# Quick Start User Guide 2025

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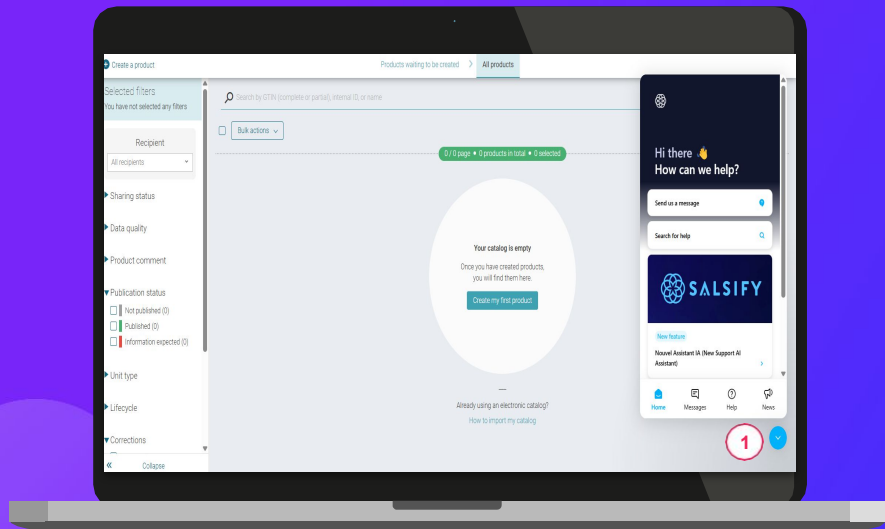# Overview

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# Need help?

Check out our **AI Chatbot** for assistance with common issues!



## Have additional questions?

### Get in touch with our Support team at

[supportanz@salsify.com](mailto:supportanz@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.

Connect to the SupplierXM platform

Activate the recipient in the "Publication" section

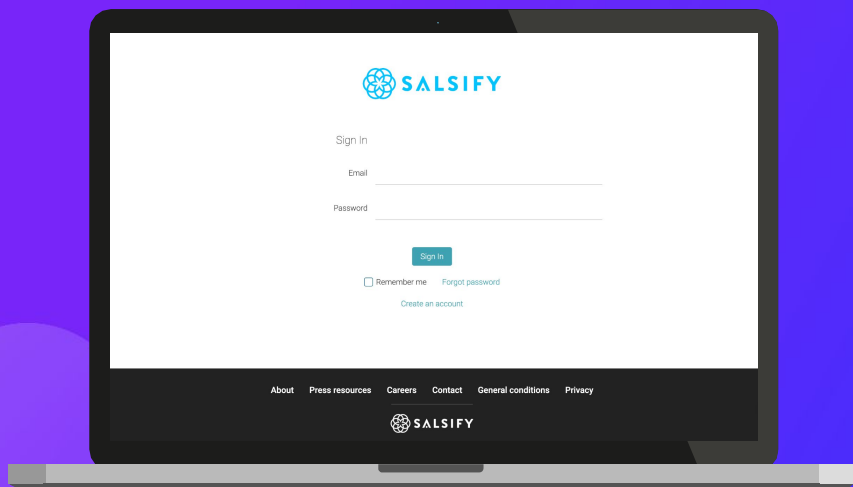Fill in the product page with the requested information and save your changes

Your retailer have the product available

# 2. Sign up and Log in

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# Log in to the platform

## Go to [app.supplierxm.salsify.com](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.
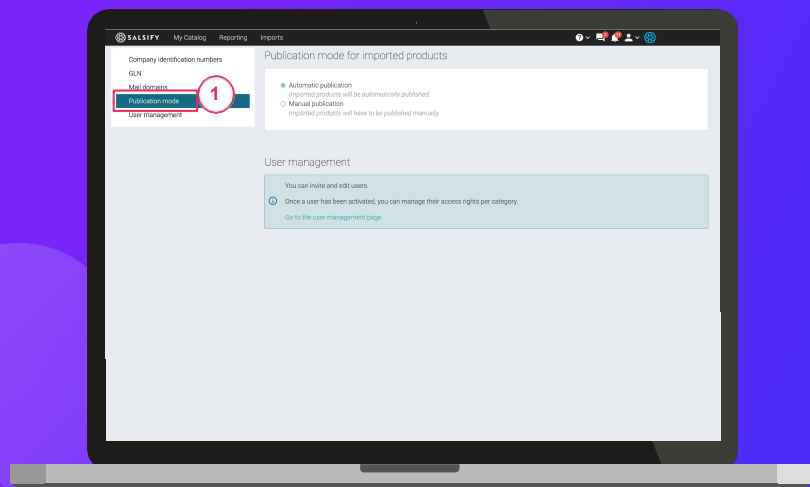
# 3. Import your product data via Excel

