MANAGING CATALOGUES ON THE COUPA SUPPLIER PORTAL

RAINMAKER
POWERED BY coupa

Description

This course explains the process of creating and managing a catalogue on the Coupa Supplier Portal.

Objectives

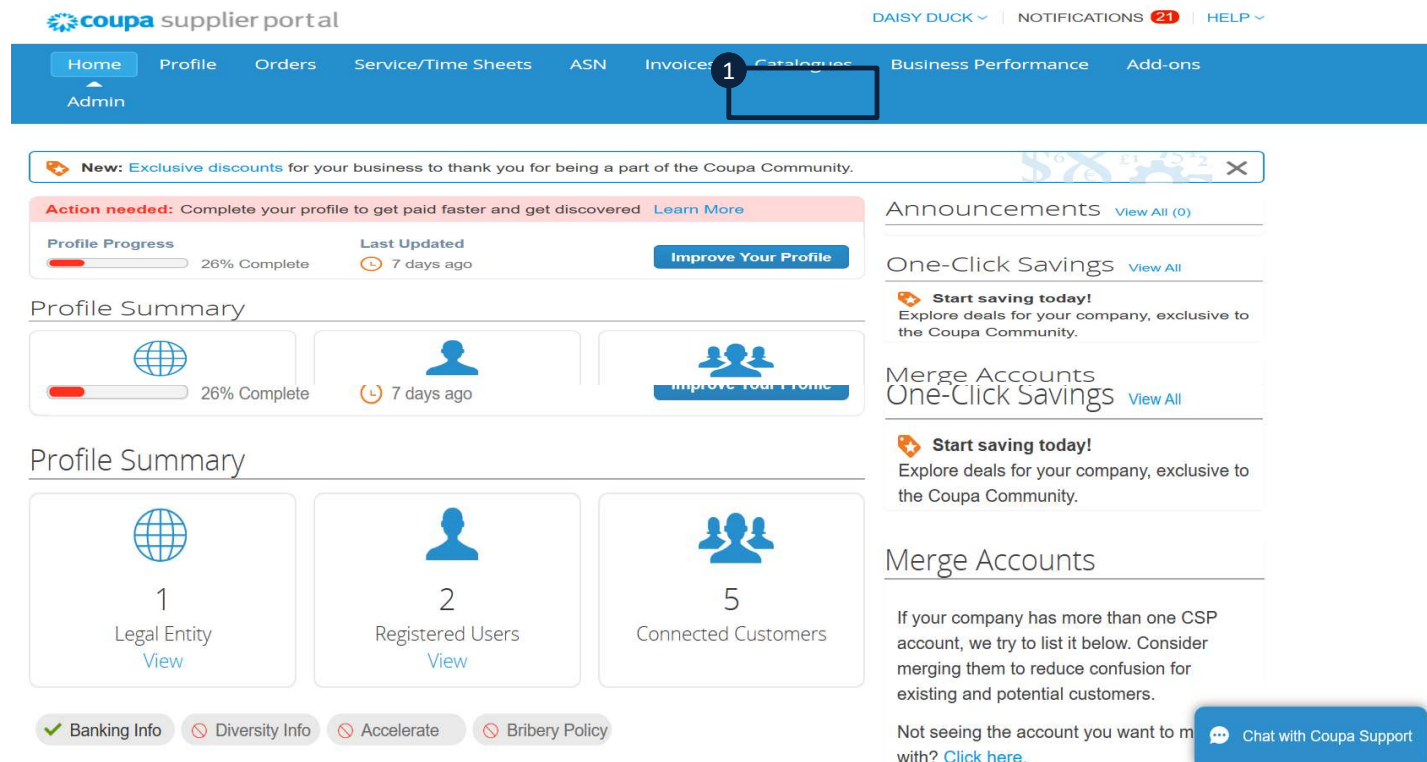After completing this course, you will be able to:

1. Access the catalogue page.

2. Create a catalogue.

3. Load a catalogue from an existing file.

4. Understand the different catalogue statuses.

Managing Catalogues on the Coupa Supplier Portal

To view and manage your catalogues, login to the CSP and follow the steps below:

Navigation:

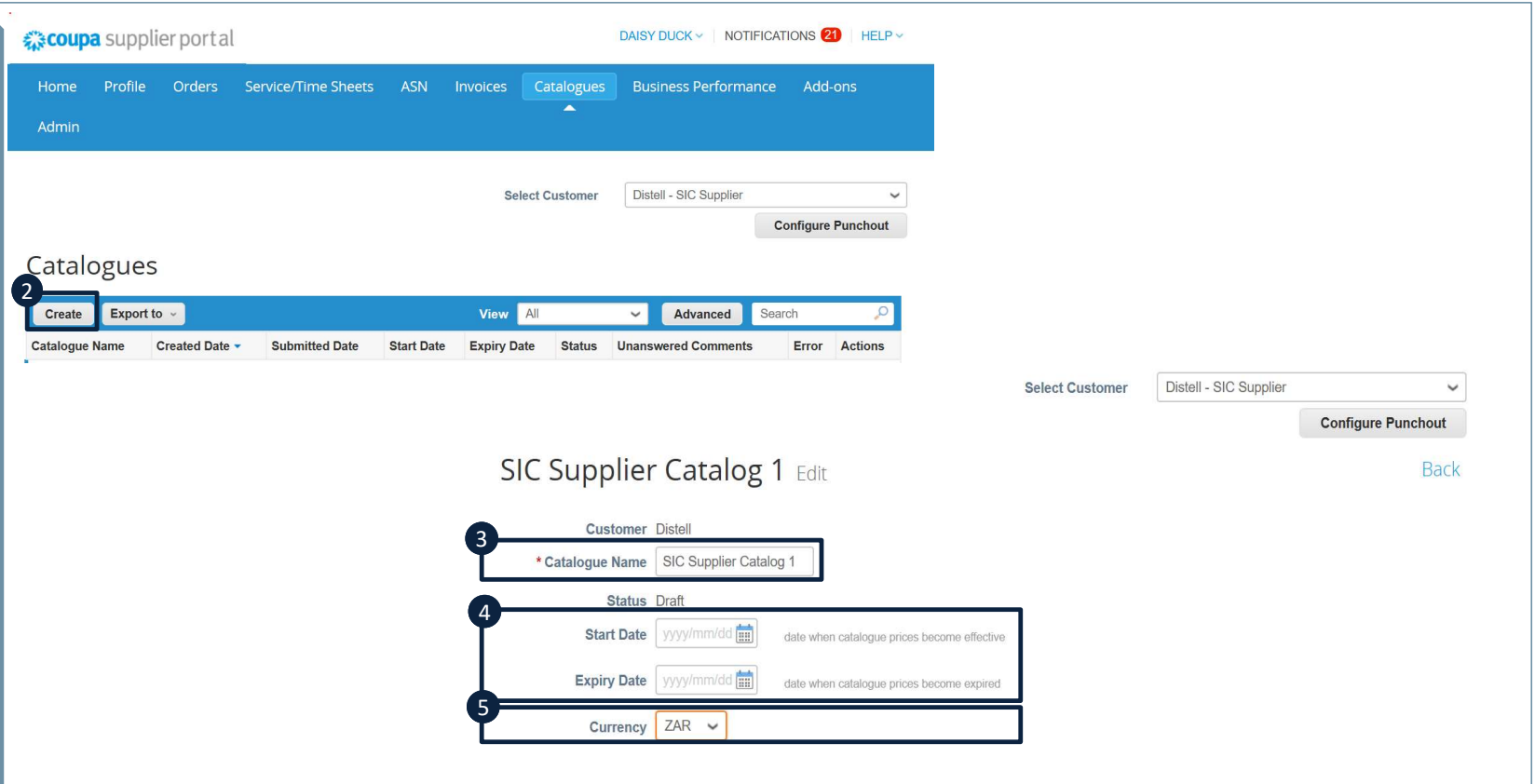**1** Once you have logged into the CSP navigate to '**Catalogues**' tab to view and manage your catalogues.

To view and manage your catalogues, login to the CSP and follow the steps below:

Navigation:

2 Click on '**Create**' to create a catalogue.

3 Populate the '**Catalogue Name**'.

4 Add the '**Start date**' for when the catalogue price will become effective and the '**Expiry date**' for when the catalogue prices will expire.

