



SPS COMMERCE  
INFINITE RETAIL POWER™



# Assortment User Guide

May 2020

# ASSORTMENT

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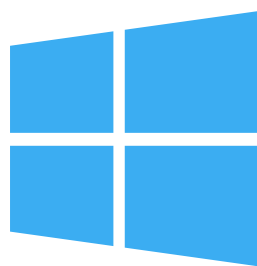
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# System Requirements

## SUPPORTED OPERATING SYSTEMS

Supported operating systems for Fulfillment are MacOS and above and Windows 7 and above.



## SUPPORTED BROWSERS

Supported browsers are Chrome, Mozilla Firefox, Safari and Edge.



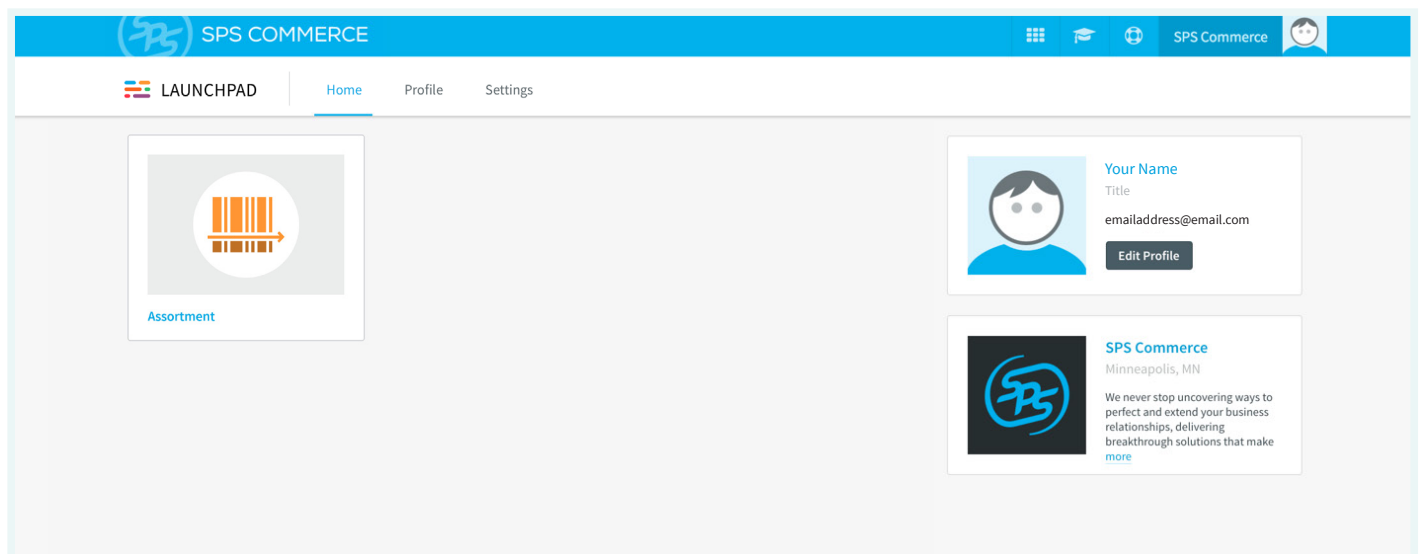
# Logging in



You will receive an email invitation to register for Assortment when your setup is completed by the SPS Commerce consultant responsible for your implementation.

The Assortment platform allows for multiple users. Your login information is your company registered email address and the password you set.

When you log in, you are brought to the SPS Commerce **Launchpad**.

A screenshot of the SPS Commerce login page. The page is split into two main sections. The left section has a blue background and features the SPS Commerce logo (a stylized 'S' and 'P' inside a circle) and the text 'SPS COMMERCE' and 'INFINITE RETAIL POWER™'. The right section has a white background and is titled 'Sign in to your account'. It contains two input fields: 'Email Address' and 'Password'. Below the password field is a checkbox labeled 'Remember Me'. A blue 'Login' button is positioned below the checkbox. At the bottom of the right section is a link that says 'Forgot Password?'.

# Launchpad

The blue navigation bar, located across the top of the page, is available at all times when you are signed into your account.

