Requirements Contracts: Vendor Catalog Management

Any goods a vendor offers the City under their Requirements Contract can be loaded into an online goods catalog in PASSPort, creating one central location for agencies to purchase items and receive invoices. This guide provides step-by-step instructions for managing vendor catalogs in PASSPort. For more information about Catalog Management, please see Requirements Contracts.

Vendors currently doing business with the City of New York via the Department of Citywide Administrative Services (DCAS) requirements contracts are encouraged to complete the Catalog Management process. This process involves:

1. Requesting a PASSPort account (please refer to the Requesting a Vendor PASSPort Account guide or video on our Learning to Use PASSPort page).
2. Ensuring at least one Vendor Contact is assigned the appropriate role to manage Catalogs in PASSPort (refer to the Adding Vendor Users and Assigning Roles guide on our Learning to Use PASSPort page).
3. Importing the organization's Goods Catalog into PASSPort.

To initiate the import process, users provisioned with Vendor Admin or Vendor Procurement L2 access will import their Catalog and submit the Catalog for approval. Once the Catalog has been submitted for approval, a DCAS will validate the uploaded Catalog and determine whether to approve or reject the file. Items will be available in PASSPort for agencies to purchase off a registered contract only after the Catalog is approved. If the import is rejected, the Catalog will be returned to the import initiator for revision.

Once a Catalog is imported and approved, vendors can manage their imported items by reviewing, editing, and expiring these items in one centralized system.

Note: Any changes made to the Catalog items will require additional agency approval. The purchasing agency can then use this information to easily create Requisitions and purchase items from vendors.
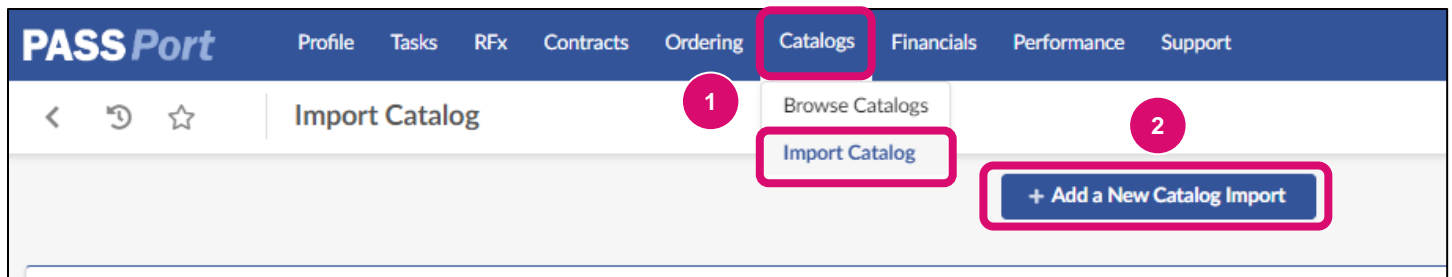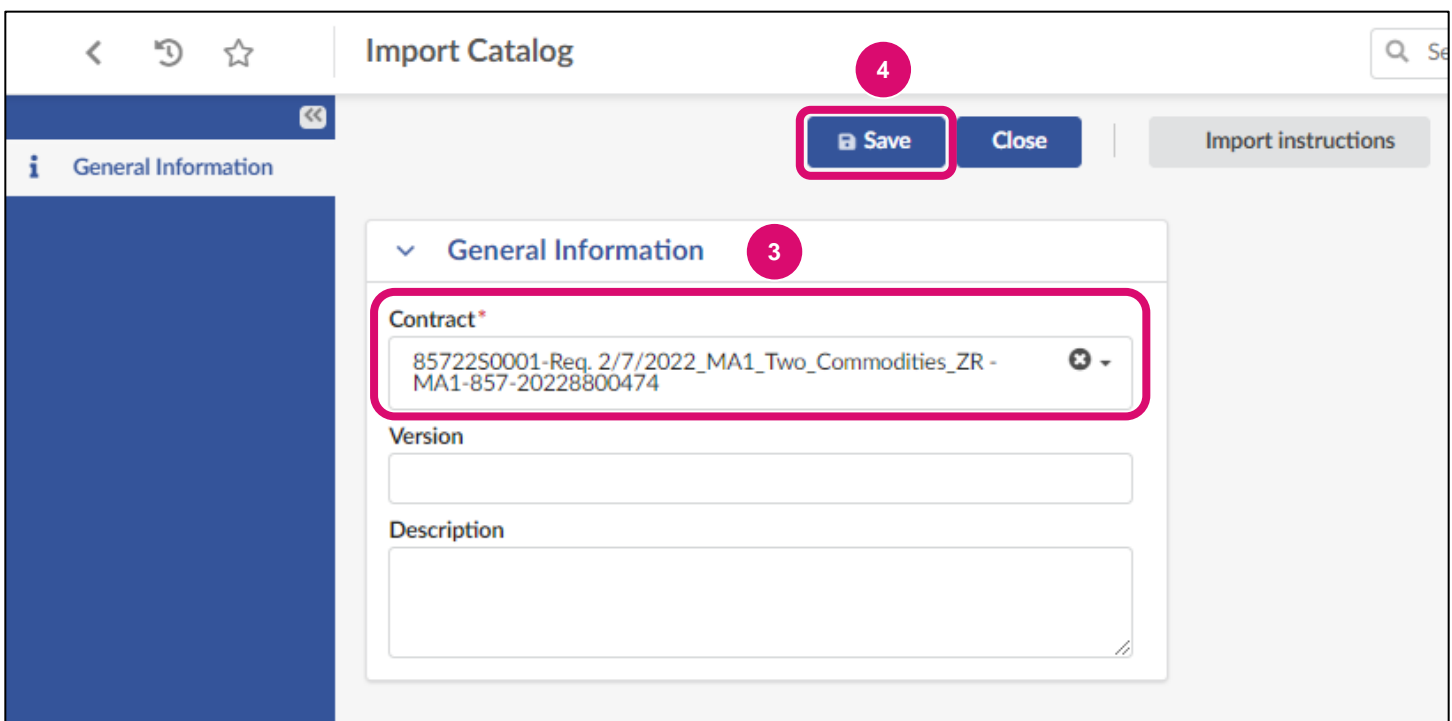
Importing a Catalog

