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firstbase consumer goods User Manual for data providers

firstbase consumer goods – the industry solution for standardized item master data exchange for consumer goods / retail in Switzerland

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Revocation (Disclaimer)

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1 Introduction

1.1 How is this manual structured?

The manual introduces you step by step to the handling and use of firstbase consumer goods and explains the user interface and the most important functions.

1.2 Target group

This manual is aimed at data suppliers who record/deliver/maintain the item master data in firstbase consumer goods and publish it for their customers.



Note:

A version for data recipients is in the works.

1.3 Scope and delimitation

No interfaces are described in this manual. Information on the interfaces can be found on our firstbase website in the menu item "Services" in "[Documents & Links](#)".

1.4 Who is responsible for the publication?

Item master data can be recorded and delivered in firstbase consumer goods Item various channels and in multiple formats. They are validated by the solution and can then be published in the firstbase consumer goods catalog.

The rules for the publication of item master data in the Swiss target market are basically as follows:

- Trademark owner in Switzerland: The Swiss-based trademark owner is responsible for all aspects of its own items in the Swiss target market. He publishes item data in firstbase consumer goods.
- Trademark owner outside Switzerland: The trademark owner based outside Switzerland is **not** responsible for the publication of the item master data in the Swiss target market. He publishes only then Item data in firstbase consumer goods, if this has been agreed with the distributor (distributor, importer or Swiss authorized representative).
- Retailers: The trading company in Switzerland is generally responsible for the publication of item data in the Swiss target market. In coordination with the distributor, it publishes item data in firstbase consumer goods.
- Importer: The Swiss-based distributor who imports goods into the Swiss target market is responsible for all matters relating to imported items in the Swiss target market. He publishes item data in firstbase consumer goods.

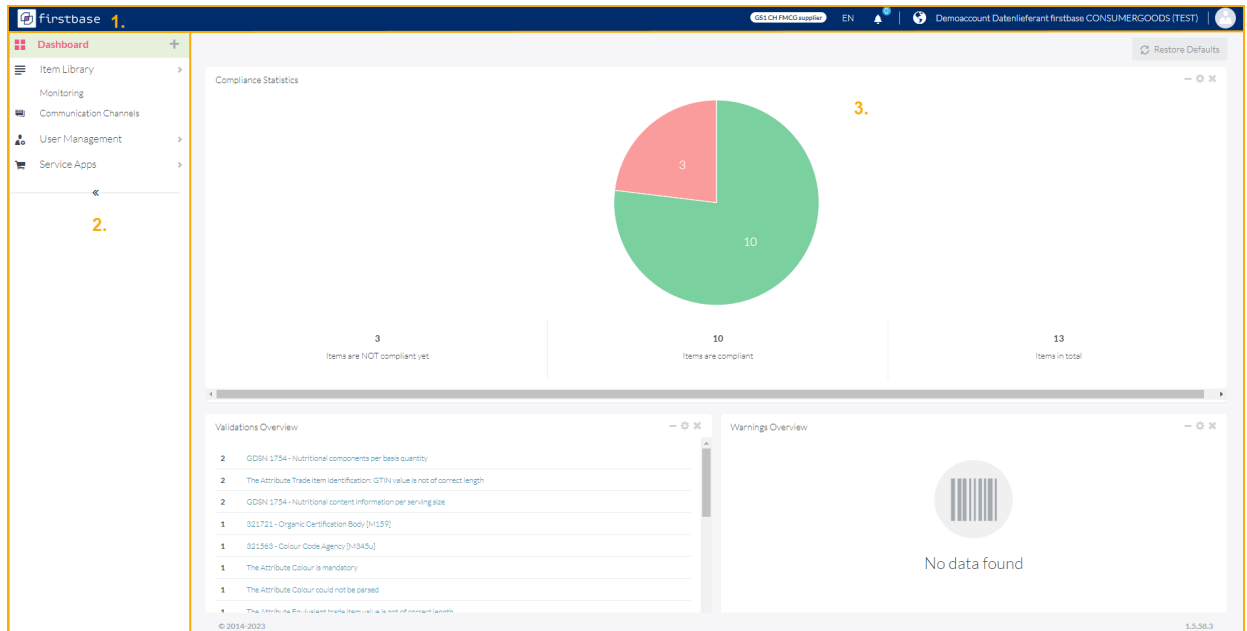


Note:

Items are published in firstbase with the primary key [GTIN:GLN:Target Market]. Thus, it is impossible for the same item to be published in firstbase by the same information provider. However, the same GTIN can be included multiple times in the solution; each from different information providers.

2 Overview of the firstbase web application

After you have successfully registered and logged in, the web application will show you a dynamic dashboard with an overview of your item data (at the start, the display is empty because no item data has yet been entered).



1. At the top of the screen, on the right, you have the option of
 - Change the interface language
 - View notifications (Notifications) (Activity Feed)
 - adjust the settings of your user information, in particular you can change your user password here
 - log out and thus log out of the web application.
2. On the left side of the screen, you will see the menu. You can use it to access the various application functions:

"Item Library" takes you to the item management (see [Entering item data ff.](#)), to the [import](#) and [export functions](#), and to the [assets function](#).

¹ Widgets present specific data that resides in an application.

3 Entering item data

This chapter describes how to enter an item the web interface (GUI – Graphical User Interface).

The Basic Item, repackaging/transport packaging and pallets are separate categories.

Enter the repackaging/transport packaging and pallets separately or in "Basic Item" category. In Basic Item, outer and transport packaging is recorded as an additional item level and linked to the basic item to form an item hierarchy.

We recommend that you enter the repackaging/transport packaging and pallets in the basic item, as the data does not have to be entered again in the basic item.

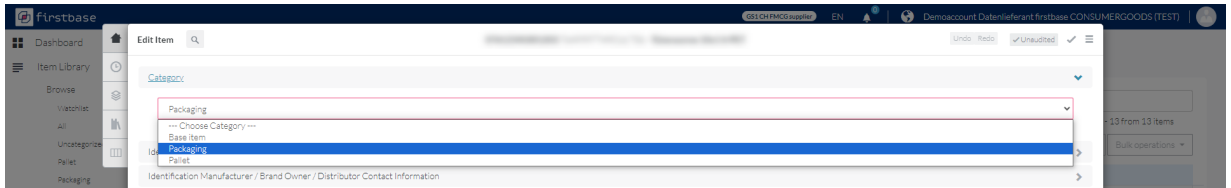


Figure 1: In Category, you can determine whether you want to enter a basic item, packaging, or pallet

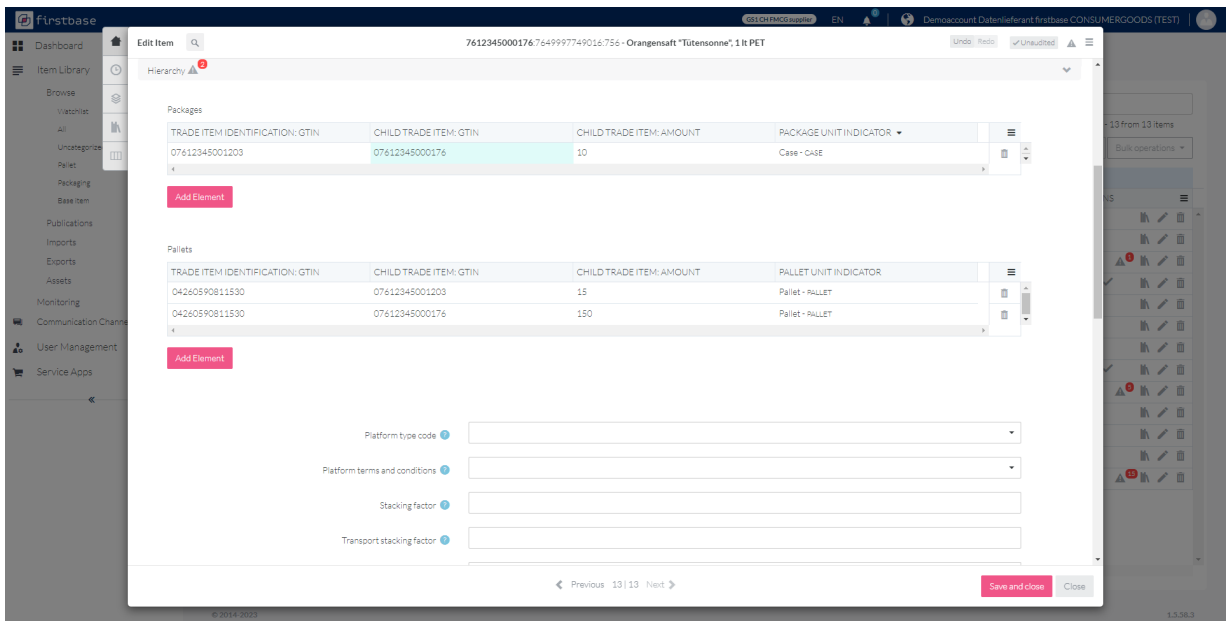


Figure 2: Packaging and pallet recorded and linked to Basic Item



Note:

Make sure that you start with the base item when entering item data. Then you create the packaging as the next higher level and link these hierarchical levels together to form an item hierarchy. If necessary, add the pallet as another hierarchical level and link it to the packaging.

