The list is then sorted in ascending order of the entries in this column.

Clicking on the column title again sorts the list in descending order.

You can use the "Action" column to view and edit the "[Catalog Details](#)".

4.17.1 Creating catalogs

This section describes how to create new catalogs for a supplier.

Prerequisites

The supplier for which you want to create the catalog must already exist in the portal and be linked to a supplier in Product 360 Desktop.

You have opened the "[Supplier Details](#)"²³ for the relevant supplier.

Procedure

Perform the following steps in order:

1. Click on **Create new catalog** below the "Catalog Overview".
2. An input box is displayed.
3. Enter the name of the catalog to be created in the input box.
4. Click on **Create**.

⇒ The catalog is created for the supplier.

4.17.2 Viewing and editing catalog details

This section describes how to open and edit catalog details for a supplier.

Prerequisites

You have opened the "[Supplier Details](#)"²³ for the relevant supplier.

Procedure

Perform the following steps in order:

1.
Find the relevant catalog in the "Catalog Overview".
2. In the "Action" column, select the "Open catalog" option.

⇒ The "Catalog Details" are displayed. In addition to the supplier name, catalog identifier, and the status, the languages in which the catalog name is available and the number of items the catalog contains are displayed.

Catalog Details - Erstein_2012

To details view of Erstein AG

Supplier name

Erstein AG

Catalog identifier

Erstein_2012

Catalog name available in English

Edit

There are 166 items in this catalog

View

Status

Active

Update History

7/24/12 10:11 AM Portal Admin

Import of Erstein_2012_en.csv

Erstein CSV

Finished with 0 errors, 0 warnings.

View report

7/24/12 10:03 AM Ernie Erstein

Test run of Erstein_2012_en.csv

Erstein CSV

Finished with 0 errors, 0 warnings.

View report

"Catalog details"

⇒ The **catalog status** influences the visibility of the catalog and can have the following values:

Status	Meaning
"Active"	The catalog is visible to the supplier.
"Inactive"	The catalog is not visible to the supplier.

- The visibility of the catalog can be changed by clicking on the status.
- Click on **Edit** next to the list of languages in which the catalog name is available and enter catalog names in other languages or edit the entries.
- Under "Update History", you will find a list of update operations performed on the catalog. Click on **View report** to view the relevant [test run report](#)^[43] or [import report](#)^[44] that was created during the corresponding update operation.

4.17.3 Editing items

This section describes how to edit items from a supplier catalog.

Prerequisites

You have opened the "[Supplier Details](#)"^[23] for the relevant supplier.

Procedure

Perform the following steps in order:

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1.

Find the relevant catalog in the "Catalog Overview".

2.

In the "Action" column, select the "Open catalog" option.

⇒ The "[Catalog Details](#)" are displayed.

3. Click on **Edit** next to the number of items.

Result

Clicking on **Edit** displays the items in the Product 360 Web, where they can be edited. Information on editing items can be found in the user manual for Product 360 Web.

4.18 Broker

Broker can maintain catalogs of different suppliers.

4.18.1 Create broker user

Prerequisites

You have opened the "[Supplier Overview](#)".

Procedure

Perform the following steps in order:

Find the relevant supplier in the "Supplier Overview".

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)" are opened.

1. Click on **Create new user**.

⇒ The "Create new user" dialog box opens.

2. Choose Broker.

3. Enter the first name, second name, and e-mail address of the new Broker.

4. Select the display language for the user using the drop-down list.

All editing changes are automatically saved when you exit this view.

Create new User

☒ Supplier user
☐ Broker

First name:

Last name:

E-mail:

Language:
English

Supplier name:
Supplier organization
State:
Invited


Once you have clicked on "Save", an e-mail will be sent to the given address. It contains a link which the recipient can use to assign a password.


SaveClose

Create new broker

Result

The broker user is created with the specified data. The broker user is assigned the status "Invited" and invited by e-mail to connect to the portal and set a password.

