

Quick-Start User Guide

Supplier Portal



Overview

1. How the SupplierXM platform works
2. Sign up and log in
3. Import your product data via Excel
4. Create your products and share them with your retailers
5. Add information to your product pages
6. Go further with our productivity tools
7. FAQ

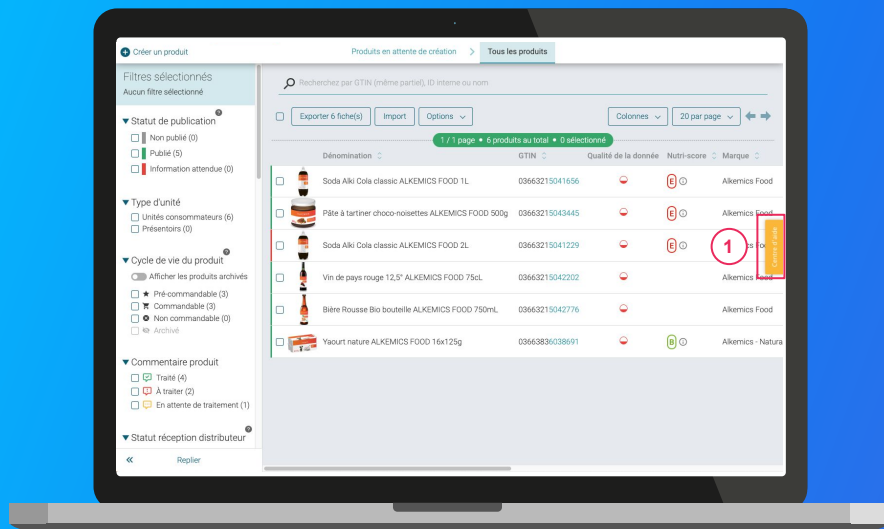


SALSIFY

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

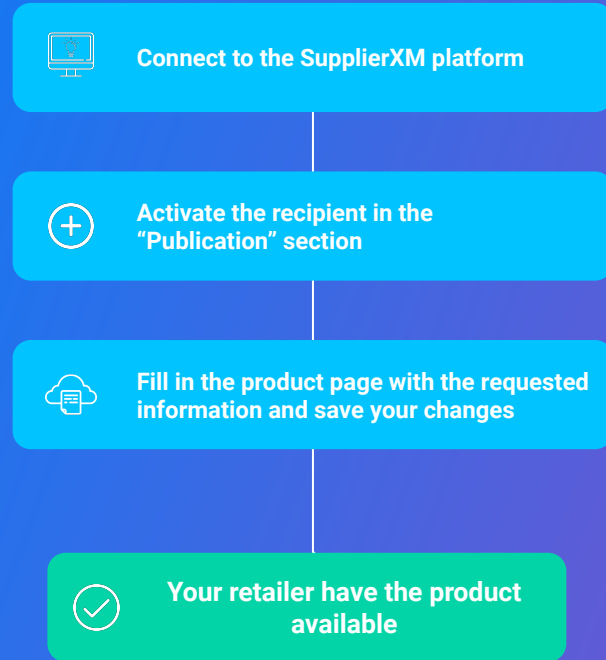


1. How the SupplierXM platform works

Overview of the data sharing process

The free sharing approach

Instead of the request-based approach, your retailer might choose to use the free sharing approach. This simply means that you can share any of your products with the retailer, even if they have not been requested.

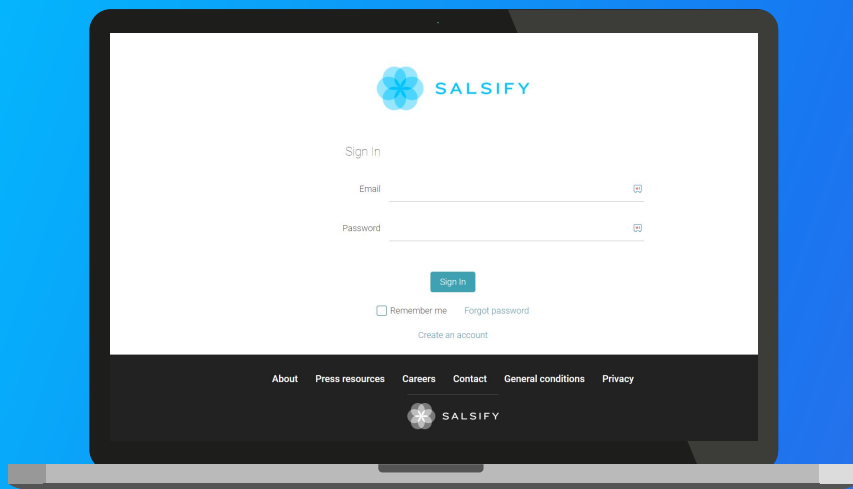


The background is a gradient of blue, transitioning from a lighter shade on the left to a darker shade on the right. A white hexagonal grid pattern is overlaid on the background, with some hexagons filled with a lighter blue color. A white rounded rectangular bar is positioned horizontally across the center of the image.

2. Login

Log in to the platform

Go to app.supplierxm.salsify.com



If you don't have an account: Sign up

1. Click on "Create an account."
2. Fill in the form and confirm the creation of your account.
3. 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."

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

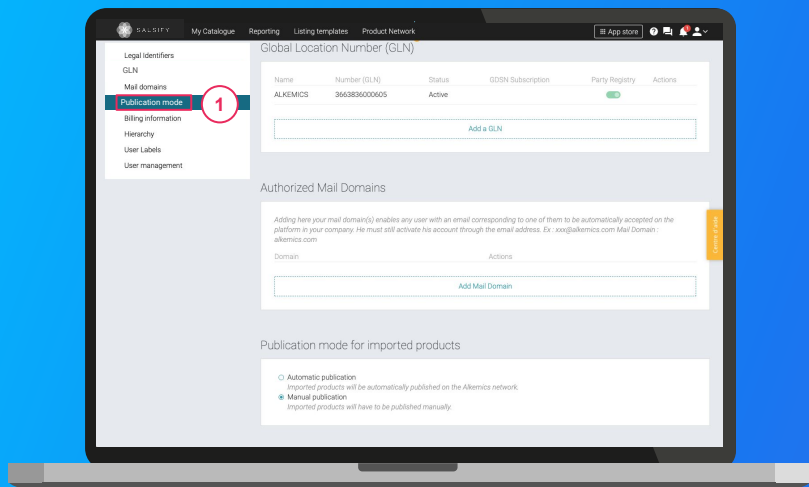


3. Import your product data via Excel

Settings: automatic VS manual publication

Publication modes

Go to your administration page, then to the “Publication mode” section, then select one of the following options according to your needs.