3.1 Create a first item – basic item

The basic item is the smallest unit of an item hierarchy and always the starting point for the creation of a new item. Whether an item level - i.e. the basic item, the packaging or the pallet - is an order or delivery unit is specified individually for each item level.

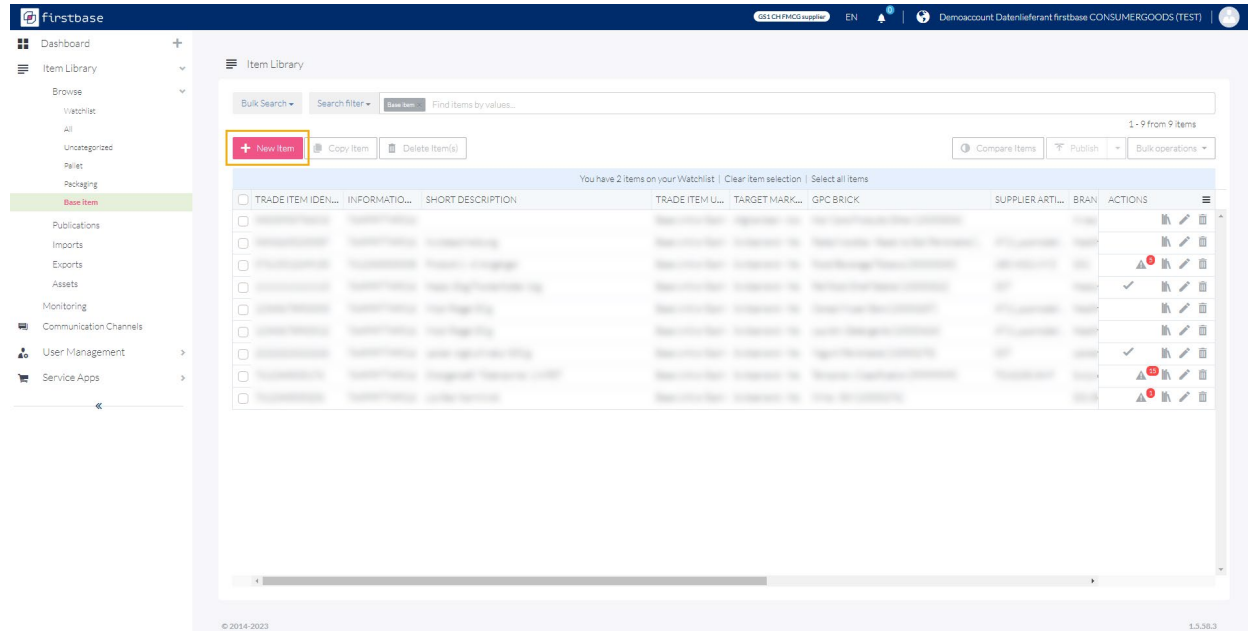


Figure 3: Overview of Items Library --> Browse

1. Go to **Browse** → **Basic Item**
2. Click on «**+New Item**»
3. Fill in at least all mandatory information (marked in red) – and add as much optional information as possible that is relevant to the item.
4. Save and save the data by clicking on «**Create**».



Note:

In order to make your item master data visible and available to data recipients, the item master data must be published (see [Publishing items](#)).



The GTIN (Global Trade Item Number) is recorded in 14 digits in firstbase. For this purpose, a 13-digit GTIN is preceded by a 0. This method does not change the check digit at the end of the GTIN.

3.1.1 Create a packaging layer

In Basic Item, outer and transport packaging is recorded as an additional item level and linked to the basic item to form an item hierarchy.

"GTIN of the next lower item unit" corresponds to the GTIN of the base item. In the case of "GTIN", the GTIN of the packaging is recorded. The item level describes the type of item that is in the packaging.

GTIN = GTIN of the packaging

GTIN of the next lower item unit = GTIN of the base item

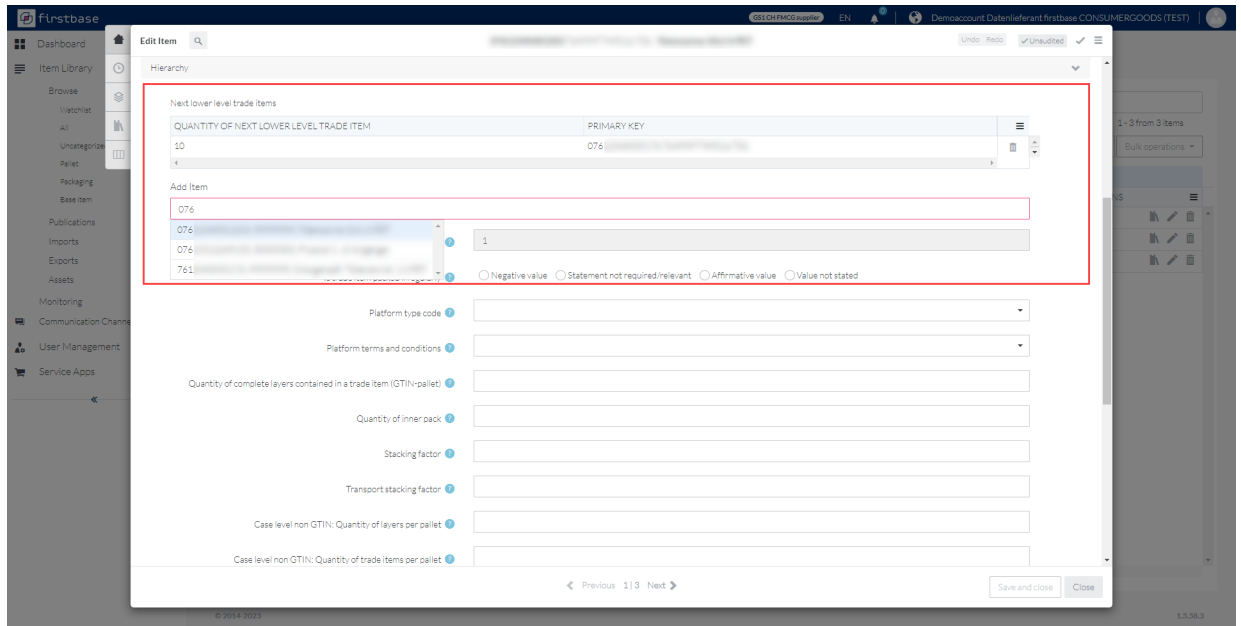


Figure 4: One package contains 10 basic items

If you want to create the relocation/transport packaging separately, then the data of the basic item must be entered again.

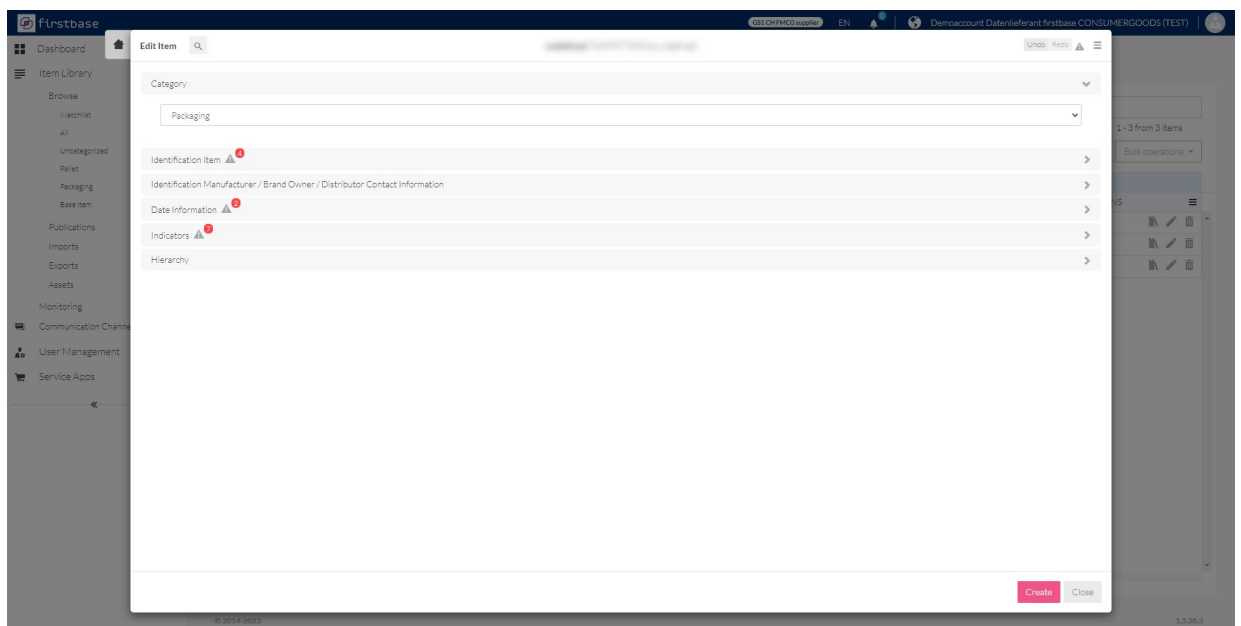


Figure 5: Separate capture of a package

3.1.2 Create a pallet

GTIN-coded pallets are recorded as an additional item level and linked to an item hierarchy with the outer and transport packaging to the basic item.

