Periscope Marketplace

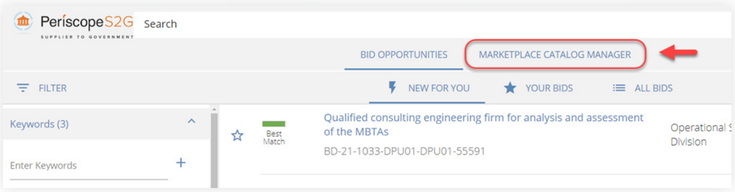
Periscope Marketplace Catalog Upload Guide

In getting set up in the Periscope Marketplace, you will be able to upload your catalog(s) into the Catalog Manager for government agencies to purchase your products and services direct. Please note, you must already have an existing Periscope S2G account to set up your catalog(s) in the Marketplace. Periscope S2G accounts are available in both limited, free versions and premium versions for a subscription fee.

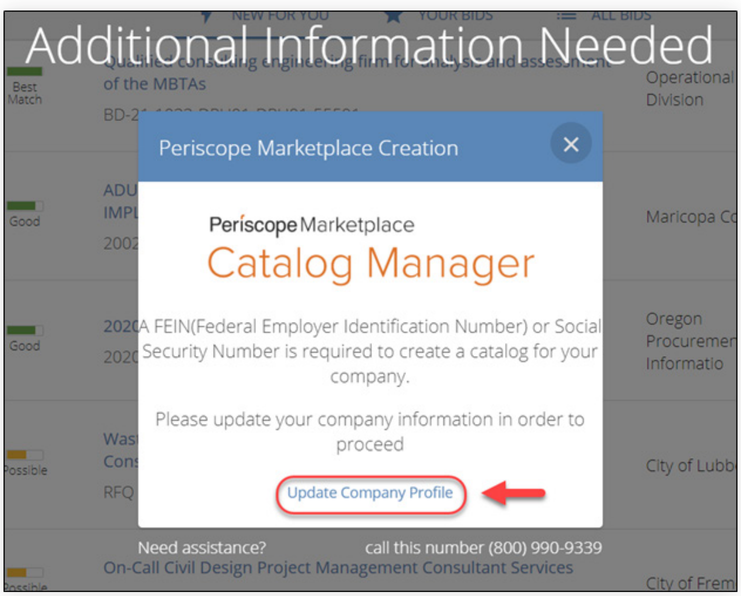
Please allow a minimum of one (1) hour for this process to ensure your catalog is setup properly.

Getting Marketplace Catalog Manager Access:

1. **Log into your Periscope S2G: Login Here.**
2. **Click the "Marketplace Catalog Manager" tab on your home screen.**



3. **A window for "Periscope Marketplace Creation" will pop up.**
4. **To add your FEIN or SSN (required for Marketplace), you must click the "Update Company Profile" option at the bottom of this pop up.**



In the Know: Before You Start

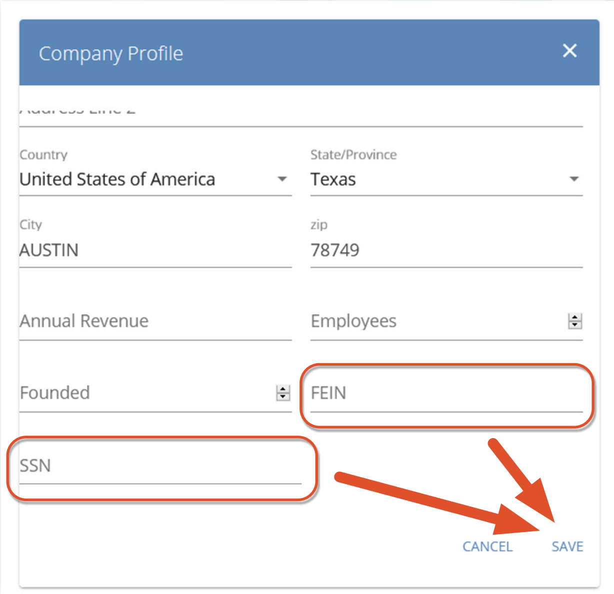
What is Marketplace Catalog Manager?