5 Select the correct '**Currency**' from the drop down list.

coupa supplier portal

DAISY DUCK ⌄ | NOTIFICATIONS **21** | HELP ⌄

Home   Profile   Orders   Service/Time Sheets   ASN   Invoices   Catalogues   Business Performance   Add-ons

Admin

Select Customer   Distell - SIC Supplier ⌄

Configure Punchout

Catalogues

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Create	Export to ⌄				View All ⌄	Advanced	Search 🔍

Catalogue Name	Created Date ▾	Submitted Date	Start Date	Expiry Date	Status	Unanswered Comments	Error	Actions

Select Customer   Distell - SIC Supplier ⌄

Configure Punchout

SIC Supplier Catalog 1 Edit

Back

Customer   Distell

3   * Catalogue Name   SIC Supplier Catalog 1

Status   Draft

4   Start Date   yyyy/mm/dd 📅   date when catalogue prices become effective

Expiry Date   yyyy/mm/dd 📅   date when catalogue prices become expired

5   Currency   ZAR ⌄

To view and manage your catalogues, login to the CSP and follow the steps below:

Navigation:

1. To load catalogues from an excel file click 'load from file'.

2. Select the correct 'Item type' from the drop down list.

3. Populate the 'Name' of the catalogue item.

4. Add a 'Description' of the catalogue item

5. Select the 'Unit of measure' from the drop down list.

6. Click on 'Browse' to add a picture of the catalogue item.

Items Included in Catalogue

Create	Load from file	Export to			View	All	Advanced	Search
Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed		Actions

Catalogue Item Create

Item Type	Item
* Name	
* Description	
* Unit of Measure	% mass of total solution
Purchasable	☑
Manufacturer Name	
Manufacturer Part Number	

Browse...

To view and manage your catalogues, login to the CSP and follow the steps below:

Navigation:

8 Populate the 'Part number' of the catalogue item.

9 Populate the 'Price' of the catalogue items.

10 Select the 'Currency' of the item from the drop down list.

11 Click 'Save' to save the item.

Managing Catalogues on the Coupa Supplier Portal

To view and manage your catalogues, login to the CSP and follow the steps below:

Navigation:

12 The item will be added to the other items included in the catalogue

13 You can edit the item by clicking on the **Pencil** icon under actions.

To delete the item click on the **red circle with the white cross**.

14 Click on '**Submit to Buyer**' to submit the catalogue for approval.

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To view and manage your catalogues, login to the CSP and follow the steps below:

Navigation:

15 You will be notified that the catalogue was submitted to the buyer.

16 Catalogue statuses and descriptions.

Catalogues

Catalogue was submitted and buyer will be notified.   ✕

| Create | Export to ⌄ | | | View | All ⌄ | Advanced | Search 🔍 |

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Catalogue Name	Created Date ▾	Submitted Date	Start Date	Expiry Date	Status	Unanswered Comments	Error	Actions
SIC Supplier Catalog 1	2020/09/11	2020/09/11	2020/09/14	2020/09/18	Pending Approval	No		

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Catalogue status	Description
Accepted	The catalogue has been accepted by your customer, and all the items in it are now available for purchase within Coupa.
Pending Approval	The catalogue has entered the approval process but still needs to be approved by Distell.
Draft	The catalogue has been created, but may be missing information necessary to send it to the customer
Error	Something is wrong with the catalogue. Contact your customer to get the catalogue back on track
Rejected	The catalogue has been rejected. Contact your customer to find out why, and then resubmit.
Pending Activation	The catalogue was approved by Distell but the effective date is in future. The status will be accepted on the effective date

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Below are Item change statuses and descriptions:

Item change	Description
Price increase	Total number of items in the catalogues that increased in price. New items do not appear in this count.
Price decrease	Total number of items in the catalogues that decreased in price. New items do not appear in this count.
Other fields updated	Total number of items that were modified in a way other than a change in price.
New items	Total number of new items included in the catalogues since the last upload or creation of new items.
Deactivated items	Total number of items that are no longer available in the catalogues or search within Coupa.

0 Items Changed (0 unchanged)

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

Save   Submit to buyer

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END- THANK YOU