

# Future Enterprise Procurement Platform

## Catalogues in Coupa

1.1 – External Catalogue Management by Supplier (CSP)

### SUPPLIER TRAINING

# Read first

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 so can reach out to their local ERGO Buyer for being invited to CSP or register directly at <https://supplier.couphost.com> and ask the ERGO Buyer to connect.

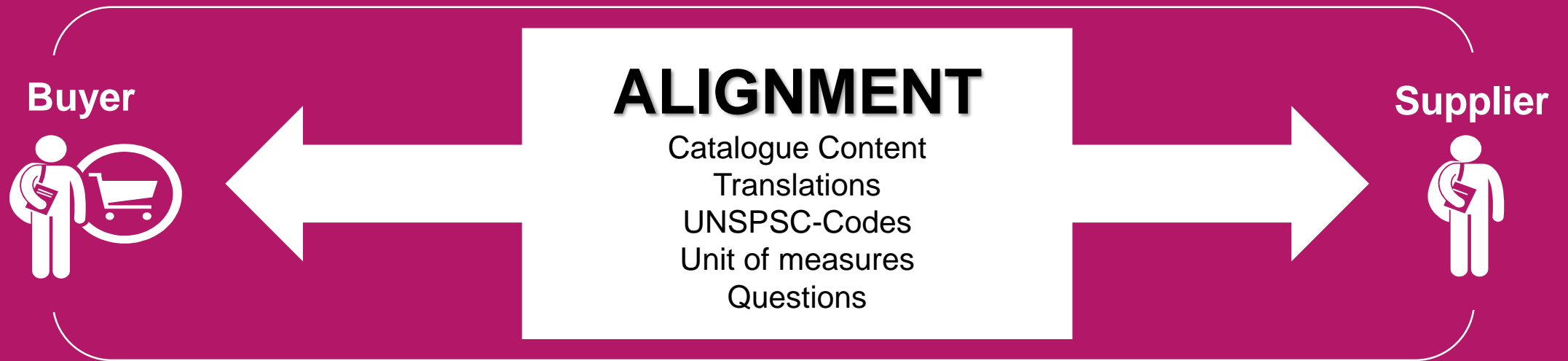
This document was prepared to the best of our knowledge and is intended to assist our suppliers in producing catalogues in Coupa. Despite careful checking, this document is provided without any guarantee of completeness or accuracy. Without a written requirement from ERGO to create a catalogue in Coupa,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

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## Sequence External Catalogue Creation by Supplier (CSP)





**The catalogue creation starts with the exchange of important information.**

## Alignment subjects:

### Content

Which items should be listed in the catalogue?

Buyer and supplier specify the items/services the supplier is able to supply/perform and the buyer expects to be available in the catalogue.

### Units of measure

Which units of measure can be used?

Buyer communicates the list of units of measure, applicable in the ERGO-Instance of Coupa, which the supplier must comply with.

### Translations

In which languages is the catalogue available?

Buyer and supplier agree the languages that the new catalogue shall be available in. Single-country catalogues do not need a translation.

### UNSPSC-Codes

Which UNSPSC-Codes are used at ERGO?

Buyer communicates the list of UNSPSC-Codes, applicable in the ERGO-Instance of Coupa, which the supplier must comply with.

### Images

Can supplier host pictures for the catalogue?

Product images provided by the supplier must be kept vendor-neutral and be accessible online via a link (URL).

What if the supplier is not able to upload images?

The ERGO-Buyer can support. Please refer to the „Images“ section of this instruction.