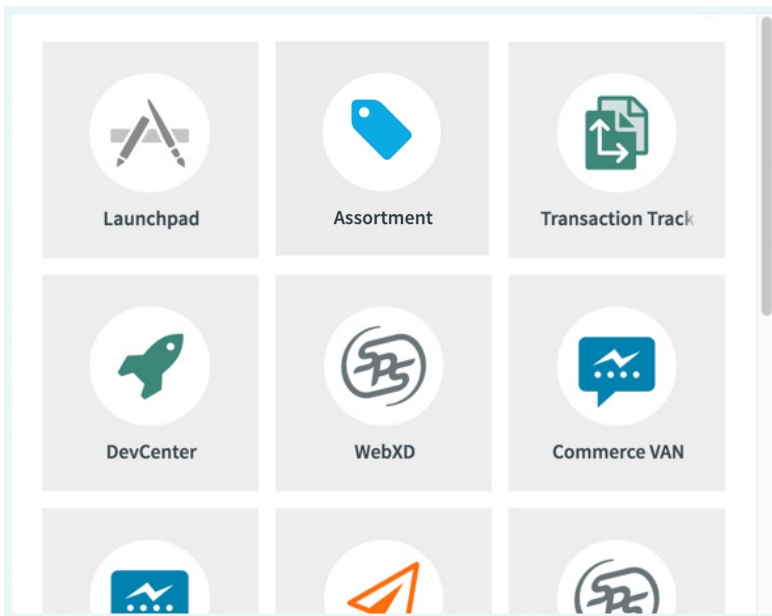


Click **SPS Commerce** to return to the Launchpad.

Click your **User Profile** to sign out of your account or change organizations if you are attached to more than one.

Click the **Life Preserver** icon to be brought to the SPS Commerce Contact Page. The Contact Page contains important SPS Commerce phone numbers and email addresses you may need.

Click the **Training Center** icon to be brought to the SPS Commerce Training Center. To login or request an account, click **Log In To Training Center**. Training Center is an on-demand learning environment where you can learn about SPS Commerce products and your trading partnerships.

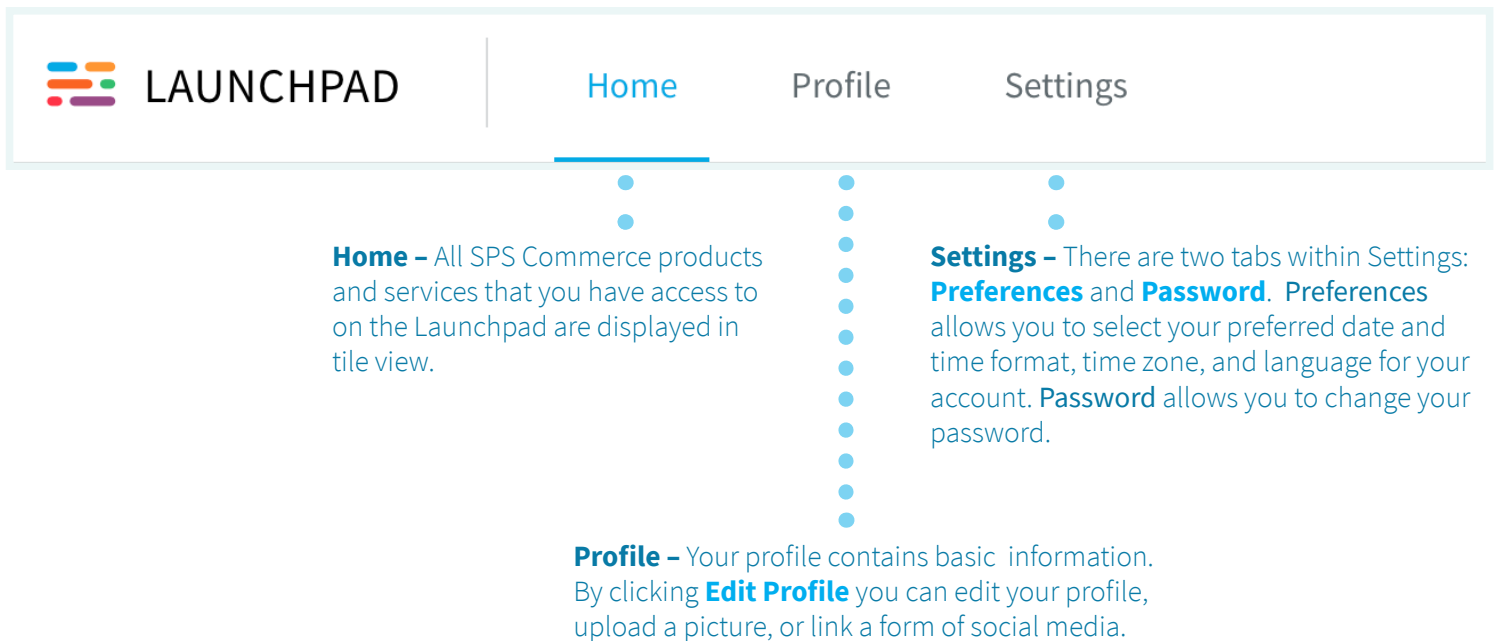


Click the **Products** icon to see a clickable menu of all products and services you have access to within Launchpad.