# 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.
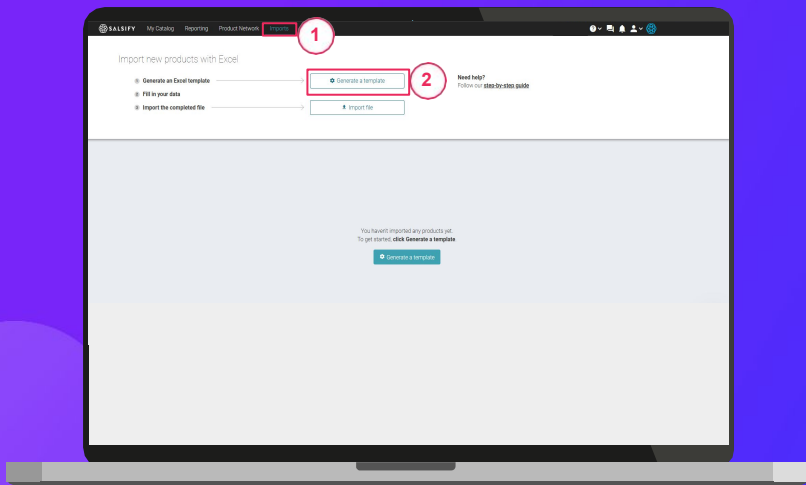
2. **Manual publication**

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.

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# 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)
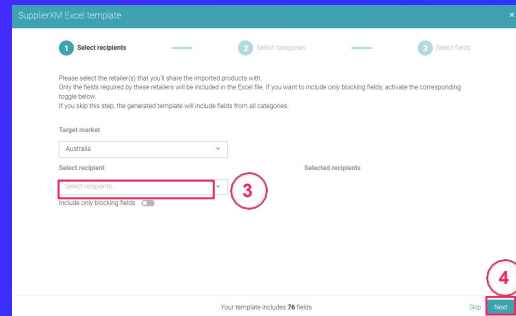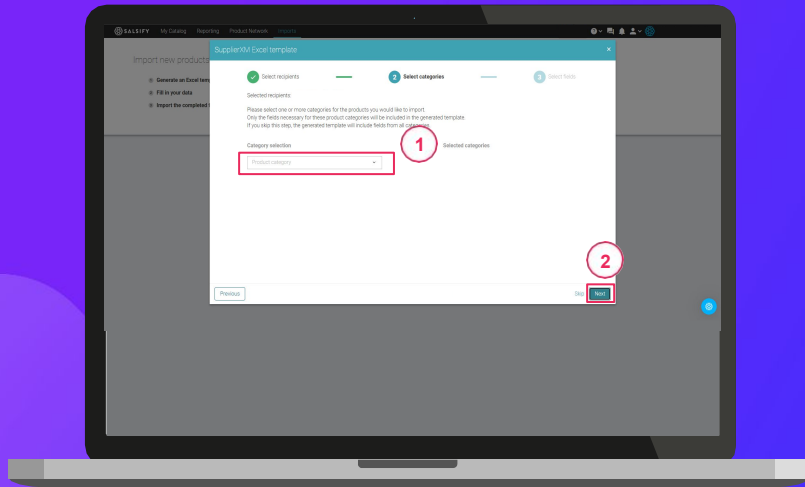
3. Click on **"Next."** (4)



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.

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# 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"** ②

# Import your product data via an Excel file

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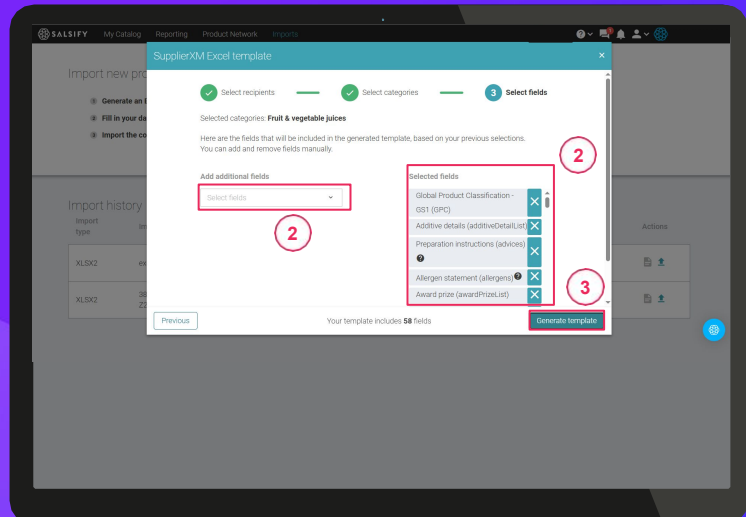


1. By default, and following step 1, **only the fields that are blocking for the selected recipients and are applicable to the categories selected in step 2 will be included.**

