SupplierXM User Guide

coles

SKUVantage — now part of SALSIFY

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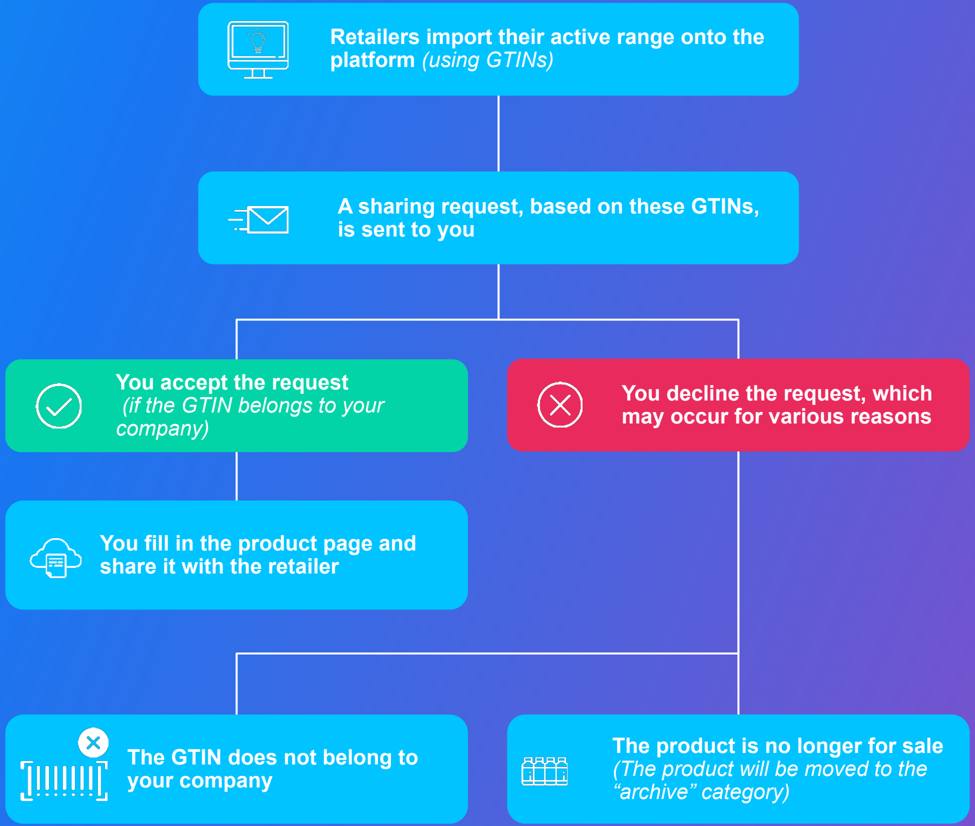
Overview

1. How the SupplierXM platform works
2. Sign up and Log in
3. Fulfilling products with incomplete data
4. Import your product data via Excel
5. Go further with our productivity tools
6. Going further: Messaging tools
7. Q&A
8. Require more assistance
9. Live Webinars

SALSIFY

1. How the SupplierXM platform works

Overview of the data sharing process



The request-based approach

In order for you to be able to fill in and share your product pages, retailers using this approach will assign a product that they are listing to your brand and ask you to provide information for that product.

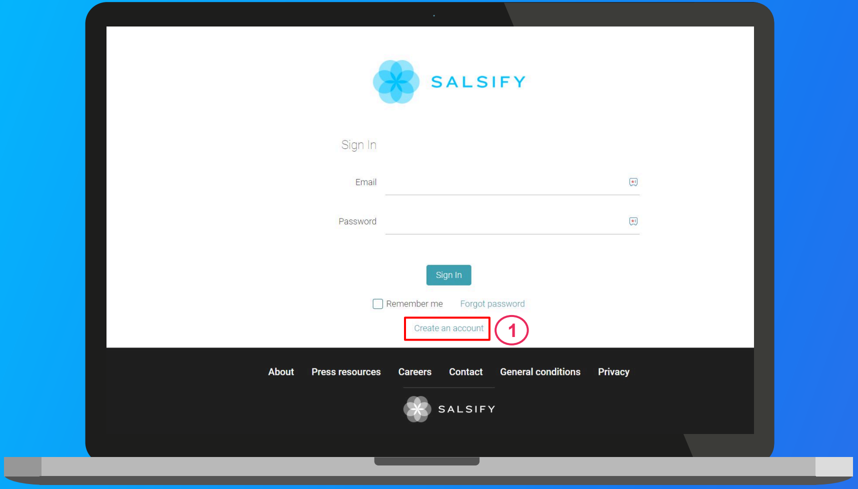
This means you can only share product pages with a retailer if they have requested them.

2. Signup & Login

A) Sign up and login
B) Adding additional users

A) Log in to the platform

Go to app.supplierxm.salsify.com



If you have forgotten your password, click on “Forgot password” to reset it.

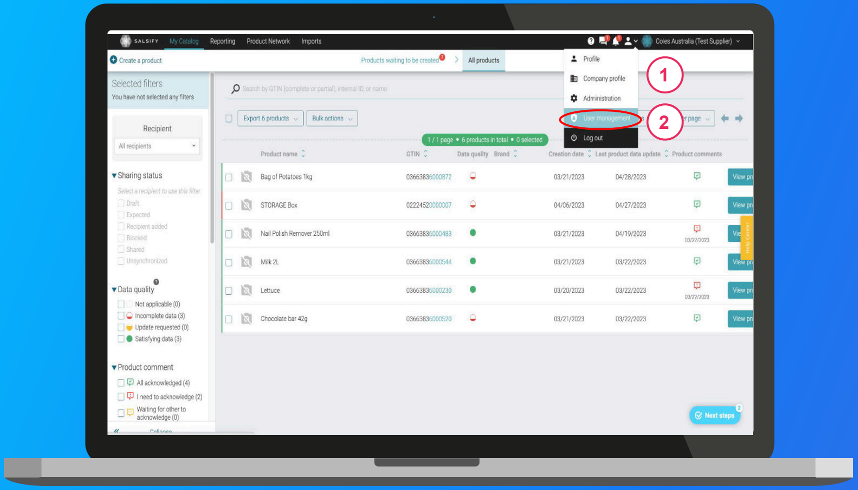
If you don’t have an account: Sign up

1. Click on *Create an account*.
2. **Organisation you belong to** field, enter your business name and choose **ADD** option. Please ensure that if your company already appears in the dropdown list, continue typing and add Australia at the end of your company name. Do not select the existing company as this will put you in a different market.
3. **In which market do you intend to use SupplierXM** please select Australia.
4. **Your organisation,** select *Supplier.*
5. Confirm your registration by clicking on the link that will be sent to you by email.