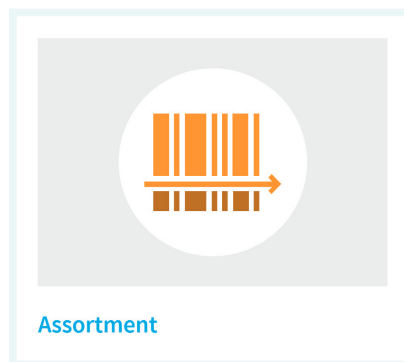


Click the **Messenger** icon in the lower right-hand corner of the screen to contact Assortment support.

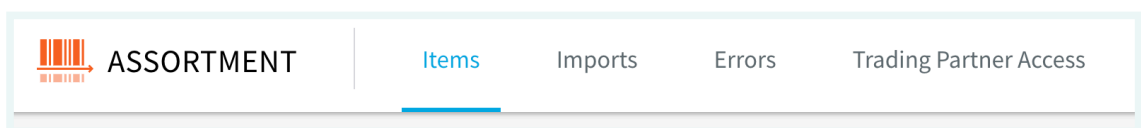
The **Launchpad** navigation bar is located below the blue navigation bar at the top of the page and is available only while in the Launchpad.



To access **Assortment**, click the **Assortment** tile from the **Launchpad Home** or select it from the **Product** menu.



Within the Assortment navigation bar there are four tabs available to you: **Items**, **Imports**, **Errors**, and **Trading Partner Access**.




# Items Tab


The **Items** tab displays an overview of all items in your assortment.

	UPC	Vendor Part Number	Product Description	Created	Updated	Actions
<input type="checkbox"/>	118473017150	311972	The North Face Ballard Lace	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	394216175598	281849	Sesto Meucci Safari	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	371225483229	623148	Camper Beetle - K400010	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	310647354076	901483	Woolrich Pocono Creek	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	514154188561	245451	Chrome Storm 415 Workboot	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	651651011778	464996	Frye Janis Shield Short	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	912518467870	868082	Frye Renee Seam Tall	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	727634747741	982595	Frye Tabitha Harness Short	Sep 29, 2016	Sep 29, 2016	...

## Column Settings Icon

The Column Settings  icon allows you to choose what information is visible in search results within the Items tab.

Drag items from **Available Columns** to **Active Columns** to display them in your search results.

Click the **Remove column**  icon next to an item in the Active Columns to remove it from your displayed search results.

### Column Settings

**AVAILABLE COLUMNS**

Part Number

EAN

ISBN

GTIN

Created

Customer Available

**ACTIVE COLUMNS**

Status

Catalog Name

Product Code

Selection Code

UPC


Updated

Drag here to add

Drag here to add

Drag here to add

# Search by UPC

- 1. Select **UPC**, **VPN**, **EAN**, **ISBN**, or **GTIN** from the dropdown.
- 2. Enter the corresponding number.
- 3. Click the **Search**  icon. Your results will display below.
- 4. Click the **UPC number** or item identifier to see additional item attributes.

UPC ▼ 98756890745 Q Advanced Search Actions ...

MATCHING RESULTS Clear

<input type="checkbox"/>	Status	Catalog Name	Product Code	Selection Code	UPC	Updated	Actions
<input type="checkbox"/>	!		CVAVP262	001	98756890745	Nov 9, 2018	

View 25 ▼ Per Page Viewing 1 - 1 of 1 1 of 1 < >

[Back to Items](#)

789123 partnumber

Item Attributes Edit

Retail Media Pricing Ordering Logistics Regulatory & Compliance Extended Electronics Apparel Sporting Goods Book Home Improvement & C

Item Identifiers Minimum 1 required

UPC	008333610090
GTIN	00833361009012
EAN	
ISBN	
Vendor Part Number	789123
National Drug Code	

Item Categorization All fields required

Catalog	Release Management test vendor3
Selection Code	600
Selection Code Description	Womens Ts & Tops
Selection Code	152
Selection Code Description	Womens Ts & Tops
Product Code	111800
Product Code Description	Updated Prod Desc

Your weekly claim certification is considered incomplete and is erased if you stop the weekly claim certification before teh system or a claims specialist

Primary Variant Name



## Advanced Search

1. Click **Advanced Search** to search by additional criteria.
2. Enter at least one field under **Minimum One Required** along with any other search criteria.
3. Click **Search**.