   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



1. **The template has two 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.
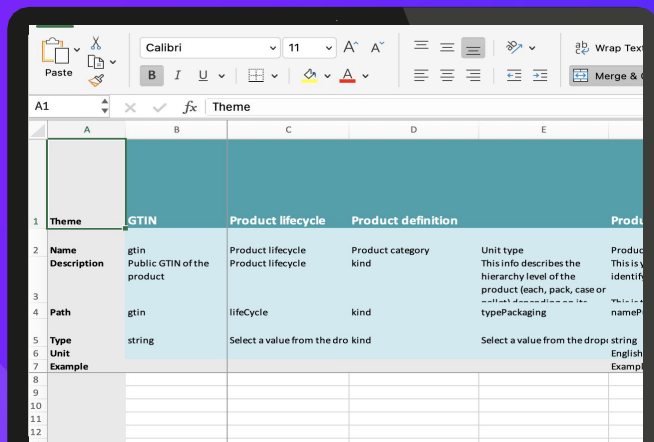
2. Fill in all of the columns (1 GTIN per line) and save the file in XLSX format.
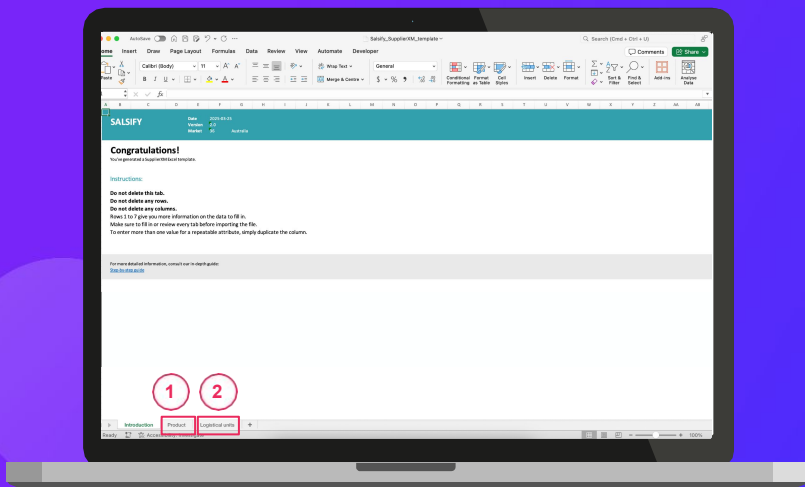
Tip: note the "Introduction" tab which gives you instructions on how to fill in the template correctly!

# 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.

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# Import your product data via an Excel file

Import your data
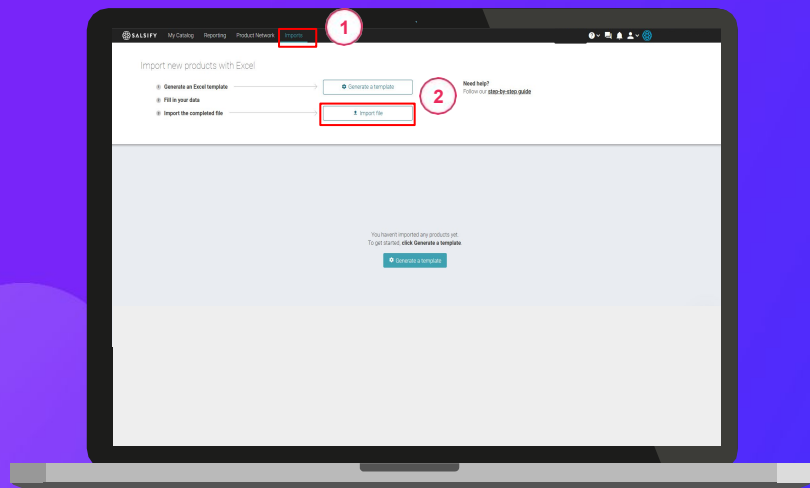


In the "Imports" section: ①

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
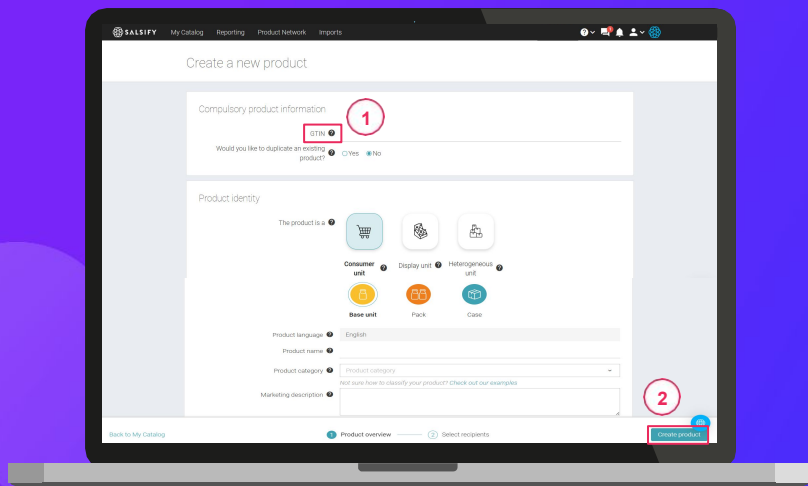
Tip: Once completed, you can view a record of your import directly via the "Imports" tab

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# 4. Create your products and share them with your retailers