1. Automatic publication

Once they have been imported, your products will be published automatically. All you need to do is select the recipients that you would like to send the information to. Activate multiple recipients at once by following the steps described [here](#).

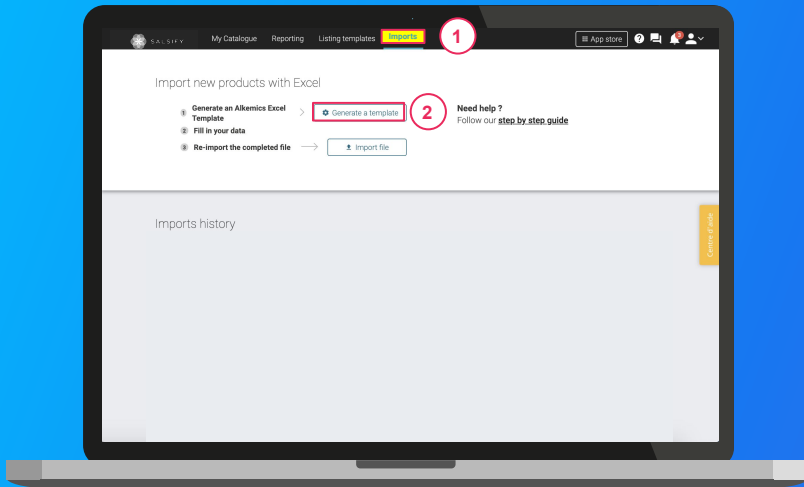
2. Manual publication

Your products will not be automatically published as they are imported, and therefore will not be shared with your retailers. To do this, you will need to publish each product on its product page, or publish multiple products at once (by following the steps [here](#)). Remember to also activate your recipients. Multiple recipients can be activated at once by following the steps [here](#).

Publishing your products makes them accessible to retailers who ask for this information via the request-based approach, explained [here](#).

Import your product data via an Excel file

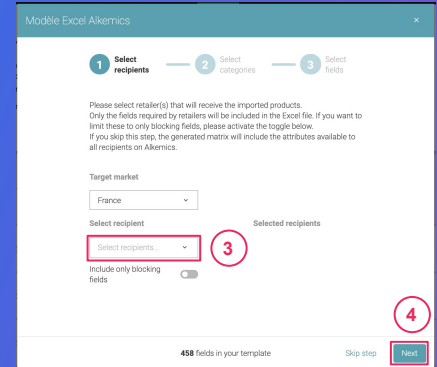
Step 1: To import product data for multiple products at once, click on the “Imports” tab. **1**



1. Click on “Generate a template.” **2**

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

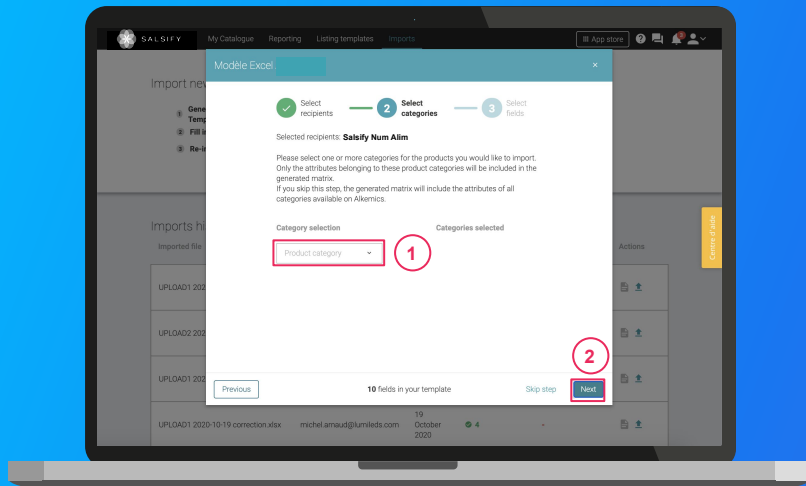
3. Click on “Next.” **4**



Click on *The “Include only blocking fields” option: the generated template will only include the fields that are blocking for the product to be shared with the selected recipients.

Import your product data via an Excel file

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



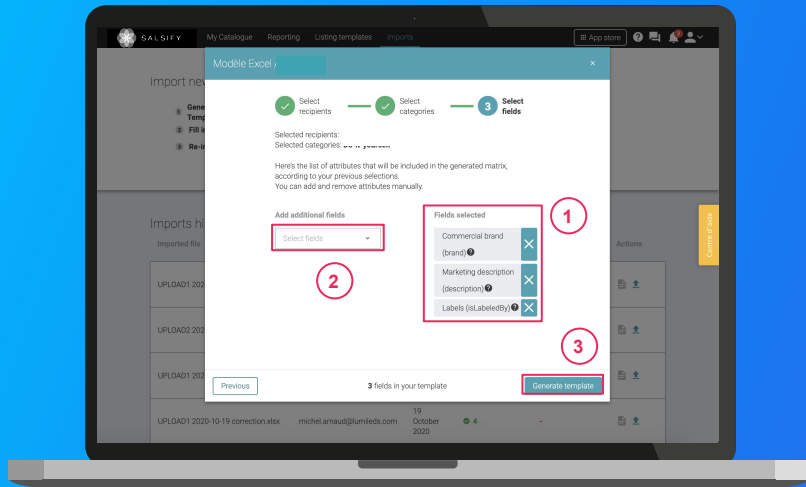
1. Select the categories of the products that you wish to import. Only information related to these categories will be included in the template.

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.

2. Click on “Next”

Import your product data via an Excel file

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

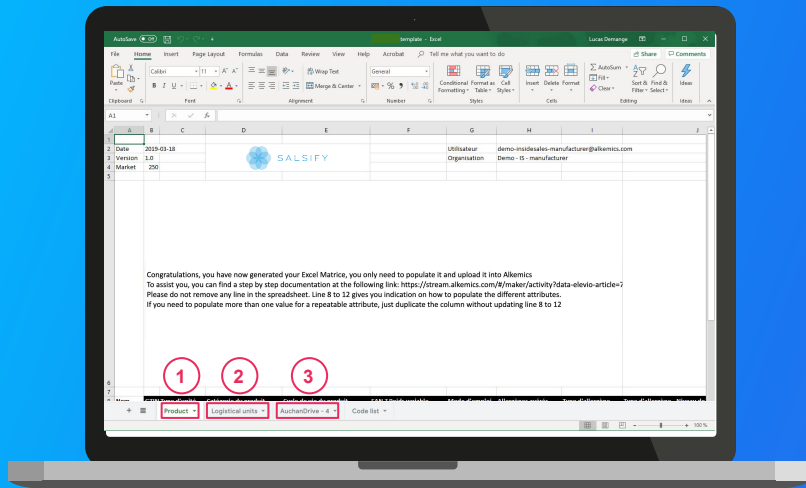


1. By default, and following step 1, **only the fields that are blocking for the selected recipients and are applicable to the categories selected in step 2 will be included.** These will appear on the right side of the window. **1**
2. Add any additional fields that you wish to include. **2**
3. Click on “Generate template.” **3**

This will initiate the download.