In the category «Basic Item», you can create the pallet with the basic item and the packaging at the same time. To assign a palette, add a new element.

The item level describes the type of item that is on the pallet.

GTIN = GTIN of the pallet

GTIN of the next lower item unit = GTIN of the packaging and/or basic item

If you want to create the pallets separately, then the data from the basic item must be entered again.

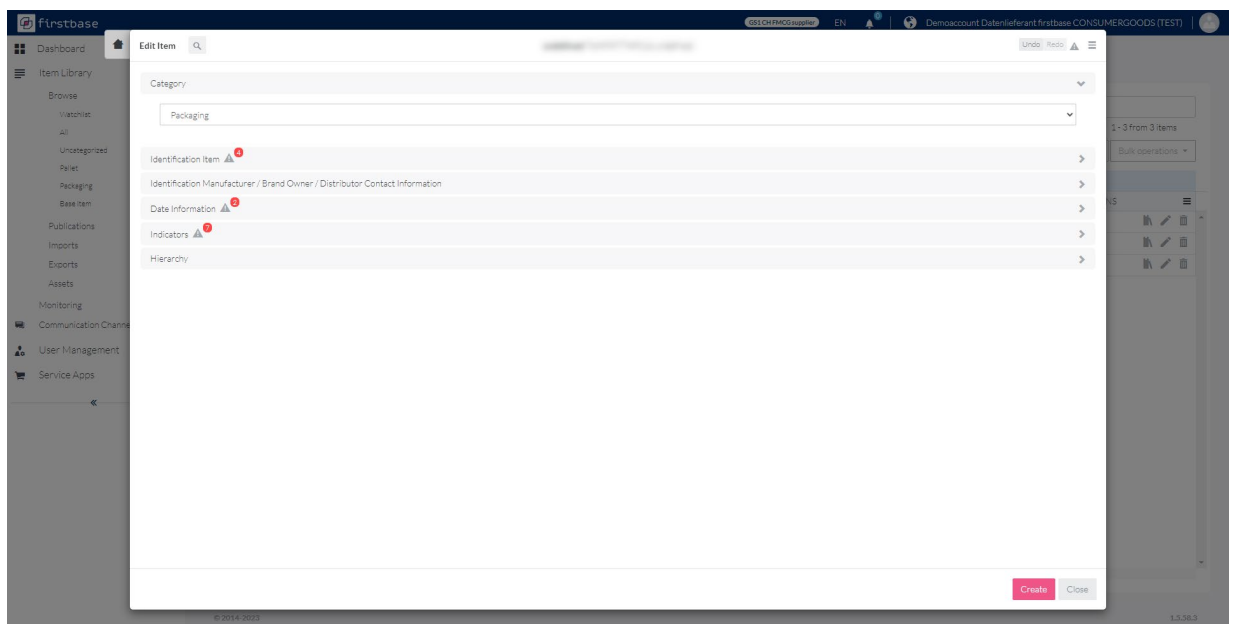


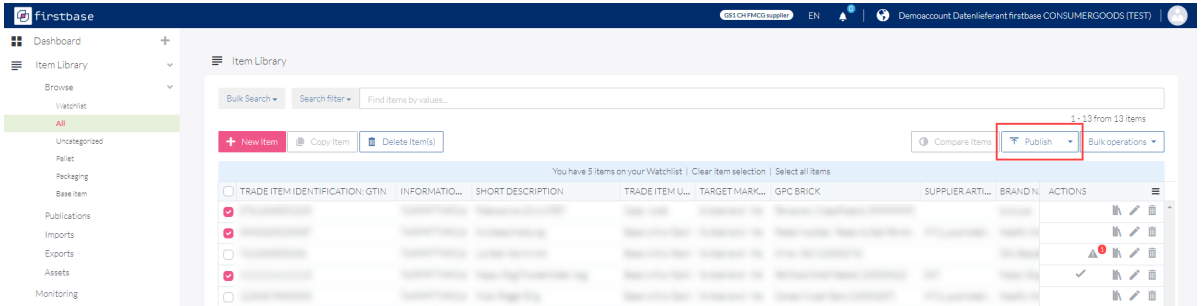
Figure 6: Separate detection of a pallet

3.2 Publishing items

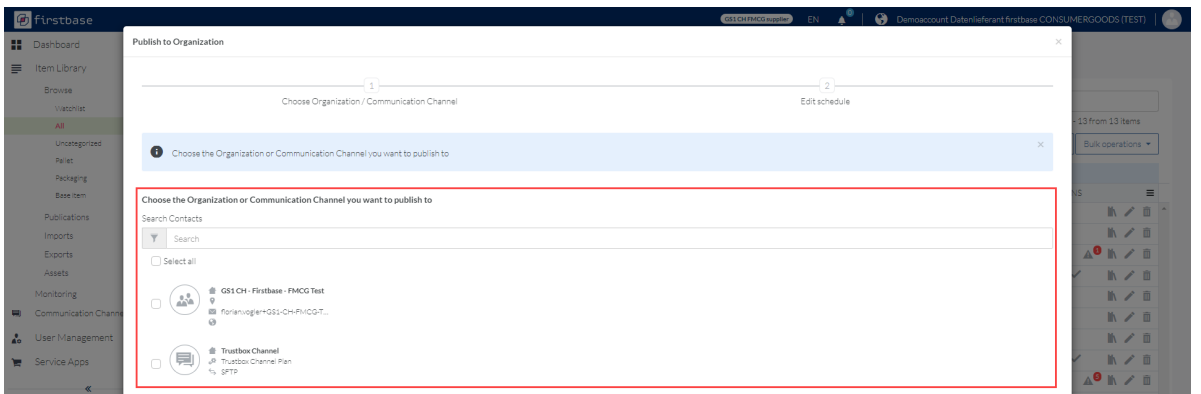
After capturing and validating the item information, you publish (= publish) the items. Only then will data recipients be able to see or download your item information.

1. Select the items to be published in the item list.

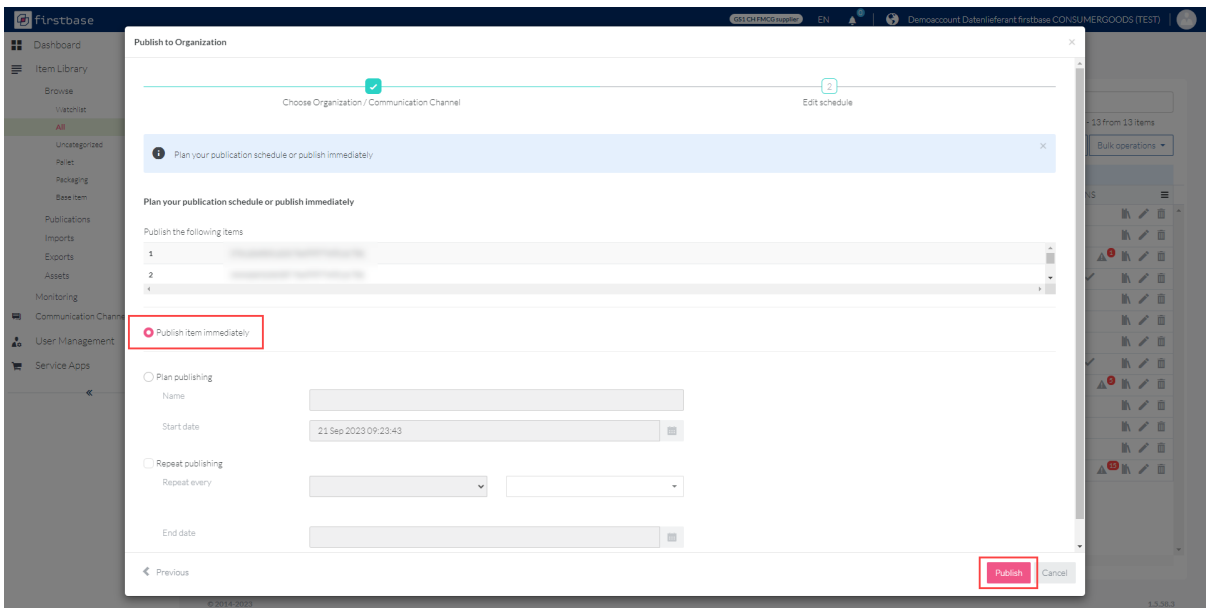
Then click on «Publish»