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# Create a product manually

Create a **new product page**



**To create a new product page:**

1.      Go to the **Catalogue 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).*

# Create a product manually

Create a **new product page**
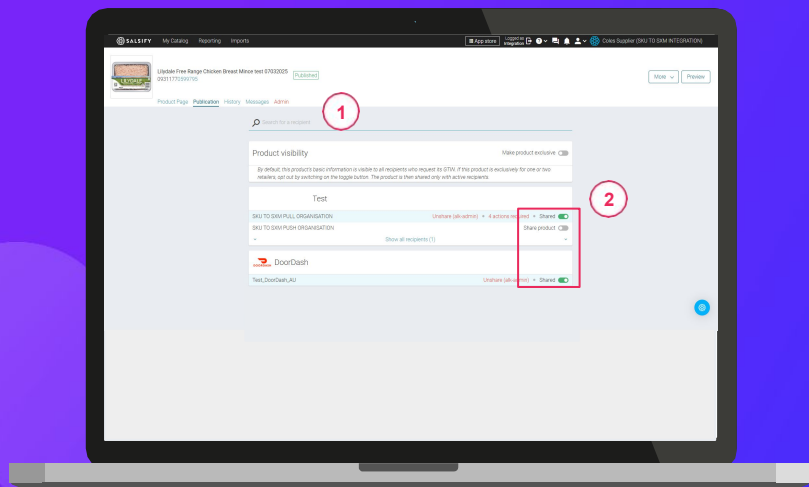


1. Search for a **recipient.** ①

2. Select recipient/s 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](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
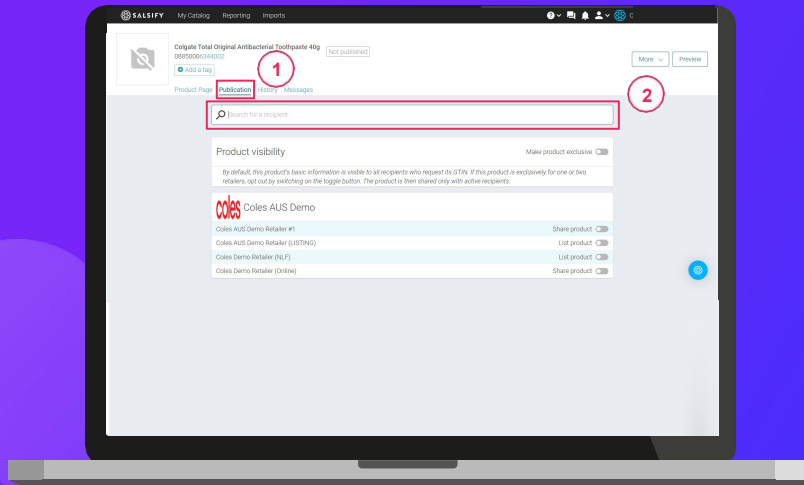