Import your product data via an Excel file

Open the downloaded Excel file and fill in the template



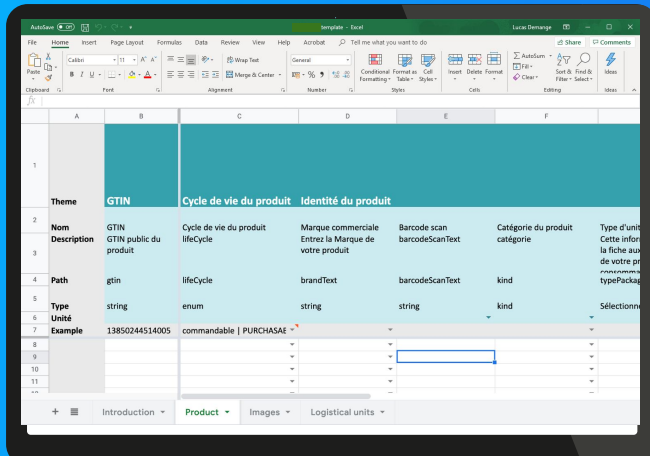
Tip: note the "Introduction" tab which gives you instructions on how to fill in the template correctly! More info on filling the template in our [dedicated article](#).

1. The template has three main sections to fill in:
 - 1 "Product": all information related to the product (marketing, composition, etc.) as summarised in step 3 of your template generation.
 - 2 "Logistical units": includes the logistical hierarchies connected to the product. These can be filled in either on this template or directly on the platform.
 - 3 "Selected recipient": includes the specific information requested by this recipient (only visible to the corresponding recipient).
2. Fill in all of the columns (1 GTIN per line) and save the file in XLSX format.

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:** technical name of the fields.
- **“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.

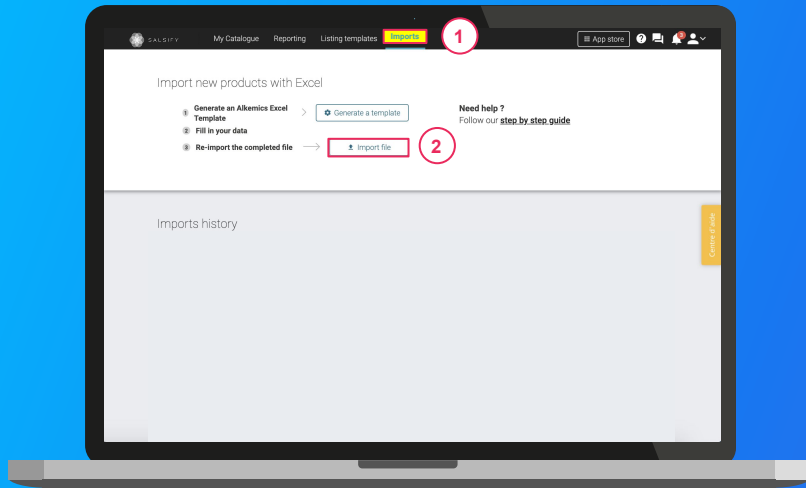


The screenshot shows an Excel spreadsheet with a green header row and several data rows. The columns are labeled A through F. The data rows are as follows:

	A	B	C	D	E	F
1						
2	Theme	GTIN	Cycle de vie du produit	Identité du produit		
3	Nom	GTIN public du produit	Cycle de vie du produit	Marque commerciale	Barcode scan	Catégorie du produit
4	Description	GTIN public du produit	lifeCycle	Entrez la Marque de votre produit	barcodeScanText	catégorie
5	Path	gtin	lifeCycle	brandText	barcodeScanText	kind
6	Type	string	enum	string	string	kind
7	Unité	13850244514005	commandable PURCHASAE			typePackaging
8	Exemple					
9						
10						
11						

Import your product data via an Excel file

Import your data





In the “Imports” section: 




1. Click on “Import file.” 

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 

Imports history					
Imported file	User	Date	Imported products	Rejected products	Actions
Demo - Module_Imports.xlsx	cremy+demo1@alkemics.com	4 January 2021	-	 2	 

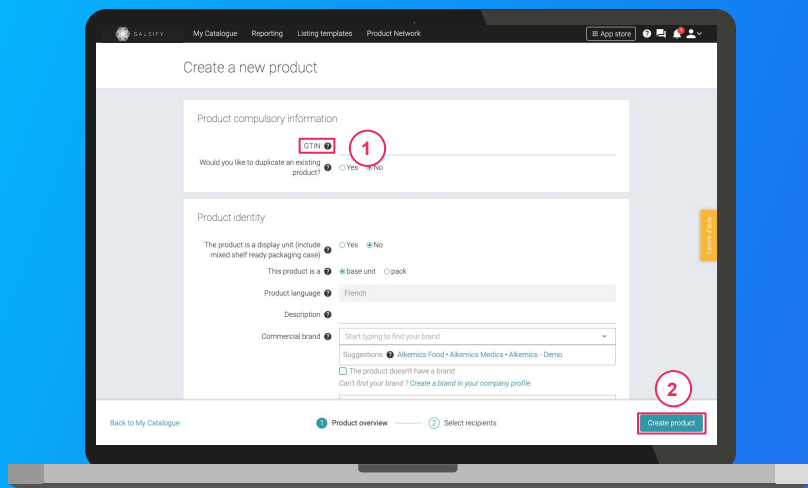
Tip: once completed, you can view a record of your import directly via the “Imports” tab



4. Create your products and share them with retailers

Create a product manually

Create a new product page



To create a new product page:

1. Go to the [Catalog page](#).
2. Click on “Create a product.”

Product Overview

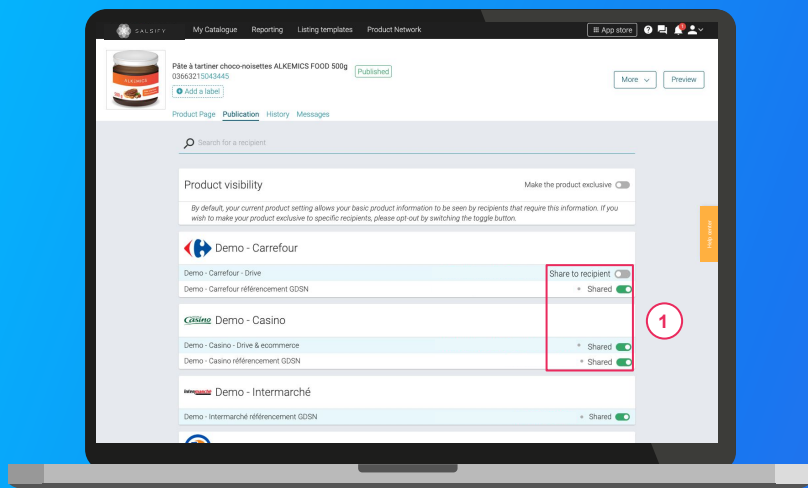
1. In this section, enter the key product information that is required to create your product page, beginning with the GTIN (EAN code), product category and [photo](#). **1**
2. Then click on “Create product”. **2**


Note: suggestions for the product category will be shown when you enter the product's commercial name (long).

For more information on adding images, please see:
<https://app.supplierxm.salsify.com/?data-elevio-article=83>

Create a product manually

Selecting recipients



1. Activate **your recipient**.  **1**
2. Click on **“Add recipients”** to complete the process of creating your product page. **2**

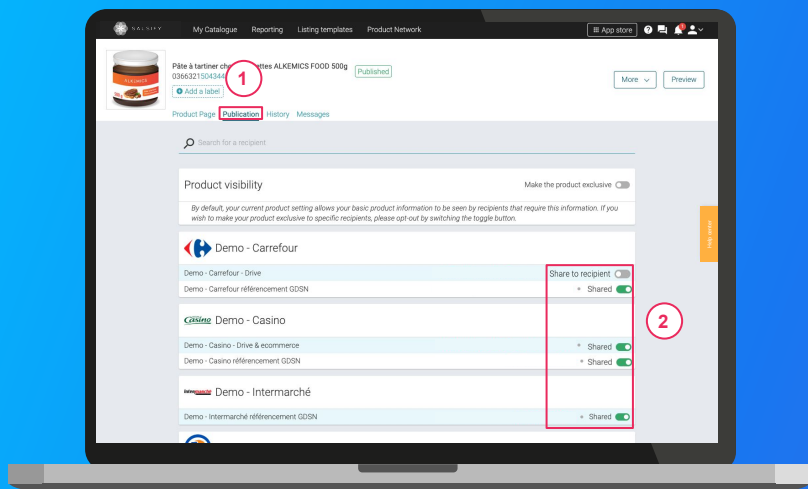
Please note: When you activate your recipients, you may see the following message appear: “Expecting product”

This means that your product has been requested by the retailer in question, via the request-based approach (more infos [here](#)).

In order for your product to be listed by this retailer, **the product page must be published.**

Share an existing product

Go to your product page



1. Click on the “**Publication**” tab. **1**
2. Activate **the recipient(s)** of your choice. **2**
3. Enter **the requested fields** on your product page, using the filters on the top left side of the page.
4. Click on **Save/Publish**.

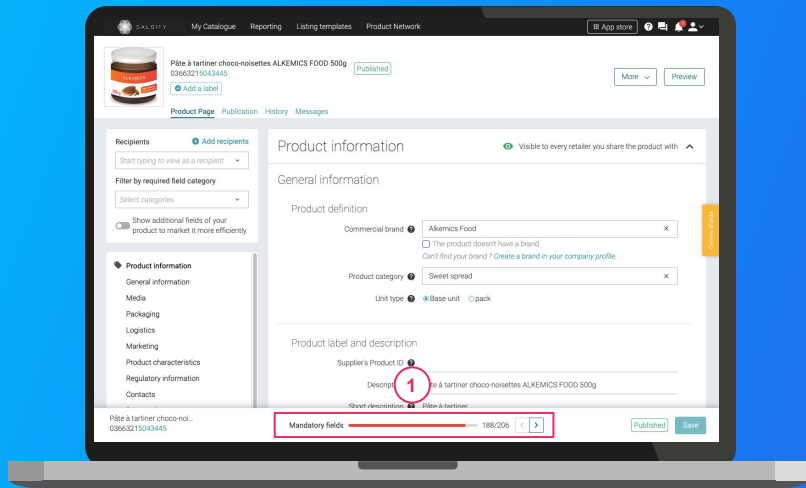
5. Add information to your product pages



1. **Essential information: mandatory fields**
2. **Filling in the product page**
3. **Adding images**

Essential information: mandatory fields

Requested information will vary based on your retailer's needs



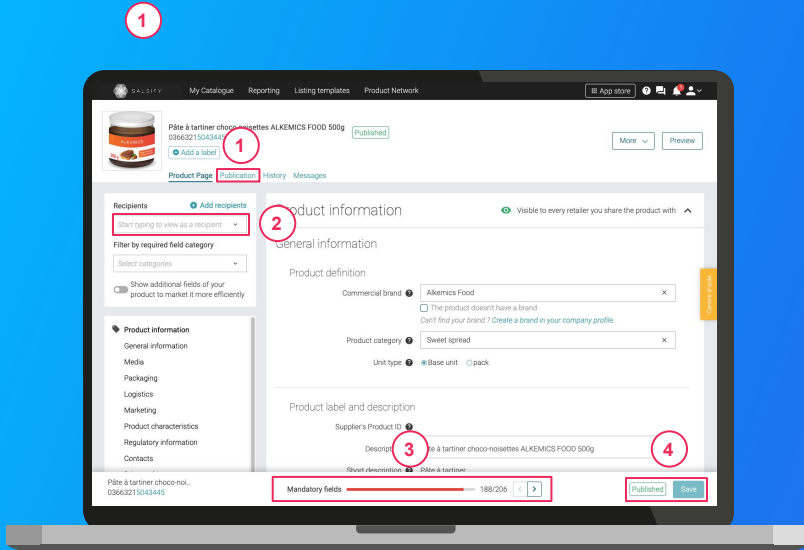
Use the **progress bar** at the bottom of your product page to help you **identify these fields**. It will show you all of the **mandatory** fields that must be filled in before you can share your product.