Marketplace Catalog Manager lives within the Periscope Marketplace. Marketplace Catalog Manager is essentially the administrative gateway to the Marketplace, providing suppliers the ability to upload their catalogs and manage how they are viewed by Marketplace shoppers.

What is Periscope S2G?

Periscope S2G is the brand name for Periscope's Supplier-to-Government solution set, providing government bid notification and supplier access to the Marketplace.

5. **The company profile will be auto filled based on the information provided during your initial S2G account creation. The FEIN or SSN, however, was not part of the initial account creation and needs to be provided prior to accessing the Marketplace.**



6. **Enter the company "FEIN" or "SSN" in the indicated fields and click "save."**
7. **Return to the home screen for your Periscope S2G account and click on the "Marketplace Catalog Manager" tab. You should be redirected into the Periscope Marketplace Catalog Manager.**
   - ✓ Note: You may need to enable pop-ups for this function to work.

Your account is now successfully set-up and ready for Marketplace Catalog Manager access!

Preparing Your Product List for Upload:

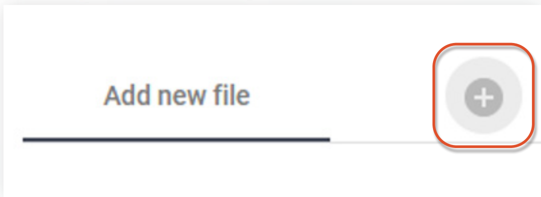
1. **Download the Marketplace catalog template here: Marketplace Product List Template**
   - ✓ Save this document in .csv format for file upload.
2. **Fill out the provided template with your catalog information.**
   - ✓ At a minimum, you must include the first six (6) columns: Product ID, Product Name, Product Description, Price, UOM, and five-digit NIGP code(s).
   - ✓ The more information you can include, the more efficient your catalog will be to shop.
3. **Save the catalog template file as a .csv with a name that is universal, as you will need to use this exact same file name for any future catalog uploads or modifications.**

Uploading Your Product List:

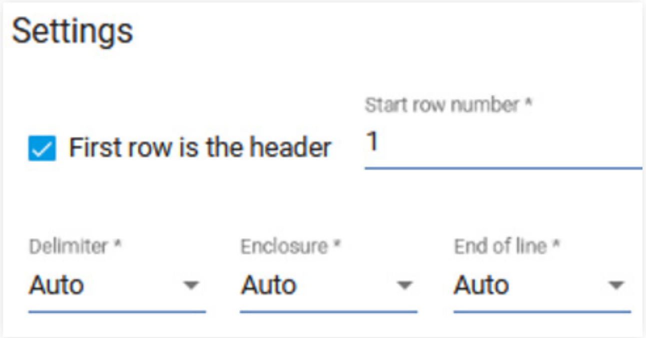
1. **Navigate to the "Products Upload" tab on the left-hand menu.**
   Click on the "+" bubble in the upper-right corner to begin adding your product list.

2. **A pop-up will appear titled "New Task" asking for a name, this is where you name your catalog.**
   - ✓ Tip: Name your catalog something unique to your business, i.e., "JM Automotive Products" versus "Automotive Product.")

3. **You will see a screen with three (3) steps. First, select "add new file" by clicking the "+" button to the right of this text and choose the option from the dropdown that aligns with your connection type: FTP or file upload, click "Save."**
   - ✓ This should be the product list developed in the last section using the provided template. If you do not have this already developed, please look back at the previous section.
   - ✓ Ensure your catalog is saved in .csv format to upload properly.