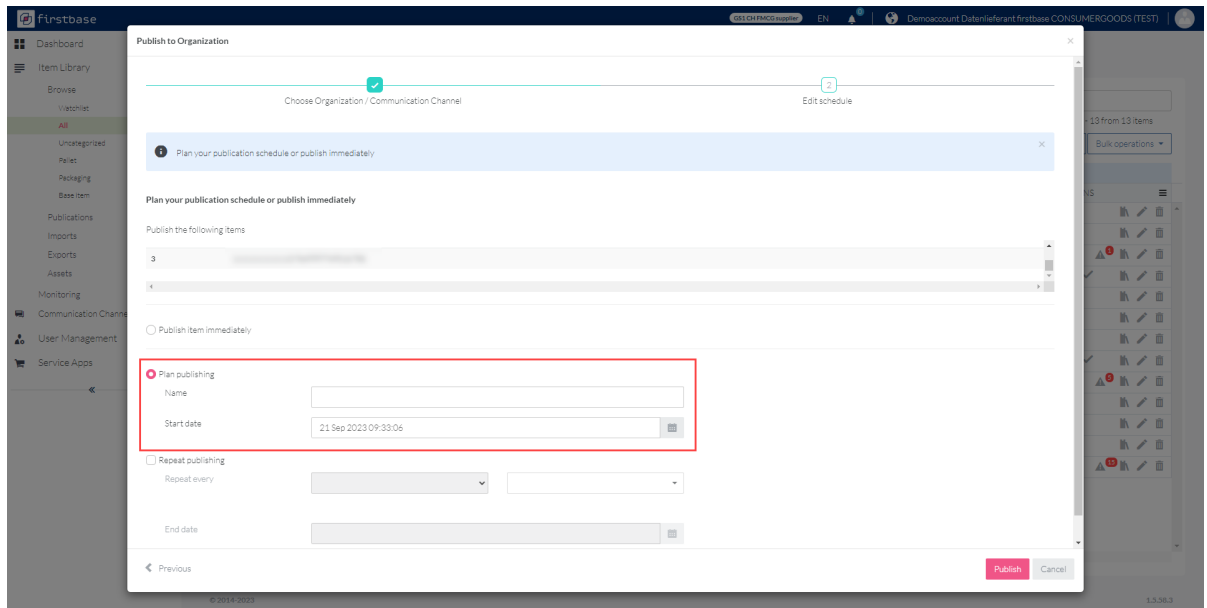
2. Choose the Organization or Communication Channel you want to publish to
For firebase consumer goods users, the firebase consumer goods catalog and trustbox catalog are available here. In this way, you make your items available to all data recipients who obtain your data from firebase consumer goods and trustbox.



3. Click on «Next».
4. Click «Run immediately» so that the items are published immediately.



Expert Tips: With «Plan publishing», you can ensure that the items are published/updated from a certain date. This can be the case, for example, with seasonal items.



5. *Optional Repeat publication* : Do you have items that are updated at regular intervals? Set the repetition(s) of the publications and their regularity
6. Confirm the settings by clicking on «**Publish**»



Note:

Only items without validation errors can be published.



All items published by data suppliers to firstbase consumer goods are accessible to all connected data recipients. If the data for customer-specific items is to be explicitly transmitted 1:1 to only one customer (data recipient), we recommend that you exchange data with GS1 GDSN[®]. Please contact us in this regard. We will be happy to advise you on the implementation.

3.3 Delete items

This section describes how to depublish and delete items.

Do you still have items that are no longer in production (discontinued items) or temporarily unavailable items (e.g. seasonal items)? Then you can store the data in the item information. You first share all this information with your customers (data recipients) by adding these dates to the item before you depublish the item (= withdraw publication).

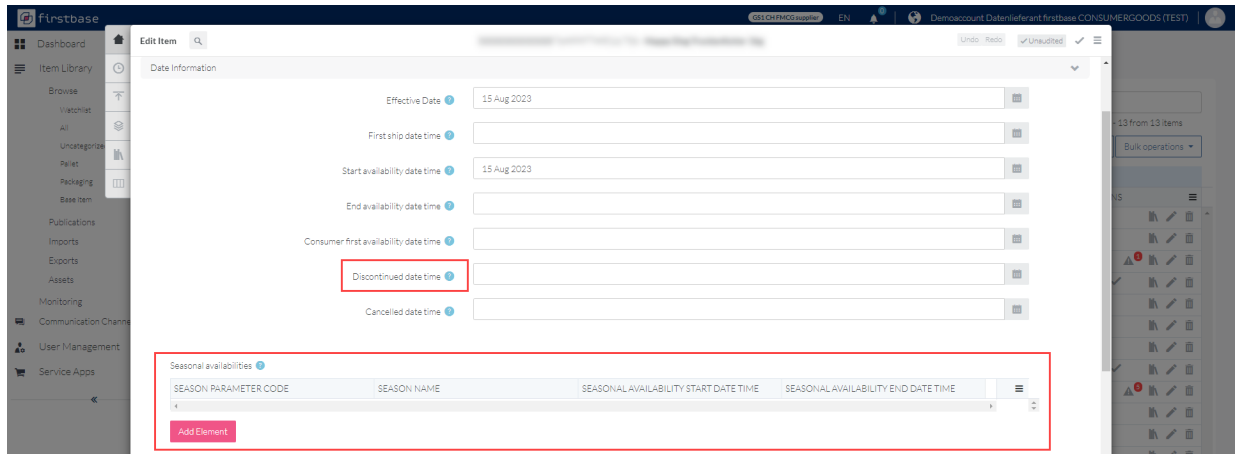


Figure 7: In Validity/Origin, you can specify, among other things, the expiry and availability dates of the seasonal items

Note:



We recommend that you keep track of unpublished items for a longer period of time. This data is then only visible to you and to you. They can be further edited and reactivated if necessary.



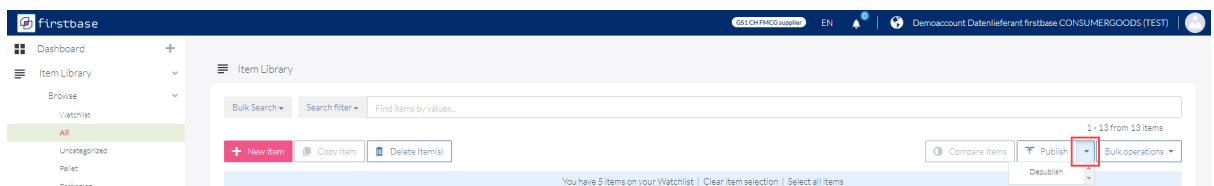
For the deletion of already published items, the steps described in the chapters [Depublish item](#) before deleting and Delete item must be performed. In order to make your item master data visible and available to data recipients, the item master data must be published (see [Publishing items](#)).

Otherwise, the item remains visible to the data recipient.

For items that have not yet been published, you can go directly to "[Delete item](#)".

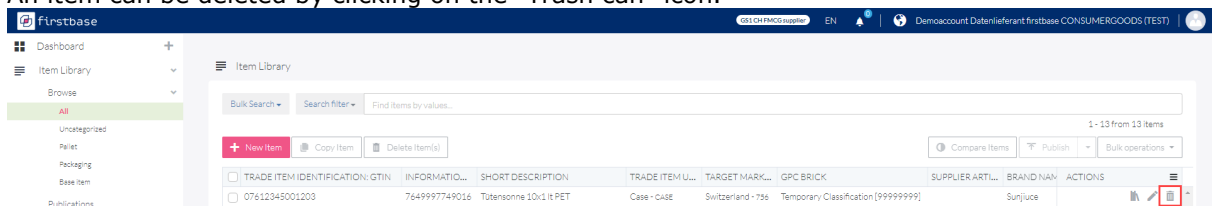
3.3.1 Depublish the item before deleting it

Depublish an item by selecting the desired item and then clicking on "**Depublish**".



3.3.2 Delete item

An item can be deleted by clicking on the "Trash can" icon.



Note:

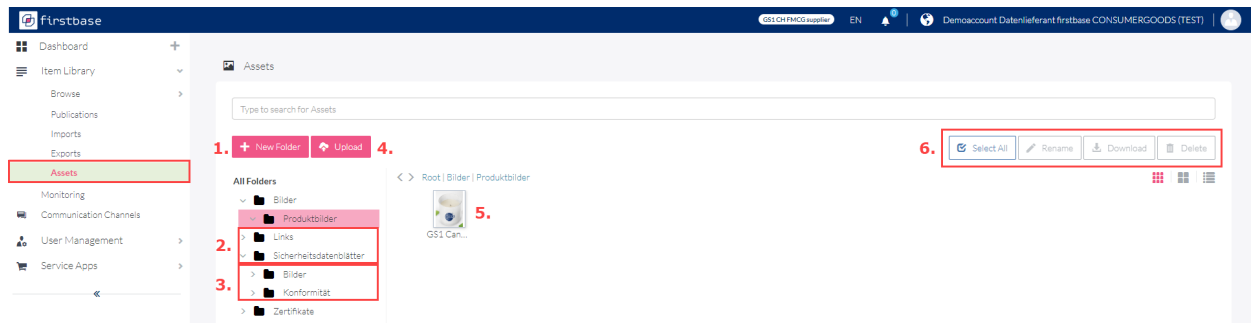


Note that published items must be depublished before deleting them.

4 Store images, safety data sheets, certificates and other files (assets)

Manage the so-called "media assets" (image files as well as declarations of conformity, certificates, safety data sheets and other pdf documents) and link them to your items.

In "Items" you can manage your media assets in "Assets". To do this, you can create, name and manage any folder in the structure you need.



5. Create a new folder
6. Create one or more folders to be able to store the files in a structured way
7. Create subfolders to keep a better overview of the folder
8. You can store item images, certificates, safety data sheets, etc.
9. The folders can be renamed, downloaded or deleted at any time

4.1 Item images

Import Item images from your device easily and directly with "drag & drop" or "Upload" function in "Assets".