If you already have an account: Log in

1. Enter your login information (email address and password).
2. Then click on *Sign in*.

B) Adding additional users



If you need to add a user: Log in

1. Click on the profile icon in the top right of the main screen.
2. Click on *User Management.* 2
3. A new screen will appear and click on *invite user.*

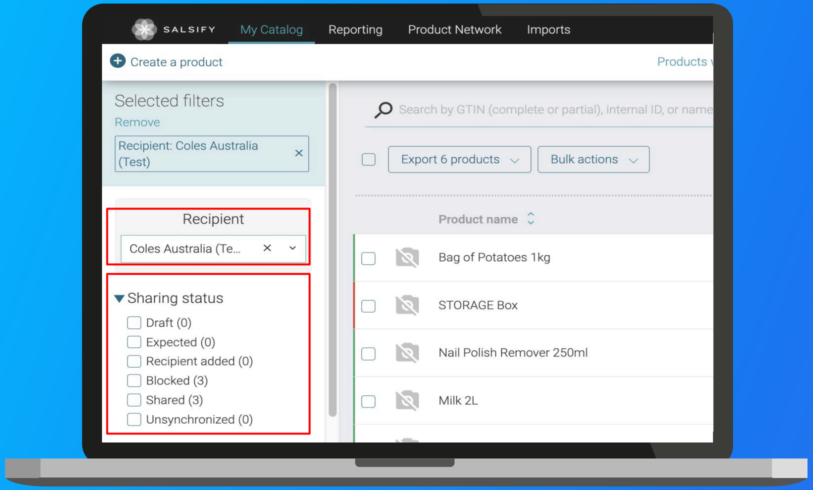
This will trigger an email to the invitee from the email address notify@supplierxm.salsify.com asking for the user to activate their email. Once this is completed, the new user will have access to the account.

3. Completing products with incomplete data

A) Filter by recipient to view *sharing status*
B) Data Quality
C) Products with incomplete data
D) Products waiting to be created

A) Filter recipient: Coles Australia Sharing Status

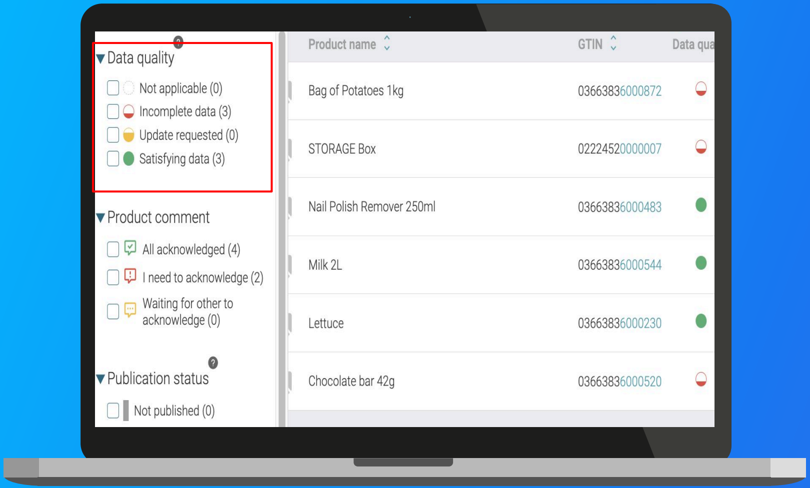
This filter is the most crucial, let's take a look at the status'.



- **Recipient added**: Coles has been added on the publication page but the product is not published/shared. The product is not shared with the recipient, the user just needs to publish these products.
- **Blocked**: The product cannot be shared with Coles because a blocking rule is not respected. When this rule is respected, the product can be shared. Data must be filled in on the product page.
- **Shared**: The product is shared with Coles. If the product is updated, Coles will receive the update.
- **Unsynchronized**: The product has been shared with Coles but they are no longer requesting your product.

B) Data Quality

Understanding the different data quality filters and where missing information is needed



- **Not applicable**
  These products will not be visible to Coles because they are not being requested for the day one launch, these are the products which have been unsynchronized.

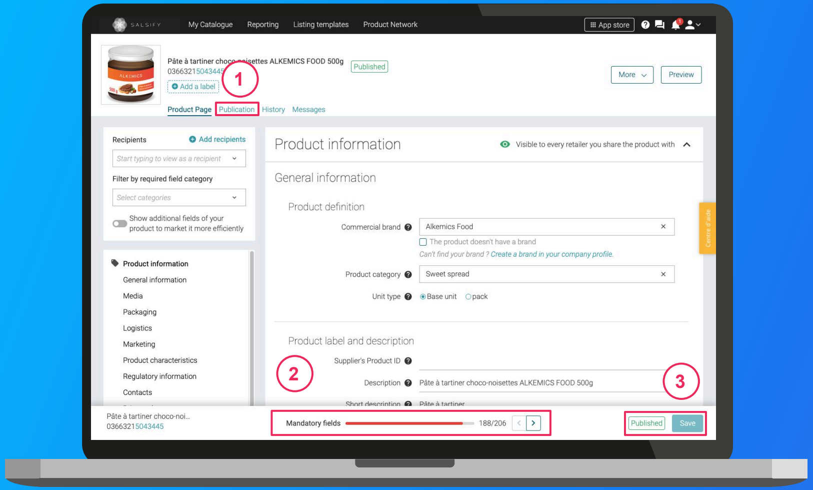
- **Incomplete data**
  The product has missing information that Coles wants. Data must be filled in on the product page by clicking on *View product*.

- **Update requested**
  The product is shared with Coles, however an update has been requested from the QA team.

- **Satisfying data**
  The product data has been completed and can now be shared with Coles.