> 👤 The steps below can be completed by users provisioned with the roles:
> **Vendor Admin**, **Vendor Procurement L2**.

PASSPort allows users provisioned with **Vendor Admin** or **Vendor Procurement L2** access to import Catalogs as necessary. Once the Catalog file is imported, an agency user will review the import to ensure all data matches the agreed terms and details for each item. If the agency user finds any discrepancies or there are any issues with the file, they will reject the submission in the system. This will trigger an automated email alerting the initial importer to review and reupload the catalog. The fields and description of the Catalog template can be found starting on page 5.

1. Click **Catalogs** in the top navigation menu and select **Import Catalog** from the drop-down.

2. Click the **Add a New Catalog Import** button.

3. In the **Contract** field, select a contract from the drop-down menu.

4. Click the **Save** button.

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5. Click the **Download Import Template** button.

   Note: If this is not the first time importing a Catalog and there is already a Catalog uploaded for the organization, click the **Download Current Catalog** button.

6. Add updated or new items to the Catalog template and save the file to a computer. Review the Catalog Template Description section of this guide for more details on required columns.

Images cannot be uploaded by adding them to the template directly. Instead, create a folder on a computer and save the template within the folder, along with all associated images. Then, zip the folder. If uploading a zip folder with images, that image file name must match exactly what is in the template (**Image** field), for images to upload successfully.

7. In the Load New Catalog section, click **Choose File** to search for and select the Catalog file that should be uploaded. If images are being uploaded, be sure to search for the zipped folder containing both images and the template.

8. Click the **Upload New Catalog** button. A new section named **File(s)** will appear.

9. In the File(s) section, check if there are any errors appearing: **0 lines(s) in error / 0 line(s).**
   Note: If there are errors, they should be corrected before submitting the catalog for approval.

10. Click the **Submit for Approval** button.

The Catalog has now been submitted to the agency for approval. If the import is rejected, the Catalog will be returned to the import initiator for revision.

Catalog Template Description

The table below contains the fields and description of a Catalog template. All field names marked with an * are required fields.

