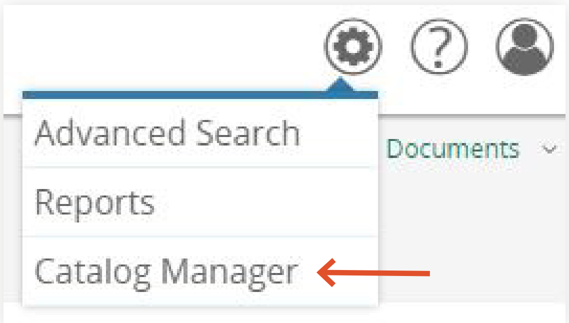
OregonBuys Catalog Upload Guide

The next step in getting fully enabled in OregonBuys is getting set up in the Periscope Marketplace, where you will be able to upload your catalogs into the Catalog Manager for Oregon to purchase your products and services direct.

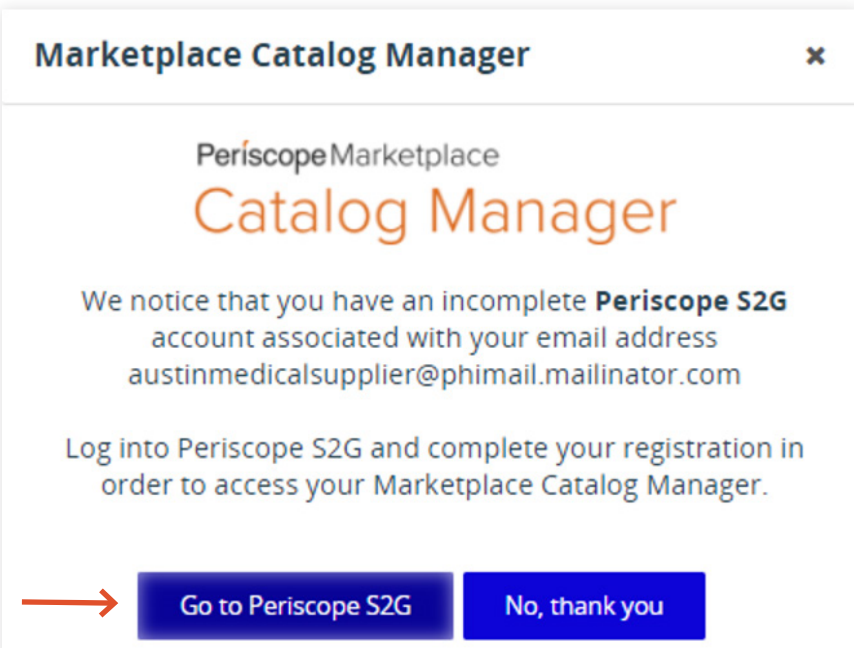
Now that you have registered in OregonBuys, all you have to do is setup and upload your catalog. Please allow a minimum of one (1) hour for this process to ensure your catalog is setup properly.

Getting Your Periscope S2G Account Set-Up to Power Marketplace:

1. **Log into OregonBuys using the "Sign In" button in the upper-right corner: https://oregonbuys.gov/bso/.**
2. **Click the settings icon in the upper-right corner and select "Catalog Manager" from the dropdown.**



3. **The Periscope Marketplace "Catalog Manager" window will appear explaining that you will need to complete your S2G Account. Click "Go to Periscope S2G."**



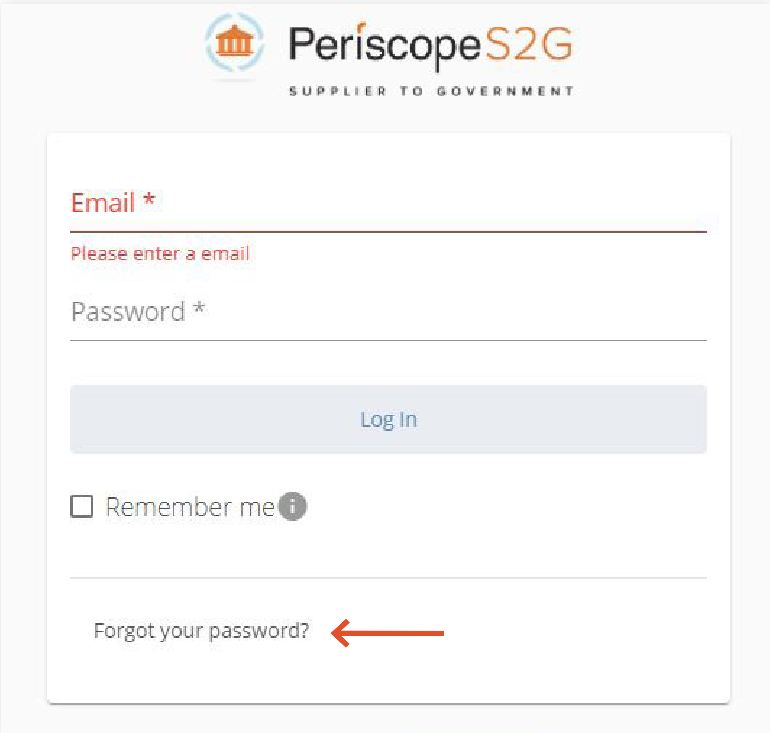
Important!