1. Click on the **"Publication"** tab. ①

2. Search for 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

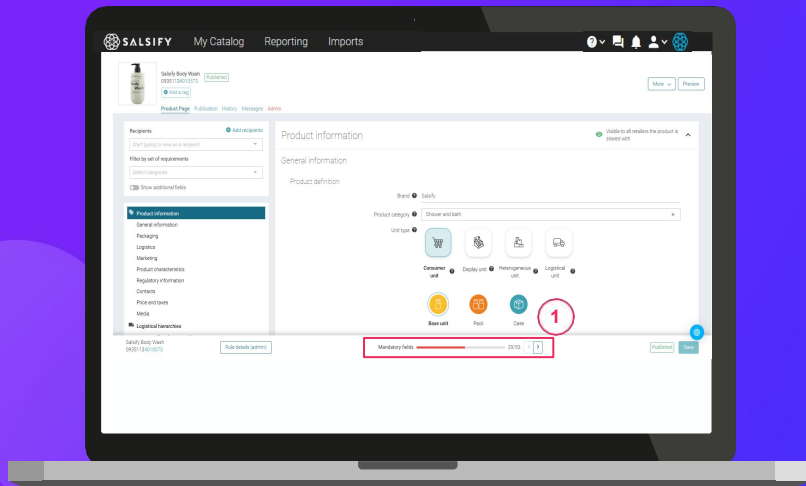SALSIFY

# 5. Add information to your product pages

5.1 Essential information: mandatory fields
5.2 Filling in the product page
5.3 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. ①
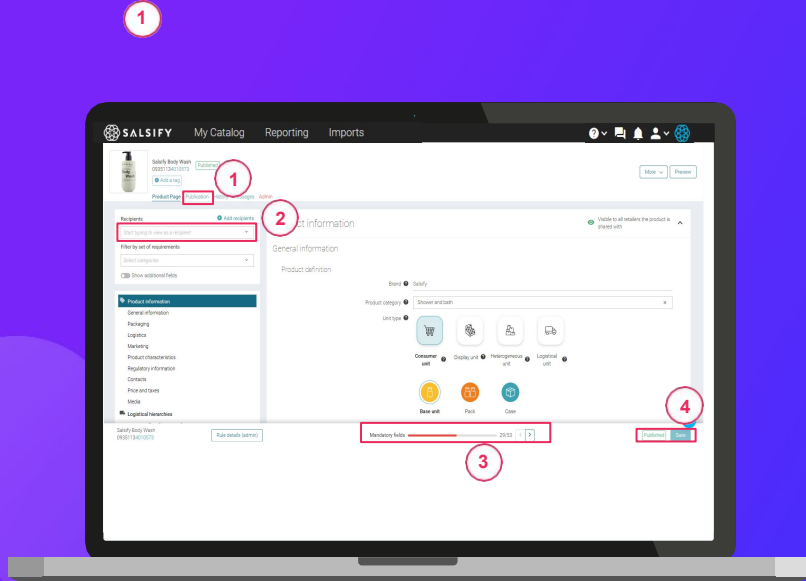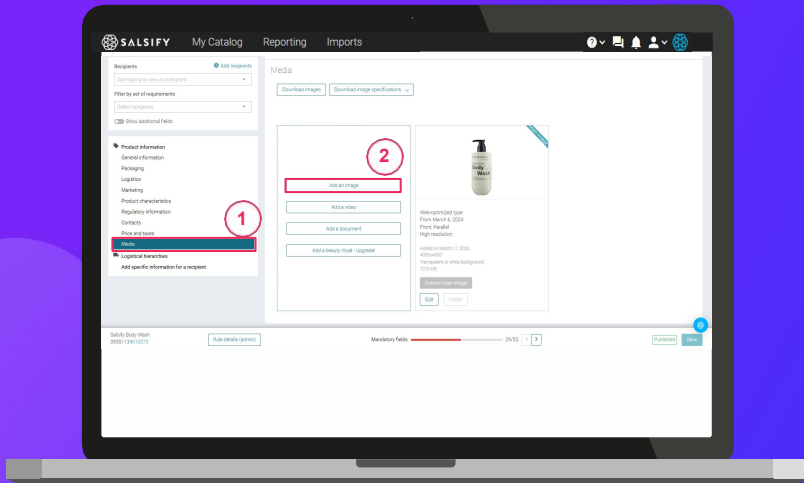


After creating the product page:

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
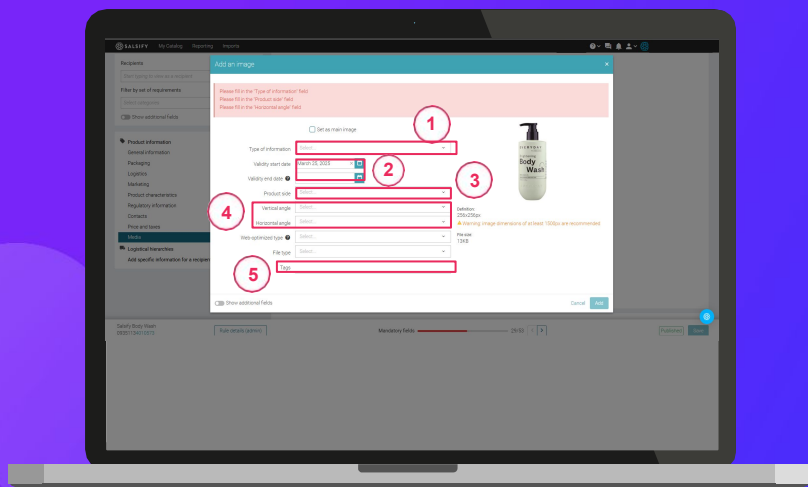
3. Click on **Save/Publish** ④

# Adding images

You can **add images** to your product pages.



1. Go to the "Media" section of your product  page 1

2. Click on "Add an image" 2

3. Drag and drop or select the image that you would like to upload

4. Then fill in the requested information (see next page)

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# Adding images

What information must be filled in?

**①** **Type of information:** Presentation of the product (unpackaged, 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 (vertical and horizontal)

**⑤** **Tags:** These enable you to label and categorise your photos based on your needs.
*Note: this field is not mandatory.*

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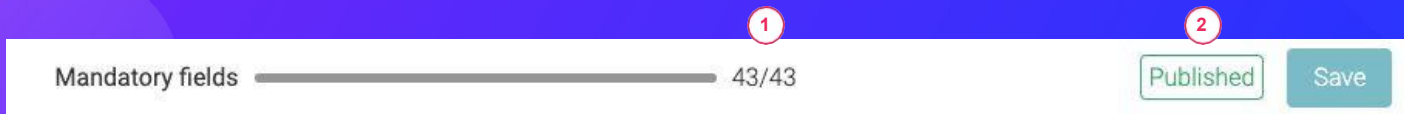
# Adding images