Field	Description	Notes
Product Code*	Code of the product the item is attached to.	For a contract, each item requires a unique code. The same code should be listed in the "product_code" and "item_code" fields. Codes are alphanumeric and don't include spaces.
Product Label	Name of the product.	Enter the same text in the "product_label" and "item_label" fields.
Commodity Type*	The type of commodity code (NIGP, UNSPSC, NAICS) that is entered in the commodity_code field.	
Commodity*	Commodity to which the item is attached.	For NIGP codes, enter the 5-digit code. For NAICS and UNSPSC, enter any level code.
Manufacturer	Vendor's internal/ERP code for the product.	
Link to Manufacture Catalog	URL link to manufacturer catalog.	
Product Vendor Ref.	Manufacturer's reference code for the product.	
Summary	Summary of the Product the Item is linked to.	This summary will be visible to requestors while browsing the online catalog.
Keywords	Allows PASSPort to associate keywords with the product in order to facilitate searching in the catalog.	This field is critical in making an item searchable in PASSPort. When a requestor does a keyword search, PASSPort will be searching this field associated with each item.
Description	Description of the Product the Item is linked to.	From the browse screen, the requestor can click on an item to view the description.
Image	Name of product image file associated with the Product sheet.	Only 1 image per item. The exact file name of the image needs to be entered into this field (i.e. "stapler.jpg" for an image of a stapler).
Document	Any specification file attached to the product.	

Field	Description	Notes
Item Code	Code assigned to the item in the Price sheet.	For a contract, each item requires a unique code. Enter the same code in the "product_code" and "item_code" fields. Use an existing product code or create a new one for PASSPort. Codes are alphanumeric and don't include spaces.
Item Label*	Label of the item in the Price sheet.	Enter the same text in the "product_label" and "item_label" fields.
Vendor Code*	Vendor proposing this item with the conditions written in the Price sheet.	
Vendor Contact	Email of the Vendor Contact.	
Item Vendor Ref.	Manufacturer's reference code for the item.	
Link to Supplier Catalog		
Contract*	Reference for Contract associated with the item.	This information is provided in the email received from DCAS.
Account	General ledger account to which the item is attached.	
Validated from*	Validity start date for the item.	This date is the same as the start date of the contract. Use date format mm/dd/yyyy.
To*	Validity end date for the item.	This date is the same as the end date of the contract. Use date format mm/dd/yyyy.
Option type	Values: 0 or 1. 1 Indicates whether it's a regular item or an optional item that can be attached to other items.	Enter "1" if this is an option item that can only be ordered with other items.
Item Comment	Additional information for the item.	
Public Price*	Retail price for the item.	Do not enter a dollar sign.
Negotiated Price*	Negotiated price per the attached contract.	Do not enter a dollar sign.
Item Quantity A Negotiated	Negotiated quantity within the attached contract.	

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Field	Description	Notes
Negotiated Price for Quantity A	1st tier Negotiated price at the associated negotiated.	Do not enter a dollar sign.
Item Quantity B Negotiated	Negotiated quantity within the attached contract.	
Negotiated Price for Quantity B	2nd tier Negotiated price at the associated negotiated.	Do not enter a dollar sign.
Item Quantity C Negotiated	Negotiated quantity within the attached contract.	
Negotiated Price for Quantity C	3rd tier Negotiated price at the associated negotiated.	Do not enter a dollar sign.
Item Quantity D Negotiated	Negotiated quantity within the attached contract.	
Negotiated Price for Quantity D	4th tier Negotiated price at the associated negotiated.	Do not enter a dollar sign.
Item Quantity E Negotiated	Negotiated quantity within the attached contract.	
Negotiated Price for Quantity E	5th tier Negotiated price at the associated negotiated.	Do not enter a dollar sign.
Negotiated Quantity*	Negotiated quantity for the price quoted.	
Unit*	Unit used to count or measure the item.	
Other Units	Code for other units that can be used to count or measure the item.	
Packaging	Type of packaging used by the Vendor for this item.	
Lead Time	Delivery time announced by the Vendor (in days).	
Shipping Mode	Shipping mode for the item.	
Incoterm	Code for the Applicable Incoterm.	
Incopalce		
Substitute Item	When an item is no longer available, a substitute item can be selected.	
Flexible Price	Populating 'Yes' will allow requestor to modify price on req and 'No' will not allow requestor to modify price on a req.	If an item's price is negotiable, select "yes" in this field. Selecting "yes" gives a requestor the ability to update the price when they are purchasing the item in PASSPort.
Discount	Negotiated prices and quantities.	
Warranty	Warranty specific to the item.	
Return Policy	Return Policy specific to the item.	

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Browse Catalogs

The steps below can be completed by users provisioned with the roles:

- **Vendor Admin**
- **Vendor Procurement L1**
- **Vendor Procurement L2**
- **Vendor Financials L1**
- **Vendor Financials L2**

PASSPort allows users provisioned with the above roles to easily search for and view their organization's Catalog items after they have been imported. Follow the below steps to search for and review a previously imported Catalog.