Due to the individual nature of each supplier and how they register to work with the State of Oregon, there are some rare, but unique cases in getting your catalogs uploaded properly. If you are having any trouble uploading your catalog using the process outlined in this guide, please reach out to our dedicated supplier enablement team at **OregonBuys@periscopeholdings.com**. com or **800-203-5727** and they will assist in the upload process.

Want to see these steps in action? Check out our resource videos for additional help here:

Additional Resource Videos

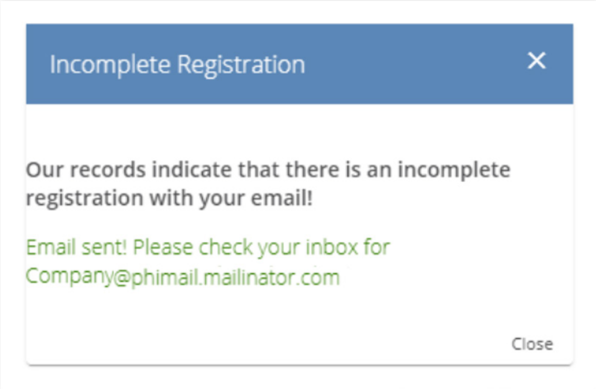
4. **When the Periscope S2G window opens choose the "Forgot Your Password" option below the sign-in**



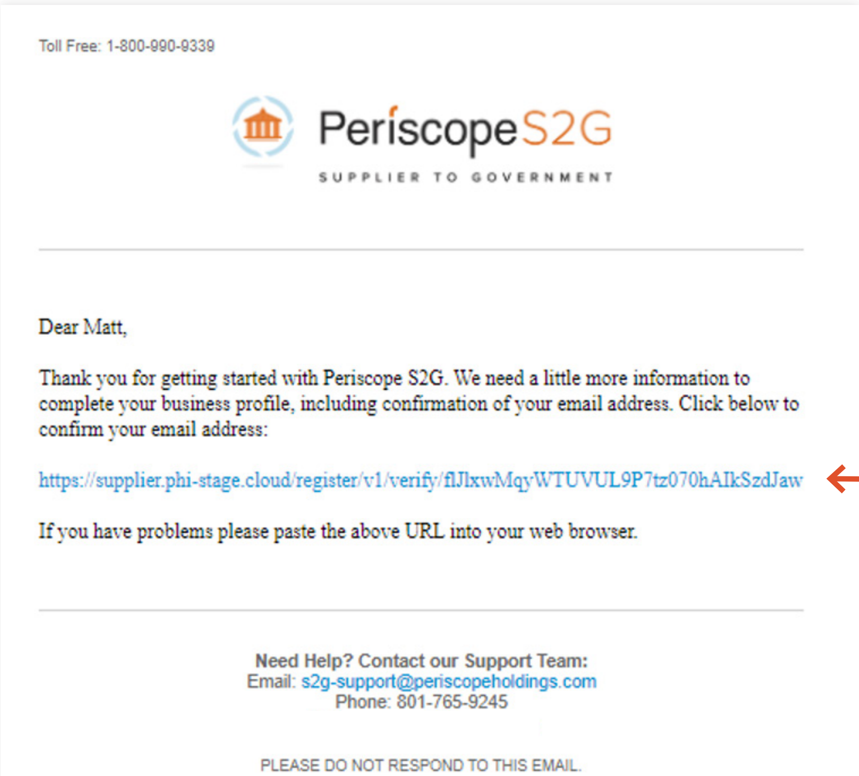
5. **Enter email address (this will be the same email address used to register in OregonBuys). Click "Continue."**

6. **Click the "Resend Verification Email" link on the next screen.**

7. **Click “Close” to escape out of this pop-up.**



8. **Retrieve the password reset email from the email address that was entered on the previous screen.**
   ✓ Click the provided hyperlink in the email.
   ✓ Check junk/spam folder if you do not immediately see email in inbox.
   ✓ Periscope S2G will open in another window.



Toll Free: 1-800-990-9339

PeriscopeS2G
SUPPLIER TO GOVERNMENT

Dear Matt,

Thank you for getting started with Periscope S2G. We need a little more information to complete your business profile, including confirmation of your email address. Click below to confirm your email address:

https://supplier.phi-stage.cloud/register/v1/verify/flJlxwMqyWTUVUL9P7tz070hAIkSzdJaw

If you have problems please paste the above URL into your web browser.