What information must be filled in?
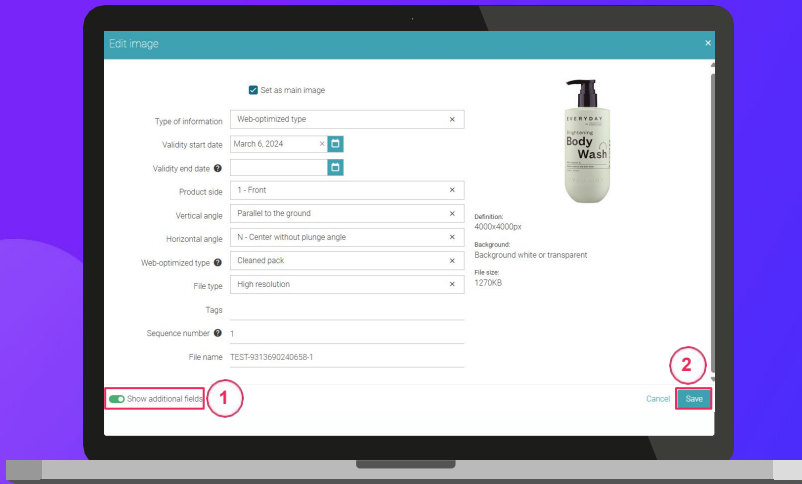


1. Ensure you can see the additionals fields ①

2. Ensure you save your product ②

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# 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



Mandatory fields     43/43     Published   Save

**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

6.1 Duplicating your products
6.2 Editing product information for multiple pages at once
6.3 Publishing multiple product pages at once
6.4 Activating multiple recipients at once
6.5 Reporting

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# 1. Duplicating your products

Go to the **Catalogue** page
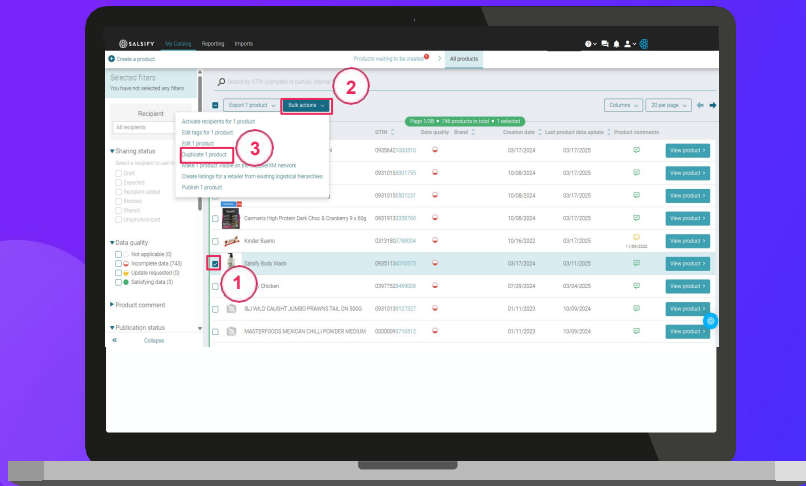


1.   Select the product you wish to duplicate  ①

2.   Click on **"Bulk actions"** then on **"Duplicate 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)

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# 2. Editing product information for multiple pages at once
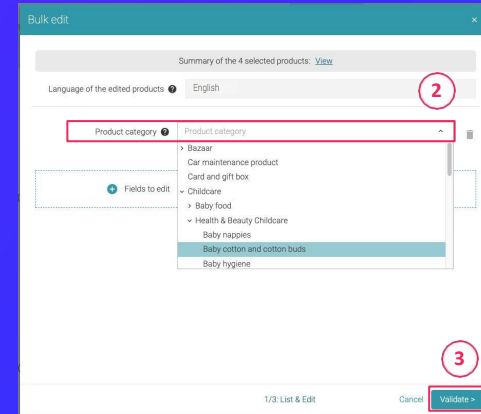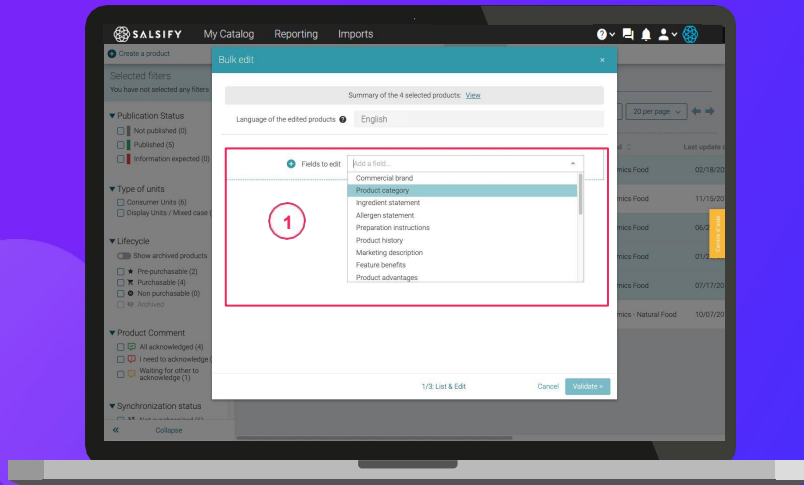
Go to the **Catalogue** page
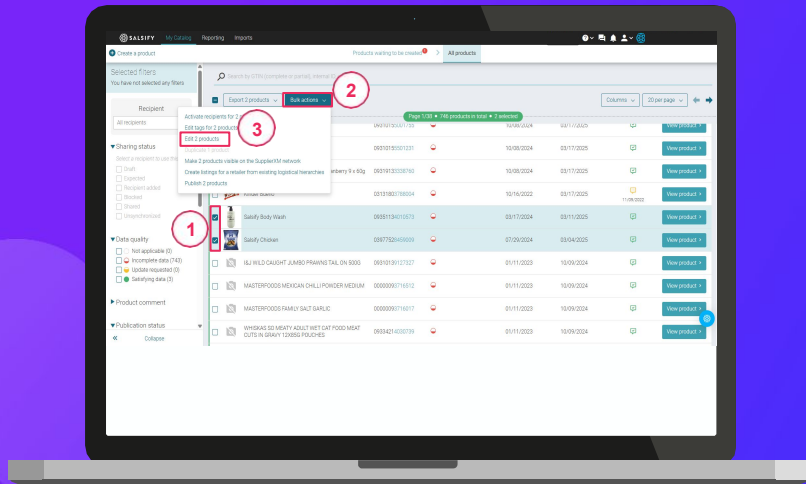


