

How to Manage Supplier Hosted Catalogs in the Coupa Supplier Portal (CSP)



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This icon is used to call out important information relating to a particular step in this QRC.

Purpose

This Quick Reference Card (QRC) explains the process for how to manage catalogs in the Coupa Supplier Portal (CSP).

- **Task 1:** How to Verify Catalog Setup
- **Task 2:** How to Update Supplier Hosted Catalogs in the CSP

Key Terms

- **n Items Changed (n Unchanged)** are the total number of items that changed and did not change in the catalog.
- **Price Increase** is the total number of items in the catalog that increased in price. New items do not appear in this count.
- **Price Decrease** is the total number of items in the catalog that decreased in price. New items do not appear in this count.
- **Other Fields Updated** is the total number of items that were modified in a way other than a change in price.
- **New Items** are the total number of new items included in the catalog since the last upload or creation of new items.
- **Deactivated Items** are the total number of items that are no longer available in the catalog or search within Coupa.

Prerequisite Information for Catalog Setup

All Supplier Hosted Catalogs with Kimberly-Clark (K-C) will be initially loaded by the K-C team to ensure K-C required fields are properly populated on the item record.

Additionally, this will ensure the accurate application of your contract specifications, including tiered or plant-based pricing (if applicable), any applicable SAP Material Numbers, catalog access control for content groups and other critical information for your catalog(s) item record within K-C Coupa. Once loaded and published by K-C you will be able to manage the catalogs in the Coupa Supplier Portal.

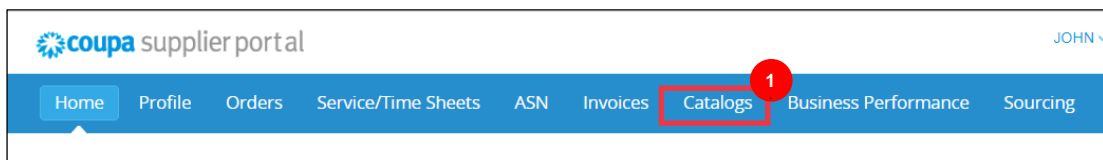
Additional details around K-C’s requirements are below:

- K-C requires all catalogs to have a contract assigned to them.
- K-C requires separate catalogs be maintained for plant-based and tiered-pricing to allow contract records to align to their specified pricing model.
- K-C requires all items to have the corresponding K-C commodity assigned to them.

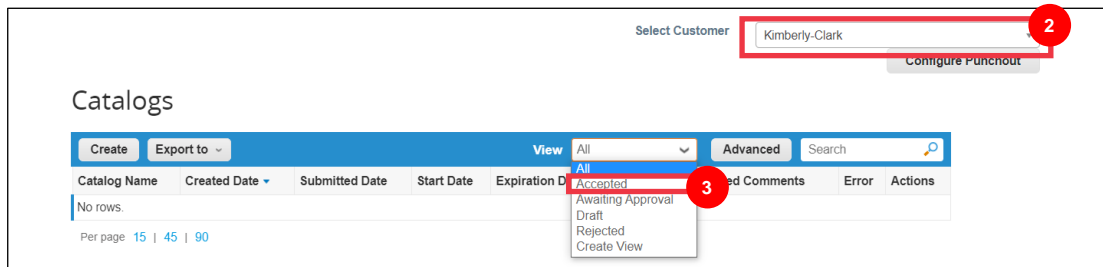
How to Verify Catalog Setup

To verify that your catalog(s) have been loaded perform the following steps:

1. From your **CSP Home Page**, click the **Catalogs** tab in the menu bar.



2. Click the **Select Customer** drop-down list and select **Kimberly-Clark**.
3. Click the **View** drop-down list and select **Accepted** (your list view will populate with all catalogs that have been accepted by K-C).



Note: If you do not see any catalogs or a specific catalog that you are trying to identify, contact your K-C point-of-contact (POC) for information related to its setup.