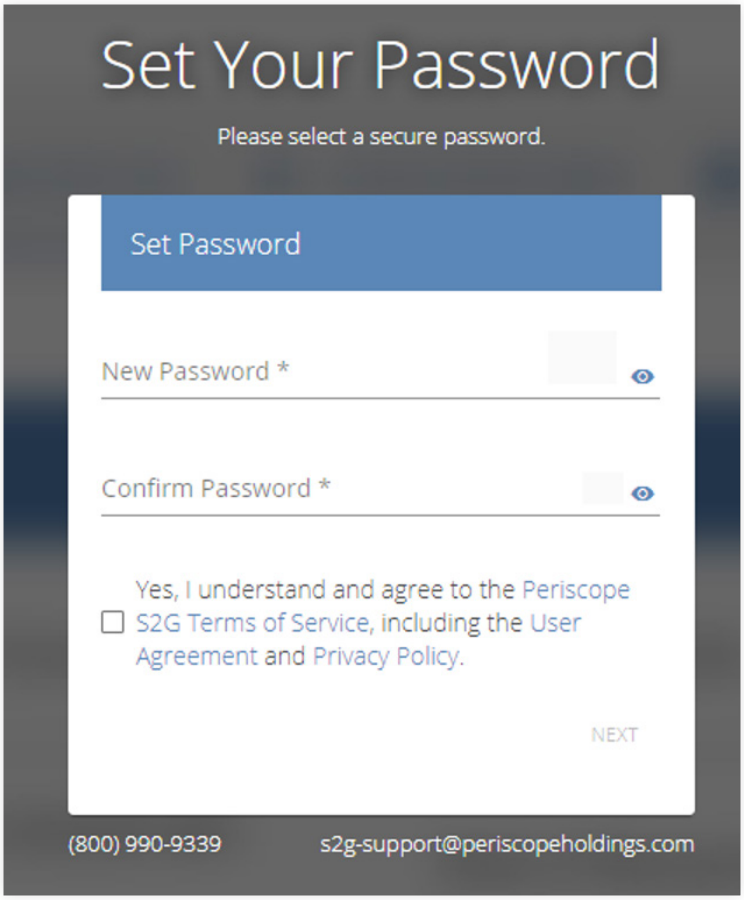
Need Help? Contact our Support Team:
Email: s2g-support@periscopeholdings.com
Phone: 801-765-9245

PLEASE DO NOT RESPOND TO THIS EMAIL.

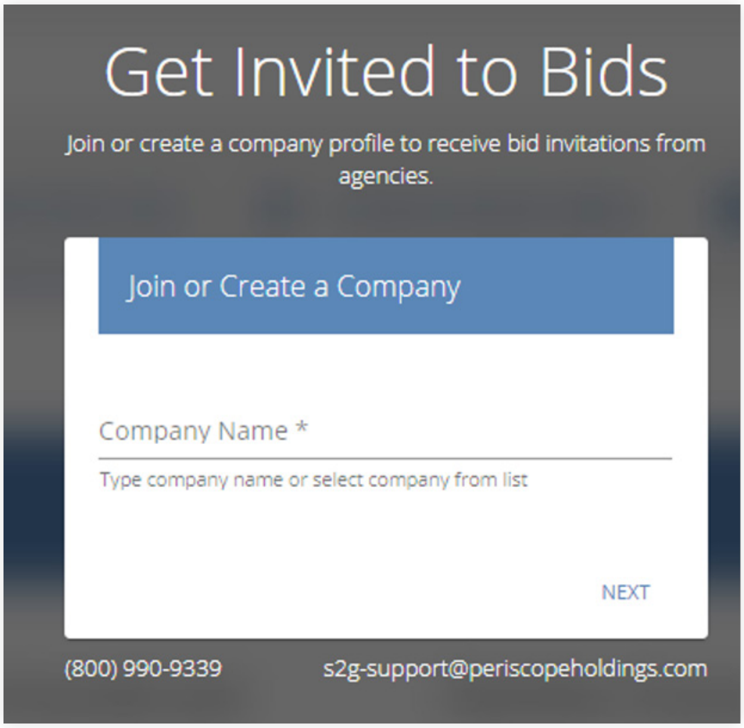
9. **Enter the new password in the “New” and “Confirm Password” fields.**
   ✓ Passwords rules:
      - Minimum of 8 characters
      - One Upper Case
      - One Lower Case
      - One Digit
      - One Special Character

✓ Accept the "S2G Terms of Service" by checking the box.

- Click "Next."

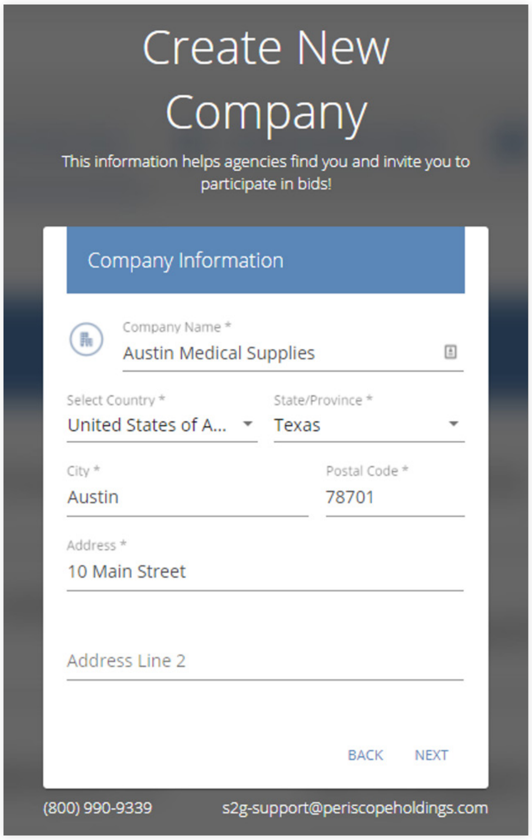


- Enter your "Company Name"
- Click "Next"