C) Filling in products with incomplete data

Important: After clicking on View product, make sure that Coles has been activated by clicking on the *Publication* tab on your product page. 1

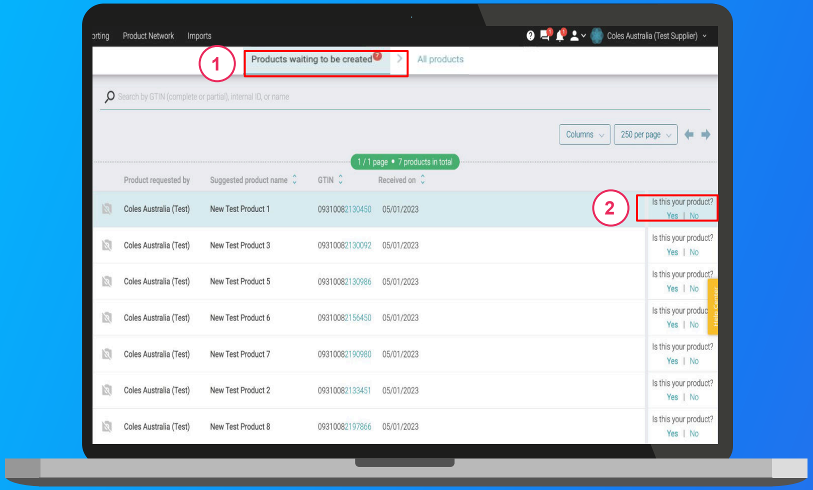


1. Use **the progress bar** to focus only on the **blocking fields that are required** by Coles. It will show you all of the **mandatory** fields that must be filled in before you can share your product. A set of mandatory definitions can be found here. 2

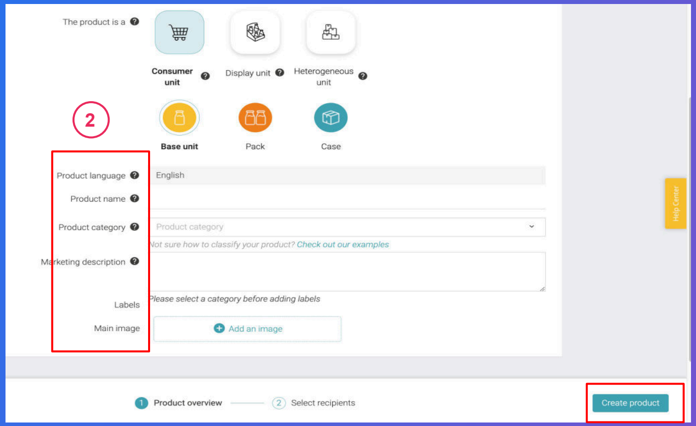
2. Click on *Save / Publish*. 3

D) Products Waiting to be created

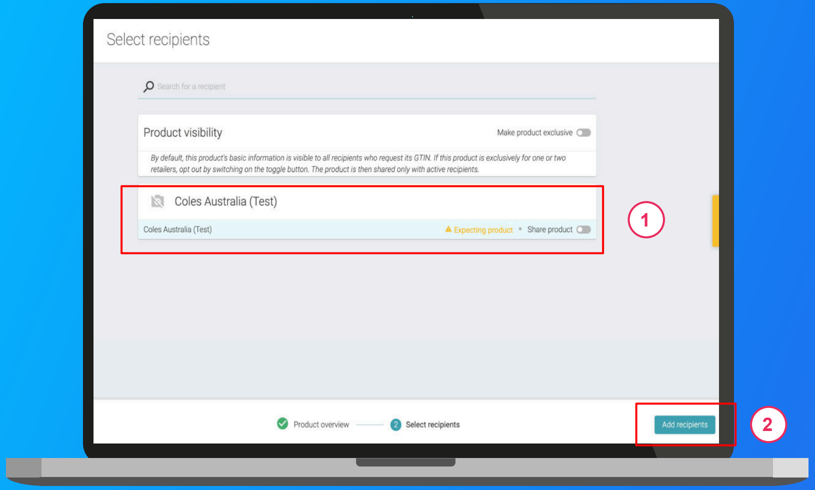
New requests from Coles will come through under this tab and will need to be enriched if they are your product



1. Click on **Products waiting to be created.** 1
2. **Is this your product**, please click yes and enrich the product as per the below, ensuring to fill in each attribute displayed on the screen. 2
3. Then **Create Product.** 3



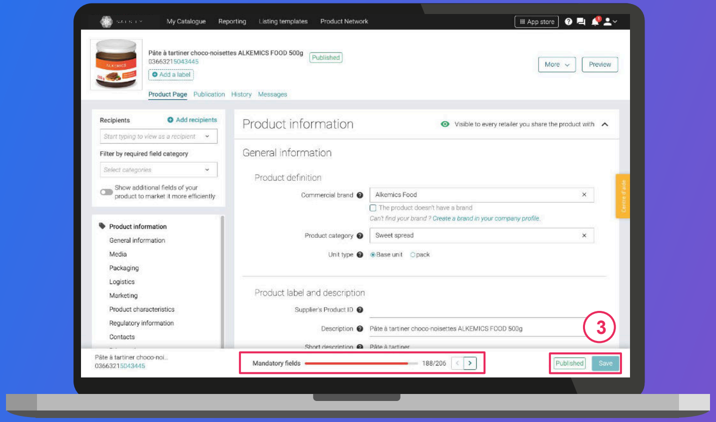
Products Waiting to be created



1. Select your recipient as Coles and *share product*. 1

2. Then **add recipient**. 2

3. A new screen will appear as per the below image. Use the progress bar to focus only on the blocking fields that are required by Coles and then save and publish. 3



Congratulations, your product has been created!

To check that your page has been shared successfully, go to the bottom of the page and ensure that:

1. All fields that are mandatory for the recipient in question have been filled in 1

1. Your product's status is "Published" 2

Reminder
Click on the "Publication" tab on your product page to check that you have activated recipients.