Important

In order to make the data sharing process as efficient as possible, new fields and validation rules for shared data can be added to the platform at your retailer's request. If this happens, you will be sent a notification ahead of time.

Filling in the product page

Important: Make sure that your recipient has been activated by clicking on the “Publication” tab on your product page.

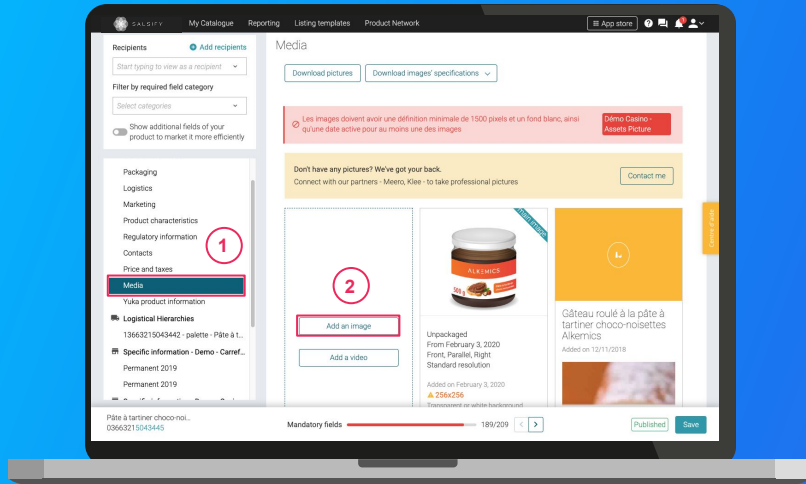


After creating your product page:

1. Use the “**View as a recipient**” filter and select the desired recipient to see only fields that are required by that retailer. 2
2. Use the **progress bar** to focus only on the **fields that are required** by the retailer(s) you have selected. 3
3. Click on **Save / Publish**. 4

Adding images

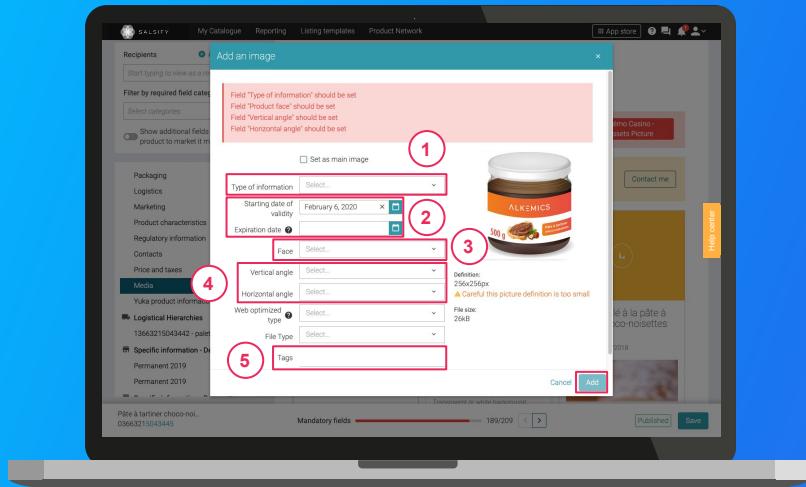
You can add images to your product pages.



1. Go to the “Media” section of your product page.
2. Click on “Add an image.”
3. Drag and drop or select the image that you would like to upload.
4. Then fill in the requested information (see next page).

Adding images

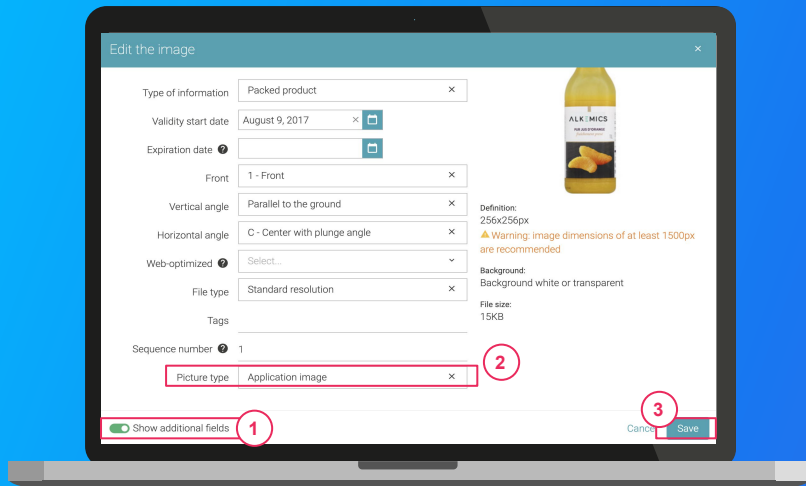
What information must be filled in?



- 1 Type of information:** Presentation of the product (unpacked, in context, in a set, etc.).
- 2 Starting/end validity dates:** Time period in which the product, as shown in the photo, is available for sale.
- 3 Face:** the side of the product that appears in the photo (front, left side, back, etc.).
- 4 Angles:** the angle at which the photo was taken.
- 5 Tags:** These enable you to label and categorise your photos based on your needs.
Note: this field is not mandatory.

Adding images

What information must be filled in?

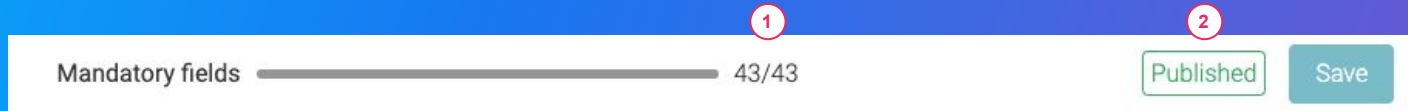


1. Ensure you can see the additional fields
2. Select the “Picture Type”
As an example you can have ‘product picture’
3. Ensure you save your product

Congratulations, your product page 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
2. Your product's status is "published" 2