**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!**

# Alignment

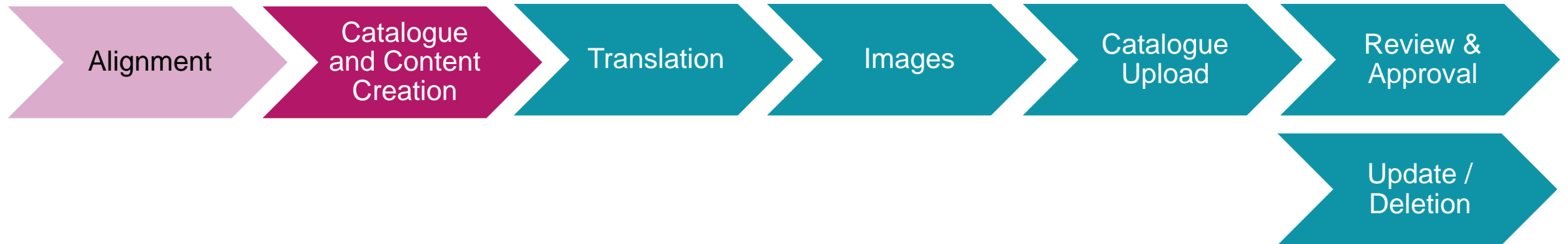
**ERGO**

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**PLEASE WAIT FOR THE E-MAIL FROM THE ERGO-BUYER,  
THAT INCLUDES ALL RELEVANT INFORMATION AND DOCUMENTS**

## Sequence External Catalogue Creation by Supplier (CSP)





## 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:**

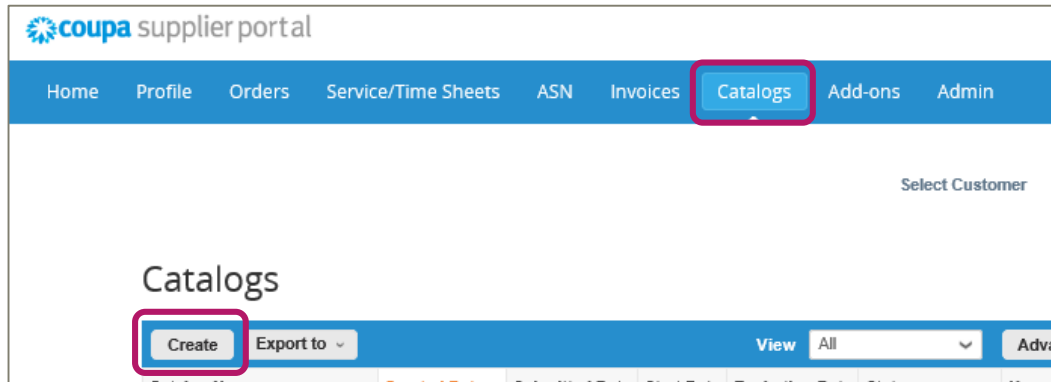
- ❖ Supplier Instructions File → Information from this file must be used, when creating the catalogue and catalogue upload file
  - List of UNSPSC-Codes → Only these UNSPSC-Codes shall be used in the catalogue upload file
  - List of Units of Measure → Only these Units of Measure must be used in the 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

