Future Enterprise Procurement Platform

Catalogues in Coupa

1.1 – External Catalogue Management by Supplier (CSP)

SUPPLIER TRAINING
This document shows the process of external catalogue creation by a supplier in the Coupa Supplier Portal (CSP). A Coupa Supplier Portal Account that is linked with ERGO is a prerequisite. Suppliers that did not register for CSP but desire to do can reach out to their local ERGO Buyer for being invited to CSP or register directly at https://supplier.coupahost.com and ask the ERGO Buyer to connect.

This document was prepared to the best of our knowledge and is intended to assist our suppliers in producing catalogues in Coupa. Despite careful checking, this document is provided without any guarantee of completeness or accuracy. Without a written requirement from ERGO to create a catalogue in Coupa, the deployment and transmission of this document does neither constitute a request to produce a catalogue nor does oblige ERGO to accept a catalogue provided. Copy or reproduction of this document in whole or parts require the express consent of ERGO Group AG.
# Table of content

<table>
<thead>
<tr>
<th>Alignment</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalogue and Content Creation</td>
<td>4 - 7</td>
</tr>
<tr>
<td>Translations</td>
<td>8 - 13</td>
</tr>
<tr>
<td>Images</td>
<td>14 - 15</td>
</tr>
<tr>
<td>Catalogue Upload</td>
<td>16 - 17</td>
</tr>
<tr>
<td>Review &amp; Approval</td>
<td>18 - 19</td>
</tr>
<tr>
<td>Update / Deletion</td>
<td>20 - 23</td>
</tr>
<tr>
<td></td>
<td>24 - 25</td>
</tr>
</tbody>
</table>
Sequence External Catalogue Creation by Supplier (CSP)

- Alignment
- Catalogue and Content Creation
- Translation
- Images
- Catalogue Upload
- Review & Approval
- Update / Deletion
The catalogue creation starts with the exchange of important information.
**Alignment subjects:**

<table>
<thead>
<tr>
<th>Content</th>
<th>Units of measure</th>
<th>Translations</th>
<th>UNSPSC-Codes</th>
<th>Images</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which items should be listed in the catalogue?</td>
<td>Which units of measure can be used?</td>
<td>In which languages is the catalogue available?</td>
<td>Which UNSPSC-Codes are used at ERGO?</td>
<td>Can supplier host pictures for the catalogue?</td>
</tr>
<tr>
<td>Buyer and supplier specify the items/services the supplier is able to supply/perform and the buyer expects to be available in the catalogue.</td>
<td>Buyer communicates the list of units of measure, applicable in the ERGO-Instance of Coupa, which the supplier must comply with.</td>
<td>Buyer and supplier agree the languages that the new catalogue shall be available in. Single-country catalogues do not need a translation.</td>
<td>Buyer communicates the list of UNSPSC-Codes, applicable in the ERGO-Instance of Coupa, which the supplier must comply with.</td>
<td>Product images provided by the supplier must be kept vendor-neutral and be accessible online via a link (URL).</td>
</tr>
</tbody>
</table>

**The supplier will receive all needed documents and files upfront by e-mail**

Please address any open questions directly to your ERGO Buyer in charge!
PLEASE WAIT FOR THE E-MAIL FROM THE ERGO-BUYER, THAT INCLUDES ALL RELEVANT INFORMATION AND DOCUMENTS
Sequence External Catalogue Creation by Supplier (CSP)

- Alignment
- Catalogue and Content Creation
- Translation
- Images
- Catalogue Upload
- Review & Approval
- Update / Deletion
Who is doing what?

