



# MANAGING CATALOGUES ON THE COUPA SUPPLIER PORTAL



## Course Outline

### 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:

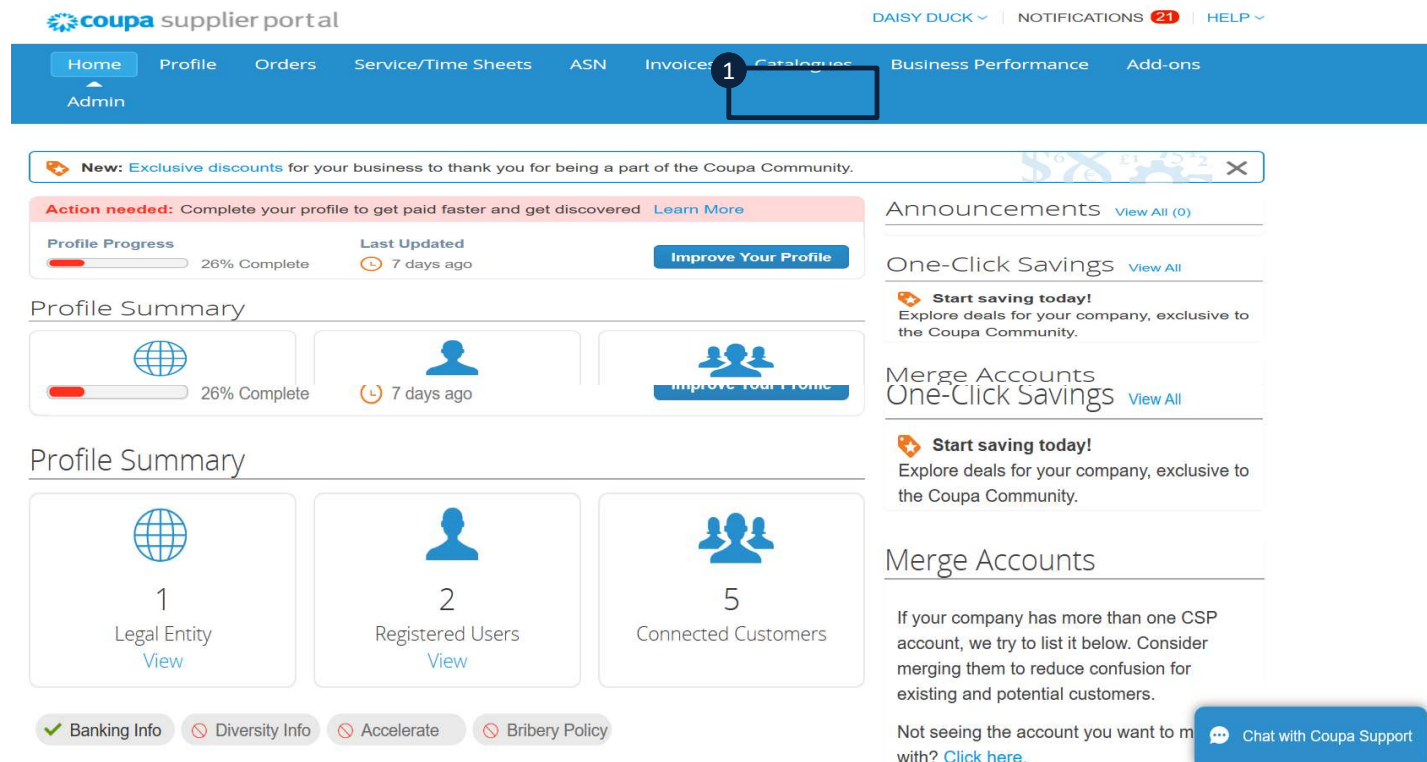
1. Access the catalogue page.
2. Create a catalogue.
3. Load a catalogue from an existing file.
4. Understand the different catalogue statuses.

