

Coupa Supplier Portal User Guide

CSP supplier created catalogs

- The supplier needs to go to the “Catalogs” tab in CSP and click on Create which then takes the supplier to the catalog creation page
- The supplier can either create the items separately or by bulk upload
- Using the Load from file option will allow them to fill in the template with the desired items
- The template has a few mandatory fields that need to be filled in before upload, such as: Supplier Part Number, Name of the item, Description, Price, Currency, UOM code, and the Active field which makes the item purchasable in Coupa
- The Contract Number column needs to be populated by the supplier with the same Contract Number provided

A	B	C	D	E	F	G	H	I	J	K	L
Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*	Item Classification Name	Lead Time	Manufacturer	Contract Number

- Once the CSV template is filled in with all the relevant information, the supplier will upload it under step 3 of the bulk load menu by choosing the file and clicking on the Start Upload button

Bulk Load Item Updates for Test Anca's supplier Catalog 37

Follow these steps to upload items

1. **Download** the [CSV template](#) or the [current list of items](#).
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.

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](#).

- The “Verify Data” screen will appear showing the supplier the data they have entered highlighted in orange; after that they can finish the upload or click on Cancel and re-upload a different or amended template:

Verify Data

The first row of your upload has 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.

Row 1	
New	
Supplier Part Num*	16789
Supplier Aux Part Num	
Name*	Item 56
Description*	item 56
Price*	10
Currency*	EUR
UOM code*	EA
active*	Yes
Item Classification Name	
Lead Time	
Manufacturer	

- Once the “Finish Upload” button has been clicked, the system will start to upload the items and will show the number of rows processed in real time:

Select Custom

Loading items

Filename: item_list.csv
 Status: Submitted to resque 
 Rows Processed:

- Once the upload has finished, the successful upload message will appear:

Select Custom

Upload completed successfully

Upload completed successfully. 1 row processed, creating 1 new row and updating 0 rows.

- As soon as the upload is successful and the supplier presses the “Done” button, they will be redirected to the catalog page where they will be able to see the items included in the catalog, some statistics regarding the change in the catalog
- For the catalog to be visible, it should be submitted to Buyer. This means it will undergo an approval process to the buyer.

Test Anca's supplier Catalog 37 [Edit](#)

[Configure](#)
[Back](#)

Customer Xoomworks

* Catalog Name

Status Draft

Start Date date when catalog prices become effective

Expiration Date date when catalog prices become expired

Currency

1 Item Changed (15 unchanged)

0 ↑	0 ↓	0	1	0
Price Increase	Price Decrease	Other Fields Updated	New Items	Deactivated Items

[Save](#) [Submit to buyer](#)

Items Included in Catalog

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
Item 56	16789	New	10.00		EUR		

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- Once the catalog has been submitted for approval the following message appears and the status of the catalog changes to Pending Approval:

Select Customer [Configure Punchout](#)

Catalogs

Catalog was submitted and buyer will be notified.

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Actions
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Catalogs

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Actions
Test Anca's supplier Catalog 37	02/19/18	02/19/18	None	None	Pending Approval	No	

Fields Explained

Field Name	Mandatory	Description
Supplier Part Number*	Yes	The supplier's part number. It must be unique.
Name*	Yes	This is best used as a short, basic description of the item. There is a 255 character limit for this field. Everything written will appear on the requisition line, so it's best to keep this short and clear. For example, "Cordless Hammer Drill/Driver Kit.18.0 V" is a short name but covers most of the main points. Item names are case-sensitive. Beware of trailing or leading spaces in the item name! This name must be unique. !!! Don't use generic item names (Bad: "iPhone". Good: "iPhone 7 Plus 128GB Jet Black")
Description*	Yes	Full description of the item/service. With up to 4000 characters at your disposal, you can provide all the detail you want to include about an item in this field. Using the example "Cordless Hammer Drill/Driver Kit.18.0 V", you could add information about product dimensions, packaging and functionality about the drill. When a customer searches for an item and clicks on its name, they will be taken to a product information screen where they can read the product description.
Price*	Yes	The NET price (excluding VAT). Enter up to two decimal places. Will default to 0.00 if left blank.
Currency*	Yes	
UOM code*	Yes	Unit of Measure: This field tells us how many or how much of an item are ordering. Common units of measure include each, case, dozen, pair, hour, or pound. The full of units of measure list can be found in the excel file template on the tab called UOM.
Active*	Yes	Yes

Field Name	Mandatory	Description
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UNSPSC Code	Optional	Unique UNSPSC code relevant for this item/service – The United Nations Standard Products and Services Classification (UN SPSC) code classifies goods or services. For example, there are many different laptop computers each with their own unique item numbers, but they would all be given the same UNSPSC code of '43211503 - Notebook Computers' A full list of UNSPSC codes can be found at http://www.unspsc.org/ Please provide if you are using UNSPSC classification for your products.
Lead Time	Optional	Enter number of working days not calendar days. The lead time is the number of days the customer should expect to wait before the supplier can fulfil the order.
Manufacturer	Optional	This is used when the company supplying goods to your company is reselling the goods made by someone else.
Contract Number	Optional	Coupa Contract Number – The initial upload does not require you to fill out the Contract Number for any changes to the catalogues, please discuss with the client.
Image URL	Optional	To add an image to an item enter the URL where the item image can be found. When an Internet address is entered, Coupa will retrieve the image and attach it to the corresponding catalogue item. Please make sure the URL in the CSV file does not contain spaces and images need to be either a GIF or JPEG file.