UPC Search for an item by UPC

Advanced Search

Load a Saved Search

Add a new field by attribute name

**MINIMUM ONE REQUIRED**

UPC: Enter a UPC

GTIN: Enter a GTIN

EAN: Enter a EAN

ISBN: Enter a ISBN

Part Number: Enter a Part Number

Advanced Search Defaults

Clear Search

## Export Catalog

To receive/obtain a copy of your entire catalog from SPS Commerce Assortment, complete the steps below:

1. Click **Export Catalog**.

UPC Search for an item


Advanced Search

Export Catalog


+ Add Items

Actions

	UPC	Vendor Part Number	Product Description	Created	Updated	Actions
<input type="checkbox"/>	<input type="checkbox"/> 118473017150	311972	The North Face Ballard Lace	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	394216175598	281849	Sesto Meucci Safari	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	371225483229	623148	Camper Beetle - K400010	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	310647354076	901483	Woolrich Pocono Creek	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	514154188561	245451	Chrome Storm 415 Workboot	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	<input type="checkbox"/> 651651011778	464996	Frye Janis Shield Short	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	912518467870	868082	Frye Renee Seam Tall	Sep 29, 2016	Sep 29, 2016	...
<input type="checkbox"/>	727634747741	982595	Frye Tabitha Harness Short	Sep 29, 2016	Sep 29, 2016	...

2. The export will send the catalog to the email address you are logged in with. You can add additional recipients by entering their email addresses in the **Additional Email(s)** field.
3. Click **Export Catalog**.  Please note that it may take hours or a full day to properly send the catalog to your email, depending on the number of items in your catalog.

### Export Catalog

 Your item list will be delivered via email.


DESTINATION EMAIL  
tthompson@vendor.com

Additional Email(s)

[+ Add an Email](#)


Cancel

Export Catalog



### Catalog Export Initiated!

Once complete a file will be sent to the email address(es) you have specified.



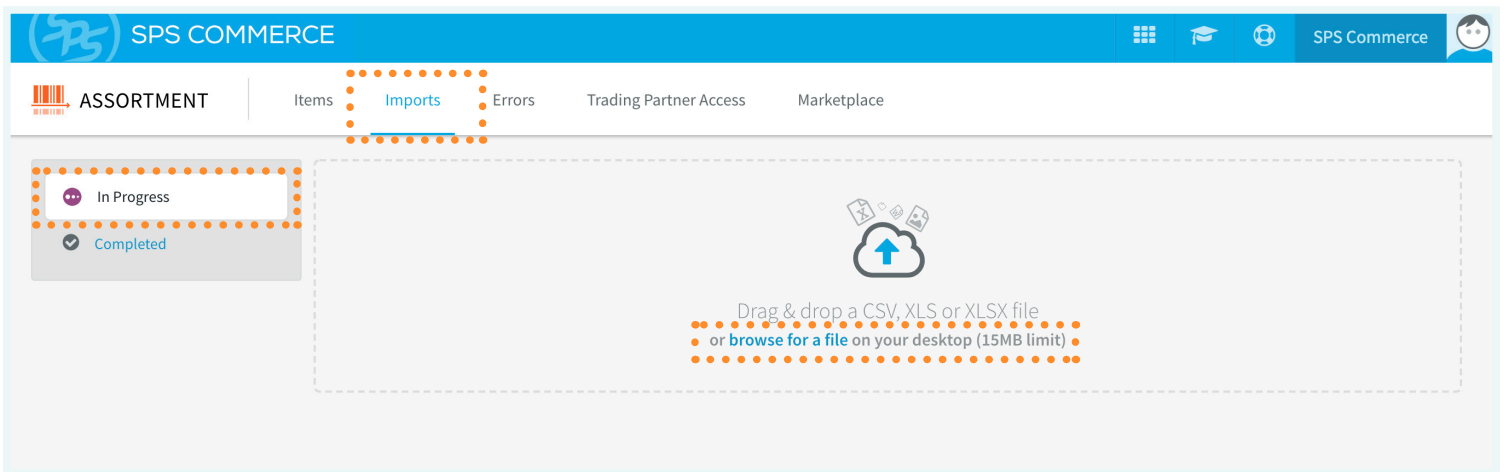
# Imports Tab

The **Imports** tab allows you to import a spreadsheet with all your items.