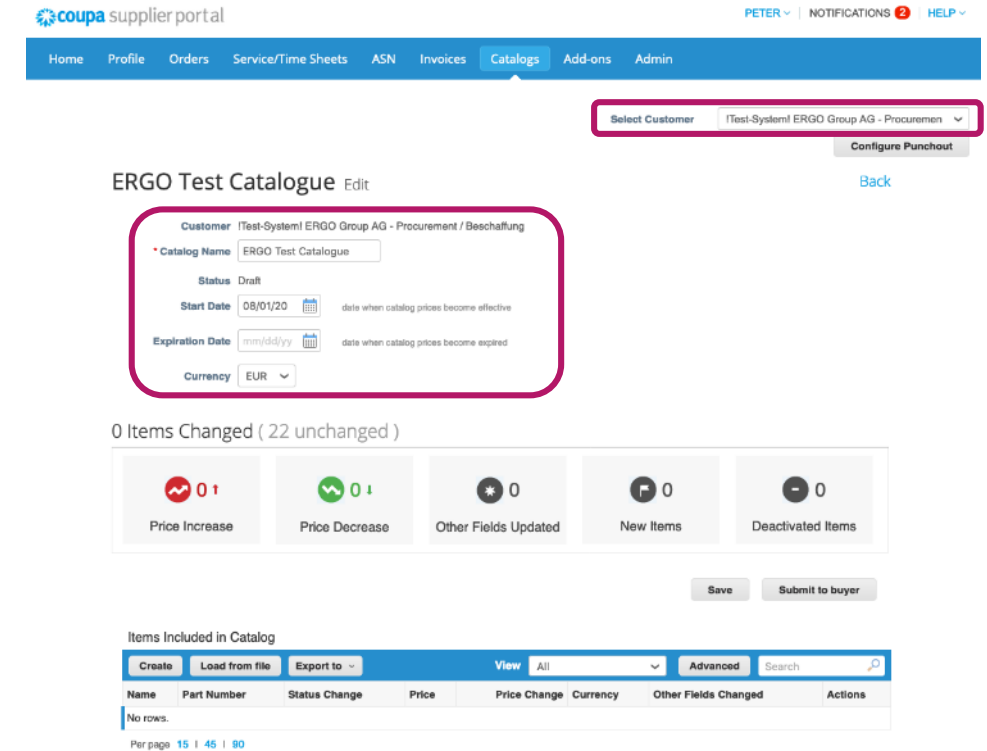
## 1. Catalog Creation

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



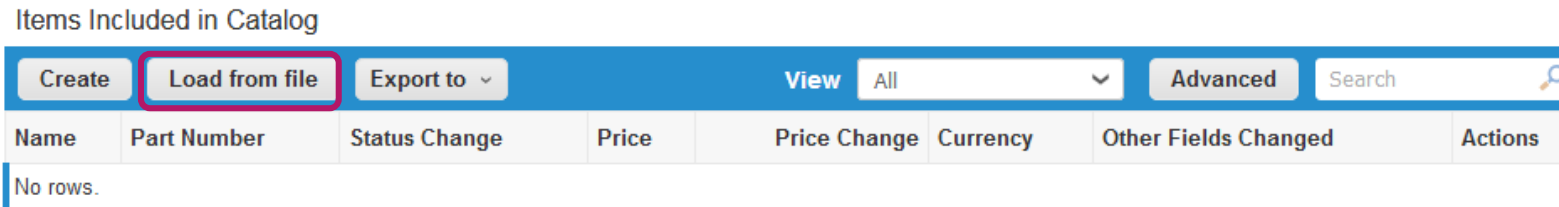
## 2. Catalogue Header Data

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



# Catalogue and Content Creation

### 3. Click “Load from file” in the section “Items Included in Catalog”



### 4. Coupa Bulk Loader Screen opens → Click “Download” and select “CSV Plain” Bulk Load Item Updates for Kloeber GmbH Bürositzmöbel Catalog 6

Follow these steps to upload items

1. Download the CSV template, or export the current list.

2. Click **Download** and select **CSV plain** file. [Click here](#) for a description of the required and optional fields in the template.
- Each row uploaded will create a new item.
  - Click Start Upload and the system will attempt to load the first 6 rows from your file and show the results.

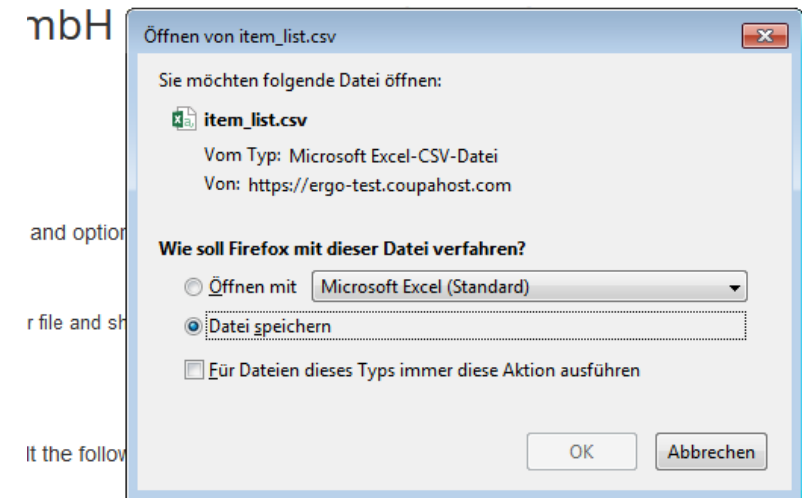
3. Load the updated file

Keine Datei ausgewählt.

Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

**Start Upload**

### 5. Save template file locally



# Catalogue and Content Creation

## 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 upload 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!**

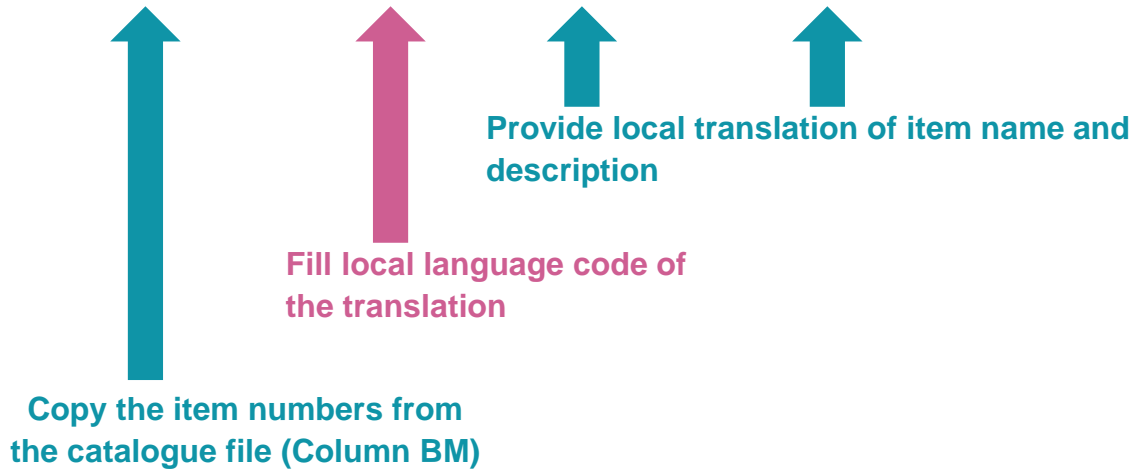
## Sequence External Catalogue Creation by Supplier (CSP)



## Translation

If a translation is required, the Buyer has sent the translation file. Open the translation template file to translate the catalogue items.

Item Number*	Locale*	Name	Description
Boat_01	de	Boot A2	schönes Boot
Boat_02	de	Boot B2	noch schöneres Boot
Boat_03	de	Boot C2	eines der schönsten Boote
Boat_04	de	Boot D2	super Boot
Boat_05	de	Boot E2	bestes Boot



**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)



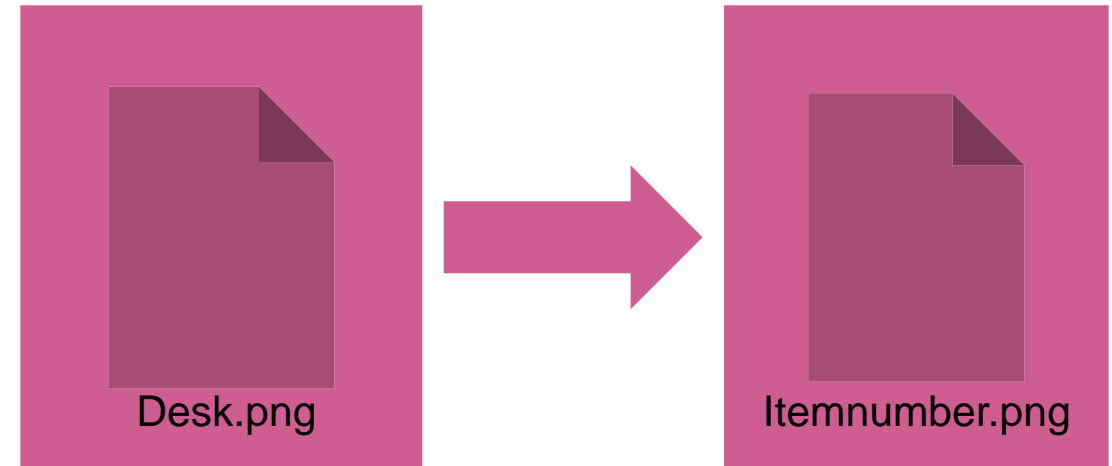


**It is the preferred method that the supplier hosts product images and provide the image URLs in the catalogue file.**

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.