1. Click **Catalogs** in the top navigation menu and select **Browse Catalog** from the drop-down.

2. Once the search terms are entered, click the **Search** button.
    Note: Select the **detailed view** checkbox next to the Search button to access item details.

3. Once the item is located, click the hyperlink under the **Label** column to open the item and view the item details.

A pop-up will appear displaying the item's product information. On this page, the item's Description, Characteristics, Prices, and Options will be available for review. If provided, a photo of the item will also display.

Editing and Expiring Catalog Items

Once an item is added to the Catalog, it will be available for purchase through PASSPort until the item's validity period ends as long as there are units available. If no validity period is assigned to the item, it can be purchased until the contract's designated end date.

While Catalog items cannot be edited within PASSPort after they are imported, if changes need to be made to an item, the details for each item can be adjusted by uploading the new information via the Catalog template.

Additionally, items cannot be removed from PASSPort; however, they can be manually expired if they should no longer be purchased from the Catalog. For example, if an item is no longer available, the item's end date should be updated to reflect the item's latest availability date.

To expire items, the validity period for each item should be adjusted on the Catalog template and reuploaded in PASSPort. This will ensure that agency users are not purchasing items that vendors can no longer provide.

> Changes to Catalog items will not be reflected in PASSPort until they are approved by DCAS.

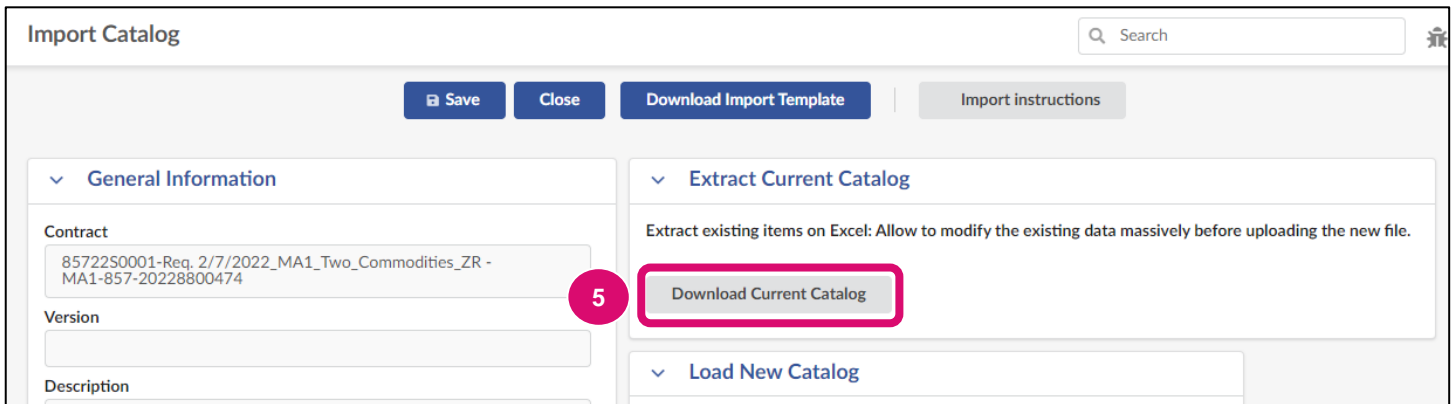Follow the steps below to edit a previously imported item.

1. Click **Catalogs** in the top navigation menu and select **Import Catalog** from the drop-down.
2. Click the **Add a New Catalog Import** button.
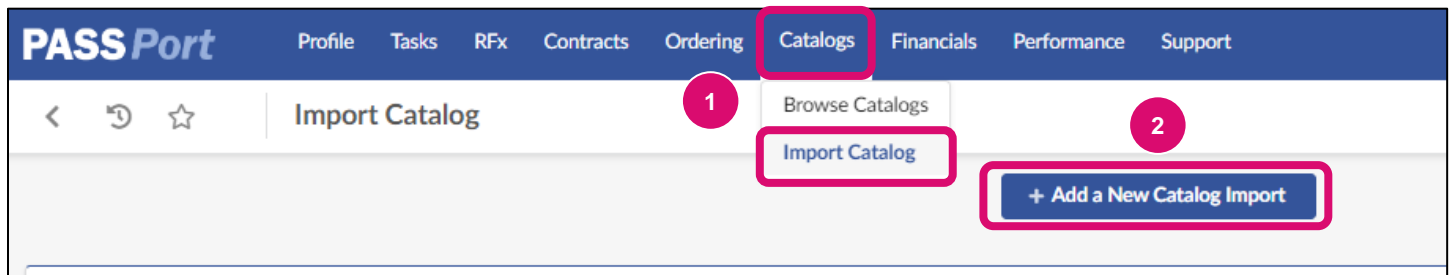
3. In the **Contract** field, select a contract from the drop-down menu.