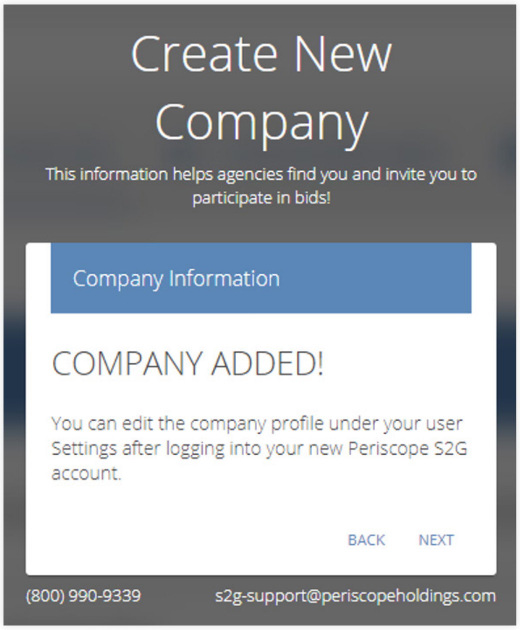


10. A new tab will open, directing you to the "Company Name" screen.

- ✓ Enter the "Company Name" in the given field, if it did not already pre-populate from the OregonBuys system.
  - Note: Make sure your company details that show up are what you expect to see, some larger companies may have multiple variations depending on the department. If any of the information does not look familiar, please go back to the previous screen and search again.
- ✓ Click "Next."

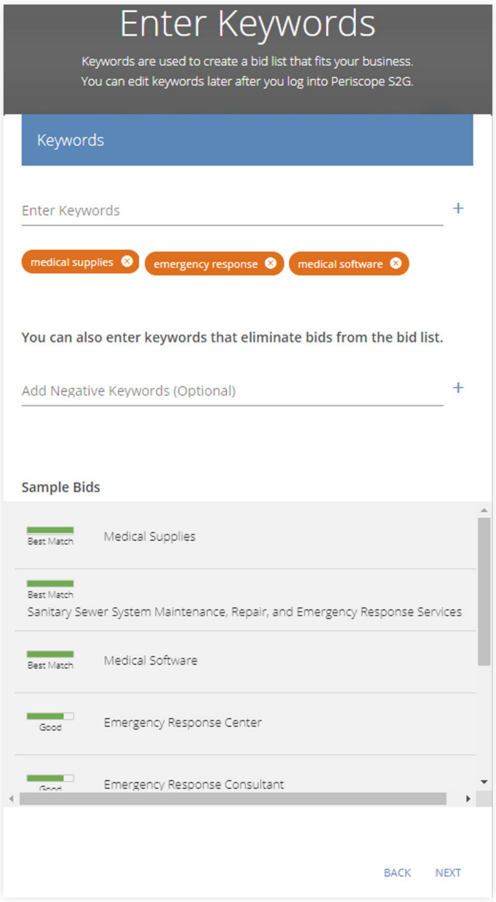


- Company added!
- Click "Next" to continue S2G Account Setup.

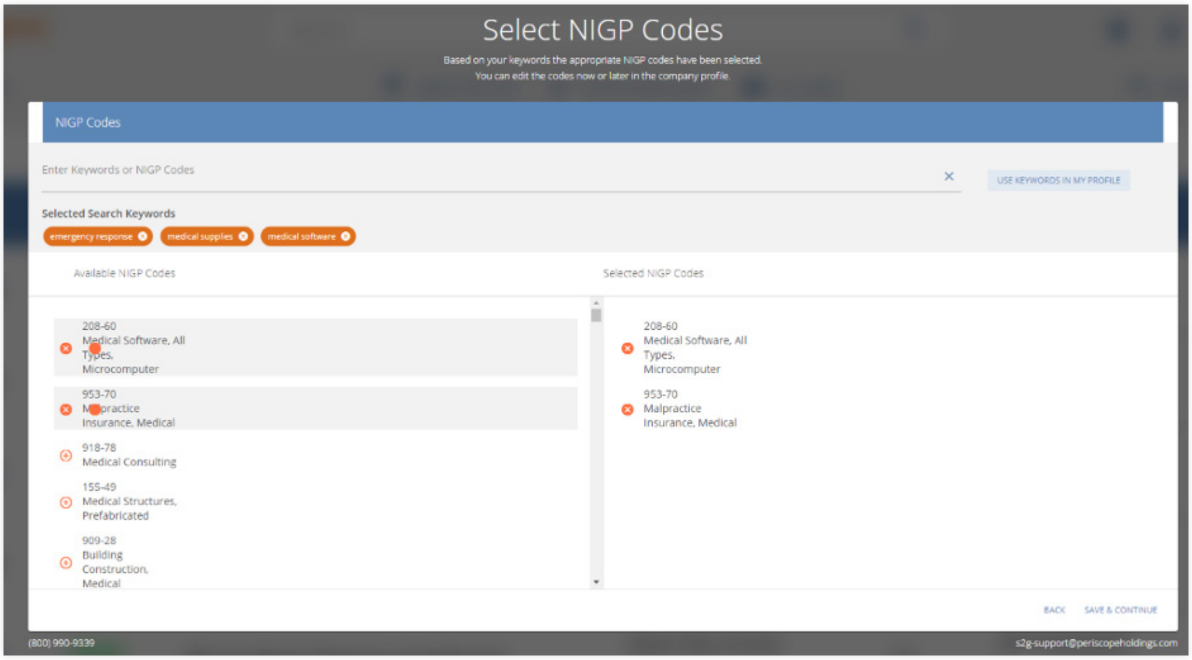


11. **Select a "Sales Region" from the provided options.**
    - ✓ Please note, this is specific to your S2G account, the Periscope supplier bid notification service. These daily notifications can be turned off. See notes below.
    - ✓ Click "Continue."