Catalogue Creation by Supplier in CSP

- Catalogue File → Supplier downloads the catalogue template file in CSP
- Supplier loads the filled catalogue file in CSP
- Translation File → Send by Buyer to Supplier (if needed)
- Supplier fills the file and sends it back to Buyer by E-Mail
- Supplier Hosted Images → No Buyer action – URL is part of catalogue file
- ERGO Hosted Images → Supplier sends images to Buyer*

* In case of many pictures it is recommended to use file sharing instead of e-mail
The Supplier should have received the following documents by E-Mail:

- Supplier Instructions File → Information from this file must be used, when creating the catalogue and catalogue upload file
  - List of UNSPSC-Codes → Only these UNSPSC-Codes shall be used in the catalogue upload file
  - List of Units of Measure → Only these Units of Measure must be used in the catalogue upload file
- Translation Template File → Only submitted when multi-language catalogue is required

PLEASE INFORM THE ERGO-BUYER, IF ANY OF THE FILES ABOVE IS MISSING
Catalogue and Content Creation

1. Catalog Creation
Login to the Coupa Supplier Portal (CSP) and create new catalogue. Click “Catalogs” and then “Create”

2. Catalogue Header Data
Select ERGO Group AG from the customer dropdown and fill the catalogue header data according to the instructions from the setup file that was provided by the buyer
3. Click “Load from file” in the section “Items Included in Catalog”

4. Coupa Bulk Loader Screen opens → Click “Download” and select “CSV Plain”

5. Save template file locally
6. Open the file and create catalogue content

Fill Catalogue Template File downloaded from CSP

- Insert the **contract number** in every item line ⇒ **IMPORTANT:** Contracts controlling user group specific access restrictions for catalogue items. If the Buyer communicates multiple different contract numbers, it is necessary to create ONE catalogue per contract.
- Align catalogue items with conditions from Supplier Instruction File
- Assign the correct UNSPSC-Code from the list of accepted codes to each item, please contact the Buyer in case that a needed UNSPSC-Code is not included
- Assign the correct unit of measure from the list of accepted codes to each item
- Fill relevant image URLs (if images are hosted by supplier – otherwise save images locally – see slide 17)

**ATTENTION**

Items in the catalogue file are uploaded to Coupa with the default language „en“ English! If the catalogue should be multi-language, the catalogue file must be filled in English and the translation of item names and descriptions is subject to a subsequent uploaded with the item translation file.

**Mandatory Fields**

- Column B – Supplier Part Number (Unique identifier at supplier)
- Column D – Name (of the item)
- Column E – Description (of the item)
- Column F – Price (per sales unit)
- Column G – Currency
- Column H – UOM code (please refer to the list of accepted units of measure)
- Column I – Active (usually „yes“ at the initial catalogue upload)
- Column K – UNSPSC Code (please refer to the list of accepted UNSPSC-Codes)
- Column P – Contract Number (communicated by ERGO Buyer)
- Column BM – Item Number (according to numbering scheme from ERGO Buyer)

**Optional Fields**

- Column L – Lead Time (Please fill days, if lead time is known and fix)
- Column M – Manufacturer (increases master data quality)
- Column N – Minimum Order Quantity (if agreed with ERGO)
- Column S – Manufacturer Name (increases master data quality)
- Column T – Manufacturer Item Number (increases master data quality)
- Column AO – Image URL (primary image - if supplier hosts item images)
- Column BC - BG – Additional Image URLs (if supplier hosts item images)

Make sure to save the catalogue file again in CSV-Format!
Sequence External Catalogue Creation by Supplier (CSP)

- Alignment
- Catalogue and Content Creation
- Translation
- Images
- Catalogue Upload
- Review & Approval
- Update / Deletion
If a translation is required, the Buyer has sent the translation file. Open the translation template file to translate the catalogue items.

<table>
<thead>
<tr>
<th>Item Number*</th>
<th>Locale*</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boat_01</td>
<td>de</td>
<td>Boot A2</td>
<td>schönes Boot</td>
</tr>
<tr>
<td>Boat_02</td>
<td>de</td>
<td>Boot B2</td>
<td>noch schöneres Boot</td>
</tr>
<tr>
<td>Boat_03</td>
<td>de</td>
<td>Boot C2</td>
<td>eines der schönsten Boote</td>
</tr>
<tr>
<td>Boat_04</td>
<td>de</td>
<td>Boot D2</td>
<td>super Boot</td>
</tr>
<tr>
<td>Boat_05</td>
<td>de</td>
<td>Boot E2</td>
<td>bestes Boot</td>
</tr>
</tbody>
</table>

Make sure to save the translation file again in CSV-Format and send it by E-Mail to the ERGO-Buyer.
Sequence External Catalogue Creation by Supplier (CSP)

Alignment → Catalogue and Content Creation → Translation → Images → Catalogue Upload → Review & Approval → Update / Deletion
It is the preferred method that the supplier hosts product images and provide the image URLs in the catalogue file. If the supplier is technically not able to host the product pictures, ERGO may upload the pictures on behalf of the supplier.