# 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.



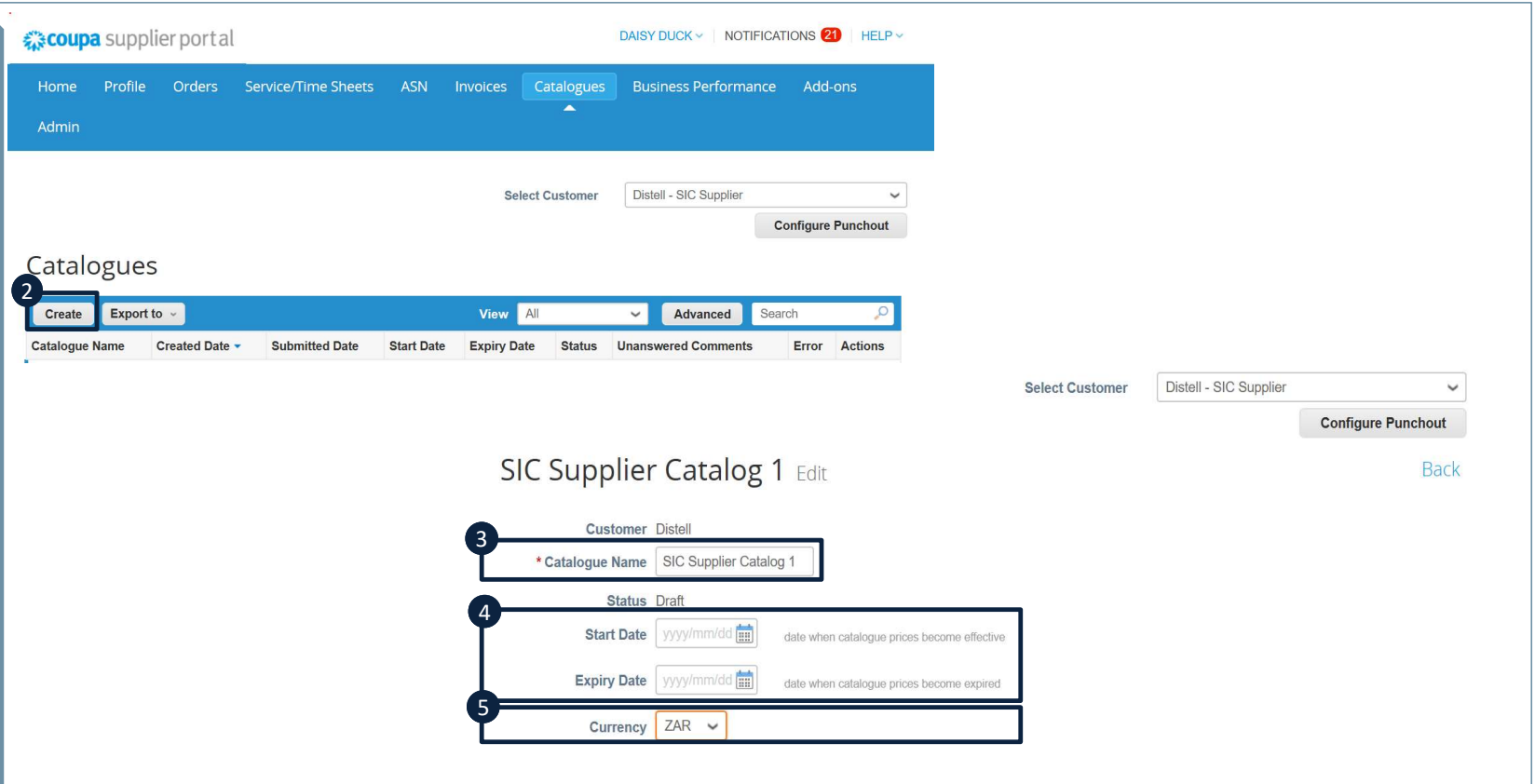
The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, **Catalogues** (highlighted with a red box and a '1' in a circle), Business Performance, and Add-ons. Below the navigation bar, a banner for 'New: Exclusive discounts' is visible. The main content area is divided into two columns. The left column features a 'Profile Progress' section with a 26% completion bar and a 'Last Updated' timestamp of 7 days ago. Below this is a 'Profile Summary' section with three cards: '1 Legal Entity' (26% Complete), '2 Registered Users' (7 days ago), and '5 Connected Customers'. At the bottom of the left column are four status indicators: 'Banking Info' (checked), 'Diversity Info' (unchecked), 'Accelerate' (unchecked), and 'Bribery Policy' (unchecked). The right column contains three sections: 'Announcements' (View All (0)), 'One-Click Savings' (View All), and 'Merge Accounts One-Click Savings' (View All). Each of these sections includes a 'Start saving today!' call to action. At the bottom right, there is a 'Merge Accounts' section with a brief explanation and a 'Chat with Coupa Support' button.

