



OregonBuys Catalog Upload Guide

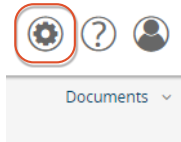
The next step in getting fully enabled in OregonBuys is getting set up in the Periscope Marketplace, where you will be able to upload your catalogs into the Catalog Manager for Oregon to purchase your products and services direct.

The process is simple, since you have registered in OregonBuys, all you have to do is setup and upload your catalog.

Getting Catalog Access:

1. Log into OregonBuys using the “Sign In” button in the upper-right corner: <https://oregonbuys.gov/bs/>.

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.

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 or **800-203-5727** and they will assist in the upload process.

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.

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

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.

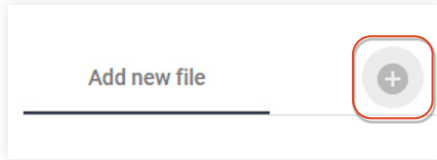
2. A pop-up will appear titled “New Task” asking for a name, this is where you name your catalog.

Tip: Name your catalog something unique to your business, i.e., “JM Automotive Products” versus “Automotive Product.”)

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

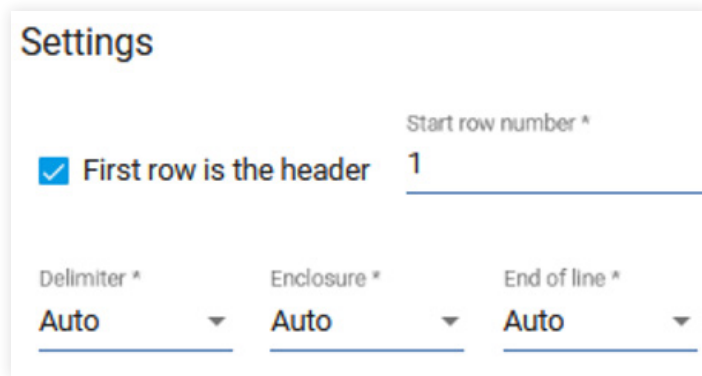
3. You will see a screen with three (3) steps. First, select “add new file” by clicking the “+” button to the right of this text and choose the option from the dropdown that aligns with your connection type: FTP or file upload, click “Save.”

- ✓ 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.



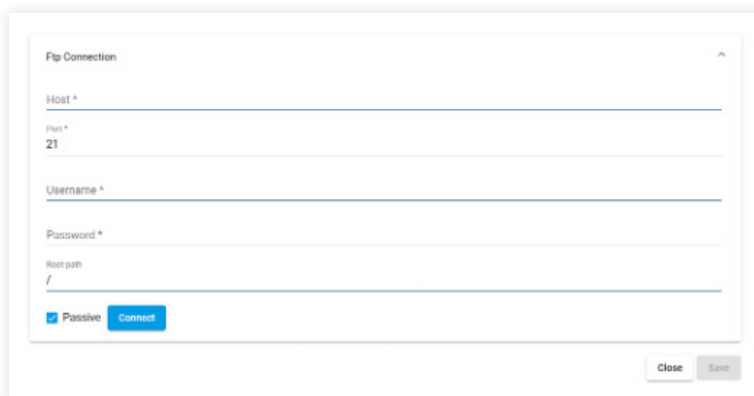
4. Once your connection type has been selected, it's time to upload your catalog. This will vary based on your selection:

- ✓ 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.

A screenshot of a "Settings" dialog box. At the top left is the title "Settings". Below it is a checked checkbox labeled "First row is the header". To the right of this checkbox is a text input field labeled "Start row number *" containing the number "1". Below these are three dropdown menus: "Delimiter *" set to "Auto", "Enclosure *" set to "Auto", and "End of line *" set to "Auto".

- 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.

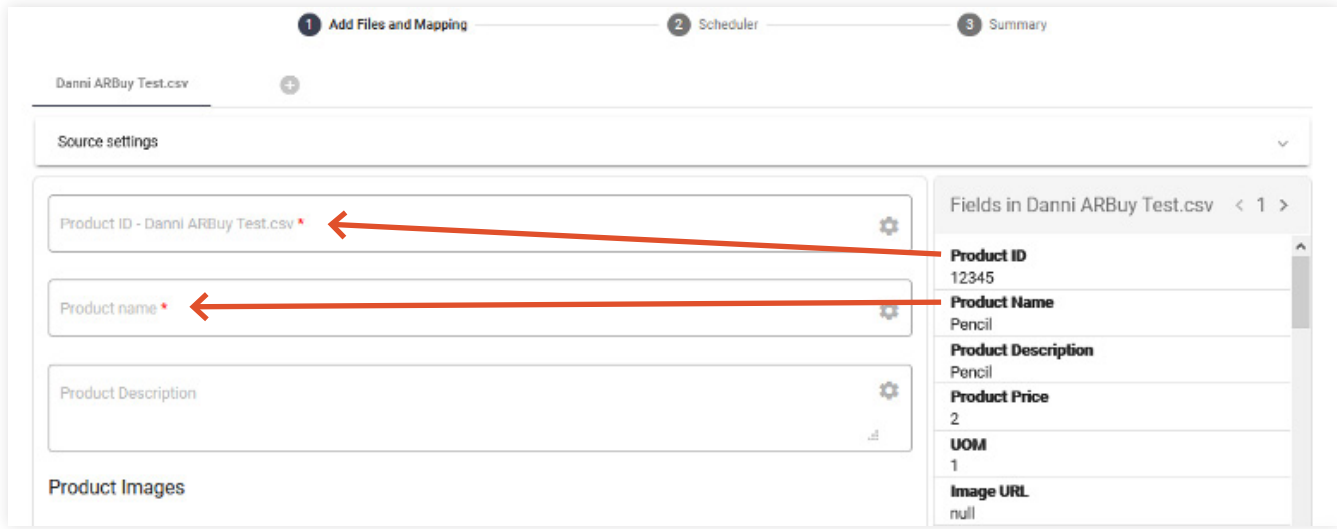
- ✓ FTP:
 - A pop-up will appear requesting the following required information:
 1. Host
 2. Port
 3. Username
 4. Password
 5. Root Path