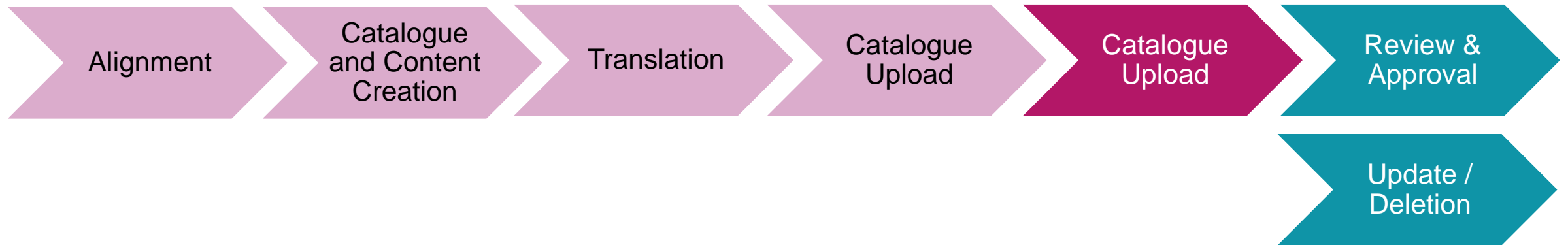
### **Image sizes:**

Item search 64px x 64px

Item detail page 300px x 450px

Uploaded pictures are resized by Coupa automatically

## Sequence External Catalogue Creation by Supplier (CSP)



# Catalogue Upload

0 Items Changed ( 5 unchanged )

Price Increase 0 ↑   Price Decrease 0 ↓   Other Fields Updated 0   New Items 0   Deactivated Items 0

Save   Submit to buyer

Items Included in Catalog

Create   Load from file   Export to   View All   Advanced   Search

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
No rows.							

Per page 15 | 45 | 90

## 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”.

## 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.

### 3. Load the updated file

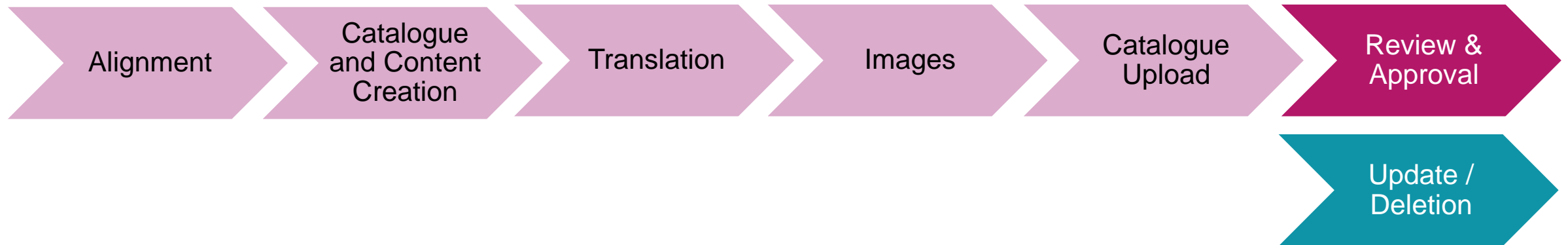
Durchsuchen... Keine Datei ausgewählt.

Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

Start Upload

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

## Sequence External Catalogue Creation by Supplier (CSP)



# Review & Approval



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

The screenshot shows the Coupa Supplier Portal interface. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Add-ons, and Admin. The 'Catalogues' tab is selected. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'Test-System! ERGO Group AG - Procurement' and a 'Configure Punchout' button. A green notification banner at the top states 'Catalogue was submitted and buyer will be notified.'

Catalogue Name	Created Date	Submitted Date	Start Date	Expiry Date	Status	Unanswered Comments	Error	Actions
ERGO Test 2	12/07/2020	12/07/2020	12/07/2020	None	Pending Approval	No		
ERGO Test Catalogue	09/07/2020	None	01/08/2020	None	Draft	No		

## Catalogues

This screenshot shows the same Coupa Supplier Portal interface as above, but with the 'ERGO Test Catalogue' row highlighted. The status for this catalogue is 'Draft'.

Catalogue Name	Created Date	Submitted Date	Start Date	Expiry Date	Status	Unanswered Comments	Error	Actions
ERGO Test 2	12/07/2020	12/07/2020	12/07/2020	None	Pending Approval	No		
ERGO Test Catalogue	09/07/2020	None	01/08/2020	None	Draft	No		

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

In case of Buyer Approval the status changes to “Accepted by Customer”

## Catalogues

The screenshot shows the Coupa Supplier Portal interface with the 'ERGO Test 2' row highlighted. The status for this catalogue is 'Accepted by Customer'.

