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Summary

An Agreement in Product Manager pulls together all the elements that enable you and a supplier to review, approve and publish content to the Marketplace.

To access your Agreements click the Product Manager tab and then click Agreements:



You can create three types of agreements:

- **Standard Agreement:** use this type to make content available within your organisation.
- **Shared Agreement:** use this for sharing content with a Group of organisations within the Basware Commerce Network.
- **Punchout Agreement:** use this to make content on a supplier's website available via punchout.

More information on Agreement Type is provided below on the Agreement Detail Page guide.

As agreements are created, approved, published and updated they go through the following states:

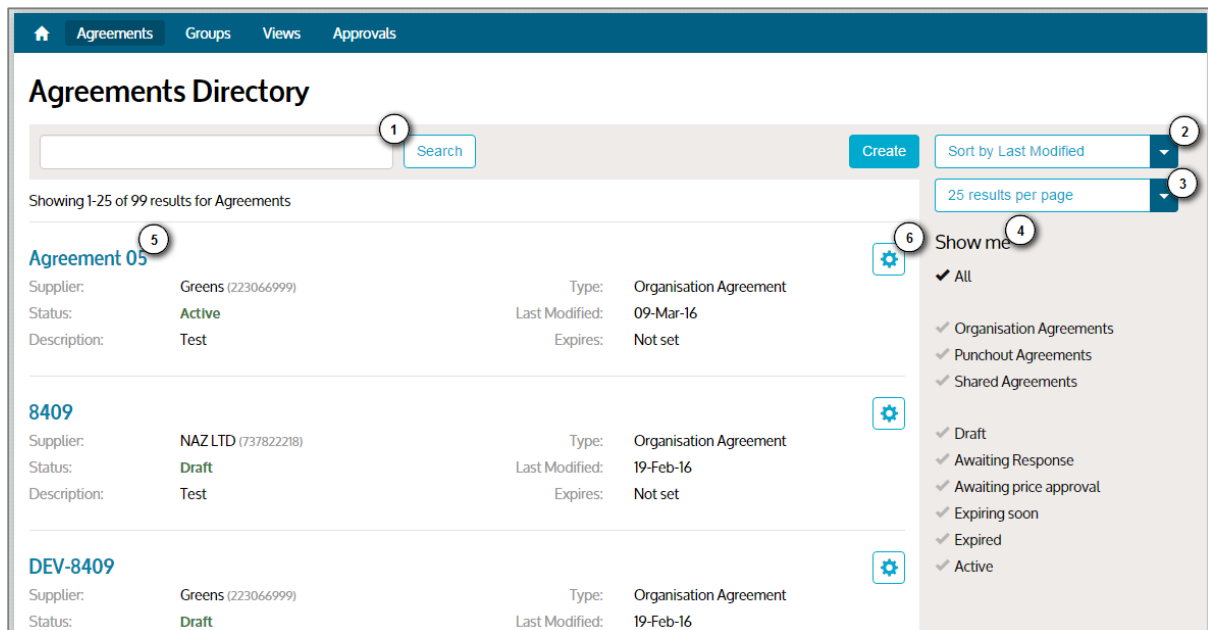
- **Draft:** agreements you have created, but not yet sent to a supplier.
- **Awaiting Response:** agreements waiting for suppliers to attach a price list.
- **Awaiting Price Approval:** agreements with price lists that need to be approved.
- **Expiring Soon:** agreements that will expire within the next thirty days.
- **Expired:** agreements that have expired.
- **Active:** agreements with an approved price list.

The above states and the agreement types are also filters on the Agreement Directory so you can quickly filter and find the agreement you need.


In the Agreements section you can:

- Find, create, share, edit, publish and archive agreements.
- Add information for the supplier
- Define approval rules and contacts
- Add a contract reference that can be used by your users to filter the items in the Marketplace
- Approve or reject and download price lists
- Exclude and include items from the price list