4. Click the **Save** button.


5. Click the **Download Current Catalog** button.

6. Edit the necessary fields in the current Catalog template and save the file to a computer.

   Note: If an item needs to be expired, enter the updated end date in the **To** field. To expire immediately, select today's date. Then save the file to a computer.

   Note: These dates cannot start prior to or end after the contract's validity period.

Contract	Account	Validatedfrom	To	Optiontype	Itemcomment
MA1-857-20228800474		02/07/2022	02/07/2025	0	
MA1-857-20228800474		07/01/2021	06/30/2025	0	
MA1-857-20228800474		07/01/2021	06/30/2025	0	
MA1-857-20228800474		07/01/2021	06/30/2025	0	
MA1-857-20228800474		07/01/2021	06/30/2022	0	
MA1-857-20228800474		02/07/2022	02/07/2025	0	
MA1-857-20228800474		02/07/2022	02/07/2025	0	
MA1-857-20228800474		02/08/2022	02/06/2025	0	

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7. In the Load New Catalog section, click **Choose File** to search for and select the Catalog file that should be uploaded.

8. Click the **Upload New Catalog** button.
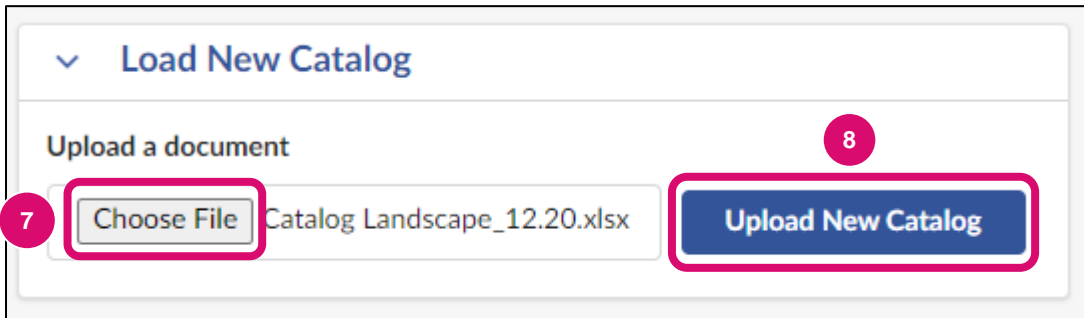
9. Click the **Submit for Approval** button.
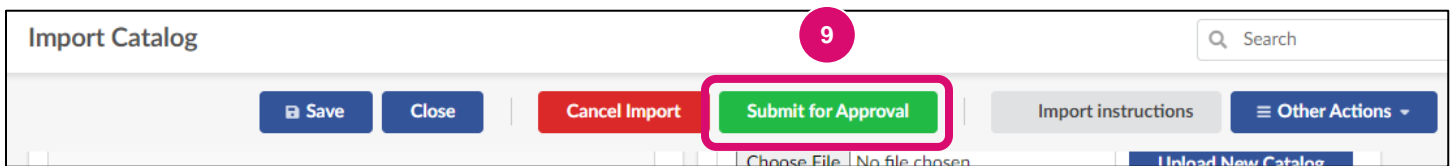
As with new Catalog imports, these changes must be reviewed and published by the agency before they will be visible in PASSPort.

How to Indicate Flexible Pricing in an Existing Catalog

On occasion, an agency and a vendor may negotiate a variable price point for a given item, typically based on conditions such as order quantity, total order cost, fluctuations in supply and demand, or levels of customization. Such items can be marked as flexible price items during the catalog import process. These items will then have price fields which can be modified by the agency Requestor during purchase. The vendor will be able to confirm the flexible price was entered correctly upon receipt of the Purchase Order. In the event a flexible price was entered incorrectly by the agency, the vendor will have the ability to reject the Purchase Order.

Note: This process only applies to hosted catalogs, and it is not applicable to PunchOut catalogs.