Reminder

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

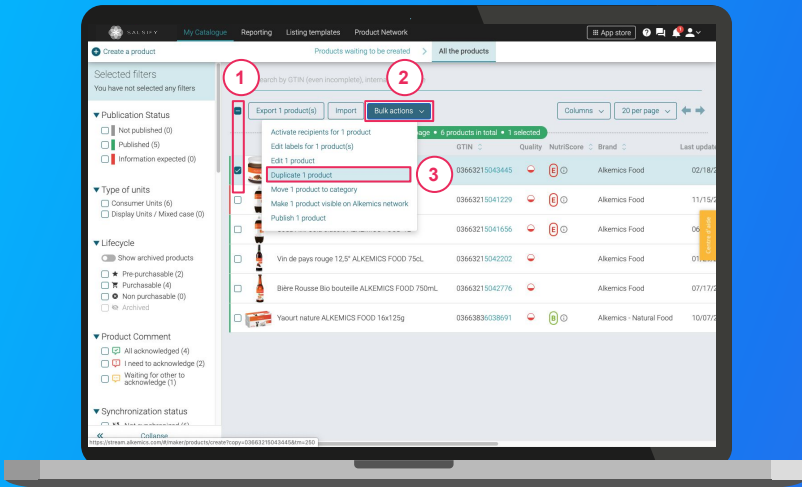
6. Go further with our productivity tools



1. **Duplicating your products**
2. **Editing product information for multiple pages at once**
3. **Publishing multiple product pages at once**
4. **Activating multiple recipients at once**
5. **Reporting**

1. Duplicating your products

Go to the **Catalog** page

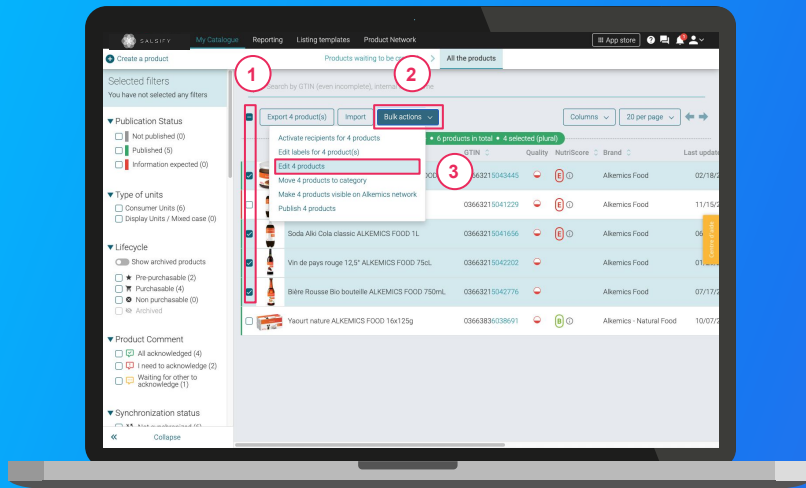


1. Select the product you wish to duplicate. **1**
2. Click on **"Bulk actions"** then on **"Duplicate 1 product."** **2** **3**
3. You will be redirected to the product creation page.
4. Enter the **requested information**, add an image (optional) and **create your product**, then **choose your recipients** (in the "Publication" section of your product page).

For more information, see the following article:
<https://app.supplierxm.salsify.com?data-elevio-article=71>

2. Editing product information for multiple pages at once

Go to the **Catalog** page

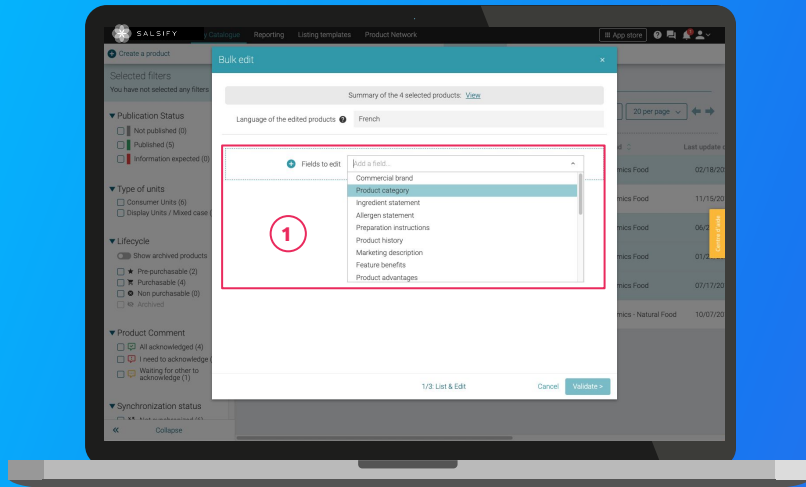


1. Select the products that you would like to edit.
2. Click on "Bulk actions" then on "Edit X products".
3. A window will open.

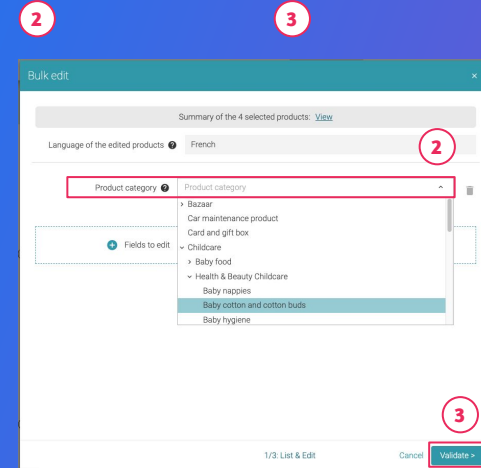
For more information, see the following article:
<https://app.supplierxm.salsify.com?data-elevio-article=32>

2. Editing product information for multiple pages at once

Go to the **Bulk edit** window



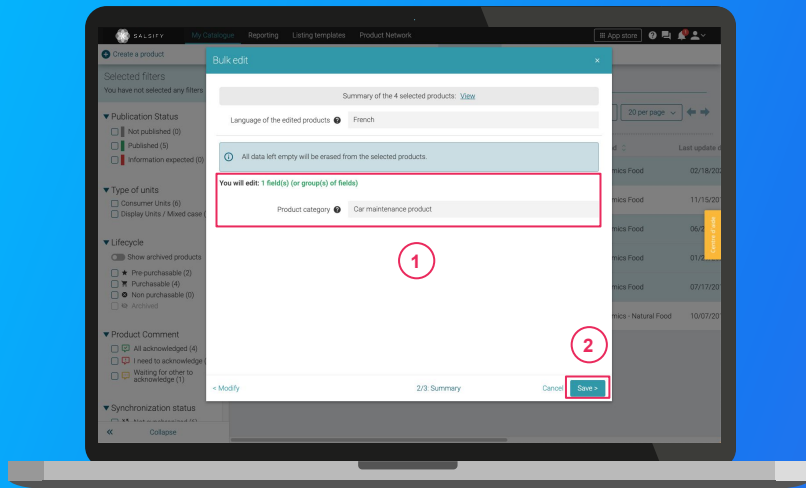
1. Choose the **field(s)** that you wish to edit on the selected product pages.
2. In this same window, fill in the applicable **information** for these selected fields and **validate** it.