4. Import your product data via Excel

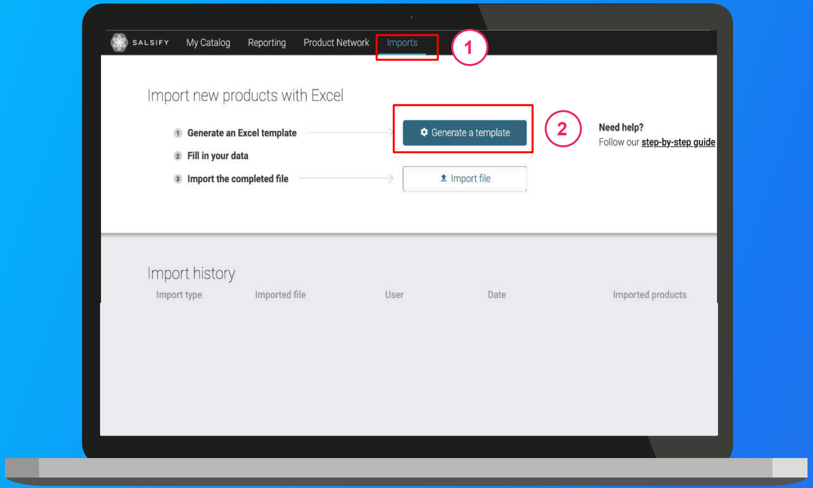
Import your product data via an Excel file

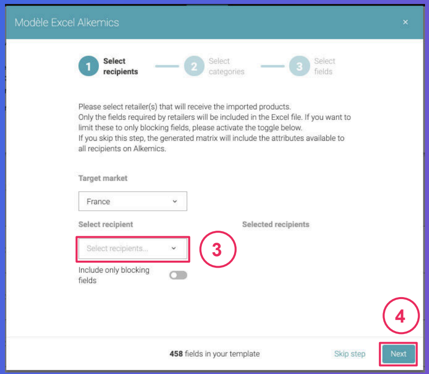
Step 1: To import product data for multiple products at once, click on the *Imports* tab. 1

1. Click on *Generate a template.* 2

2. A window will open. Select Coles for whom you wish to provide your product data. 3

3. Click on **"Next".** 4

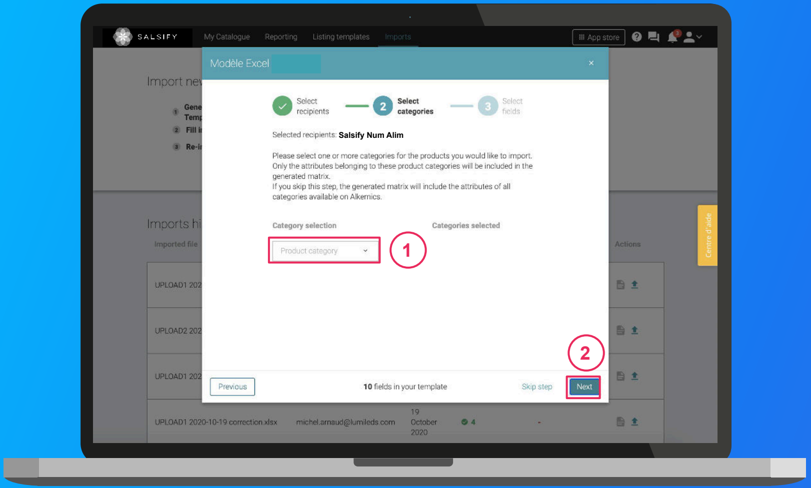




If you select **"Include only blocking fields"**, the generated template will only include the fields that are strictly mandatory to share products with Coles.

Import your product data via an Excel file

Step 2: Select the categories of the products that you wish to import



1

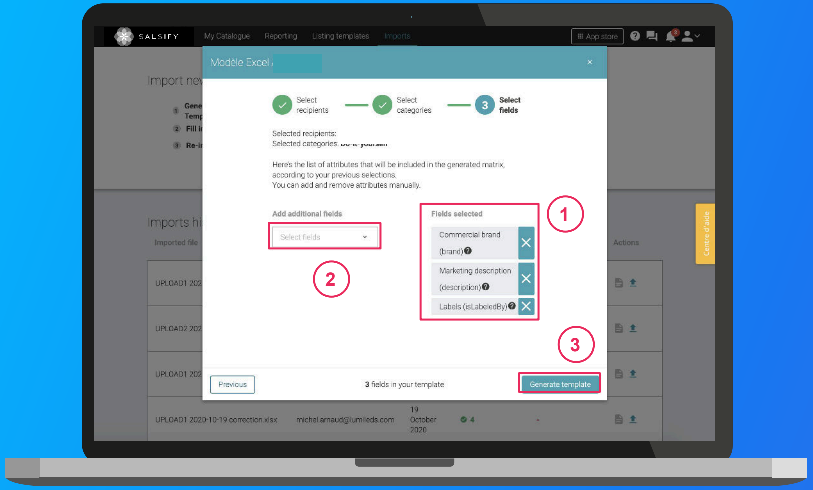
1. Select the categories of the products that you wish to import. Only information related to these categories will be included in the template.

   Note: you can skip this step by clicking on "Next". By doing so, information requested by your selected recipients for all categories available on SupplierXM will be included in the template.

1. Click on **"Next"** 2

Import your product data via an Excel file

Step 3: Select the fields that you would like to fill in



1. By default (depending on the option selected in step 1), **only fields that are strictly mandatory for the selected recipients and apply to the categories selected in step 2 will be included.** They will be displayed on the right side of the window. 1

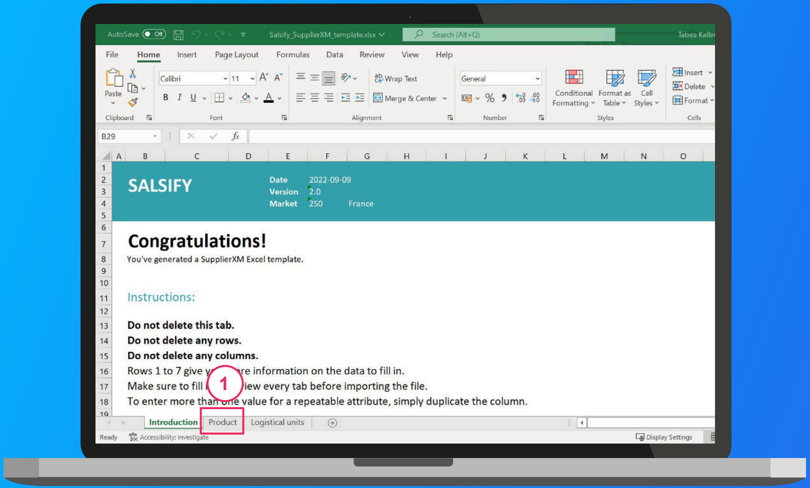
1. Add any additional fields that you wish to include. 2

1. Click on "Generate template". 3

This will start the download.