 **Note:** If you subsequently notice that you have created an access for the incorrect person or have entered the wrong e-mail address, you can [recall the invitation you have sent and thus delete the user](#)¹⁹.

 **Note:** If the user has not yet logged in to the portal after a long period, you can [send another invitation](#)²⁰ to that user.

4.18.2 Assign existing broker to supplier**Prerequisites**

You have opened the "[Supplier Overview](#)"¹⁶.

Procedure

Perform the following steps in order:

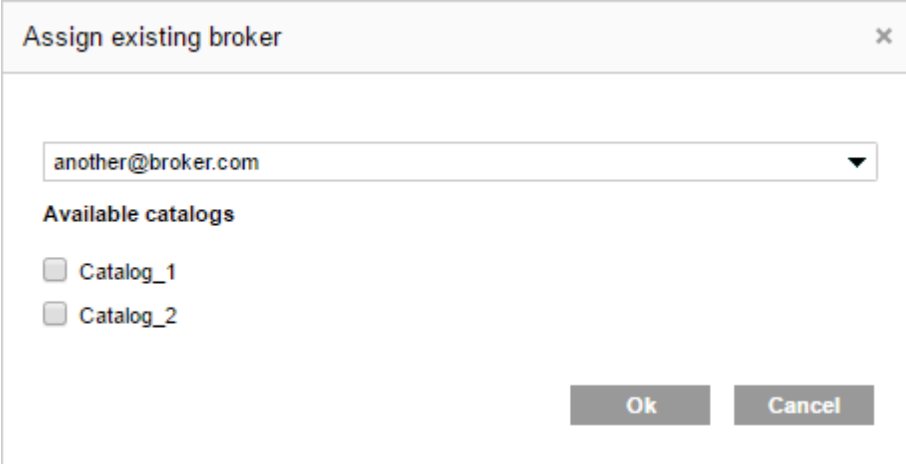
Find the relevant supplier in the "Supplier Overview".

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)"²³ are opened.

To assign existing broker to supplier

1. Choose "Assign existing broker".
2. Choose the broker to assign.
3. Choose the catalogs that the supplier can maintain.
4. Click **OK**.



The dialog box titled "Assign existing broker" contains a dropdown menu with the text "another@broker.com". Below the dropdown, under the heading "Available catalogs", there are two checkboxes: "Catalog_1" and "Catalog_2", both of which are currently unchecked. At the bottom right of the dialog box are two buttons: "Ok" and "Cancel".

Assign existing Broker

If you want to change the assigned catalogs of a broker

1. Go to the list of Users.
2. Open Action menu of broker.
3. Choose the Action "manage catalogs" in the list of user.
4. Check or Uncheck the accessible catalogs and confirm your selection.

If you want to remove the broker from the supplier

1. Go to the list of Users.
2. Open Action menu of broker.
3. Choose the Action "remove from supplier" in the list of user.

4.18.3 Switch the role of supplier

Prerequisites

You have opened the "[Supplier Overview](#)".

Procedure

Perform the following steps in order:

Find the relevant supplier in the "Supplier Overview".

In the "Action" column, select the "Open supplier" option.

⇒ The "[Supplier Details](#)" are opened.

Switch the role from supplier user to broker

1. Choose the action "switch to supplier user" from the action menu

⇒ The "Manage catalogue" dialog are opened.