To indicate an item has flexible pricing, first, follow steps 1-5 in the Importing a Catalog section of this guide. Then, follow the steps below:

1. Locate the item(s) within the catalog spreadsheet and change the corresponding cell in the **Flexible Price** column to the value of **True.**

| Incopalce	Substituteitem	FlexiblePrice	discount	warranty	returnpolicy
		TRUE			
		FALSE			
		FALSE			
		FALSE			
		FALSE			
		FALSE			
		FALSE			

2. Find that item's corresponding cell in the **Description** column and enter in the contact information of the individual at the vendor organization who is familiar with the pricing terms of this item. Note that this individual will be contacted by an agency Requestor when the price is negotiated, and ultimately agreed upon, by both parties. Save the file to the computer.

Summary	Keywords	Description	mage	Document	ItemC
		644663_Y_ishatest			
		Email Valery Vendor at valery.vendor@landscape.com for pricing quote.			64466
		Blaket Item			Blaket
		Brackets, Clamps and Holders for Fire Fighting Equipment			Brack
		Avalanche Devices, Equipment, Accessories and Parts			Emerg
		July1822			July18
		NewItem2			NewIte

3. In the Load New Catalog section, click **Choose File** to search for and select the Catalog file that should be uploaded.

4. Click the **Upload New Catalog** button.
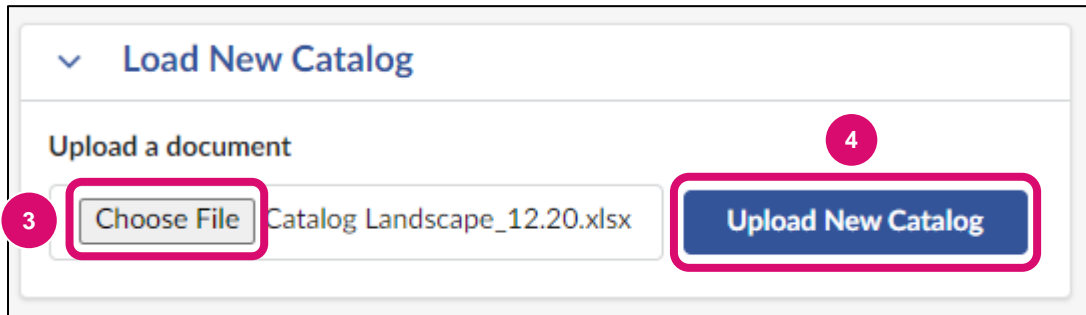
5. Ensure there are no errors listed in the File(s) section and click the **Submit for Approval** button.
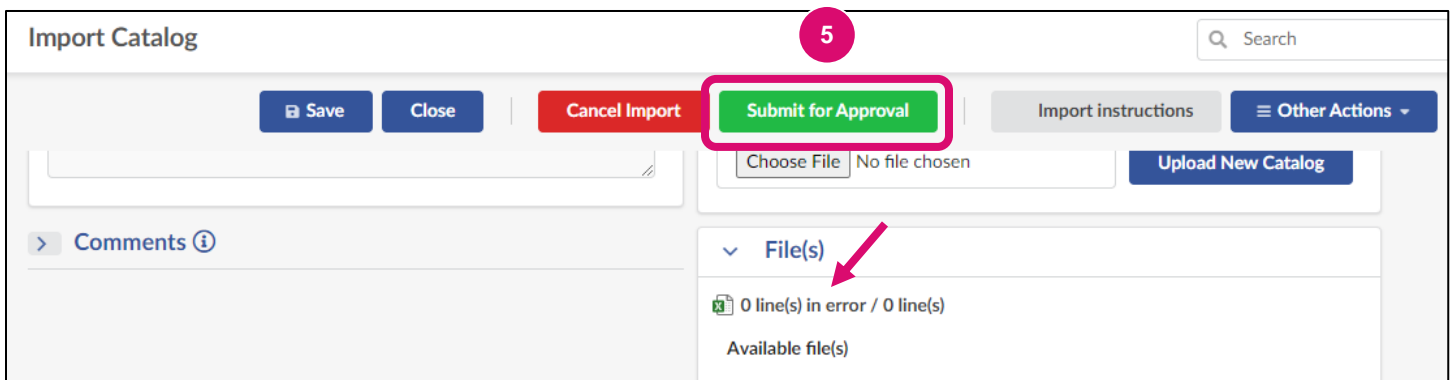
At the time of request, an agency staff member will reach out to the organization to discuss the terms of the price for the item(s) in question. Flexible price items may be subject to DCAS final approval.

Directory of Links

Requirements Contracts Page	https://www.nyc.gov/site/mocs/passport/requirements-contract.page
Learning to Use PASSPort Page	https://www.nyc.gov/site/mocs/passport/getting-started-with-passport.page