Import your product data via an Excel file

Open the downloaded Excel file and fill in the template



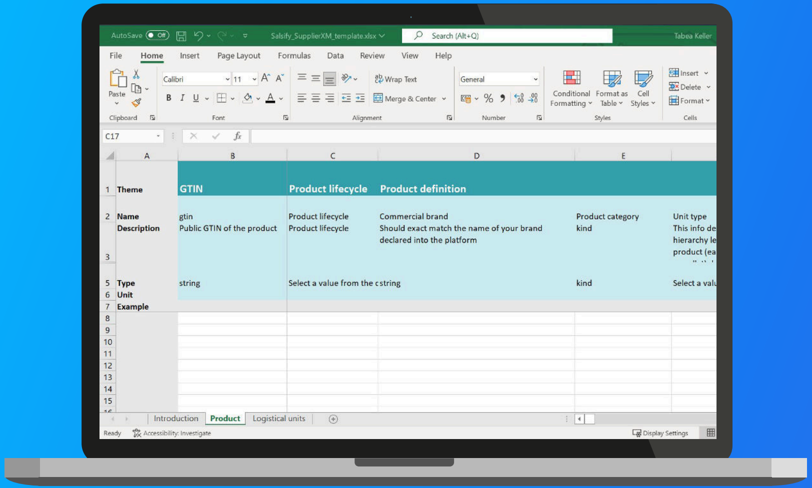
1. **The template has one important tab to fill in:**
   1 "Product": all information related to the product as summarised in step 3 of your template generation.

2. Fill in all of the columns (1 GTIN per line) and save the file in XLSX format. The GTIN's from products waiting to be created can be pasted in here so that it can be done in bulk.

Tip: note the "Introduction" tab which gives you instructions on how to fill in the template correctly! Click here to get more information on the attributes required.

Import your product data via an Excel file

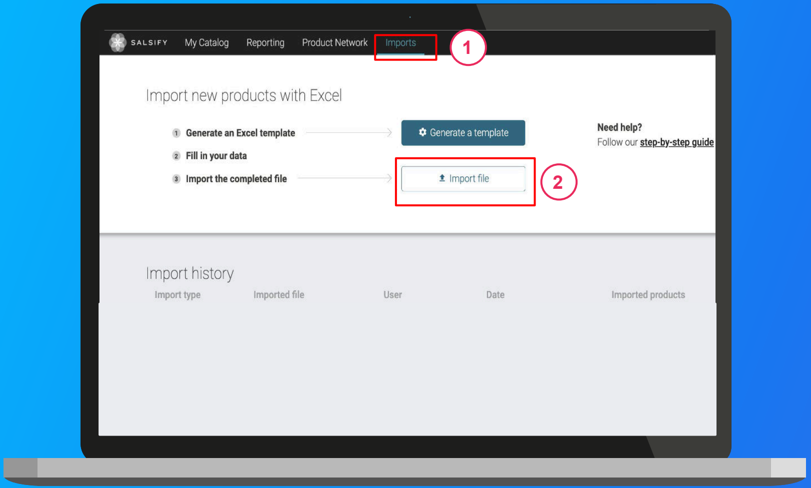
How the template works



- **"Theme" line:** labels of the sub-sections as presented on the platform, in the chronology of your product sheets.
- **"Name" line:** labels of the fields as presented on the platform, in the chronology of your product sheets.
- **"Description" line:** information required to fill in the corresponding field correctly.
- **"Path" line:** internal technical name of the SupplierXM field. *Do not modify - hidden by default.*
- **"Type" line:** information on the type of data expected in order to fill in the field correctly.
- **"Unit" line:** unit of the column to be filled in. This means that you can only fill in the corresponding information in one and the same unit, the one you have selected. If you have different units, duplicate this column.

Import your product data via an Excel file

Import your data



Tip: once completed, you can view a record of your import directly via the “Imports” tab

In the “Imports” section: 1

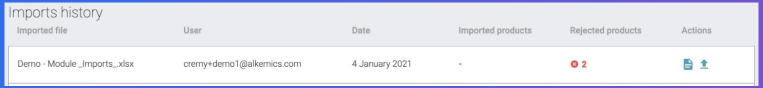
1. Click on “Import file.” 2

2. Drag and drop your Excel template into the dotted square.

3. Click on “Import”

4. Note the loading icon under the "Imported Products" line of your "Import history". Once finished, find the number of imported products as well as the number of rejected products. To view your error report and find out what information needs to be corrected, click on the icon hereafter: 

   Click on the hyperlink in the window that opens to download the file containing only your products in error. Correct your matrix and re-import it by clicking on the icon 

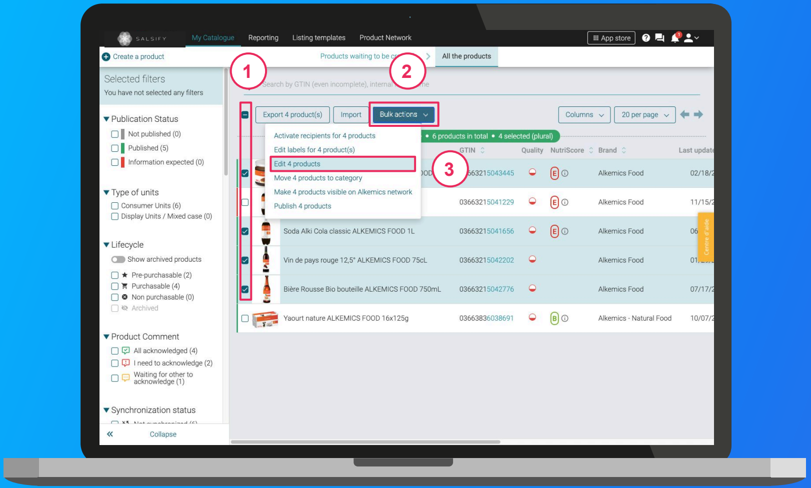


5. Go further with our productivity tools

A) Bulk edit product information
B) Bulk activate recipients
C) Bulk publish products