# Managing Catalogues on the Coupa Supplier Portal

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.



The screenshot shows the 'Catalogues' page in the Coupa Supplier Portal. The page has a top navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues (highlighted), Business Performance, and Add-ons. Below the navigation bar is a 'Select Customer' dropdown menu set to 'Distell - SIC Supplier' and a 'Configure Punchout' button. The main content area is titled 'Catalogues' and features a 'Create' button (highlighted with a blue box and a circled '2'), an 'Export to' dropdown, a 'View' dropdown set to 'All', an 'Advanced' button, and a search bar. Below this is a table with columns: Catalogue Name, Created Date, Submitted Date, Start Date, Expiry Date, Status, Unanswered Comments, Error, and Actions. The table is currently empty. To the right of the table is another 'Select Customer' dropdown set to 'Distell - SIC Supplier' and a 'Configure Punchout' button. Below the table is a section titled 'SIC Supplier Catalog 1' with an 'Edit' link. This section contains a form with the following fields: 'Customer' (Distell), 'Catalogue Name' (SIC Supplier Catalog 1, highlighted with a blue box and a circled '3'), 'Status' (Draft), 'Start Date' (a date picker set to 'yyyy/mm/dd', highlighted with a blue box and a circled '4', with a tooltip 'date when catalogue prices become effective'), 'Expiry Date' (a date picker set to 'yyyy/mm/dd', highlighted with a blue box and a circled '4', with a tooltip 'date when catalogue prices become expired'), and 'Currency' (ZAR, highlighted with a blue box and a circled '5'). A 'Back' link is located at the bottom right of the form.

# Managing Catalogues on the Coupa Supplier Portal

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

2

Item Type

Item

3

\* Name

4

\* Description

5

\* Unit of Measure

% mass of total solution

Purchasable

☒

Manufacturer Name

Manufacturer Part Number

Browse...

# Managing Catalogues on the Coupa Supplier Portal

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.

Supplier Item Attributes

8 \* Part Number

Supplier Part Number

Manufacturer

Lead Time

UNSPSC

Contract

Pricing Type

\* Price

\* Currency

Savings %

Order Increment

Minimum Order Quantity

Cancel Save

Supplier Item Attributes

9 \* Part Number

10 Supplier Part Number

Manufacturer

Lead Time

UNSPSC

Contract

Pricing Type

\* Price

\* Currency

Savings %

Order Increment

Minimum Order Quantity

11 Cancel Save


# 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.


### 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
Lillies	FLW7600	New	700,00		ZAR		 


1 Item Changed ( 0 unchanged )




0  
Price Increase




0  
Price Decrease




0  
Other Fields Updated




1  
New Items



0  
Deactivated Items



1  
New Items




0  
Deactivated Items

Save

Submit to buyer

### 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
Lillies	FLW7600	New	700,00		ZAR		 

Chat with Coupa Support



# Managing Catalogues on the Coupa Supplier Portal

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.

CreateExport to

ViewAllAdvancedSearch

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		

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




# Managing Catalogues on the Coupa Supplier Portal

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

Price Increase




0

Price Decrease




0

Other Fields Updated



0

New Items



0

Deactivated Items

Save

Submit to buyer



»»» **END- THANK YOU**