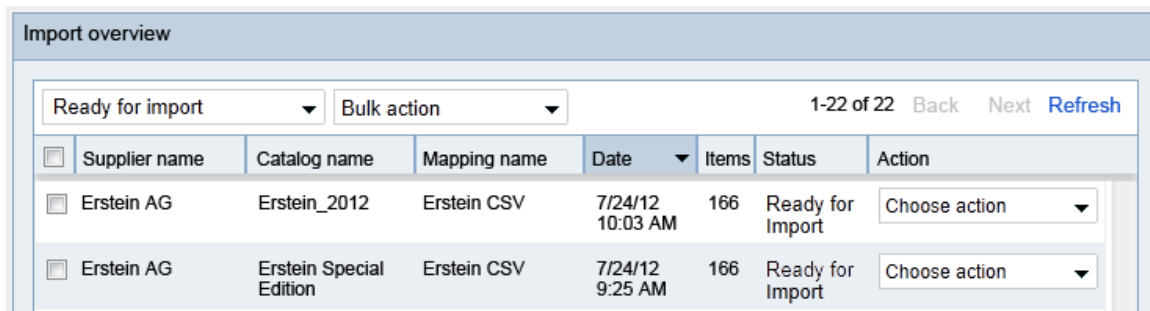
Switch the role from broker to supplier user

1. Choose the action "switch to broker" from the action menu

⇒ The "Manage catalogue" dialog are opened.

5 Imports

To get an overview of all catalog imports and [test runs](#) ⁴³ pending, in progress, or completed, click on **Manage imports** in the menu area. All pending imports will then be listed in the action area.



Import overview						
Ready for import		Bulk action		1-22 of 22 Back Next Refresh		
<input type="checkbox"/>	Supplier name	Catalog name	Mapping name	Date	Items	Status
<input type="checkbox"/>	Erstein AG	Erstein_2012	Erstein CSV	7/24/12 10:03 AM	166	Ready for Import
<input type="checkbox"/>	Erstein AG	Erstein Special Edition	Erstein CSV	7/24/12 9:25 AM	166	Ready for Import

Import overview

In addition to the name of the catalogs into which data is to be or has been imported, the "Import Overview" shows the supplier name, the name of the import mapping, the status, the date on which the displayed status was attained, and the number of items to be or already imported.

You can use the left drop-down list in the top section to filter which imports or test runs are to be displayed. You have the following options:

Option	Description
"Data ready for import"	Means that all pending imports are displayed.
"Pending imports"	Means that all imports in progress or scheduled are displayed.
"Successful imports"	Means that all successfully completed imports are displayed.
"Failed imports"	Means that all failed imports are displayed.
"Pending test runs"	Means that all catalogs for which a test run has already been performed are displayed.
"Successful test runs"	Means that all catalogs for which a test run has already been performed but which are not yet released for import are displayed.
"Failed test runs"	Means that all catalogs for which the test run failed are displayed.

You can sort the list alphabetically by the criteria shown in the columns. To do this, click on the title of the relevant column. The list is then sorted in ascending order of the entries in this column. Clicking on the column title again sorts the list in descending order.

You can use the **Next** and **Back** buttons to scroll through the list.

You can refresh the display at any time by clicking on **Refresh** in the top right corner.

The "Action" column can be used to carry out various actions:

- [Start imports](#) ⁴²
- [Schedule imports](#) ⁴³
- [View test run reports](#) ⁴³
- [View import reports](#) ⁴⁴
- [Cancel imports](#) ⁴⁶
- [Delete imports](#) ⁴⁶
- [View supplier details](#) ²³
- [View catalog details](#) ³⁵



Tip: You can carry out some actions on several imports or test runs simultaneously. To do this, select the relevant entries and select the action from the right drop-down list in the top section.

5.1 Starting imports

This section describes how to start catalog imports.

Prerequisites

The supplier must already have uploaded the catalog data to be imported to the portal. The supplier must have performed a test run with no errors and released the catalog data for import.

You have opened the "[Import Overview](#)" ⁴¹ using the "Data ready for import" filter option.

Procedure

Perform the following steps in order:

1.
Find the relevant import in the "[Import Overview](#)" ⁴¹.
2. In the "Action" column, select the "Start import" option.

Result

The import is started. The catalog data is transferred to Product 360 Desktop. The status of the import then changes to "Runnng". As long as the import has the status "Runnng" you can see it in the list of current and scheduled imports. This list is displayed when you select the "Pending imports" filter option in the "Import Overview".