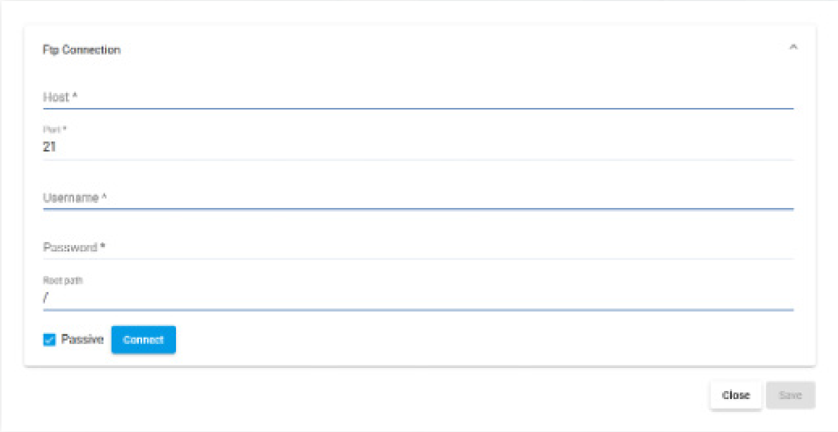
4. **Once your connection type has been selected, it's time to upload your catalog. This will vary based on your selection:**
   - ✓ File Upload:
     - Click the "Select File" button and select your previously formatted Product List from your files.
     - File type will default to .csv as this is the only accepted format.
     - Click the "Upload" button.
     - To the right of the screen, you will see setting options appear. Indicate if row one (1) is a header, this is automatically checked by default. Leave all other options defaulted to "Auto" in this section.



     - Click the "Save" button in the bottom-right corner. If successful, you will see a bar flash at the top of your screen confirming a successful upload.

✓ FTP:

- A pop-up will appear requesting the following required information:
    1. Host
    2. Port
    3. Username
    4. Password
    5. Root Path

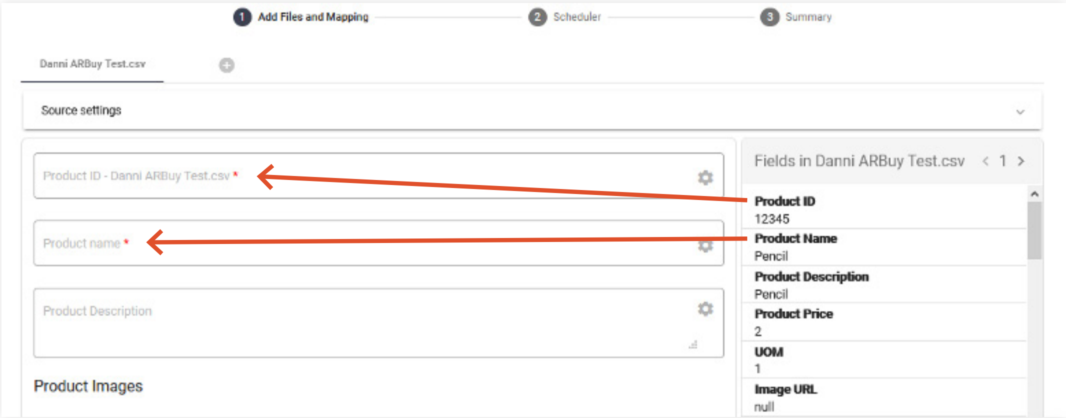


- Click the “Save” button in the bottom-right corner. If successful, you will see a bar flash at the top of your screen confirming a successful upload.

5. Now you must map your provided information from the .csv to their appropriate fields.

✓ This is only done for one (1) line item and does NOT need to be done for all line items in the provided .csv.

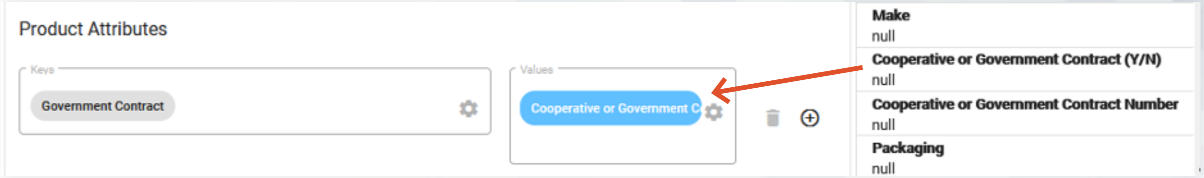
✓ This is a drag-and-drop feature in which your provided fields are indicated on the right and you must drag them to the appropriate sections on the left.