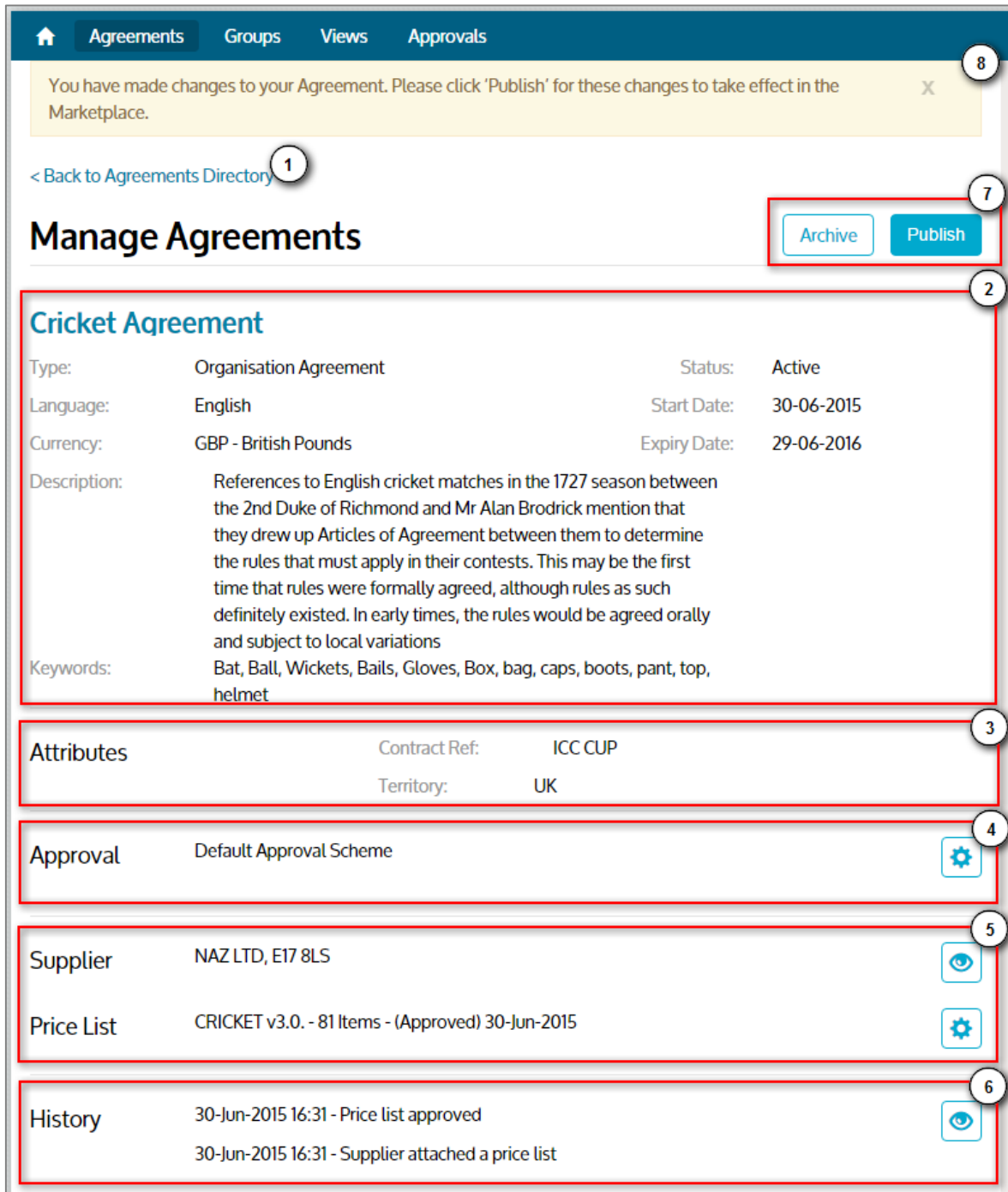
Agreements Directory



The screenshot shows the 'Agreements Directory' page. At the top, there are navigation tabs: 'Agreements', 'Groups', 'Views', and 'Approvals'. Below the tabs is a search bar (1) with a 'Search' button. To the right of the search bar is a 'Create' button, a 'Sort by Last Modified' dropdown menu (2), and a '25 results per page' dropdown menu (3). The main content area displays a list of agreements. The first agreement is 'Agreement 05' (5), with details: Supplier: Greens (223066999), Status: Active, Description: Test, Type: Organisation Agreement, Last Modified: 09-Mar-16, Expires: Not set. The second agreement is '8409', with details: Supplier: NAZ LTD (737822218), Status: Draft, Description: Test, Type: Organisation Agreement, Last Modified: 19-Feb-16, Expires: Not set. The third agreement is 'DEV-8409', with details: Supplier: Greens (223066999), Status: Draft, Description: Test, Type: Organisation Agreement, Last Modified: 19-Feb-16. To the right of the list is a 'Show me' filter panel (4) with a gear icon (6). The filter panel includes a checked 'All' option and several other filter categories: Organisation Agreements, Punchout Agreements, Shared Agreements, Draft, Awaiting Response, Awaiting price approval, Expiring soon, Expired, and Active.