After successful completion of the import, the import is assigned the status "Finished". You can then see the import in the list of successful imports. This list appears when you select the "Successful imports" filter option in the "Import Overview".

The supplier is automatically notified that the import has been performed. An [import report](#)⁴⁴ provides detailed information about the progress of the import.

5.2 Scheduling imports

This section describes how to schedule catalog imports for a particular time, e.g., at night.

Prerequisites

The supplier must already have uploaded the catalog data to be imported to the portal. The supplier must have performed a test run with no errors and released the catalog data for import.

You have opened the "[Import Overview](#)"⁴¹ using the "Data ready for import" filter option.

Procedure

Perform the following steps in order:

1.
Find the relevant import in the "[Import Overview](#)"⁴¹.
2. In the "Action" column, select the "Schedule" option.
⇒ The "Schedule Import" dialog box opens.
3. Select the start date using the date selection field.
4. Select a start time using the time selection field.
5. Click on **OK**.

Result

The import is scheduled for the specified time. In the "Import Overview" the import now has the status "Scheduled". You can see the import in the list of current and scheduled imports. This list is displayed when you select the "Pending imports" filter option in the "Import Overview".

5.3 Viewing test run reports

A supplier must perform a **test run** before releasing catalog data for import into Product 360 Desktop. This serves to identify any discrepancies in the data in advance and correct them as required. A **test run report** provides detailed information about the progress of the test run. This section describes how to view test run reports.

Prerequisites

The supplier must have performed a test run.

Procedure

There are several ways to open and view test run reports.

Using the "[Import Overview](#)"⁴¹:

1.
Find the relevant import in the "[Import Overview](#)"⁴¹.
2. In the "Action" column, select the "Show test run report" option.

Using the "Timeline":

1. In the "Timeline", find the relevant message for the test run.
2. Click on **View report**.

Result

The test run report is displayed. It provides information about who initiated the test run and when, what catalog data file is to be/has been imported, how many new items are to be created in Product 360 Desktop and how many items are/were to be updated. In addition, it shows how many errors and warnings occurred during the test run.

If errors or warnings occurred, you will find a list of these under "Details". Clicking on the relevant link in the "Message" column displays more detailed information about an error or warning.

Clicking on **Open complete report** displays a detailed report about the progress of the test run, with details of all test run steps, errors and warnings. You can also download the report by clicking on **Download complete report**.



Tip: The **Start import** button is displayed when the test run is successfully completed. Click on this button to start the import immediately.

5.4 Viewing import reports

After completion of an import, an import report is produced. This provides detailed information about the progress of the import. This section describes how to view the import report for an import.

Prerequisites

The import for which you want to view the import report must be complete.

Procedure

There are several ways to open and view import reports.

Using the "[Import Overview](#)"⁴¹:

1. In the "Import Overview" select the "Finished" filter option.

- 2.

Find the relevant import in the "[Import Overview](#)".

3. In the "Action" column, select the "Show import report" option.

Using the "Timeline"