1. **Select the products** that you would like to edit. ①

2. Click on **"Bulk actions"** then on **"Edit X products".** ③

3. A window will open

# 2. Editing product information for multiple pages at once
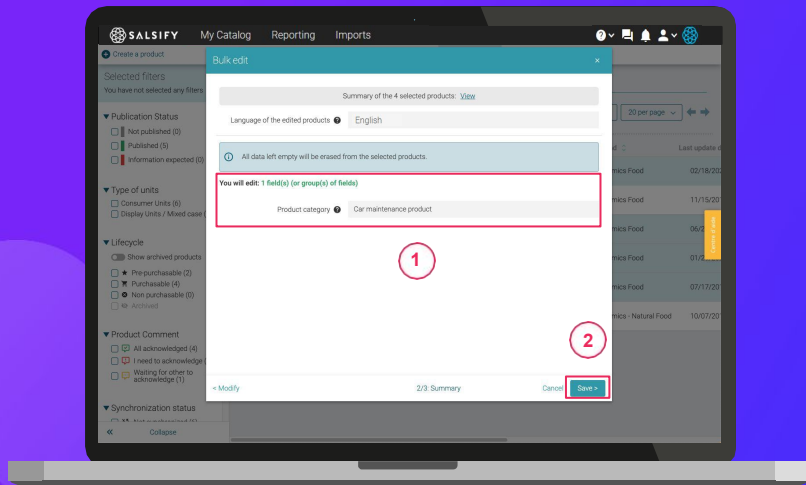
Go to the **Bulk** edit window

**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.
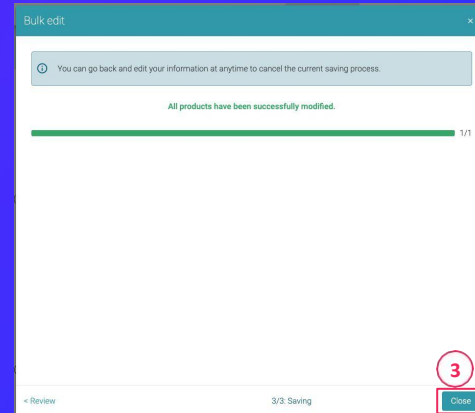
# 2. Editing product information for multiple pages at once
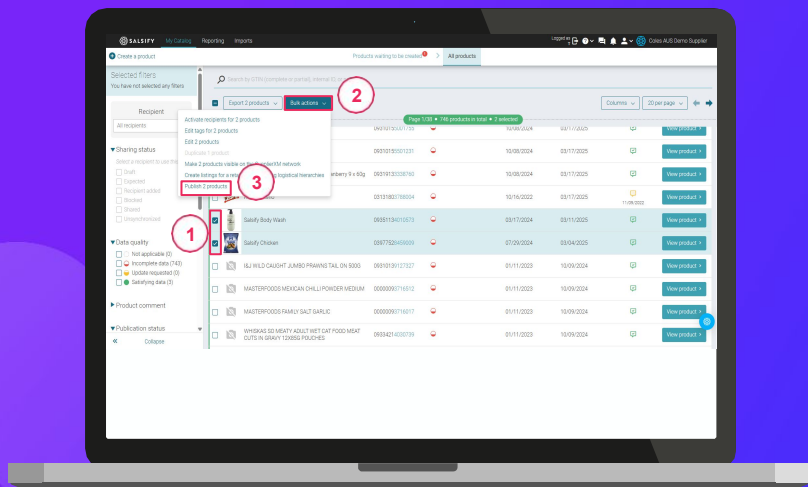
Go to the **overview** window

1. **An overview** will show all modifications made to your products. ①
2. Click on **Save.** ②
3. **Saving your changes:** once complete, click on **"Close."** ③

Your product information has been successfully modified!