It is also possible to save them in the folders created for this purpose.

In "Assets", use **" + New folder"** to create your desired folder structure.

In the example, a new folder called "Bilder" has been created. Double-click on the folder to enter the folder. You can now use the "Upload" command to drag and upload your item images either using "Browse" or "Drag & Drop".

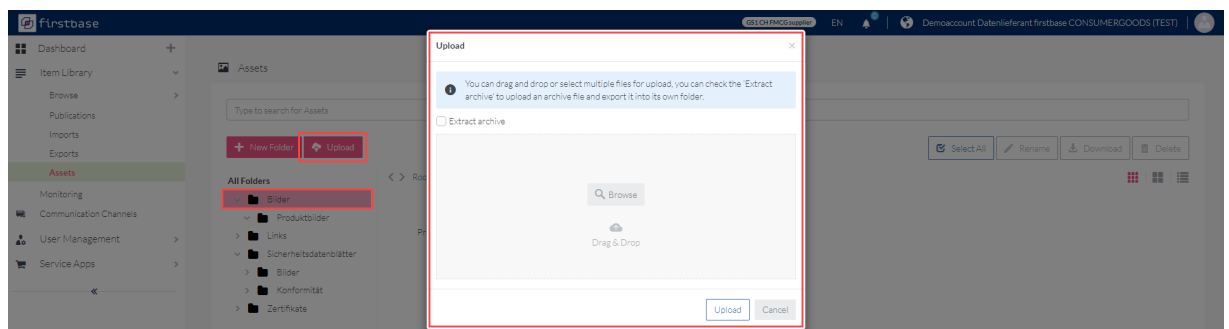


Figure 8: Image upload from your device or with drag & drop

4.2 Certificates, safety data sheets and other pdf files

The upload of pdf files such as certificates, safety data sheets, warranty declarations, etc. works identically to uploading item images (see Item images), which is described in the previous chapter.

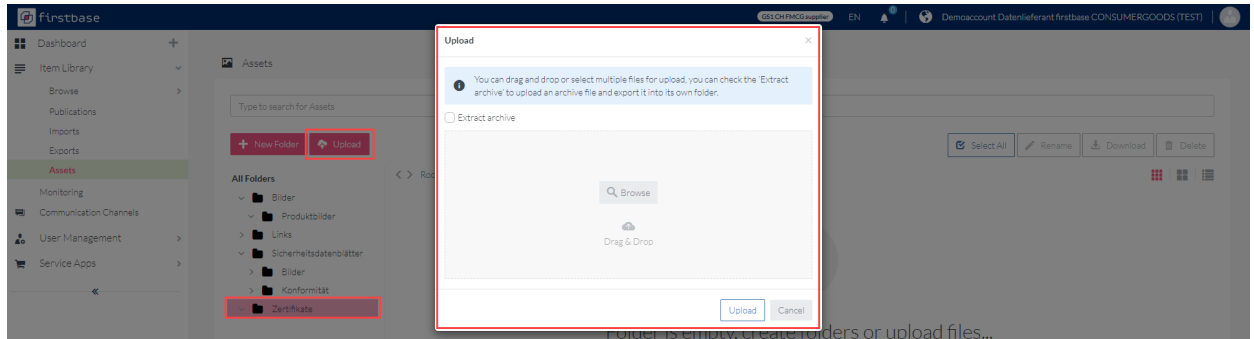


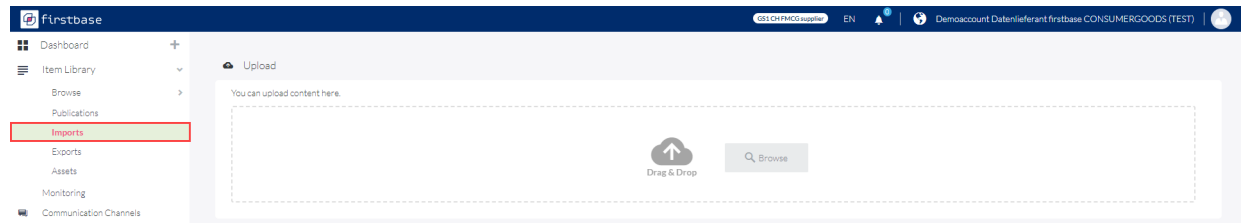
Figure 9: Certificate upload from your device or with drag & drop

In the example shown, a "Zertifikate" folder has been created. You can activate the certificates by double-clicking on this folder with «Upload». You also have two options for uploading your certificates. Clicking on "Browse" will take you to your explorer and select your desired asset. Or you can drag and drop the desired object into firebase.

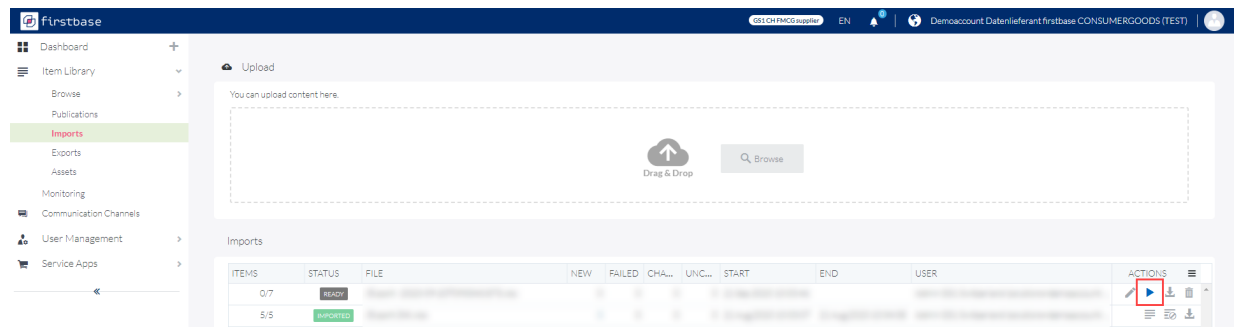
5 Importing items

If you would like to import your items with an Excel, JSON, XML or firebase consumer goods XML file, upload the file in "Imports", which can be found in "Item Library".

Insert the file by dragging and dropping it or using the "Browse" button.



To start the import, click on the play button.



Tip: Use a self-created template (see Exporting items) to prepare the new and additional items quickly and easily for import.

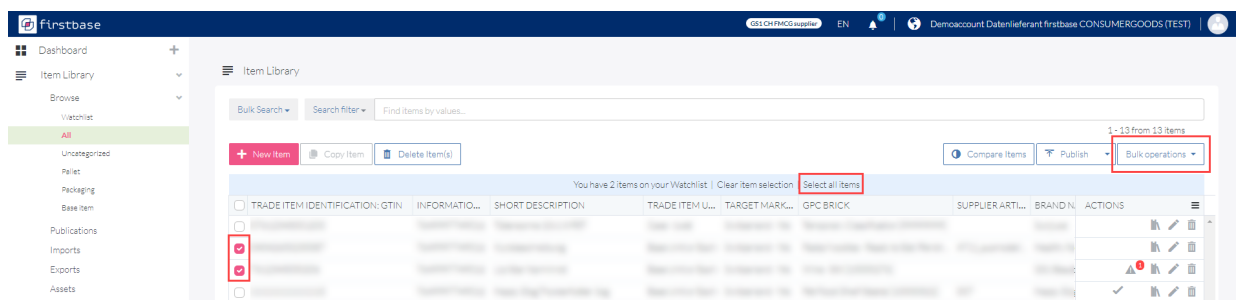
6 Exporting items

Export items in various formats. This chapter describes how to export items.

firstbase offers the possibility to download (= export) item data in various data formats. Choose from the following formats:

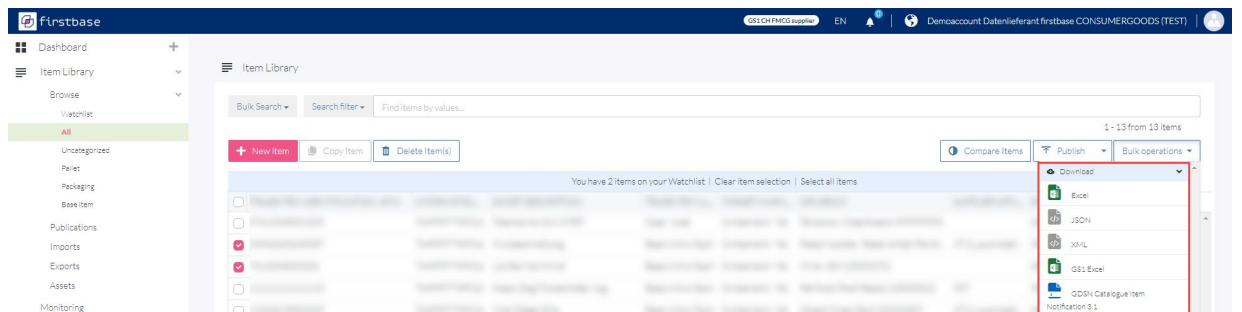
- Excel
- GS1 Excel (with separate columns for values and units of measurement, among others)
- JSON
- XML (=firstbase platform XML)
- GDSN CIN XML

1. Select the items to be exported: individually by ticking a box or using the **"Select all items"** function



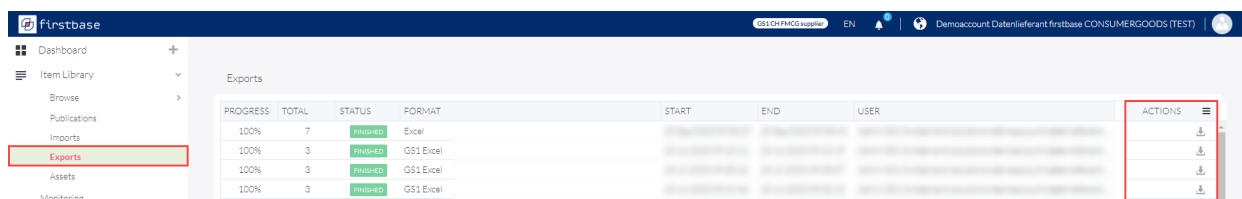
2. Click on Bulk operation **«Download»** and select the desired format.