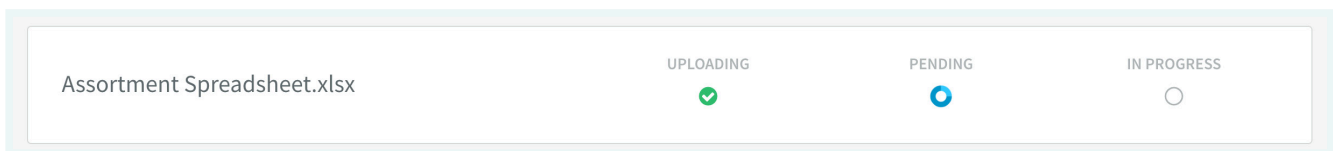
## Importing Items

Once you have filled out the required fields in the spreadsheet that was provided to you by your implementation consultant, follow the steps below:

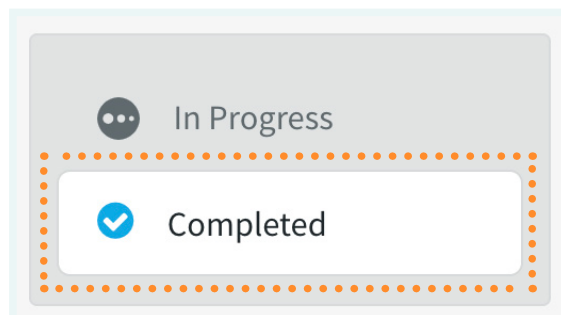
1. Navigate to the **Imports** tab.
2. Click **In Progress** on the left hand side.
3. Drag and drop your spreadsheet to the window or click **browse for a file** to locate the file on your computer. ⚠️ Your file must be 15MB or less in size.



4. Once you have chosen your file, you will see the import processing.



5. Click **Completed** to see whether your spreadsheet contains any formatting errors.





## Addressing Formatting Errors



### Erred

A status of Erred will show **one or more Total Errors**. Your spreadsheet has formatting errors that must be addressed.


Click **Total Errors** to see the errors. Once you have addressed the errors, return to **In Progress** and import the spreadsheet again.


 Assortment Spreadsheet.xlsx COMPLETED: JAN 4, 2019 @ 11:23 AM	TOTAL ERRORS  2
--	---



### Complete

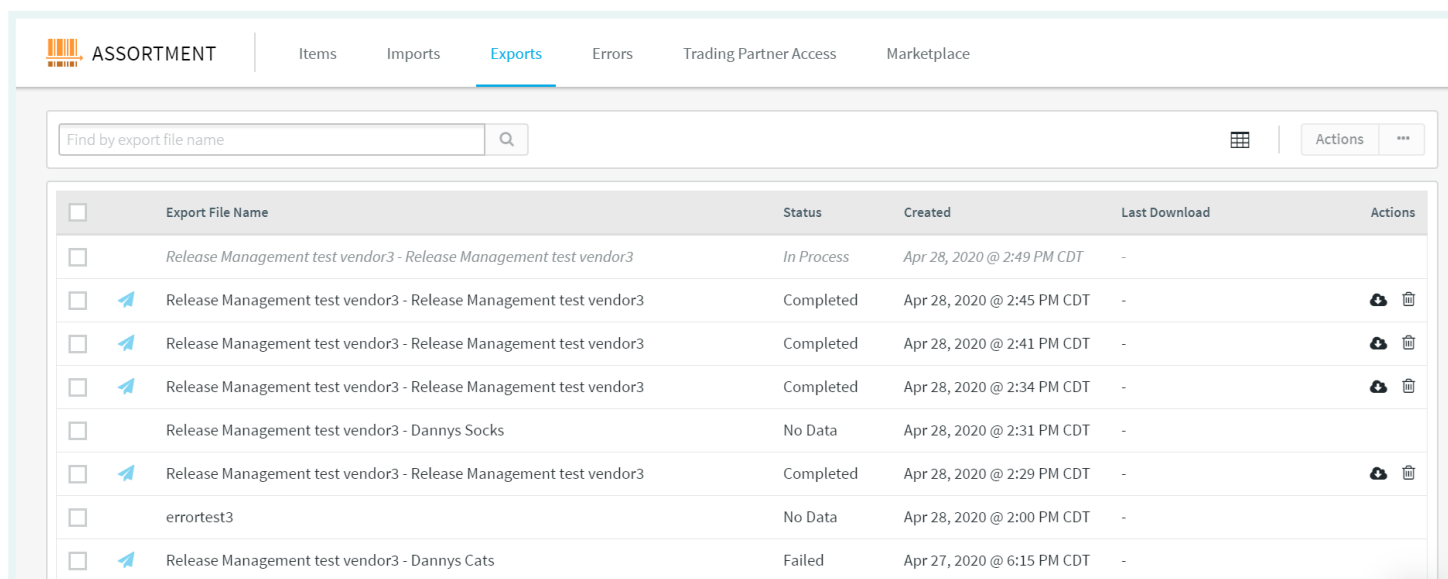
A status of Complete will show **0 Total Errors**. Your spreadsheet was imported with no formatting errors.