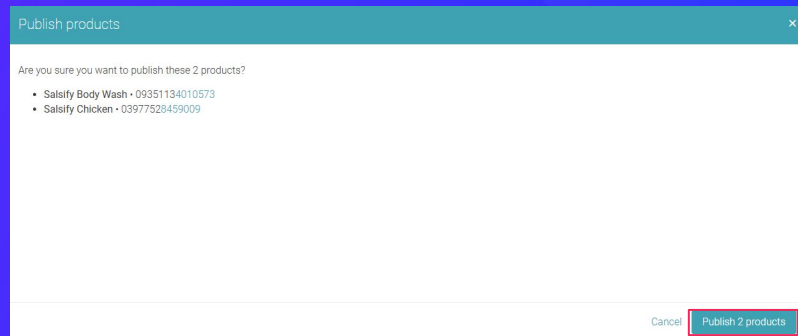# 3. Publishing multiple product pages at once

Go to the **Catalogue** page

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

2. Click on **"Bulk actions"** then on **"Publish X products."**
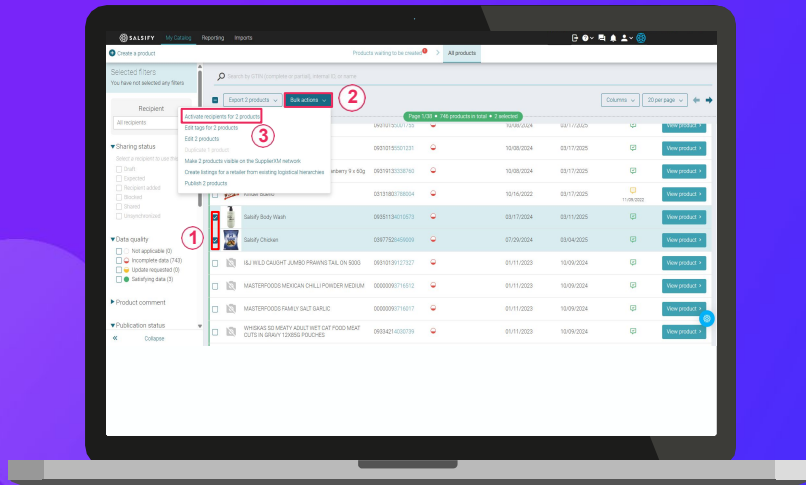
3. An overview window will appear. Click on **"Publish X product**

# 4. Activating multiple recipients at once

Go to the **Catalogue** 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."**

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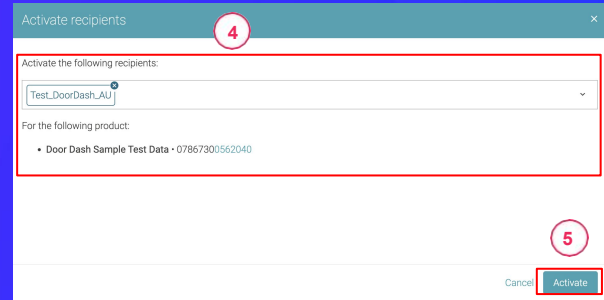
# 5. Reporting

## Go to the **Reporting** page
To access the reporting feature, you must be subscribed to a SupplierXM plan.
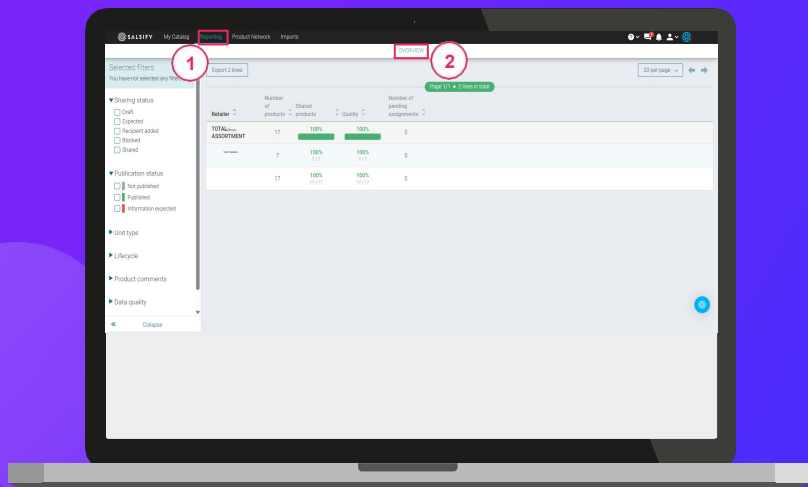


**Track and improve collaborations with your retailers!**
3 sections to help you determine which elements to focus on to **improve your efficiency:** ①

1. **Overview:** Quickly view the status of the product data you are sharing, as well as data quality. ②

# 7. FAQ's