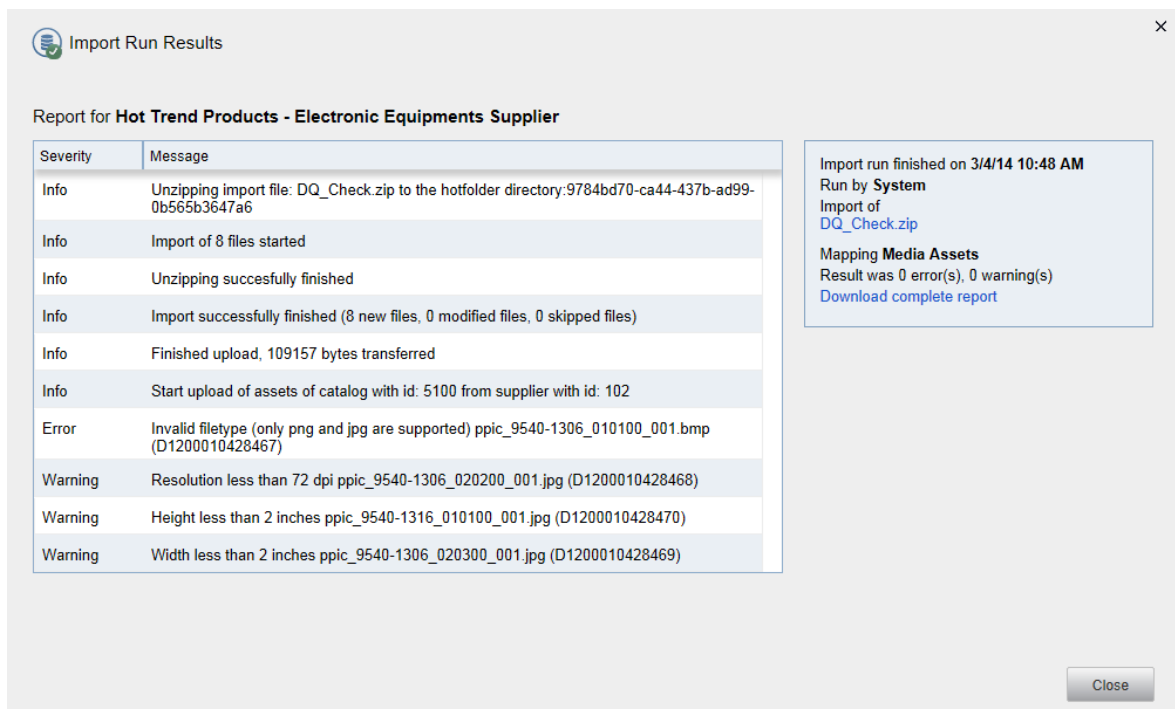
1. In the "Timeline", find the relevant message for the import.

2. Click on **View report**.

Result

The import report is displayed. The import report provides information about who initiated the import and when, what catalog data file has been imported, how many new items have been created in Product 360 Desktop and how many items have been updated. In addition, it shows how many errors and warnings occurred.

If errors or warnings occurred, you will find a list of these under "Details". Clicking on the relevant entry in the "Message" column displays more detailed information about an error or warning.



Import Run Results

Report for **Hot Trend Products - Electronic Equipments Supplier**

Severity	Message
Info	Unzipping import file: DQ_Check.zip to the hotfolder directory:9784bd70-ca44-437b-ad99-0b565b3647a6
Info	Import of 8 files started
Info	Unzipping successfully finished
Info	Import successfully finished (8 new files, 0 modified files, 0 skipped files)
Info	Finished upload, 109157 bytes transferred
Info	Start upload of assets of catalog with id: 5100 from supplier with id: 102
Error	Invalid filetype (only png and jpg are supported) ppic_9540-1306_010100_001.bmp (D1200010428467)
Warning	Resolution less than 72 dpi ppic_9540-1306_020200_001.jpg (D1200010428468)
Warning	Height less than 2 inches ppic_9540-1316_010100_001.jpg (D1200010428470)
Warning	Width less than 2 inches ppic_9540-1306_020300_001.jpg (D1200010428469)

Import run finished on 3/4/14 10:48 AM
Run by **System**
Import of
[DQ_Check.zip](#)
Mapping **Media Assets**
Result was 0 error(s), 0 warning(s)
[Download complete report](#)

Close

Import report with possible messages

Clicking on **Open complete report** displays a detailed report on the progress of the import with details of all import steps, errors, and warnings. You can also download the report by clicking on **Download complete report**.

5.5 Canceling imports

This section describes how to cancel imports that are scheduled or in progress.

Prerequisites

Only imports that have not yet been completed can be canceled.

You have opened the "[Import Overview](#)"⁴¹ using the "Pending imports" filter option.

Procedure

Perform the following steps in order:

1.

Find the relevant import in the "[Import Overview](#)"⁴¹.