 You must still check for any validation errors within the **Errors** tab.














 Assortment Spreadsheet.xlsx COMPLETED: JAN 4, 2019 @ 11:23 AM	TOTAL ERRORS 0
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# Exports Tab


Completed and In Process Catalog Exports display in the **Exports** tab. The Exports tab states a history of exports along with the status.



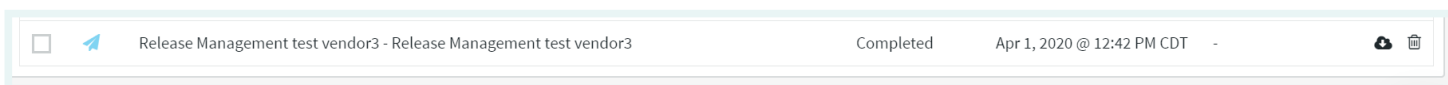
The screenshot shows the 'ASSORTMENT' application interface with the 'Exports' tab selected. At the top, there are navigation links: Items, Imports, Exports (active), Errors, Trading Partner Access, and Marketplace. Below the navigation is a search bar labeled 'Find by export file name' and an 'Actions' button. The main content is a table with the following columns: Export File Name, Status, Created, Last Download, and Actions. The table contains eight rows of export data.

<input type="checkbox"/>	Export File Name	Status	Created	Last Download	Actions
<input type="checkbox"/>	Release Management test vendor3 - Release Management test vendor3	In Process	Apr 28, 2020 @ 2:49 PM CDT	-	
<input type="checkbox"/> 	Release Management test vendor3 - Release Management test vendor3	Completed	Apr 28, 2020 @ 2:45 PM CDT	-	 
<input type="checkbox"/> 	Release Management test vendor3 - Release Management test vendor3	Completed	Apr 28, 2020 @ 2:41 PM CDT	-	 
<input type="checkbox"/> 	Release Management test vendor3 - Release Management test vendor3	Completed	Apr 28, 2020 @ 2:34 PM CDT	-	 
<input type="checkbox"/>	Release Management test vendor3 - Dannys Socks	No Data	Apr 28, 2020 @ 2:31 PM CDT	-	
<input type="checkbox"/> 	Release Management test vendor3 - Release Management test vendor3	Completed	Apr 28, 2020 @ 2:29 PM CDT	-	 
<input type="checkbox"/>	errortest3	No Data	Apr 28, 2020 @ 2:00 PM CDT	-	
<input type="checkbox"/> 	Release Management test vendor3 - Dannys Cats	Failed	Apr 27, 2020 @ 6:15 PM CDT	-	




The **Sent**  icon indicates the export email was sent.

A copy of the catalog will be available for download for seven days. To download, click the **Download**  icon next to the completed export.

To delete an export from Assortment, click the **Delete**  icon.





This is a close-up of a single row from the Exports table. It shows the 'Export File Name', 'Status', 'Created' date, and 'Last Download' date. The 'Status' is 'Completed' and the 'Created' date is 'Apr 1, 2020 @ 12:42 PM CDT'. The 'Actions' column contains a 'Download' icon and a 'Delete' icon.

<input type="checkbox"/> 	Release Management test vendor3 - Release Management test vendor3	Completed	Apr 1, 2020 @ 12:42 PM CDT	-	 
--	---	-----------	----------------------------	---	---