If the supplier cannot provide product images online

- Supplier saves all product images locally in a standard graphic format (.jpg or .png)
- File name for each product image is equal to the item number from column BM from the catalogue file.
- e.g. Item is a desk and has in the catalogue file the item number AB10. The image file name for this item must be AB10.png
- When all image files are correctly named, the supplier sends image files by email or provides download link for file sharing.
- Buyer downloads all images, fills the image upload file and loads the images on behalf of the supplier up to Coupa.

Image sizes:
- Item search 64px x 64px
- Item detail page 300px x 450px

Uploaded pictures are resized by Coupa automatically
Catalogue Upload

Sequence External Catalogue Creation by Supplier (CSP)

Alignment → Catalogue and Content Creation → Translation → Catalogue Upload → Catalogue Upload → Review & Approval → Update / Deletion
Catalogue Upload

1. Catalogue file upload
Even if catalogue items can be created individually the supplier should follow the instructions and load the catalogue from the file previously created. That ensures setup of catalogue items with all needed data.

Supplier opens the catalogue in CSP, clicks “Load from file” and in section 3 “Load the updated file” selects the catalog content CSV-File.

Click “Start Upload” to initiate the upload of the catalogue items.

2. Submit for approval
Upon successful upload of the catalogue file, the supplier can send the catalog to the buyer for approval by clicking “Submit to buyer”.

0 Items Changed (5 unchanged)

Price Increase | Price Decrease | Other Fields Updated | New Items | Deactivated Items
0 | 0 | 0 | 0 | 0

Items Included in Catalog

[Diagram of items and options]

Save | Submit to buyer

[Table of items included in catalog]

Name | Part Number | Status Change | Price | Price Change | Currency | Other Fields Changed | Actions
--- | --- | --- | --- | --- | --- | --- | ---
No result.
Per page: 15 | 40 | 90

Note: If you are loading csv files with non-English characters, please consult the following help note.
**Sequence External Catalogue Creation by Supplier (CSP)**

1. Alignment
2. Catalogue and Content Creation
3. Translation
4. Images
5. Catalogue Upload
6. Review & Approval
7. Update / Deletion
Review & Approval

After the catalogue has been submitted, the Buyer gets notified and status in CSP changes to “Pending Approval”

Based upon the results from the Buyer Review, the catalogue may be approved or rejected.

Catalogues are only editable in status “Draft” or “Rejected by Customer”
Review & Approval

What to do when a catalogue was rejected?

1. **Read comment from Buyer**
   Click the Pen-icon to edit the catalogue and read the comment with a detailed description of required corrections.

2. **If no correction needed**
   Reply to Buyer, upload catalogue file again and submit it to Buyer for approval.

3. **If corrections needed**
   Update the catalogue file with the needed corrections, upload it again and submit it to Buyer for approval.

4. **Buyer to repeat review**
   Buyer gets notified and repeats the review task. The catalogue may be rejected again or gets approved.

To read a comment, open the rejected contract and scroll down to the bottom of the page.

Participants: Tobias Stolte

*tobias.stolte*

Please correct UOM for Test Item 103 to D as it is a rate per day. Upload the catalogue file after correction and submit again for approval. Thank you!
UPON BUYER APPROVAL, THE CATALOGUE CREATION IS COMPLETE
Sequence External Catalogue Creation by Supplier (CSP)

Alignment → Catalogue and Content Creation → Translation → Images → Catalogue Upload → Review & Approval

Update / Deletion
Approved catalogues cannot be updated anymore. Thus, an update means to create a new catalogue and delete the existing. The creation of a new catalogue follows the same sequence as the one to be replaced.

Catalogues may only be deleted by Supplier in CSP upon Buyer request!