12. **Set up your profile Keywords, these are words/phrases that align with the types of bid opportunities your company is most interested in.**
    - ✓ Enter three (3) Keywords for commodities or services that your business offers.
        - As noted above, this is for daily bid notifications from the Periscope S2G system which powers the Marketplace. If you do not wish to receive these daily bid notifications, you must still complete this account set-up, but you can turn off these daily notifications. See note below.
    - ✓ Click "Next."



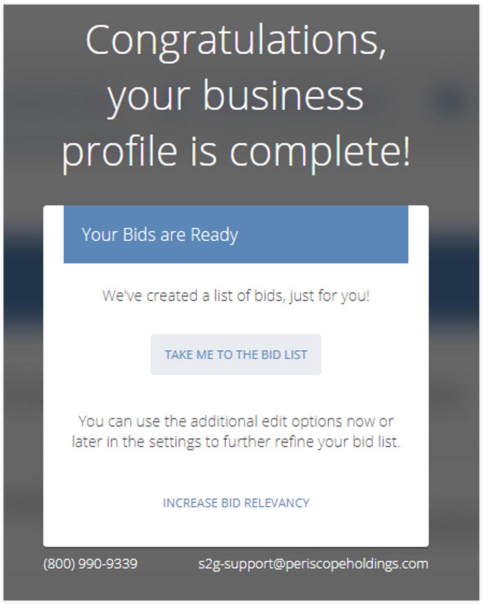
13. **Enter your NIGP Codes. Locate NIGP Codes to add to your account by:**
    - ✓ Manually entering keywords or click the "Use Keywords in my Profile" button and it will pull up any relevant keywords previously entered.
    - ✓ To select the NIGP Codes to add to the account simply click on them and they will populate to the right.
    - ✓ Click "Save & Continue."



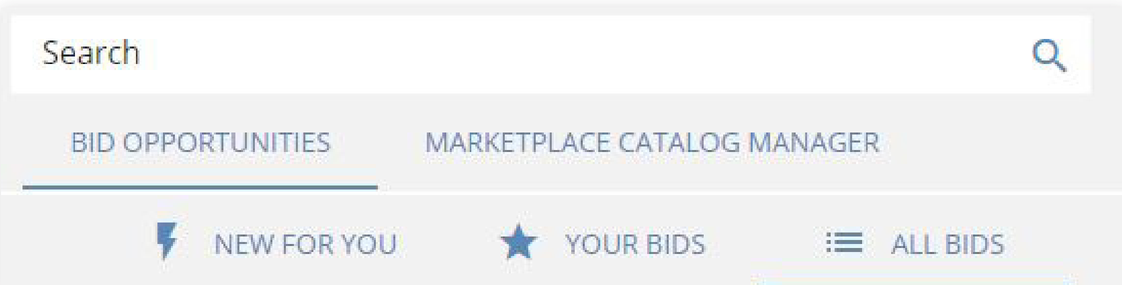
14. **Confirm your bid relevancy to finalize your S2G setup.**
    - ✓ Click the thumbs up or down button based on the bid relevance to your business.
    - ✓ This helps us improve the quality of bids being sent to you from Periscope S2G.

15. **Congratulations your S2G bid profile is complete and ready to power your account with the Periscope Marketplace.**

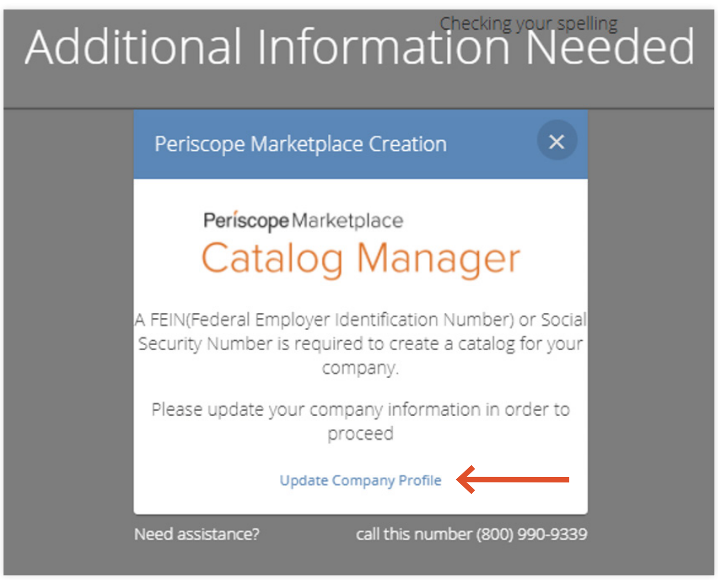
16. **Click "Take Me to the Bid List."**



17. **Once on the main S2G screen, click "Marketplace Catalog Manager" at the top.**