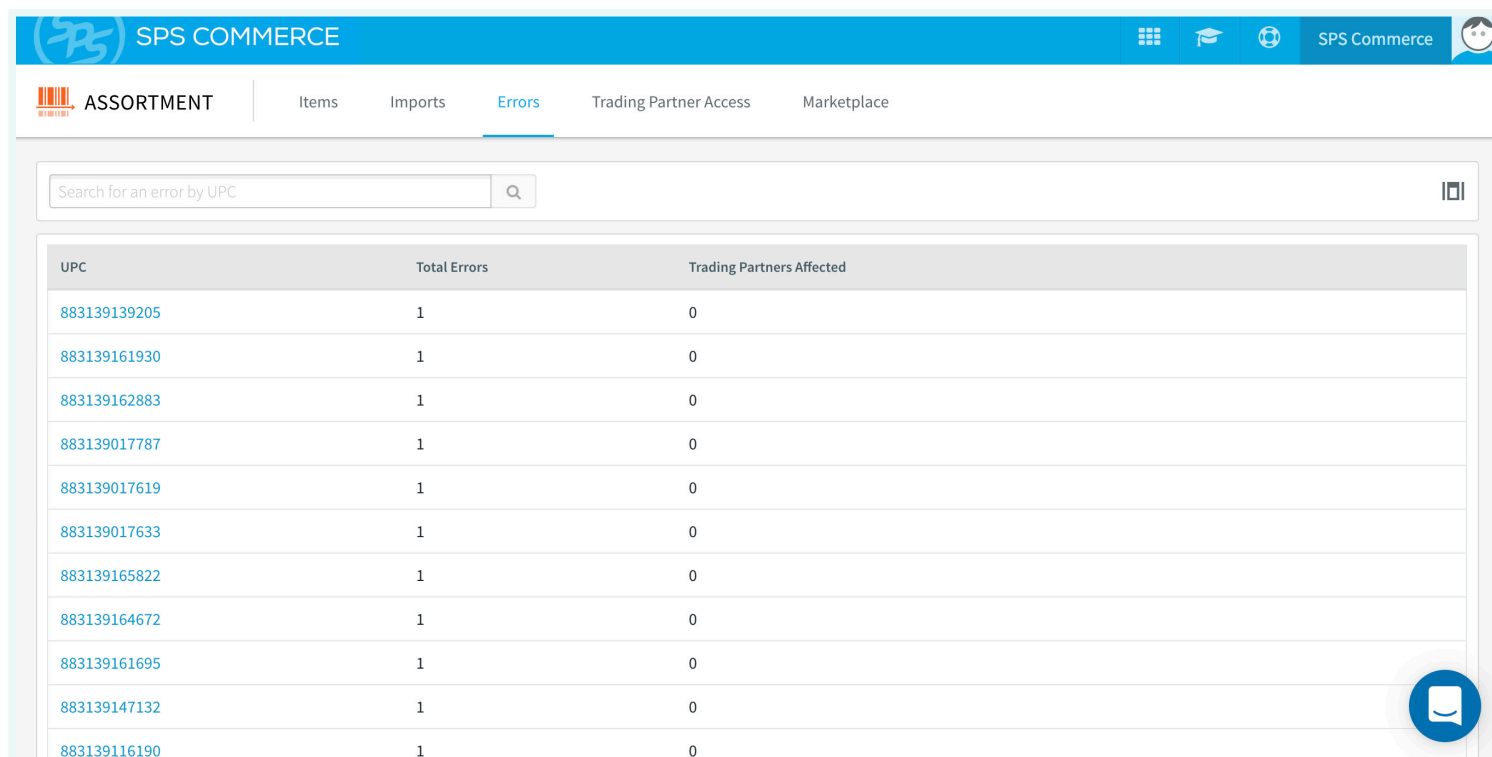
✔ A green check icon indicates that the file was successfully downloaded from the email.

## Export Status

- **Complete** – The export was successfully emailed.
- **In Process** – The export is pending.  It may take a few hours or over 24 hours to complete.
- **No Data** – There are no items in the catalog to be exported.
- **Failed** – An error occurred during the export. Reach out to the Assortment Support team by clicking the Messenger Icon  in the bottom right corner of the screen.

# Errors Tab

Data in your spreadsheet that does not meet the requirements of your trading partner will result in a validation error. The **Errors** tab allows you to see these validation errors. You can view the number of **Total Errors** and number of **Trading Partners Affected**.