2. In the "Action" column, select the "Cancel" option.

⇒ The import is canceled and reverts to the status "Ready for import".



Tip: The same method can also be used to cancel test runs.

5.6 Deleting imports

This section describes how to delete imports or entries in the "Import Overview".

Prerequisites

Only imports that have either not been carried out yet or have been completed can be deleted.

Imports that are currently running must be [canceled](#)⁴⁶ first. The entry can then be deleted from the "Import Overview" as described below.

You have opened the "[Import Overview](#)"⁴¹ using the "Ready for import", "Successful imports" or "Failed imports" filter option.

Procedure

Perform the following steps in order:

1.

Find the relevant import in the "[Import Overview](#)"⁴¹.

2. In the "Action" column, select the "Delete" option.

⇒ The relevant entry is deleted from the "Import Overview".



Note: This action does not undo imports that have already been completed.

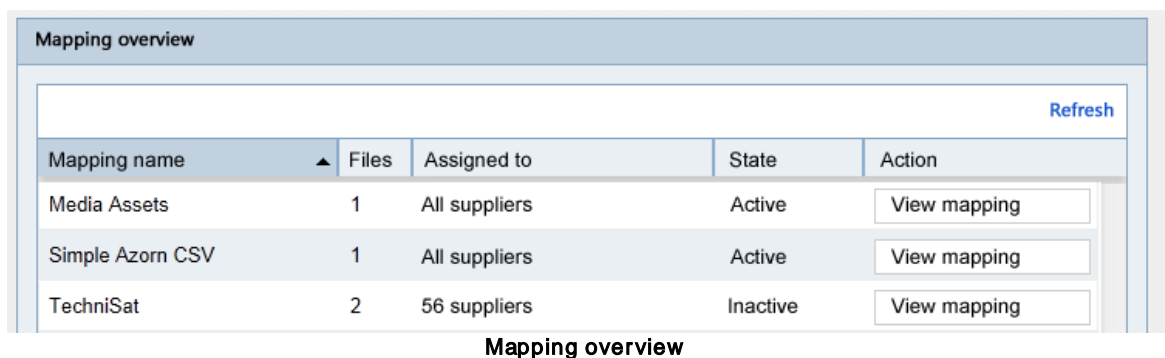


Tip: The same method can also be used to delete test runs.

6 Mappings

To import catalog data into Product 360 Desktop, you require what is known as a **mapping**. This is used to define how the data fields for the catalog data are assigned to the data fields in Product 360 Desktop. Since suppliers can have different data formats, the supplier is prompted to select an appropriate mapping when uploading the catalog data.

For an overview of all mappings in the portal, click on **View mappings** in the menu area. All mappings will then be listed in the action area.



Mapping name	Files	Assigned to	State	Action
Media Assets	1	All suppliers	Active	View mapping
Simple Azorn CSV	1	All suppliers	Active	View mapping
TechniSat	2	56 suppliers	Inactive	View mapping

In addition to the name of the mappings, the "Mapping Overview" shows the number of catalog data files that have to be uploaded simultaneously while using the relevant mapping. In addition, it shows how many suppliers the mapping has been assigned to, i.e. how many suppliers can use the mapping.

The status of a mapping specifies whether it is available ("Active") or temporarily unavailable ("Inactive") because it is being revised.

You can use the "Action" column to [view and edit "Mapping details"](#).

You can sort the list alphabetically by the criteria shown in the columns. To do this, click on the title of the relevant column. The list is then sorted in ascending order of the entries in this column. Clicking on the column title again sorts the list in descending order.

You can refresh the display at any time by clicking on **Refresh** in the top right corner.

6.1 Viewing and editing mapping details

This section describes how to open and edit mapping details. The "Mapping details" are used to manage which suppliers are entitled to use the mapping, and also to maintain the information that is shown to the suppliers when uploading catalog data during the "Select mapping" step.

Prerequisites

You have opened the "[Mapping Overview](#)".