The export mapping is already preconfigured. An adjustment is therefore not necessary.



3. Start export

4. All exported files can be found in "Exports".



By clicking on the download icon, you can download your exports. 



Tip: Start with the entry of a few items in the web application and load them, e.g. as GS1 Excel. You can now use the file as a template to create your other items: enter the items in a new row and then import the file (see [Importing items](#)).

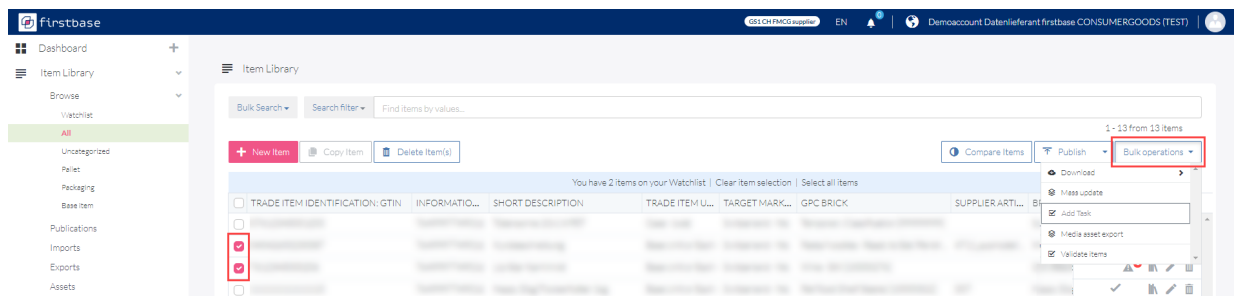
7 Possibilities for mass processing of items

If you want to add or change specific information for several or all items, you have the option of exporting (e.g. in GS1 Excel format), editing the data and then (re-)importing (see [Exporting items](#) and [Importing items](#)), as well as a simple functionality with the mass processing of items.

Example: Up to now, your items have been maintained without dangerous goods information. Now you maintain that they are not dangerous goods.

7.1 Mass update on the bulk operations

To perform a mass update, select the items to be changed and click on **Bulk operations** → **Mass update**



In the following dialog, drag the attributes to be edited from the right-hand side of the screen into the "Choose attributes" field and confirm the selection by clicking on **"Next"**.

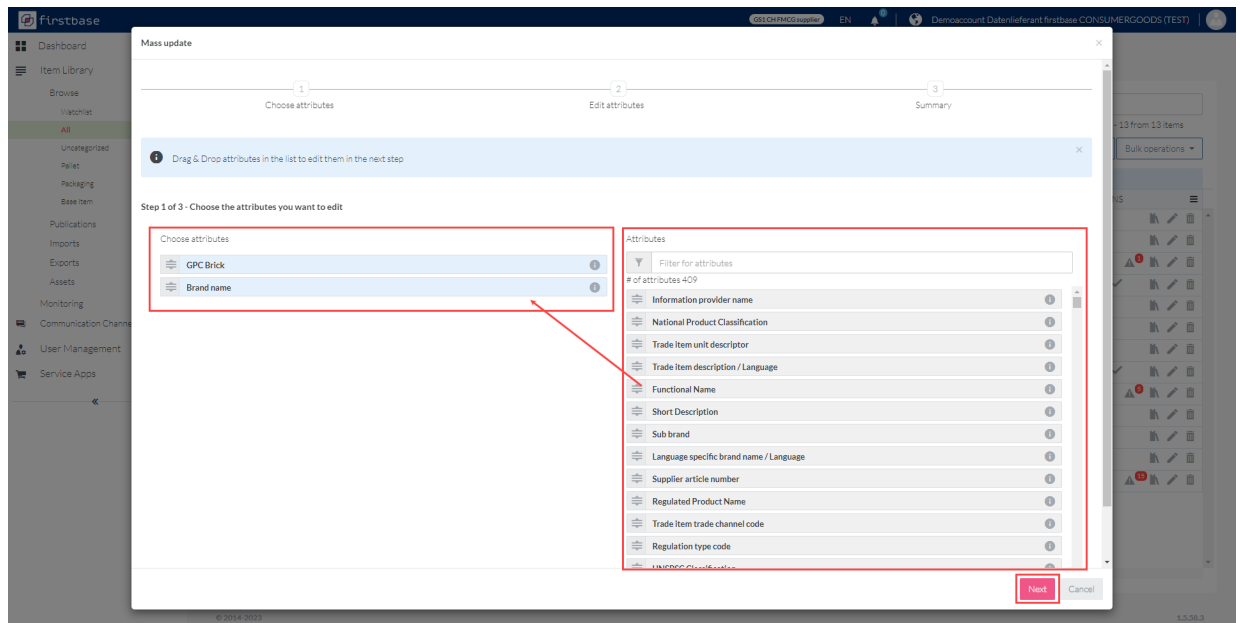


Figure 4 : Dialog to select attributes to be edited using the mass update function.

Enter the new value in the corresponding field and check your entries in the "Summary" dialog. Make changes by clicking on **«Start action»**.

7.2 Bulk update with Excel

To make an item data update Item Excel first, export the items you want to change. After the changes, the file can be imported again. The corresponding steps can be found in chapter [Importing items](#) and [Exporting items](#).



Note:

Note that for a correct assignment of a table row to the item, the columns category, gtin, gln and targetMarket must always be supplied.

8 Search

At item level, search filters can be set using the search bar or the "Bulk Search" button. You can filter for new items and suppliers, display the item data, compare items and download selected items as Excel, XML or JSON files.

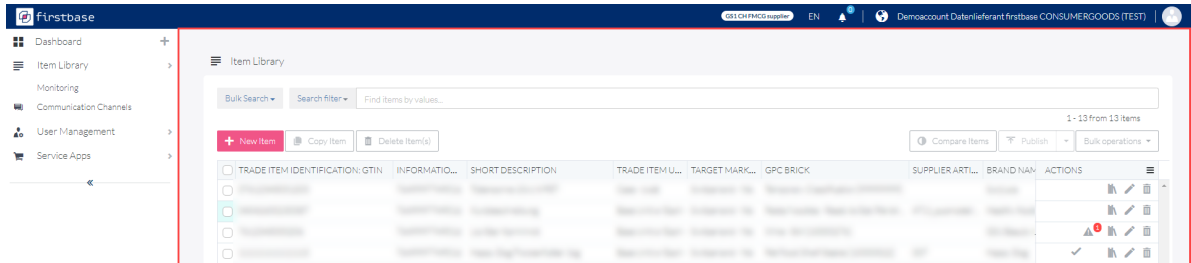


Figure 5 : General catalog view

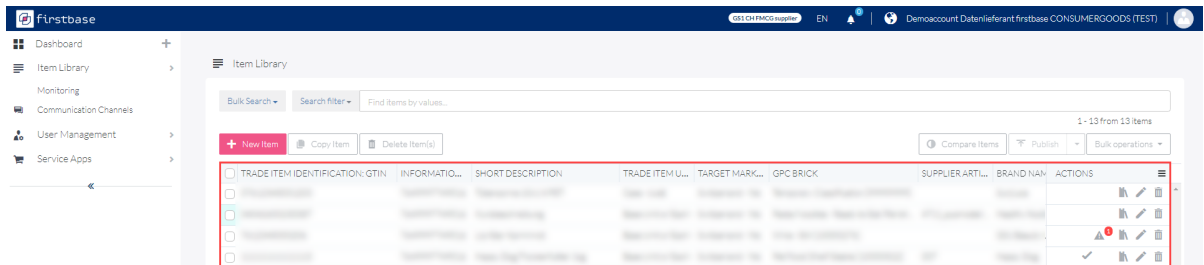


Figure 6 : General catalog view with search results

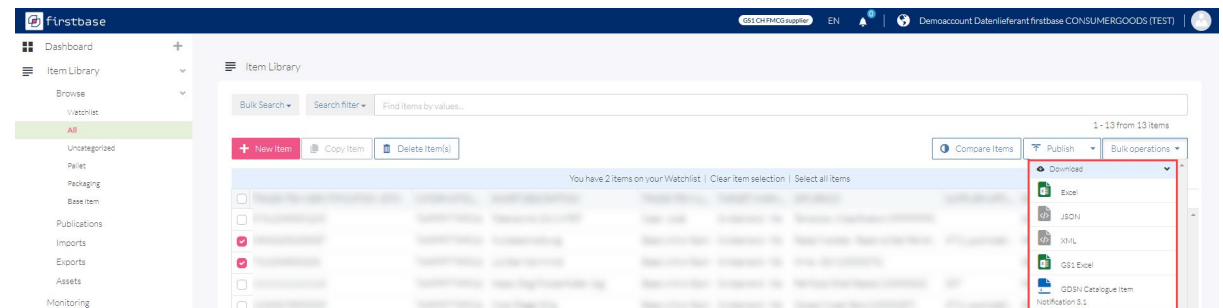


Figure 7 : Export opportunities. Applies to selected items.

