Future Enterprise Procurement Platform

Catalogues in Coupa

1.2 – External Catalogue Management by Buyer

SUPPLIER TRAINING
This document shows the process of external catalogue creation by a supplier with upload in Coupa by the ERGO-Buyer.

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.

Training video available on YouTube
https://youtu.be/9Of_4v6Ulmw
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Sequence External Catalogue Creation by Buyer

1. Alignment
2. Content Creation
3. Translation
4. Images
5. Review & Approval
6. Catalogue Upload
7. Update / Deletion
The catalogue creation starts with the exchange of important information.
Alignment subjects:

<table>
<thead>
<tr>
<th>Content</th>
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<th>Translations</th>
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<th>Images</th>
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<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 Buyer

- Alignment
- Content Creation
- Translation
- Images
- Catalogue Upload
- Review & Approval
- Update / Deletion
### Content Creation

#### Who is doing what?

<table>
<thead>
<tr>
<th>Catalogue Creation by Supplier in CSP</th>
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</thead>
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<tr>
<td>Catalogue File ➔ Send by Buyer to Supplier</td>
</tr>
<tr>
<td>Supplier fills the catalogue file and sends it back to Buyer for upload in Coupa</td>
</tr>
<tr>
<td>Translation File ➔ Send by Buyer to Supplier (if needed)</td>
</tr>
<tr>
<td>Supplier fills the file and sends it back to Buyer by E-Mail</td>
</tr>
<tr>
<td>Supplier Hosted Images ➔ No Buyer action – URL is part of catalogue file</td>
</tr>
<tr>
<td>ERGO Hosted Images ➔ Supplier sends images to Buyer*</td>
</tr>
</tbody>
</table>

* 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:

- Catalogue Template File
- 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
Open the catalogue template file that the Buyer submitted and create catalogue content

Fill Catalogue Template File
- 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 15)

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 Buyer

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

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>

- Copy the item numbers from the catalogue file (Column BM)
- Fill local language code of the translation
- Provide local translation of item name and description

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 Buyer

Alignment -> Catalogue and Content Creation -> Translation -> Images -> Review & Approval -> Catalogue Upload -> 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.
Sequence External Catalogue Creation by Buyer

- Alignment
- Catalogue and Content Creation
- Translation
- Images
- Review & Approval
- Catalogue Upload
- Update / Deletion
The Buyer will perform a cross check of the submitted documents and may send them back for corrections.

1. Buyer sends file back
If the Buyer finds errors wrong data in the files, the respective files will be returned to supplier by e-mail, describing precisely the expected corrections.

2. Supplier corrections
Supplier makes corrections in the files as required by the Buyer and sends the updated files back by e-mail.

3. Buyer to repeat review
The Buyer will again do a cross-check of the files that have been subject to changes.

4. Buyer to repeat or proceed
If the files still have errors, the Buyer may send the files back again for further corrections. Once the files are okay, the Buyer may proceed with the internal approval request for catalogue upload.
Sequence External Catalogue Creation by Buyer

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

Update / Deletion
Upon internal approval the Buyer will create the supplier catalogue, upload the catalogue file and publish the catalogue. Items within the catalogue will be searchable and orderable at the start date of the catalogue.

ERGO Buyer will inform the Buyer when the catalogue was successfully created.
CATALOGUE CREATION IS COMPLETE
Sequence External Catalogue Creation by Buyer

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

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.

Alignment

Is the catalogue still needed?
If no → The Buyer will delete the catalogue
If yes → Alignment with regard to the required catalogue updates

Catalogue and Content Creation

Create a new catalogue. The file that was used for the initial catalogue upload may be used to change and/or extend the list of catalogue items as agreed with the ERGO Buyer.

Translation

Update or extend the item translation file as needed

Images

Consider the URL of changed or new images in the catalogue upload file or (if images not supplier hosted) provide updated / new images according to naming convention

Review & Approval

The new catalogue will be reviewed. Once review was passed the ERGO Buyer proceeds with the catalogue creation.

Catalogue Upload

The ERGO Buyer creates and publishes the new (updated) catalogue and deletes the old catalogue.