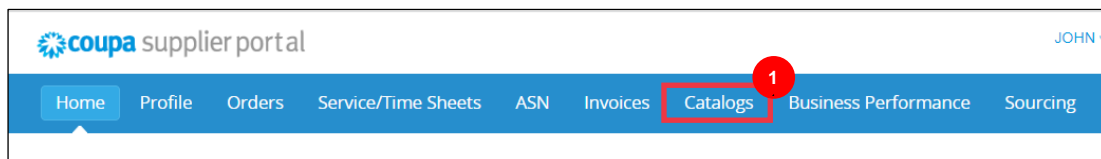
- To review existing catalog details, click the **blue hyperlinked Catalog Name** to open the catalog.

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status
Test Catalog Name	06/29/23	None	06/01/23	10/31/23	Draft

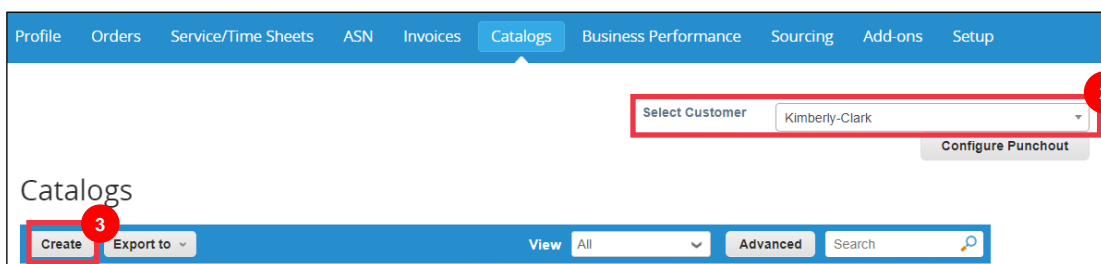
How to Update Supplier Hosted Catalogs in the CSP

Please follow the steps outlined below to perform the task.

- From your **CSP Home Page**, click the **Catalogs** tab in the menu bar.



- Click the **Select Customer** drop-down list and select **Kimberly-Clark**.
- Select **Create**.



Note: You will need to contact your K-C point-of-contact (POC) for information related to:

- Contract
- Catalog Name(s)
- Item Numbers
- Item Name
- Currency Type

4. Edit the information in the following fields (if applicable):
 - **Catalog Name** (required * - follow the existing catalog naming convention provided to you from K-C)
 - **Start Date** (if applicable, add date when your updated catalog pricing becomes effective)
 - **Expiration Date** (if applicable, add date when your updated catalog pricing expires)

ACTION STAINLESS & ALLOYS INC Catalog 5 Edit

Customer Kimberly-Clark

* Catalog Name Create Test Name Catalog

Status Draft

Start Date 02/01/23 date when catalog prices become effective

Expiration Date 01/31/24 date when catalog prices become expired

Currency USD



Note: You will need to keep and maintain separate catalogs for items that are assigned to plant-based and/or tiered pricing structures.

5. Scroll below the **Item Changed/Unchanged (dashboard)** section.
6. Under the **Items Included in Catalog** section, click the **Load from File** button

1 Item Changed (0 unchanged)

0 Price Increase

0 Price Decrease

0 Rejected Items

0 Other Fields Updated

1 New Items

0 Deactivated Items

Save Submit for Approval

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	Reject Reason	Actions
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- Click the **Export To** button and select your desired file type (CSV Plain or CSV for Excel).

Bulk Load Item Updates for [Redacted] **Catalog 19**

Follow these steps to upload items

- Download the CSV template or update the current list (Based on the CSV File Field Separator in your Language and Region settings.)

Download
Export To
- Fill in or update the template description of the required and optional fields in the template.