A screenshot of an "FTP Connection" dialog box. It contains several input fields: "Host *" (empty), "Port *" (containing "21"), "Username *" (empty), "Password *" (empty), and "Root path" (containing "/"). At the bottom left, there is a checked checkbox labeled "Passive" and a blue "Connect" button. At the bottom right, there are "Close" and "Save" buttons.

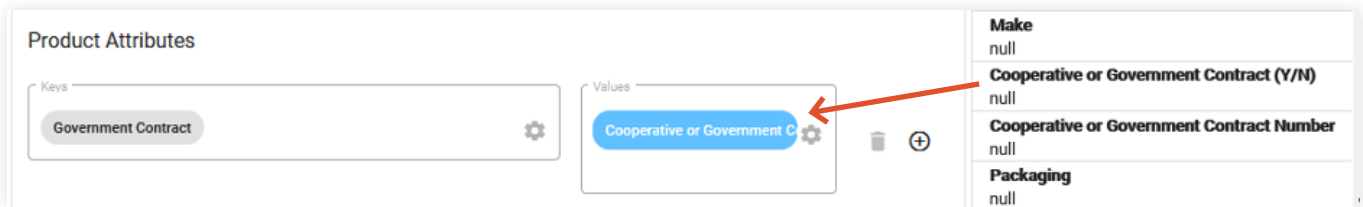
- Click the “Save” button in the bottom-right corner. If successful, you will see a bar flash at the top of your screen confirming a successful upload.

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

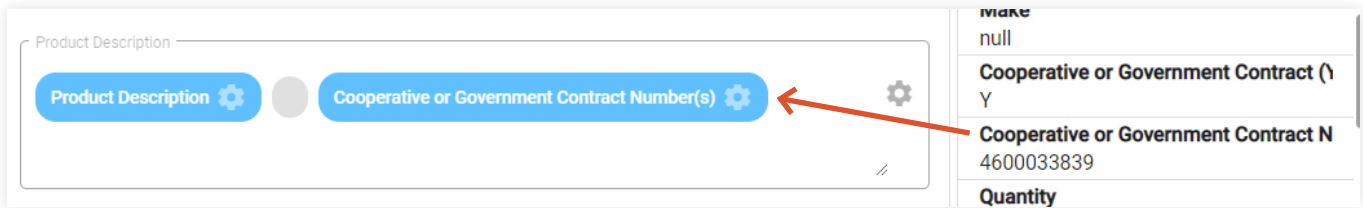
- ✓ This is only done for one (1) line item and does NOT need to be done for all line items in the provided .csv.
- ✓ This is a drag-and-drop feature in which your provided fields are indicated on the right and you must drag them to the appropriate sections on the left.



- ✓ 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.

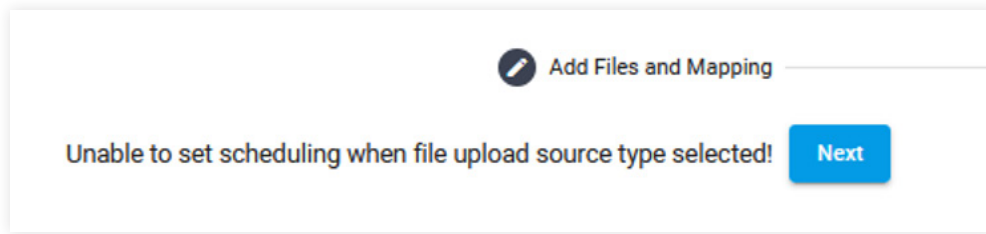


- ✓ The Cooperative or Government Contract Number will need to be mapped into the “Product Description” Field.

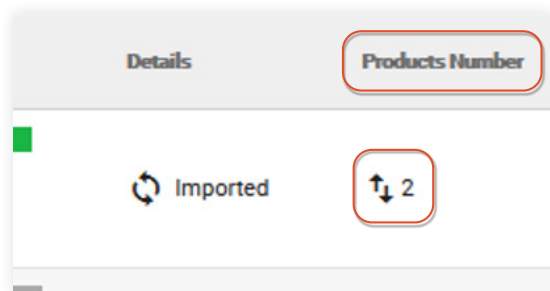


- ✓ Once this has been mapped, select the “Save and Next” button at the bottom of the page. You will see a bar flash across the top confirming this was done successful.

- ✓ 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!