Procedure

Perform the following steps in order:

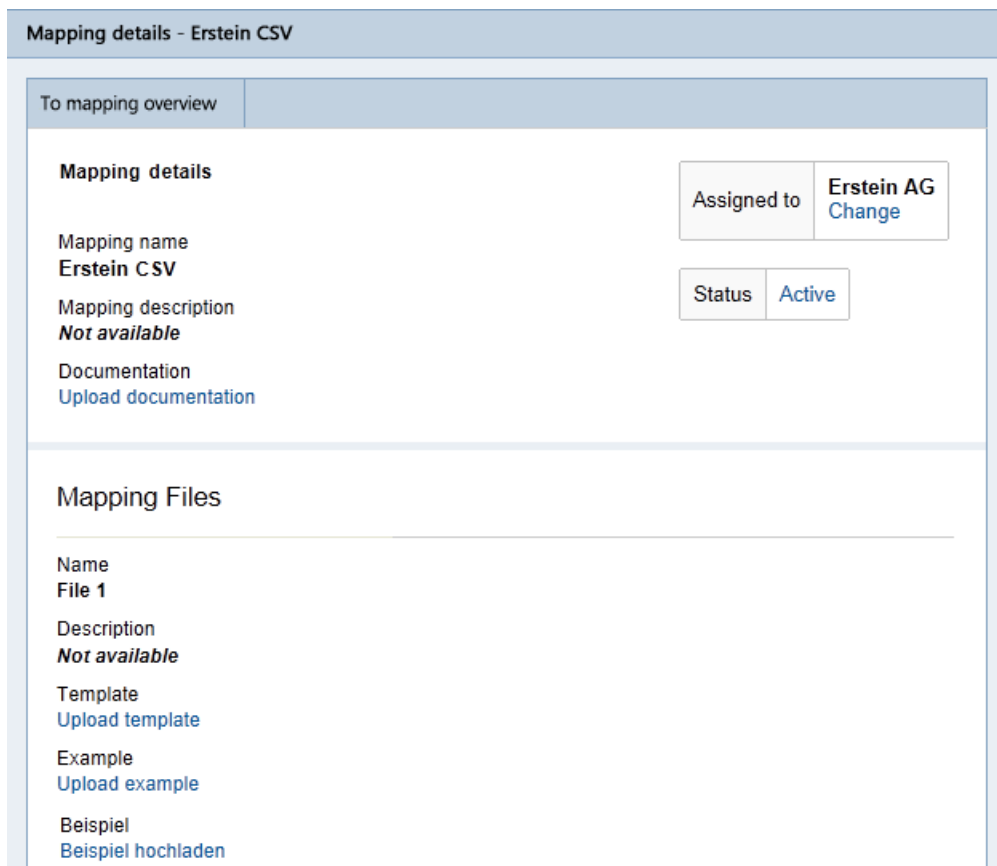
1.

In the "Mapping Overview", find the mapping you want to open.

2.

In the "Action" column, select the "Open mapping" option.

⇒ The "Mapping details" are displayed.



Mapping details - Erstein CSV

To mapping overview

Mapping details

Mapping name
Erstein CSV

Mapping description
Not available

Documentation
[Upload documentation](#)

Assigned to **Erstein AG**
[Change](#)

Status **Active**

Mapping Files

Name
File 1

Description
Not available

Template
[Upload template](#)

Example
[Upload example](#)

Beispiel
[Beispiel hochladen](#)

"Mapping details"

3. The "Assigned to" area shows how many suppliers have been assigned the mapping, i.e. how many suppliers can use the mapping. Click on "Change" to see which suppliers these are and to [change](#) them if required.
4. Under "Mapping description", you will find a brief description in relation to when to use the mapping. You can also upload a file that contains the corresponding documentation by clicking on **Upload documentation**.
5. If mappings need to be revised, you can set the status to "Inactive". Such mappings are temporarily unavailable for assignments, but all existing links remain.