1. Search for agreements using the agreement name, supplier name, or information in the Description field.
2. Your search results can be sorted by:
 - a. Relevance
 - b. Agreement Name
 - c. Supplier
 - d. Start Date
 - e. Expiry Date
 - f. Date Last Modified
3. You can view between 25 and 100 items per page.
4. You can apply the following filters to the agreements:
 - a. Filter by type of agreement, Organisation, Punchout or Shared
 - b. Filter by the state of the agreement
 - i. Draft
 - ii. Awaiting Response
 - iii. Awaiting Price Approval
 - iv. Expiring Soon
 - v. Expired
 - vi. Active
 - c. Clicking "All" removes all the filters to show all your agreements
5. The search results show the agreement name in large blue text, then a block of data with the following information:
 - a. Supplier name
 - b. The agreement status
 - c. An extract of the Description field
 - d. The type of agreement
 - e. When the agreement was last modified
 - f. When the agreement expires
6. To manage the agreement click the  icon.

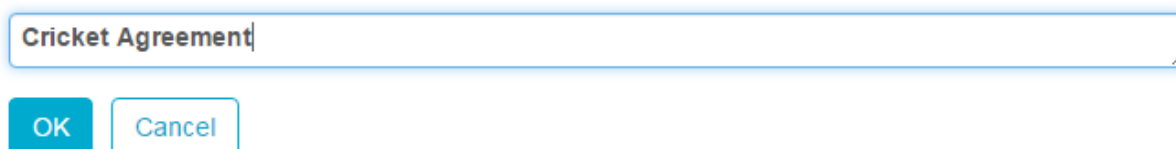
Manage Agreement








Note that some fields are editable and can be changed by clicking on them. For example, if you move your cursor over the agreement name it will look like this:



Clicking the field will then cause it to become editable:



1. Return to the Agreements Directory by clicking the 'Back to...' link.
2. The agreement header section comprises the following fields:
 - a. The **Name** of the agreement is shown in blue. Editable.
 - b. **Type** – organisation, shared or punchout. Not editable once the agreement has been created.
 - c. **Language** – the language you would prefer the supplier to provide the content in.
 - d. **Currency** – the currency of the items. GBP, EUR and USD are supported and the supplier must provide a price list in the currency you select.
 - e. **Status** – see the Summary section for a description of the statuses.
 - f. **Start & Expiry Dates** - These combine with the price list start and expiry dates to set the period during which the items are shown in the Marketplace. The latest start date and the earliest expiry date are used.
 - g. **Description** – your internal description of the agreement.
 - h. **For Supplier** – information or instructions you wish to provide to the supplier
 - i. **Keywords** – the data you enter here will not be shown on the items, but your end users will be able to use them as search keywords to find the agreement's items.
3. In the Attributes section you can add a Contract Reference and the Territory of the agreement.
 - a. You can use the information **Contract Reference** to find the agreement in the Agreement Directory, and in Marketplace it can be used as a search term or a filter.
 - b. **Territory** is for your reference only. If you are part of an international organisation you may wish to show which territory the agreement is for.
4. If you click the  icon in the **Approval** section the system will either
 - a. Display the approval scheme has been set on the agreement (and any others that are available), or
 - b. If a price list is waiting to be approved it will take you to the Agreement Item Details page so you can review the price list.
5. To make content available to your users you must select a supplier and the supplier must provide content in the form of a price list.
 - a. If no supplier has been selected click the  icon to do so.
 - b. Once you have added a supplier to the agreement the **Supplier's** name and post code is shown. Click the  icon to view full details of the supplier.
 - c. Once the supplier has attached a **Price List** the name, the number of items, it's status and the date of the last action are shown. Click the  icon manage the items on the Price List Item Details page (see below).
6. **History** shows the two latest entries in the history of the agreement. Click the  icon to view full history.
7. Towards the top of the page you will find the following buttons:
 - a. **Submit to Supplier** – once the agreement has been created and a supplier selected it can be submitted to the supplier for them to attach a price list.
 - b. **Publish** – when changes are made to live agreements they need to be published before those changes take effect.
 - c. **Archive** – this is clickable once the agreement's content has been published, and if the agreement is not in a group. Archiving an agreement removes all its content from the Marketplace and hides it from the supplier.
 - d. **Restore** – this is shown on archived agreements and allows you to make the agreement usable again.