- Fields marked with * are required
 - CSV plain (current list)
 - CSV for Excel (current list)
 - 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.
- Load the updated file
 No file chosen

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

- The existing catalog file will download. Update any necessary items or item attributes within the existing columns. Ensure the following mandatory fields are completed:
 - Supplier Part Number** (enter the part number from your system)
 - Part Name** (item naming convention must match the Coupa Item master)
 - Description** (item description must match the Coupa Item master)
 - Price**
 - Currency**
 - Unit of Measure (UoM) code** (refer to item master)
 - Active [yes or no]** - indicate if item is an active catalog item

	A	B	C	D	E	F	G	H
1	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*
2	#####	#####	Test product name	Description of product	\$0.00	USD	###	Yes
3	#####	#####	Test product name	Description of product	\$0.00	USD	###	Yes
4	#####	#####	Test product name	Description of product	\$0.00	USD	###	Yes
5	#####	#####	Test product name	Description of product	\$0.00	USD	###	Yes
6	#####	#####	Test product name	Description of product	\$0.00	USD	###	Yes
7	#####	#####	Test product name	Description of product	\$0.00	USD	###	Yes

Note: Do **not** change the column header names in the .CSV file. Please provide information in the other column headers as applicable.

9. After completing your edits, save the CSV file with the existing naming convention and return to the bulk upload within the CSP.
10. Select **Choose File** and select the updated CSV.
11. Click the **Start Upload** button.

Bulk Load Item Updates for INC Catalog 11

Follow these steps to upload items

1. Download the CSV template, or **export** the current list (Based on the CSV File Field Separator in your Language and Region settings.)
 or
2. Fill in or update the CSV file. [Click here](#) for a description of the required and optional fields in the template.
 - Fields marked with a "*" are mandatory.
 - 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
 No file chosen

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

10. Verify the data from your file. Once complete click the **Finish Upload** button.
 - Click **Cancel** if you need to correct data in the .CSV file, and then upload it again.

Verify Data

The first rows of your upload have been loaded. All changes or additions are highlighted in orange.

After reviewing the results, click Finish Upload to continue the upload or Cancel to stop the upload and discard any changes.

The CSV Field Separator is the Comma (,) character. You can change it in the [Language and Region Settings](#).

If there is an error with any of the data you have input, you will receive an **Error Generating Sample** notification.

11. CSP identifies the error number and error location on the file for all errors that need correction.
12. Click the **Back** button and re-upload the file.

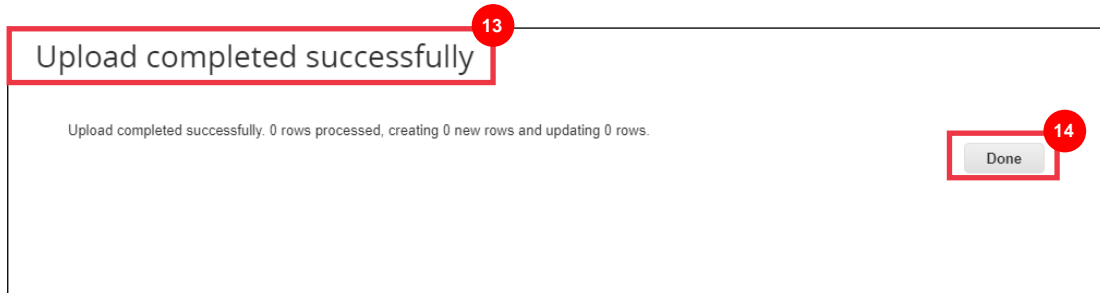
Error Generating Sample

The system found 2 errors in lines when attempting to load the sample rows.