A) Bulk edit product information

Go to the **Catalog** page



1

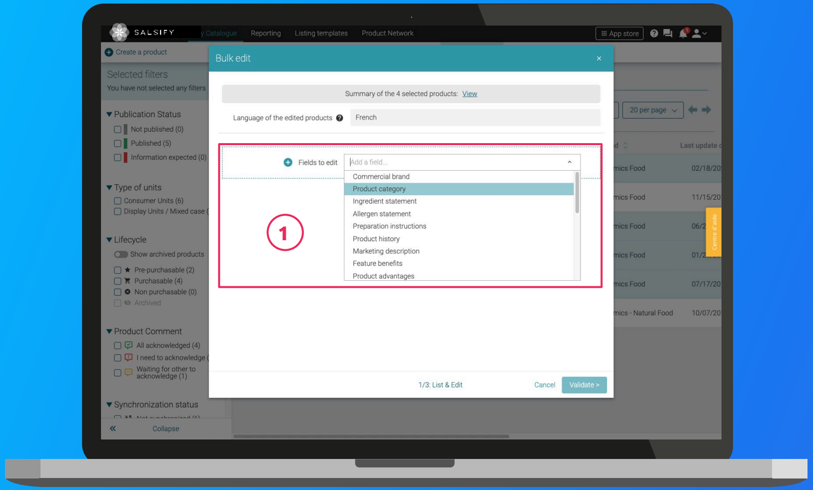
1. **Select the products** that you would like to edit.

2. Click on **"Bulk actions"** 2
3. Then click on **“Edit X products”.** 3

4. A window will open.

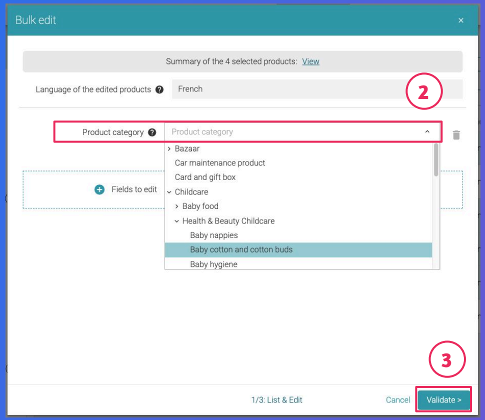
A) Bulk edit product information

Go to the **Bulk** edit window



1. **Choose the field(s)** that you wish to edit on the selected product pages.

2. In this same window, fill in the applicable **information for these selected fields** and **validate** it.

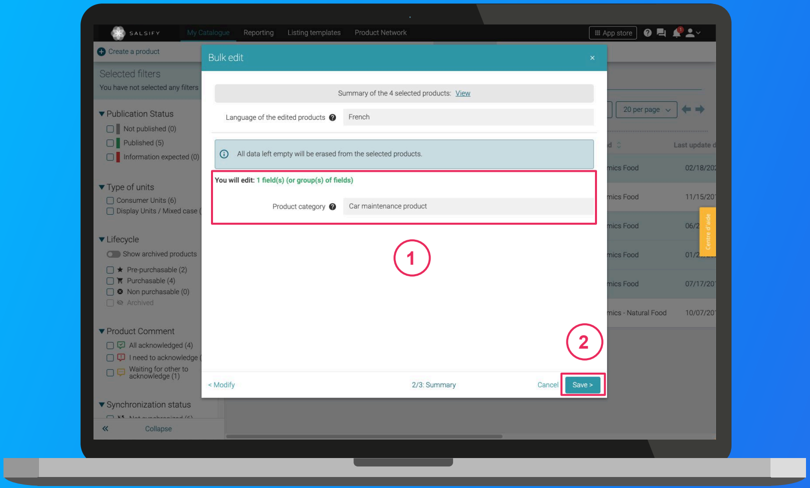


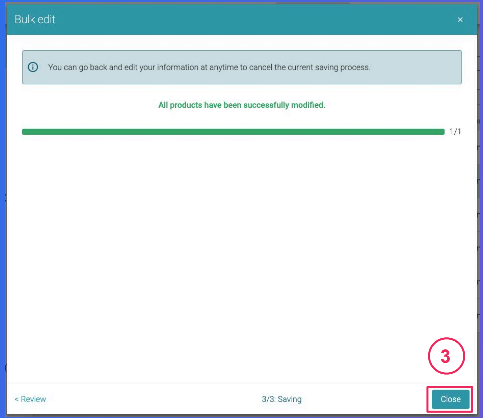
For more information, see the following article:
https://app.supplierxm.salsify.com?data-elevio-article=32

A) Bulk edit product information

Go to the **overview** window

1. **An overview** will show all modifications made to your products.
2. Click on **Save.**
3. **Saving your changes:** once complete, click on **“Close.”** Your product information has been successfully modified!

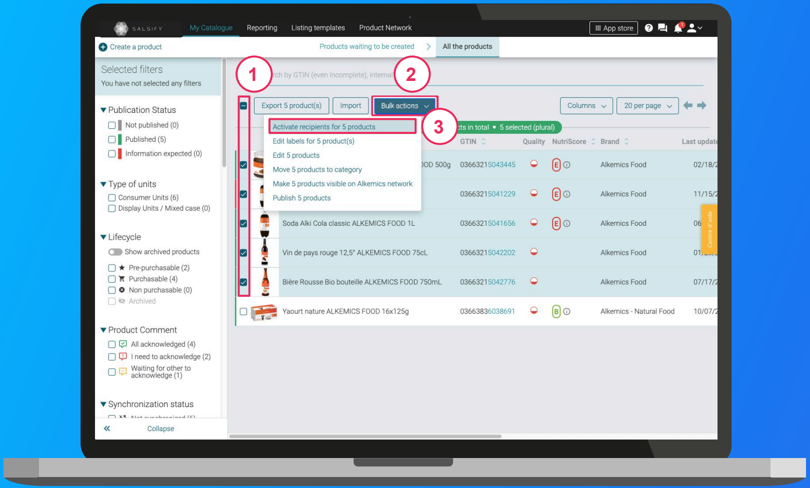




For more information, see the following article:
https://app.supplierxm.salsify.com?data-elevio-article=32