- At the top of the page is a message area that provides feedback on your changes, or lets you know if there are changes that must be published before they take effect in the Marketplace.

Agreement Item Details Page

The screenshot displays the 'Agreement Item Details' page for a 'CRICKET v3.0.' price list. The page is divided into several sections:

- Header:** Includes a navigation bar with 'Agreements', 'Groups', 'Views', and 'Approvals'. Below it is a breadcrumb link '< Back to Cricket Agreement' (1).
- Agreement Item Details:** A section (2) showing 'Current Price List: CRICKET v3.0.' and 'Proposed Price List: CRICKET v3.0.', along with 'Start Date: 01-03-2016' and 'Expiry Date: 28-02-2017' for both.
- Search and Actions:** A search bar (3) and a set of action buttons: 'Approve', 'Reject', 'Download', and 'Done' (9).
- Results:** A table of items with columns for Item ID, UOM, Item Type, and Price. Items include 'Single Item Delivery', 'Basket Delivery', and four types of cricket bats (GRAY NICOLLS, HART ATTACK, and KOOKABURRA).
- Filter Sidebar:** A sidebar (5) on the right with 'Show me' filters (All (81), Price Increased (0), Price Decreased (0), etc.), 'Excluded' filters (Yes, No), 'Product Type' filters (Standard, Delivery), and 'Rule Level' filters (Default (1), Level 2, Level 3, Level 4, Level 5).
- Item Details:** Each item has a 'Change' button (7) and a 'Rule Level' indicator (Added 1). Some items also have an 'Exclude' toggle (8).

- Return to the agreement by clicking the 'Back to...' link.
- The item details header section comprises the following fields:
 - If there is a price list awaiting approval then the header section shows:
 - The **Current Price List** name, plus it's Start Date and Expiry Date.
 - The **Proposed Price List** name, plus it's Start Date and Expiry Date.
 - If the price list does not require approval, then the header section shows:
 - The **Previous Price List** name, plus it's Start Date and Expiry Date.
 - The **Current Price List** name, plus it's Start Date and Expiry Date.
- You can **Search** the price list for specific items.
- Your search results can be sorted by Relevance or by Name (A to Z or Z to A), and you can view between 25 and 100 items per page.
- Numerous filters are available to help you understand the price list and any changes:
 - Price Increased
 - Price Decreased

- c. Cannot Compare
 - d. Removed from the price list
 - e. Added to the price list
 - f. Excluded (Yes or No)
 - g. Product Type
 - h. Which approval Rule Level has been triggered by the new price list.
6. For each item the page shows:
 - a. **Item ID**
 - b. Unit of measure (**UOM**)
 - c. If price has changed then the **Changes** field tells you what they were, e.g. Increase (500 to 550 GBP - 1 price break)
 - d. **Item Type**
 - e. The **Price** and if there are price breaks.
7. Each item also includes an area that shows if there was a **Change**, what the change was and which **Rule Level** in the approval scheme the change has triggered.
8. You can **Exclude** items from the the Marketplace. To exculde an item
 - a. Click the Exclude toggle button on all the items you wish to exclude.
 - b. If the agreement already been approved click Done and then Publish on the next page. Your changes will not take effect in the Marketplace until you click Publish.
 - c. If the price list is awaiting approval click Approve to publish the items, minus your exclusions, to the Marketplace.
 - i. Note that if you click Reject, or move away from this page without clicking Approve your exclude selections will be lost.
 - d. **Excluding bundles:** Bundles of items consist of a master item and its components. Components cannot be excluded, so if you wish a component item to be removed from the bundle or from the price list, then you must ask your supplier.
9. The buttons found at the top of this page are:
 - a. **Approve** – click to approve the price list, with or without excluded items.
 - b. **Reject** – clicking this rejects the whole price list and informs the supplier.
 - c. **Download** – you can download the price list.
 - d. **Done** – if you are not approving or rejecting the price list, click this when you are finished.