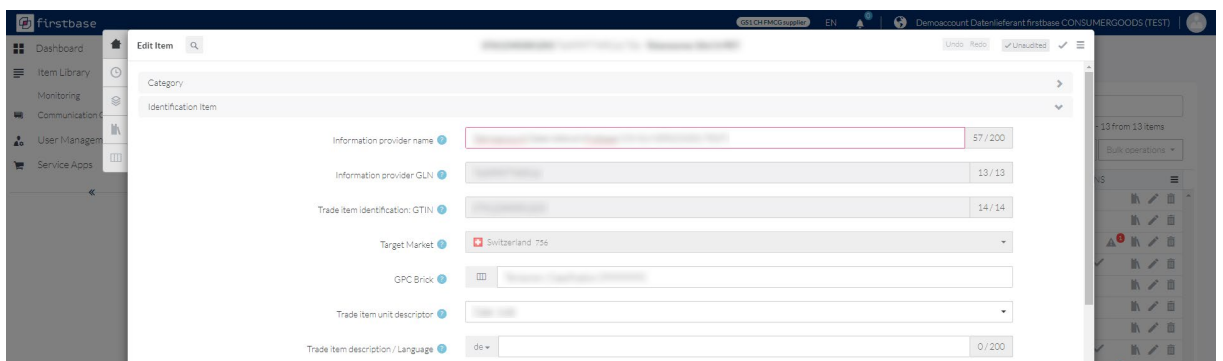


Figure 8 : Item detail view

8.1 Bulk Search

In bulk search, you can search for a specific attribute with multiple values.

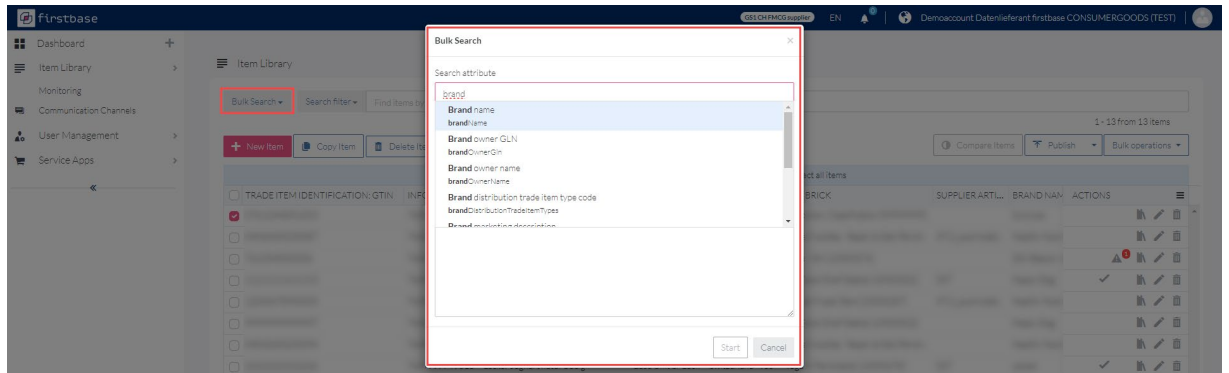


Figure 9 : Searching for a specific attribute with bulk search

8.2 Search filter

With the search filter, you can make queries with predefined rules or create a search filter yourself.

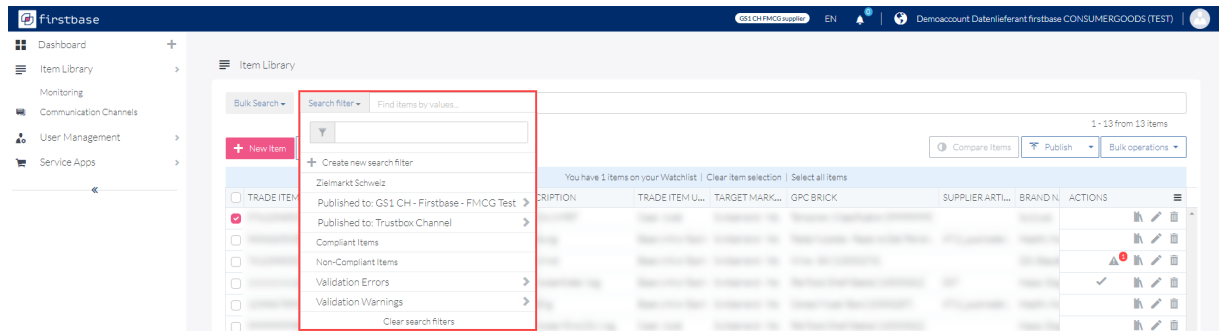


Figure 10 : Predefined search filters

8.2.1 Create custom search filters

To create a more complex search filter, click on «**+Create new search filters**» and then on «**+New group**».

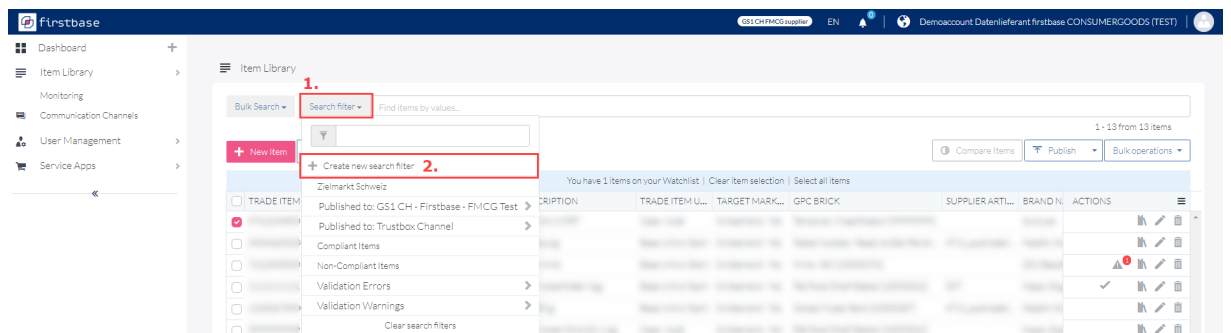


Figure 11 : Create a search filter

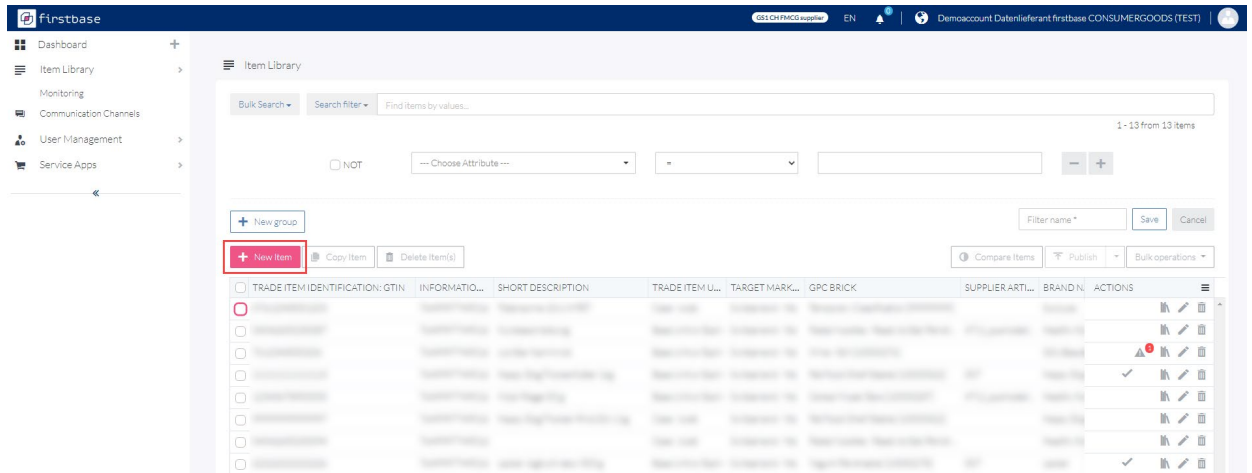


Figure 12 : Turning a simple search filter into a complex one

The logic can be extended as required. Please name your filter to save the filter.