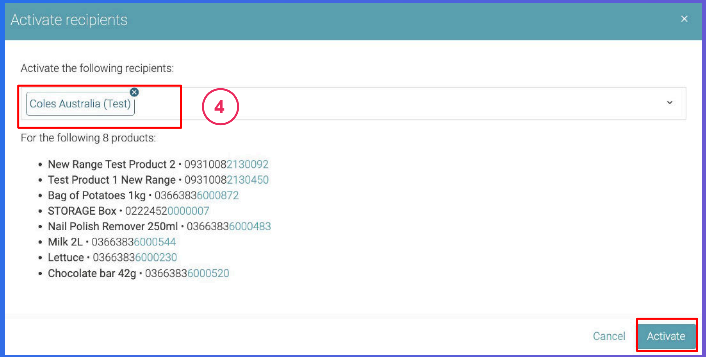
B) Bulk activate recipients

Go to the **Catalog** page



1. **Select the products** that you would like to activate recipients for.
2. Click on **"Bulk actions"** then on **"Activate recipients for X products."**

1. A window will open: **select Coles**.
2. **Click on "Activate."**



For more information, see the following article:
https://app.supplierxm.salsify.com?data-elevio-article=167

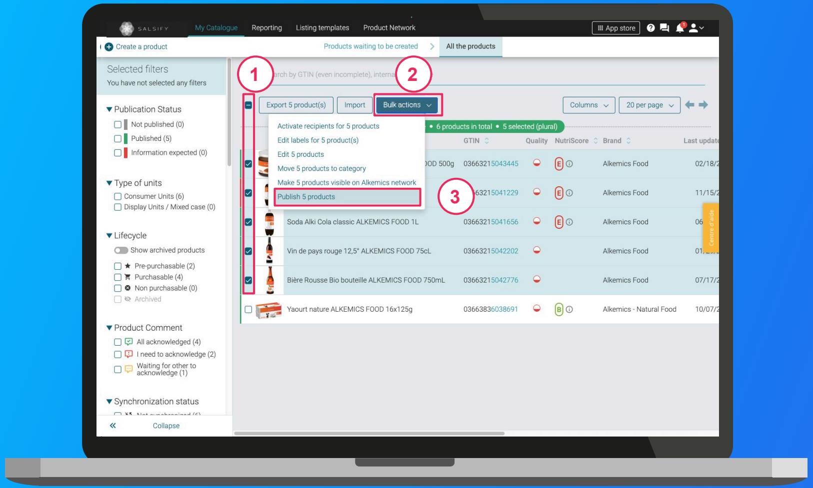
C) Bulk publish products

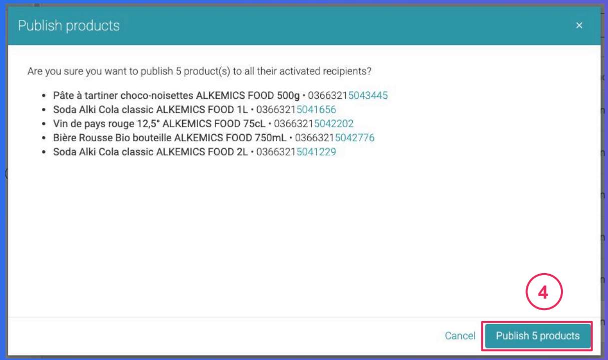
Go to the **Catalog** page

1. **Select the products** that you wish to publish. 1

1. Click on **"Bulk actions"** then on **“Publish X products.”**
 2 3

2. An overview window will appear. Click on **“Publish X products.”** 4





For more information, see the following article:
https://app.supplierxm.salsify.com?data-elevio-article=167

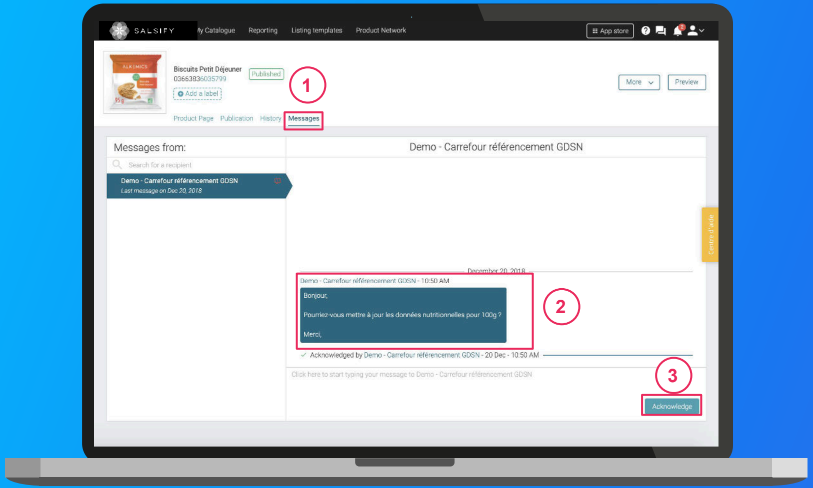
6. Going further: Messaging tools

A) The “Messages” section on the product page
B) The “Organization” chat feature

A) The “Messages” section on the product page

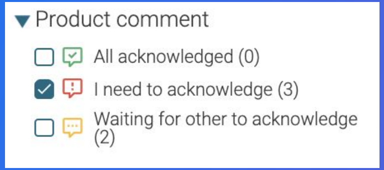
You can communicate with Coles via your product pages

Coles can also use this messaging feature to request that you make changes to a specific product page.



1. On your catalog page, use the **“Product comment”** filter to see which products have comments that have not yet been acknowledged.

2.