Note: The name of the mapping and the short descriptions are maintained in Product 360 Desktop.

6. The "Mapping files" area contains information about the expected structure of the catalog files to be uploaded. For each catalog file to be uploaded, you will find a brief description of the expected file structure under "Description". You can also upload a file that contains a corresponding template by clicking on **Upload template**. In addition, you can upload a file that contains an example by clicking on **Upload example**.

7.

All editing changes are automatically saved when you exit this view.

6.2 Assigning a mapping to suppliers

This section describes how to assign a mapping to one or more suppliers.

Prerequisites

You have opened the "[Mapping Overview](#)"⁴⁸.

The mapping has the status "Active" and is therefore available.

Procedure

Perform the following steps in order:

1.

In the "Mapping Overview", find the mapping you want to open.

2.

In the "Action" column, select the "Open mapping" option.

⇒ The "Mapping details" are displayed.

3. Click on **Change** in the "Assigned to" area.

⇒ The "Assign to Suppliers" dialog box opens.

4. To assign the mapping to all suppliers, select the "Assign to all suppliers" option. To assign the mapping to individual suppliers only, select the "Assign to individual suppliers" option and then select the suppliers from the supplier list.



Tip: In the supplier list, you can [browse for specific suppliers and filter by supplier status](#)¹⁷.

5. Click on "Assign and close".

Result

The mapping is assigned to the selected suppliers. When catalog data is uploaded, the suppliers will be able to select this mapping.

7 Editing personal settings

Messages and system messages are displayed in the "Timeline" by default. You can use your personal settings to specify that these messages are also sent to you by e-mail.

In your personal settings, you can also embed an image or a graphic as a personal avatar, or you can change or remove an embedded avatar. The embedded avatar is shown in the "Timeline" next to your messages and replies.

Procedure

Perform the following steps in order:

1. Click on **Edit my personal settings** in the menu area.
⇒ Your personal settings are displayed in the "Portal Administrator Details" dialog box.
2. Under "E-mail notification settings", specify the type of notifications you want to receive by e-mail. A distinction is made between the following message types:

Message type	Meaning
"User generated messages"	Messages sent by users.
"Test run complete"	Messages sent after completion of test runs.
"Data released for import"	Messages sent when catalog data has been released for import.
"Import complete"	Messages sent after completion of imports.
"Supplier registration"	Messages sent when users are registered.

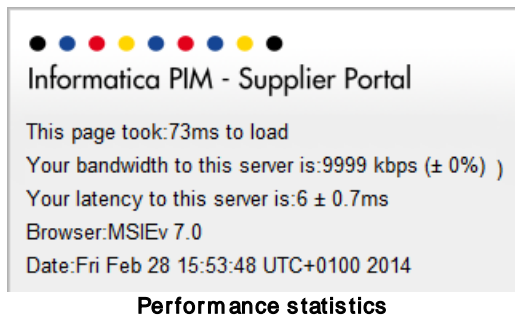
3. Click on **Change** to embed an image or graphic as an avatar or to change the avatar, and select the file containing the relevant image. To remove an avatar that has already been embedded, click on **Remove**.

4.

All editing changes are automatically saved when you exit this view.

8 Performance statistics

To ensure optimum operation of Product 360 - Supplier Portal information of a technical nature is necessary. You can view a summary of the most important performance data by selecting **Help > Performance Statistics.**



A separate window containing the following information is opened:

- The time (in milliseconds) required to load the relevant page. This specifies the difference, which arises as a delay between two operations (sending and receiving data).
- The bandwidth is a measure of the capacity or transfer rate in digital data transmission. It is specified in the unit bits per second and represents the available **data volume per unit of time** ratio for digital data transmission.
- The latency is the time (in milliseconds) between an action (or an event) and the occurrence of a delayed reaction. If there is a latency time, the action is hidden and is only clear when the reaction occurs. Colloquially, reactions with a very short latency are said to occur in real time.
- Information about the browser used and the current date rounds off the statistics.

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