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

2. Editing product information for multiple pages at once

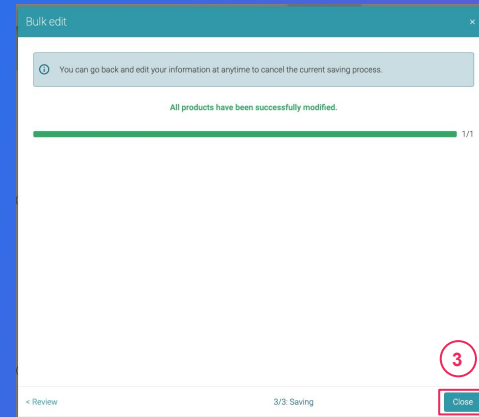
Go to the **overview** window



1. An **overview** will show all modifications made to your products.

2. Click on **Save**.

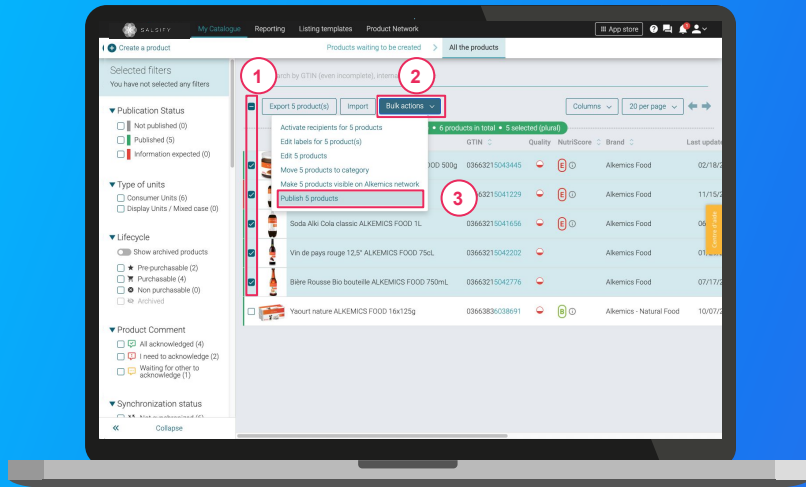
3. **Saving your changes:** once complete, click on “**Close**.”
Your product information has been successfully modified!



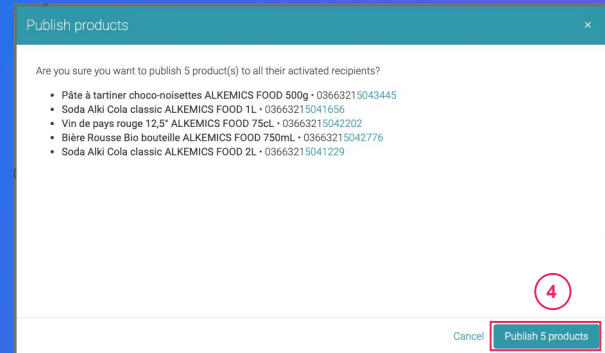
For more information, see the following article:
<https://app.supplierxm.salsify.com?data-elevio-article=32>

3. Publishing multiple product pages at once

Go to the Catalog page



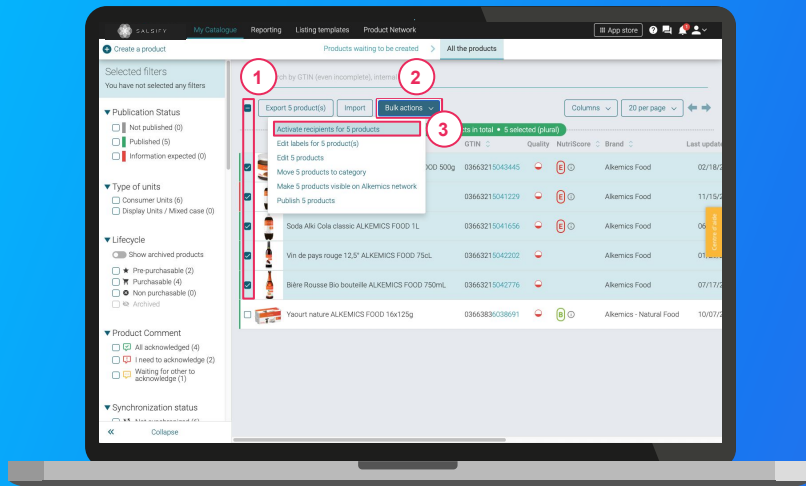
1. Select the products that you wish to publish.
2. Click on "Bulk actions" then on "Publish X products."
3. An overview window will appear. Click on "Publish X products."



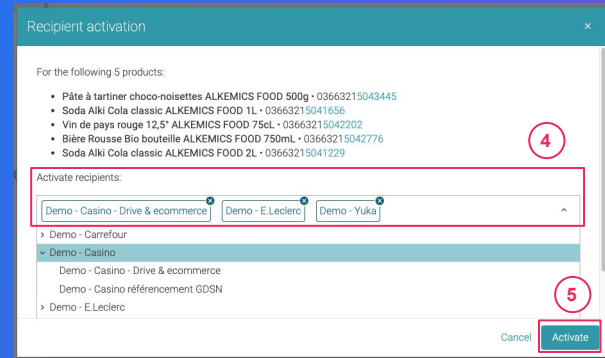
For more information, see the following article:
<https://app.supplierxm.salsify.com?data-elevio-article=167>

4. Activating multiple recipients at once

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."
3. A window will open: select the recipients that you wish to activate from the drop-down menu.
4. Click on "Activate."



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

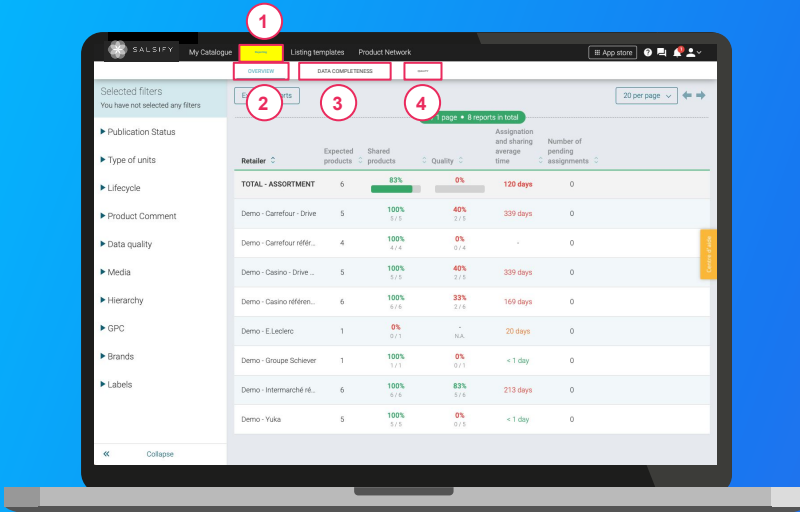
5. Reporting

Go to the Reporting page

To access the reporting feature, you must be subscribed to a SupplierXM plan.