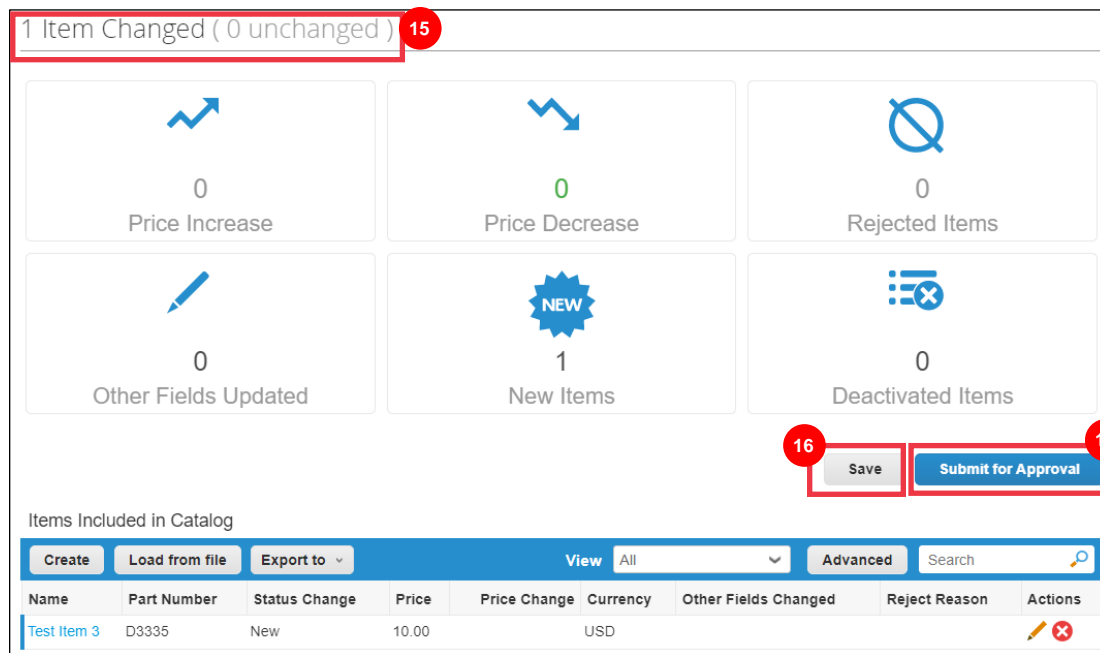
Record	Field	Your Value	Error
Row 1: ###		None	Row corrupt or invalid.
Row 2: 1111	active	None	active is a required field.

Re-upload the file until you receive a confirmation of successful upload.

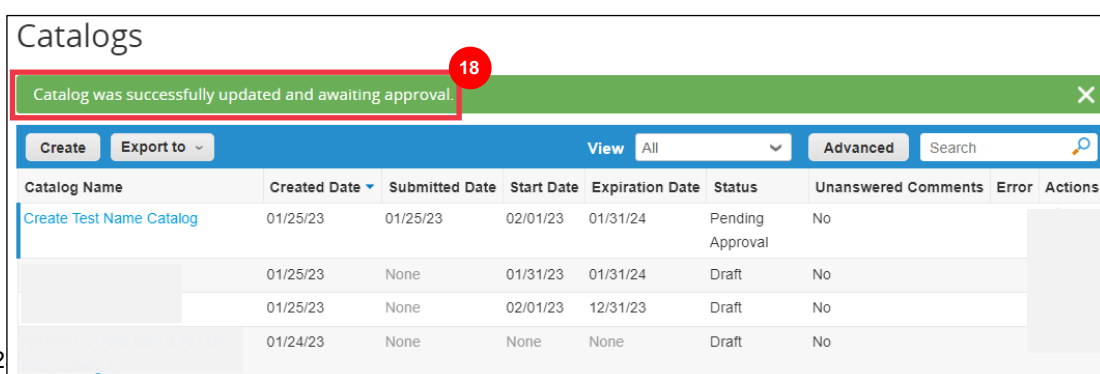
- 13. The notification **Upload completed successfully** appears.
- 14. Click the **Done** button.



- 15. You will be redirected back to the **Item Changed/Unchanged dashboard** screen (the dashboard will reflect any applicable changes made).
- 16. Click the **Save** button to save the changes.
- 17. Click the **Submit for Approval** button to submit your catalog edits for approval.



- 18. The **Catalog was successfully updated and awaiting approval** notification appears.





Note: You will receive an email informing you of the approval status. Please contact your point-of-contact at K-C for tracking/status related information.

Additional Resources

- [How to Navigate the Coupa Supplier Portal – Quick Reference Card](#)