Catalogue Name	Created Date	Submitted Date	Start Date	Expiry Date	Status	Unanswered Comments	Error	Actions
ERGO Test 2	12/07/2020	12/07/2020	12/07/2020	None	Accepted by Customer	Yes		

In case of Buyer Rejection the status changes to “Rejected by Customer”

## Catalogues

The screenshot shows the Coupa Supplier Portal interface with the 'ERGO Test 2' row highlighted. The status for this catalogue is 'Rejected by Customer'.

Catalogue Name	Created Date	Submitted Date	Start Date	Expiry Date	Status	Unanswered Comments	Error	Actions
ERGO Test 2	12/07/2020	12/07/2020	12/07/2020	None	Rejected by Customer	Yes		

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

## Review & Approval


What to do when a catalogue was rejected?

Catalogues

Catalogue Name	Created Date	Submitted Date	Start Date	Expiry Date	Status	Unanswered Comments	Error	Actions
ERGO Test ?	12/07/2020	12/07/2020	12/07/2020	None	Accepted by Customer	Yes		
ERGO Test Catalogue	09/07/2020	12/07/2020	01/08/2020	None	Rejected by Customer	Yes		

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

Participants: Tobias Stoltze



**Tobias Stoltze**

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!

### 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

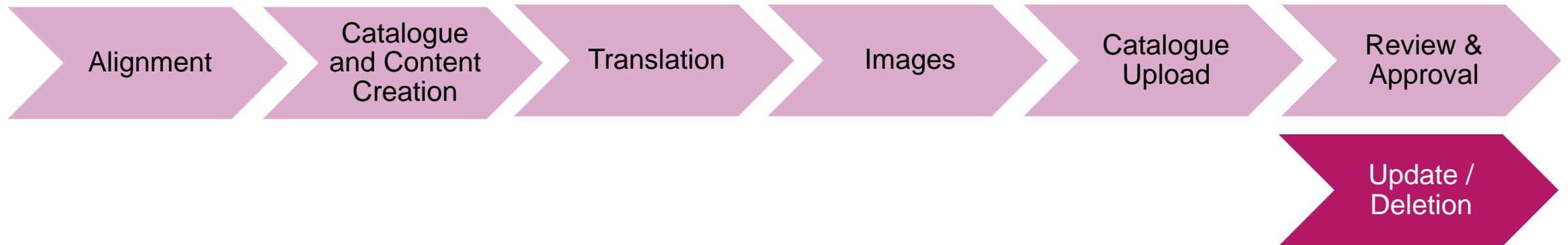
Buyer gets notified and repeats the review task. The catalogue may be rejected again or gets approved.

**This process repeats, until the catalogue can be approved by the Buyer**



**UPON BUYER APPROVAL, THE CATALOGUE CREATION IS COMPLETE**

## Sequence External Catalogue Creation by Supplier (CSP)



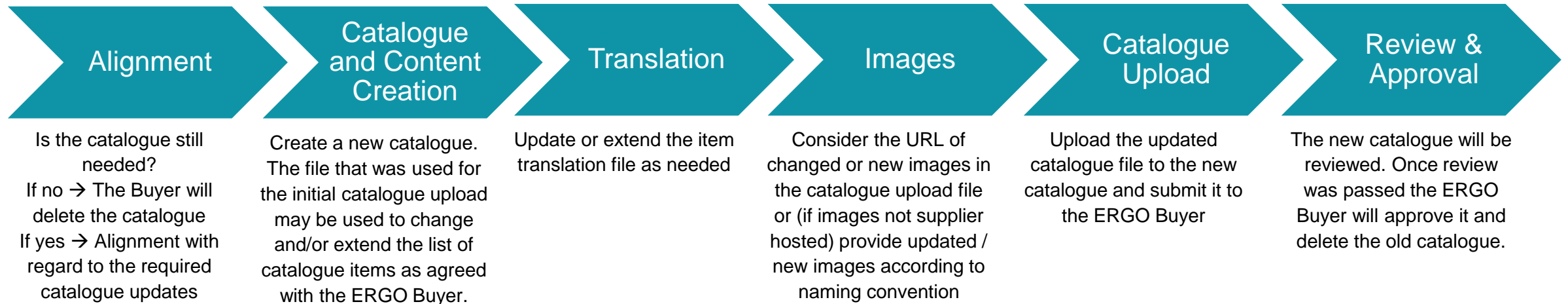


## Update / Deletion

**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!**