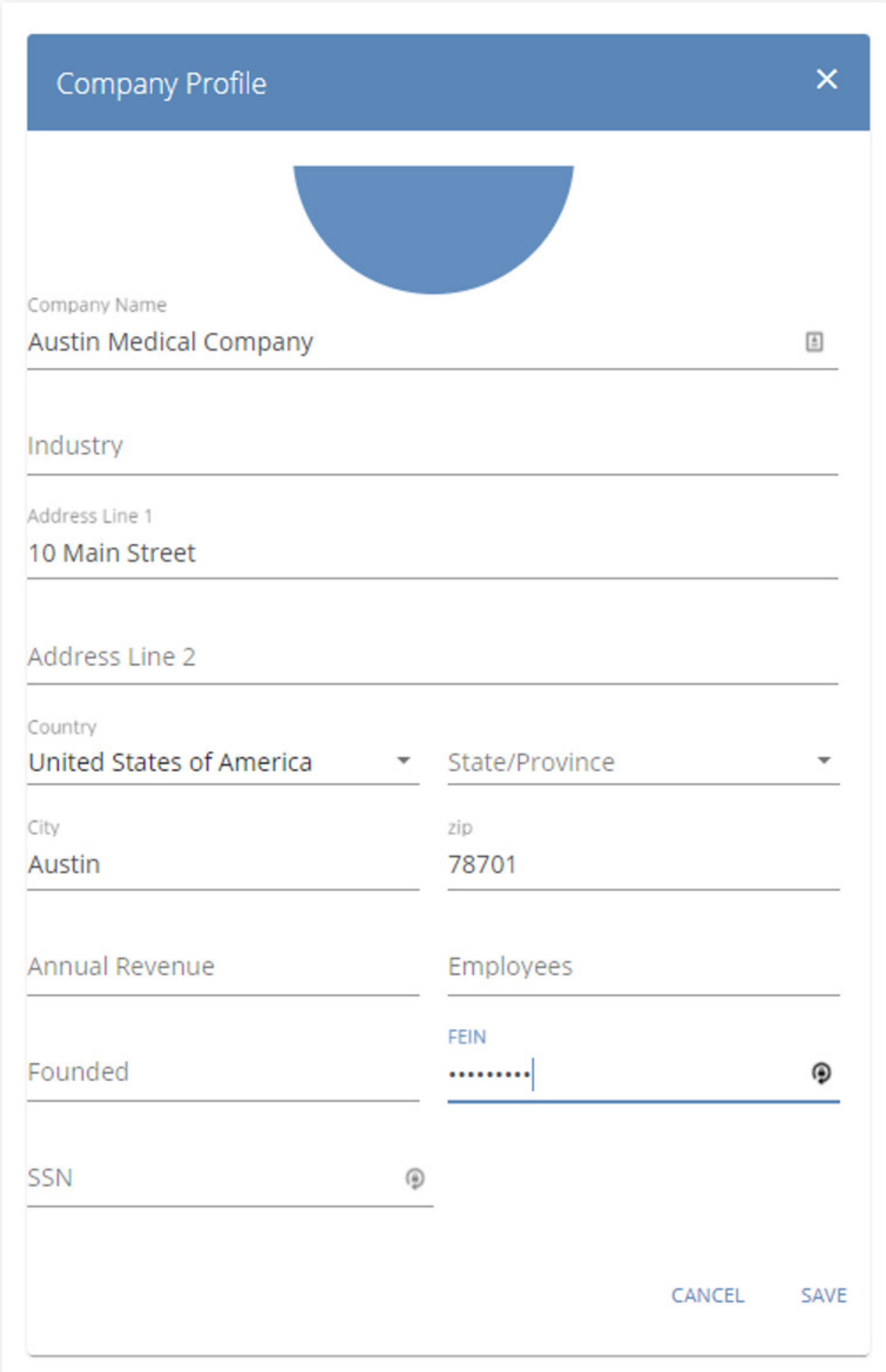


18. **A window for "Periscope Marketplace Creation" will pop up.**
19. **To add your FEIN or SSN, you must click the "Update Company Profile" option at the bottom.**



20. **The company profile will be completed based on the information provided in your OregonBuys account.**

21. **Enter the Company "FEIN" or "SSN" to sync the accounts.**
    - ✓ You can modify the company information if needed.
    - ✓ Click "Save."

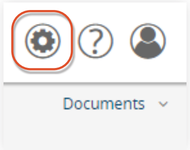


Your account is now successfully set-up and ready for catalog manager access!

Getting Catalog Access:

1. **Log into OregonBuys using the "Sign In" button in the upper-right corner: https://oregonbuys.gov/bso/.**

2. **Click the settings icon in the upper-right corner and select "Catalog Manager" from the dropdown.**



3. **A new tab will open, directing you to the "Company Name" screen.**
   - ✓ Enter the "Company Name" in the given field.
   - ✓ Click "Next."

4. **Click "Register."**
   - ✓ You'll be redirected to your account setup screen. Finish your registration by navigating through a few tabs.

5. **You will then be directed to the "Company Information" screen.**
   - ✓ The address information should populate from the "General Mailing Address" on your OregonBuys account.
   - ✓ Click "Next."
     - You can change the "Company Information" if you choose.
   - ✓ Click the "Done" button.

Your company has been successfully added!