Track and improve collaborations with your retailers!

3 sections to help you determine which elements to focus on to improve your efficiency: 1



1. **Overview:** Quickly view the status of the product data you are sharing, as well as data quality. 2
2. **Data completeness:** See all information provided on your product pages, per retailer. 3
3. **Quality:** Track data quality and percentage of completion overall and for each of the fields requested by your retailers. 4

For more information, see the following article:
<https://app.supplierxm.salsify.com?data-elevio-article=45>

The background is a gradient of blue, transitioning from a lighter shade on the left to a darker shade on the right. A white hexagonal grid pattern is overlaid on the background, with some cells filled with white dots. A white rounded rectangular bar is positioned horizontally across the middle of the image.

7. FAQ

FAQ

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.



Recipients + Add recipients

Start typing to view as a recipient ▼

Filter by set of requirements

Select categories ▼

Show additional fields

FAQ

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 you have provided a **product category**.

The screenshot shows the SupplierXM product page interface. On the left, a sidebar contains a menu with 'General information' highlighted in red and labeled with a circled '1'. The main content area is titled 'General information' and contains several sections. The 'Product definition' section has a 'Product category' dropdown menu set to 'Pastas', which is highlighted with a red box and a circled '2'. Below it, the 'Unit type' is set to 'Base unit'. The 'Product label and description' section includes fields for 'Description' (Barilla spaghetti NS), 'Regulated product name' (TEST), and 'Is product a despatch unit?' (No). At the bottom, the 'Product lifecycle' dropdown is highlighted with a red box and a circled '3', showing options: Pre-purchasable (selected), Purchasable, Non purchasable, and Archived. A 'Save & publish' button is visible on the right side of the form.

For more information on the product lifecycle, see this article:

<https://app.supplierxm.salsify.com?data-elevio-article=39>

FAQ

How do I delete a photo?

It is possible to **delete each individual media element** that has been added to your product page. However, **you cannot delete an image that has been set as the product's main image**. To do so, you need to provide a new main image by clicking on **“Set as main image.”**

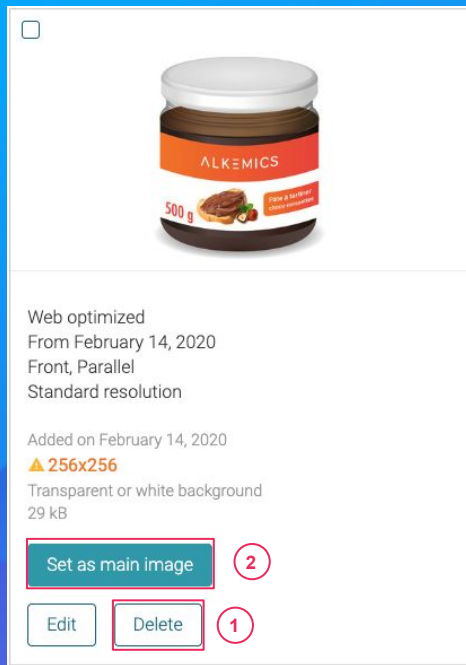
Why was my photo rejected?

In order for an image to be accepted, it needs to meet several requirements (shown here):

- White or transparent background
- Image larger than 1500 pixels
- Square (1:1 ratio)
- Must clearly show and be an accurate representation of the product
- Sufficient margin
- Less than 50 MB

If you need more information about importing images, you can **download image specifications for each retailer** directly on your product page, in the **“Media”** section, and consult the following article:

<https://app.supplierxm.salsify.com?data-elevio-article=39>



Web optimized
From February 14, 2020
Front, Parallel
Standard resolution

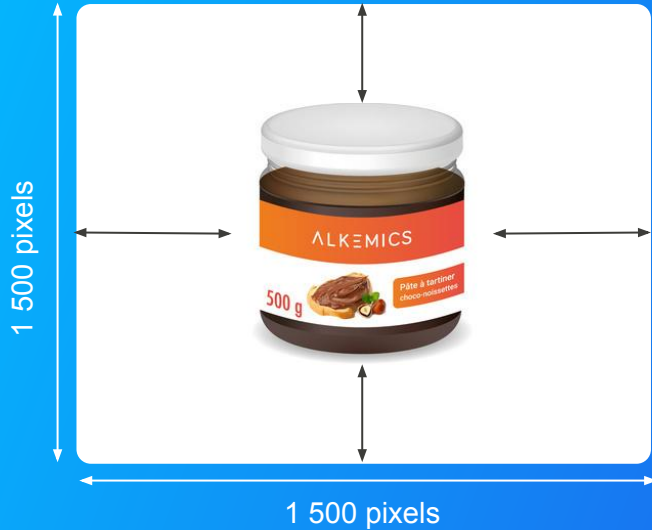
Added on February 14, 2020
▲ 256x256
Transparent or white background
29 kB

Set as main image (2)

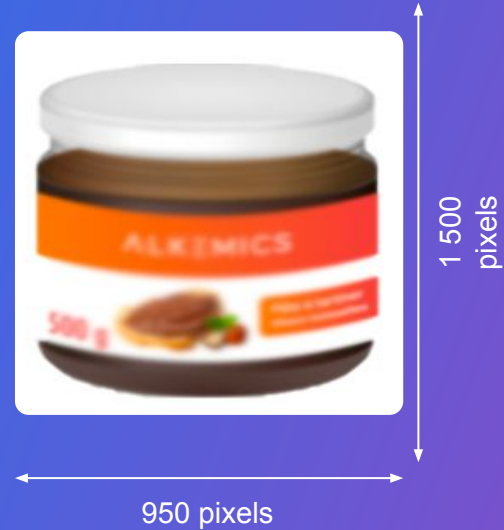
Edit Delete (1)

Download images' specifications ▾

FAQ



- ✓ White or transparent Background
- ✓ Square (1:1 ratio)
- ✓ Product clearly visible
- ✓ Sufficient margin
- ✓ Less than 50 MB



1 500 pixels

950 pixels