1

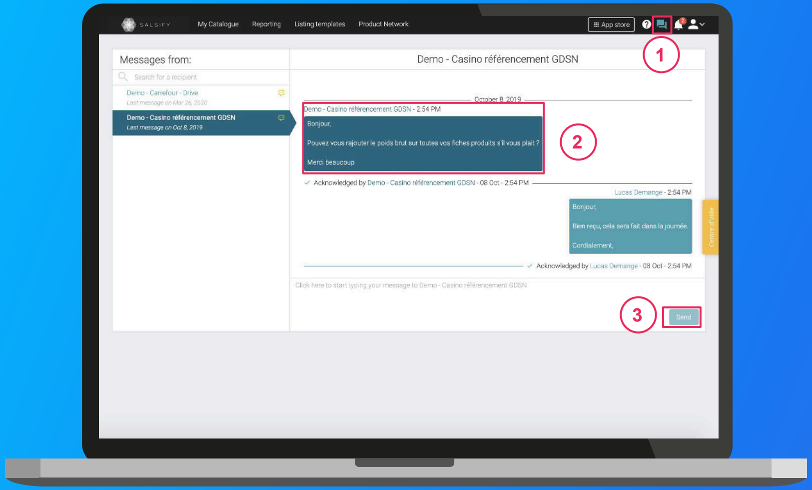
1. Open the page and go to the **“Messages”** section.

1. Read the message and complete the requested tasks. 2

2. Reply to the comment and/or mark it as **“acknowledged.”** 3

B) The “Organization” chat feature

You can also use your account’s **“Organization” chat feature to communicate with Coles**



1. To access the chat feature, click on the **messaging** icon at the top right of the screen. Unread messages are indicated by a red circle on the icon. 1 

1. Read your message. 2

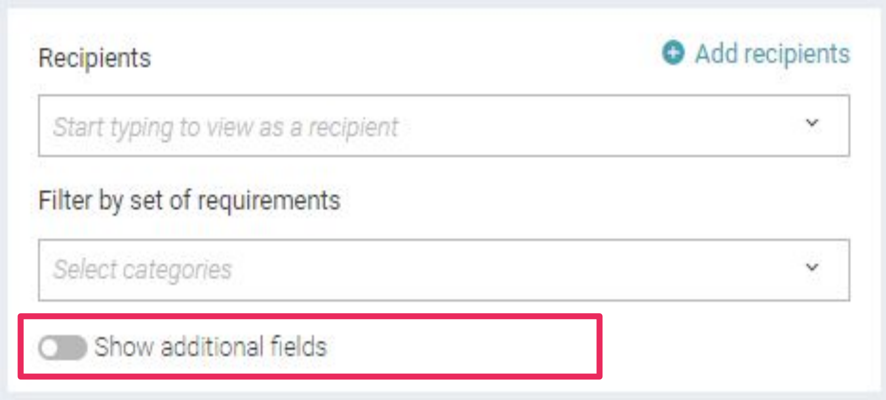
2. Send your reply and/or mark it as **“acknowledged.”** 3

7. Q&A

Q&A

Why can’t I find a specific field that I would like to fill in on my product page?

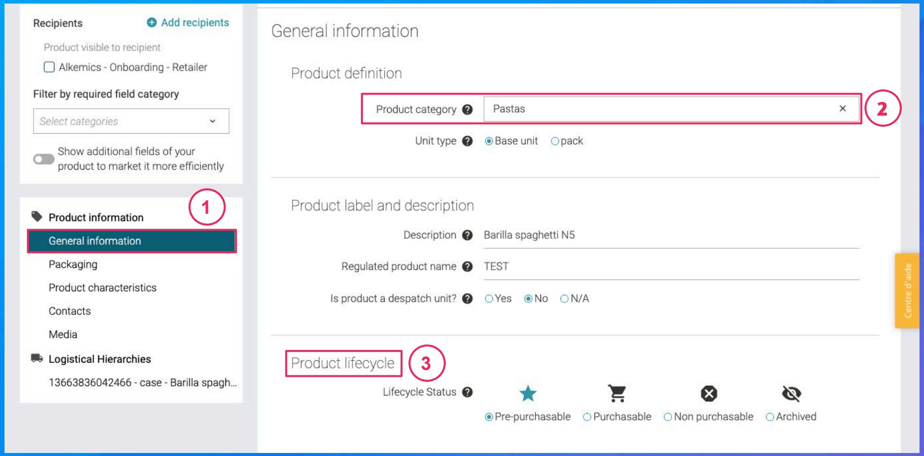
To show all fields that can be filled in on a product page, activate the “**Show additional fields**” option on the left side of the page.



Q&A

How do I delete a product?

It is not possible to “delete” a product on the SupplierXM platform, but you can archive a product. To do this, go to the 1 **“General information”** section of your product page and **update your product lifecycle status**. This can only be done if 3 you have provided a **product category.** 2



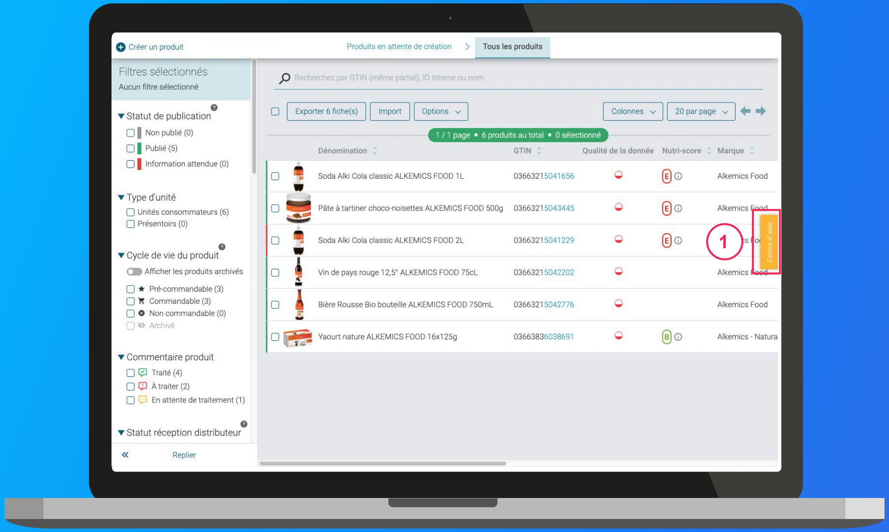
8. Require more assistance

View our FAQ's page here

Need help?

Check out our **Help Center** for assistance with common issues!

1



Have additional questions?

Get in touch with our Support team at

help.sxm@salsify.com or view our supplier portal using the link here.

10. Live Webinars designed to train suppliers on SXM

Please view the booking page here