Preparing Your Product List for Upload:

1. **Download the OregonBuys 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.

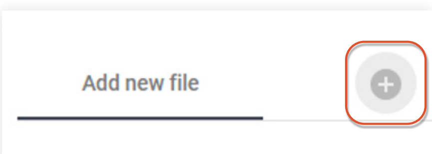
3. **Save the catalog template file as a .csv with a name that is universal, as you will need to use this exact same file name for any future catalog uploads or modifications.**

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.")

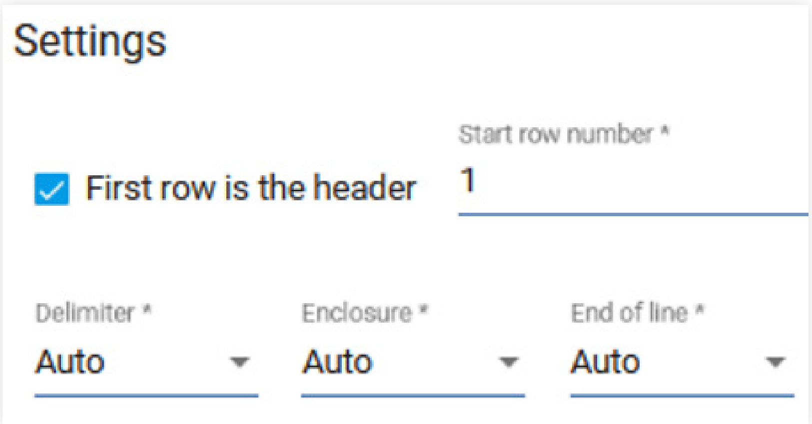
3. **You will see a screen with three (3) steps. First, select "add new file" by clicking the "+" button to the right of this text and choose the option from the dropdown that aligns with your connection type: FTP or file upload, click "Save."**
   - ✓ This should be the product list developed in the 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:

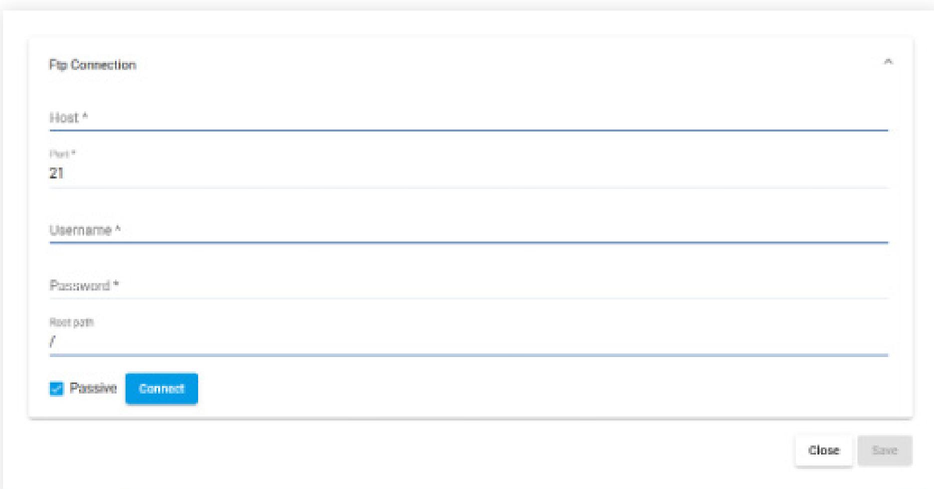
- Click the "Select File" button and select your previously formatted Product List from your files.
- File type will default to .csv as this is the only accepted format.
- Click the "Upload" button.
- To the right of the screen, you will see setting options appear. Indicate if row one (1) is a header, 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.

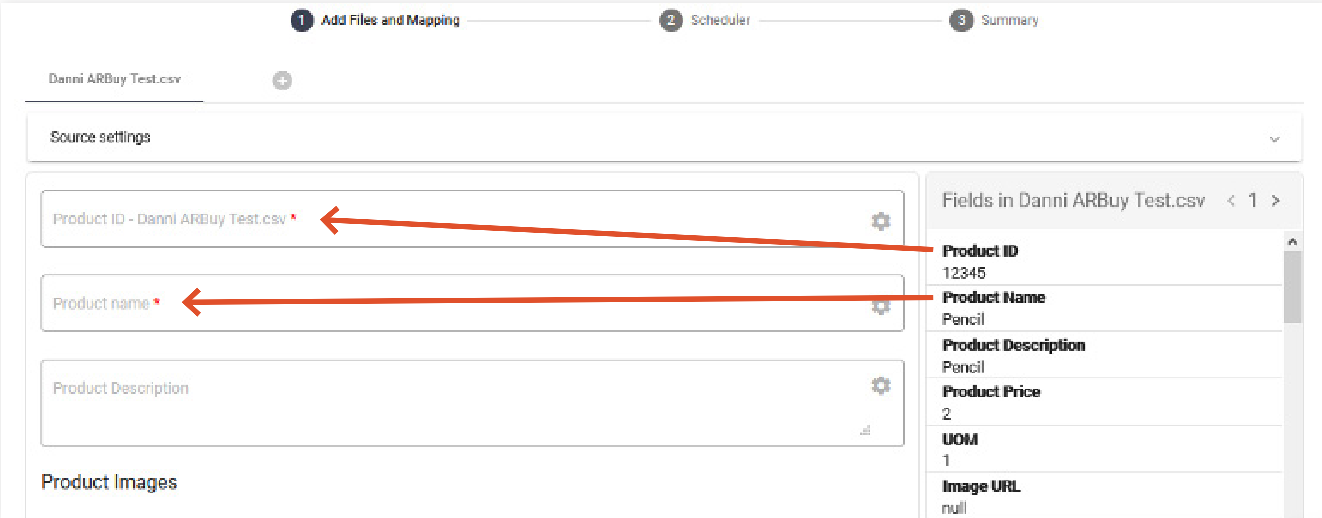
✓ FTP:

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



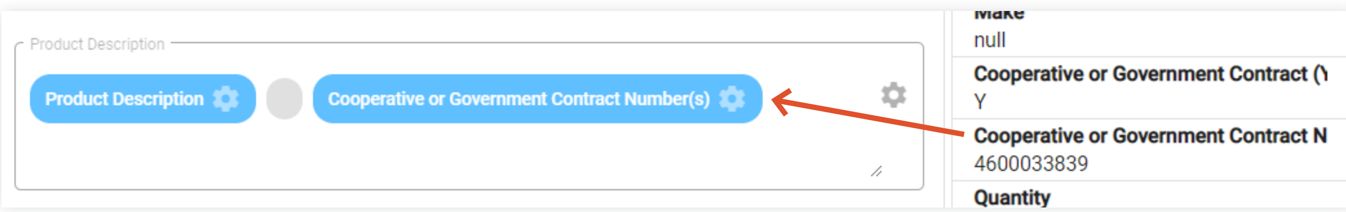
- Click the "Save" button in the bottom-right corner. If successful, you will see a bar flash at the top of your screen confirming a successful upload.

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.

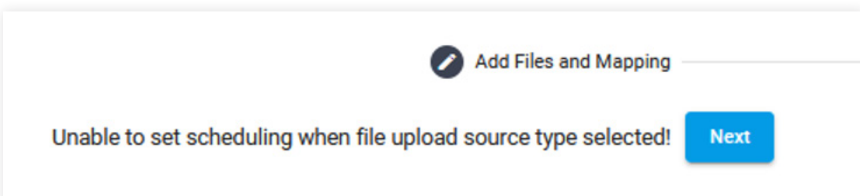


   - ✓ To map your government contract(s) status, these fields require special mapping and a manual input:
     - Use the Key field under the subhead "Product Attributes" and physically type into the Key field "Government Contract".
   - ✓ Drag and drop the field "Cooperative or Government Contract Y/N" 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.

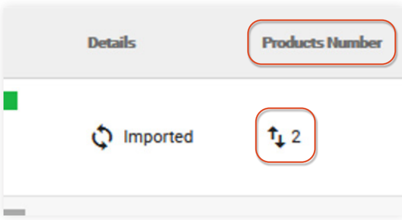


   - ✓ Note: If you selected "File Upload" as your connection type, on the next screen you will see that you are on phase two (2) which is "Scheduler." On this page you will see a message indicating it was unable to schedule. This is NOT an error, this is only applicable to those who selected "FTP" for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

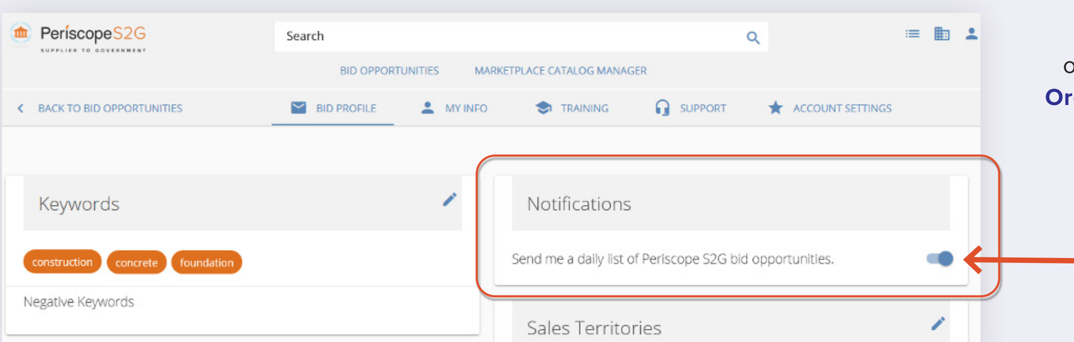
7. Click the “Save and Finish” button at the bottom.
   ✓ Please note, in rare cases, this page has caused a web browser to freeze. If you are unable to hit “Save and Finish” on this screen, we apologize but you will need to back out of this page and try again. Please reach out if it gives any further issues.

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

How to Turn Off Daily Bid Notifications from Periscope S2G:

1. Click the “Account” button in the upper-right corner and select “Bid Profile” from the dropdown.

2. Uncheck the toggle under “Notifications” to turn off the daily bid notifications.
   ✓ You can always turn them back on and modify your keywords/territories in this section as well.



Need Assistance?

If you have any questions or need support, please email us at **OregonBuys@periscopeholdings.com** or call **800-203-5727.**
Support Hours: Monday – Friday, 8 a.m. – 5 p.m. CDT