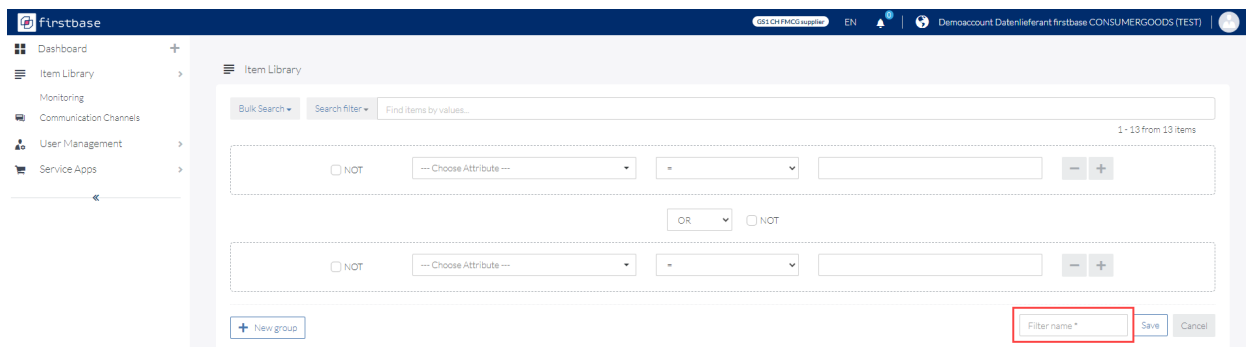
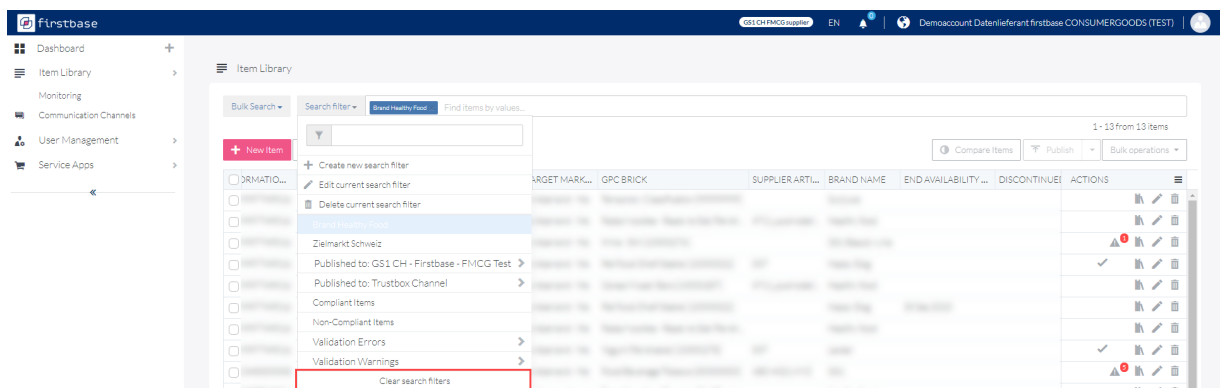


Figure 13 : Complex search filter creation consisting of logic Delete individual search filters

If you no longer need the search filters, you can remove them.

1. Click on «**Search filters**»
2. Click on the search filter you want to delete
3. Click on «**Search filters**» again
4. Click on «**Clear searchfilters**» to delete the filter



9 User

In User Management, you can add users and manage their access rights (= roles).

9.1 Create a new user

Go to User in User Management to get a view of all users.

To add a new user, do the following:

1. Click on «**+New User**»
2. Enter the e-mail address of the person who is to receive an invitation to use firebase consumer goods
3. Give the person one or more roles
4. Leave the «Filter» field blank
5. Leave the «Query» field blank
6. Send the invitation by clicking on "**Send invitation**"

After sending, the invited person will receive an e-mail with which he or she can register on firebase consumer goods.

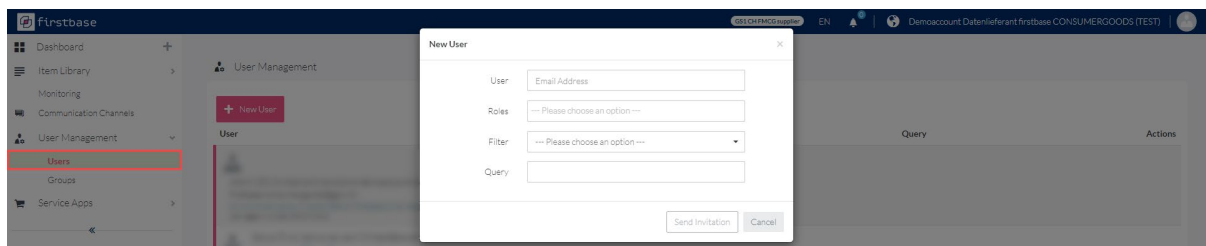


Figure 14 : Dialog for creating new users

9.2 Roles

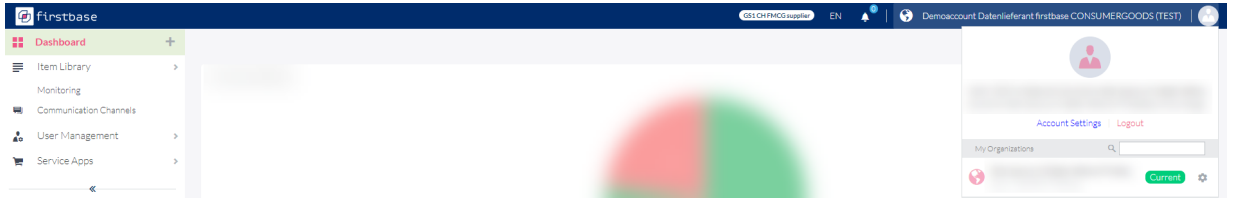
There are predefined user roles. Below is an excerpt of the most common roles.

Role	Right
Admin	A user with the admin role has all read and write permissions in Item management, communication channels and user management
editor	A user with the editor role has all read and write permissions in item management
View_only	A user with role view_only has read rights in item management

10 User Data

The settings will take you to "User Data", where you can adjust your password and user information.

Click on the profile picture and then on "Account Settings" to access "User Data".



In "User Data", you can change your profile picture, name and password.

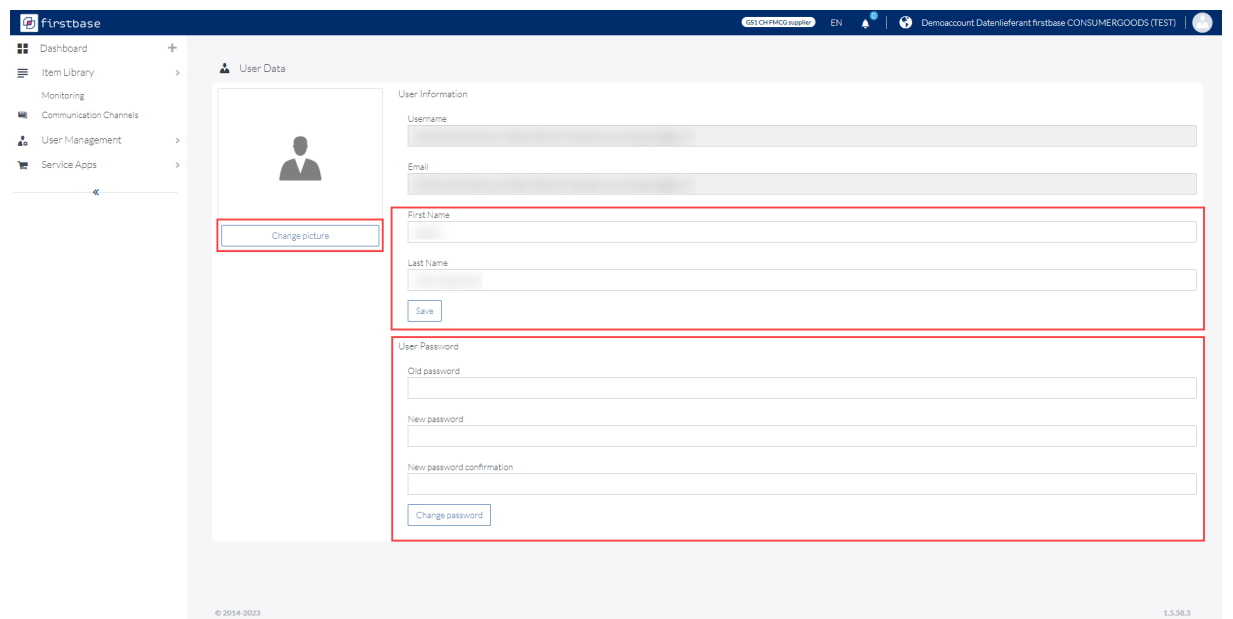


Figure 15 : Account View

10.1 Change Password

Change your password by entering your current password in the first field. This is a mechanism to prevent misuse of the feature. Enter your new password in the second field and confirm it in the third field.

11 Contact details

Do you have any questions about the use of the firstbase consumer goods data exchange platform?

Our support team will be happy to assist you with any questions or uncertainties.

In order to be able to guarantee you fast and efficient support, we ask you to describe the problem as precisely as possible. At best, with screenshots (images).

We will be happy to assist you personally during the following times:

Monday to Friday

Between 08.00-12.00 and 13.00-17.00

[E-mail: solutions@gs1.ch](mailto:solutions@gs1.ch)

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