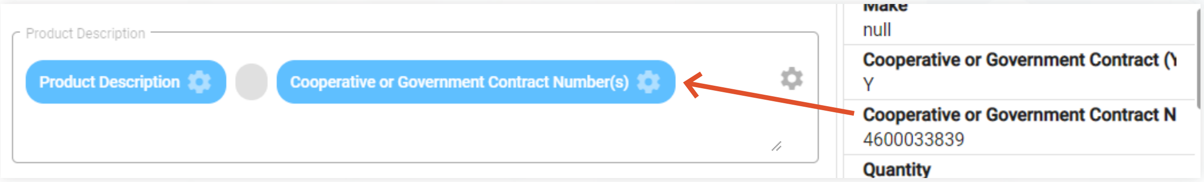
✓ To map your government contract(s) status, these fields require special mapping and a manual input:

- Use the Key field under the subhead “Product Attributes” and physically type into the Key field “Government Contract”.

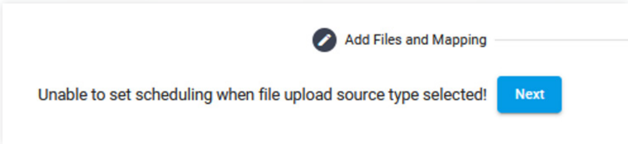
✓ Drag and drop the field “Cooperative or Government Contract Y/N” from the right-hand side to the “Values” field.



✓ The Cooperative or Government Contract Number will need to be mapped into the “Product Description” Field.



✓ Once this has been mapped, select the “Save and Next” button at the bottom of the page. You will see a bar flash across the top confirming this was done successful.

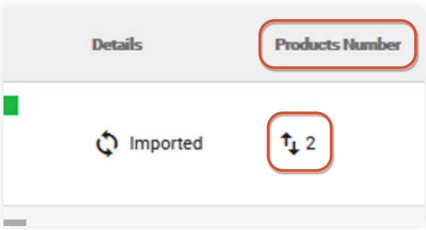


✓ Note: If you selected “File Upload” as your connection type, on the next screen you will see that you are on phase two (2) which is “Scheduler.” On this page you will see a message indicating it was unable to schedule. This is NOT an error, this is only applicable to those who selected “FTP” for their connection type. Simply click the “Next” button on this screen to proceed.

6. **You will now see your summary. Verify everything is correct, then select the “Finish” button.**

7. **You are now directed back to the “Products Upload” screen. You must now click the “Run” button that correlates with the .csv you just uploaded. You will see a bar flash across the top of the screen indicating that “Task Started” which means the system is importing your provided .csv.**

8. **Wait for the “Run” task to complete and populate the items from your product list.**
   ✓ Verify the number indicated in the “Products Number” column matches the amount of line items you uploaded.
      • Do not refresh the screen on this page while waiting for the run process to complete.



Creating your catalog:

1. **From the left-hand menu, now select "My Catalogs" from the list.**
2. **Once on this page, select the "+ Catalog" button in the upper-right corner. You will be directed to a page asking you to name and build your catalog.**
3. **Create tags such as "PPE" or "Automotive Tires" for buyer search purposes.**
4. **Select from the provided "Categories" list, all related categories associated with your items in the product list.**
5. **Select your "Catalog Type" which indicates products or services.**
6. **In the "Tasks" section, you will need to select the uploaded product list by checking the appropriate box. This associates that product list to this catalog. Set your given start date, which can be as immediate as today, and if applicable you can set expiration dates, though an expiration date is not required to proceed.**
7. **Click the "Save and Finish" button at the bottom.**
   - ✓ Please note, in rare cases, this page has caused a web browser to freeze. If you are unable to hit "Save and Finish" on this screen, we apologize but you will need to back out of this page and try again. Please reach out if it gives any further issues.

Congratulations! You have just successfully uploaded your catalog into the Marketplace!

Need Help?

Our team of dedicated supplier enablement professionals
are available to answer your questions at
supplierenablement@periscopeholdings.com or call **800-203-5727**.

Check out these helpful **step-by-step videos** for even more information
on setting up your catalog(s) in the Periscope Marketplace.