UPC	Total Errors	Trading Partners Affected
883139139205	1	0
883139161930	1	0
883139162883	1	0
883139017787	1	0
883139017619	1	0
883139017633	1	0
883139165822	1	0
883139164672	1	0
883139161695	1	0
883139147132	1	0
883139116190	1	0

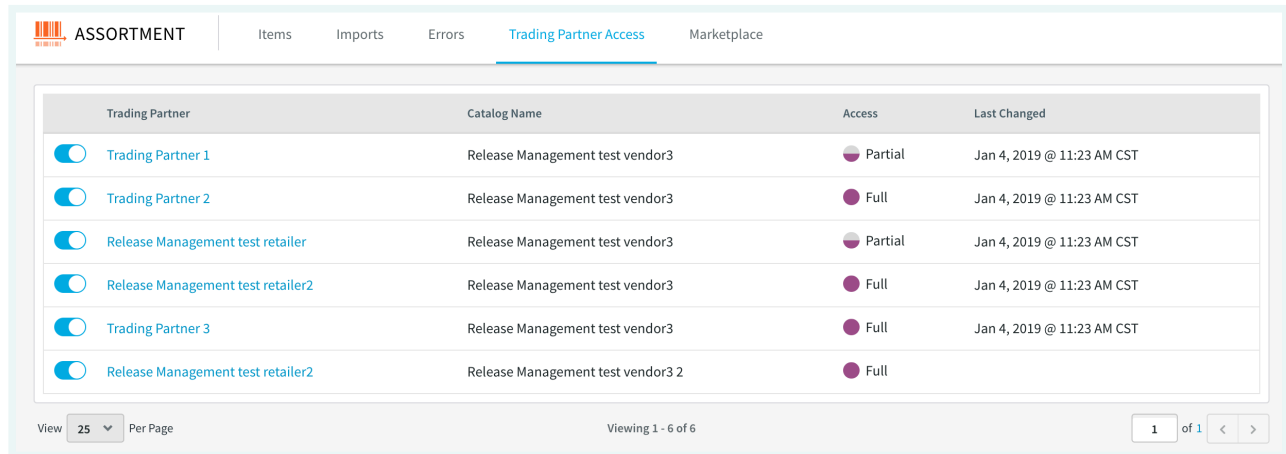
## Addressing Validation Errors

1. Navigate to the **Errors** tab.
2. Click on the **UPC number** to go to a specific item. You will see the error messages and the trading partners that the errors are impacting.
3. Once you have addressed all errors by updating the information in your spreadsheet, go back to the **Imports** tab and import the spreadsheet again.
4. Once the spreadsheet has imported successfully, come back to the **Errors** tab to verify.
5. Repeat the process until no errors are shown.













# Trading Partner Access Tab

Assortment is a universal product - it allows you to provide data to multiple trading partners without having to fill out all the data for each individual trading partner. However, there may be times when you do not want a partner to have access to a certain item. The **Trading Partner Access** tab allows you to restrict access to items by retailer.

The Trading Partner Access tab shows all of your current trading partners within Assortment, as well as their level of access.

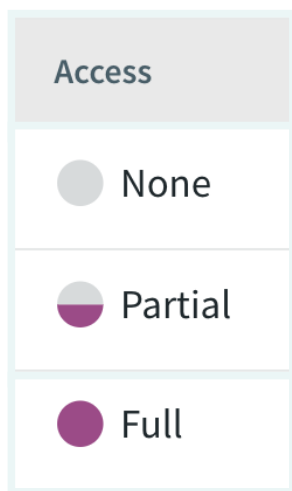



The screenshot shows the 'ASSORTMENT' application interface with the 'Trading Partner Access' tab selected. The table lists trading partners, their catalog names, access levels, and last changed dates. Each row has a toggle button on the left.


Trading Partner	Catalog Name	Access	Last Changed
 Trading Partner 1	Release Management test vendor3	 Partial	Jan 4, 2019 @ 11:23 AM CST
 Trading Partner 2	Release Management test vendor3	 Full	Jan 4, 2019 @ 11:23 AM CST
 Release Management test retailer	Release Management test vendor3	 Partial	Jan 4, 2019 @ 11:23 AM CST
 Release Management test retailer2	Release Management test vendor3	 Full	Jan 4, 2019 @ 11:23 AM CST
 Trading Partner 3	Release Management test vendor3	 Full	Jan 4, 2019 @ 11:23 AM CST
 Release Management test retailer2	Release Management test vendor3 2	 Full	


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There are three different levels of access:



**None** - **None** of your items are available to this trading partner. To turn this level of access on or off, click the toggle  button.

**Partial** - **Some** of your valid items are available to this trading partner. Click the name of the trading partner to see which Product Codes/Selection Codes are available. To turn each Product Code/Select Code on or off, click the toggle  button.

**Full** - **All** of your valid items are available to your trading partner. To turn this level of access on or off, click the toggle  button.

## Sending Data to your Trading Partner

Assortment makes it easy for you to exchange data with your trading partners without manual work.

Required data is automatically sent through Assortment on a schedule that your trading partner has requested.