



SCHAEFFLER

Coupa Quick Reference Guide for Suppliers | Managing Catalogs

We pioneer motion

Managing Catalogs in the Coupa Supplier Portal

1 In case Schaeffler has created for the business a Catalog in Coupa to raise requisitions against, a Catalog will be visible by clicking on the tab “Catalogs”.
At this place you will be able to update and manage the existing Catalog items.

2 Please consider to be logged in in the respective “catalog language” if you are creating new catalogs or catalog content. – Example: Please login in system/ user language Italian if you are loading a catalog for Italy with Italian article descriptions.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs (highlighted with a red box and a circled '1'), Business Performance, Sourcing, Add-ons, and Setup. Below the navigation bar, there is a 'Select Customer' dropdown menu with 'Schaeffler Group' selected. The main content area is titled 'Catalogs' and features a table with columns: Catalog Name, Created Date, Submitted Date, Start Date, Expiration Date, Status, Unanswered Comments, Error, and Actions. A language selection dropdown menu is open, showing options: Français (Canada), Français (France), Français (Luxembourg), Français (Suisse), Italiano (Italia) (highlighted with a blue bar and a circled '2'), Italiano (Svizzera), Magyar, and Nederlands (België). At the bottom of the dropdown, there is a 'Deutsch (Deutschland)' option.



Note:

- Please ensure that you have chosen “Schaeffler” as selected customer within the drop down list.
- Please use the language of the catalog/ catalog articles also for logging in since Coupa is using a translation tool that is based on the user language.

Create or Edit a Catalog in CSP

- 1 To create a new Catalog, click on the 'Create' button.
- 2
 - If requested, you can change the default Catalog title ([Your Company Name] [Catalog (Number)]) in the mandatory field "Catalog Name"
 - Select a start and expiration date for your Catalog
 - Select a currency to be applied to your Catalog items
- 3 To edit a draft Catalog, click on the Edit icon for the respective Catalog.

The screenshot displays the 'Catalogs' management interface. At the top, there are buttons for 'Create' and 'Export to', with 'Create' highlighted by a red box and a circled '1'. Below this is a table with columns: Catalog Name, Created Date, Submitted Date, Start Date, Expiration Date, Status, Unanswered Comments, Error, and Actions. The table lists two catalogs: 'Catalog 3' (Draft) and 'One Six Eight Store' (Pending). The 'Catalog 3' row has an 'Edit' icon in the 'Actions' column, highlighted with a red box and a circled '3'. Below the table, the 'Catalog Edit' form for 'Konstantin GmbH - Gmail based Catalog 1' is shown. The 'Catalog Name' field is highlighted with a red box and a circled '2'. The form includes fields for 'Start Date', 'Expiration Date', and 'Currency'. Below the form are several summary cards for 'Price Increase', 'Price Decrease', 'Rejected Items', 'Other Fields Updated', 'New Items', and 'Deactivated Items'. At the bottom, there is a table for 'Items Included in Catalog' with columns for 'Catalog Name', 'Created Date', 'Submitted Date', 'Start Date', 'Expiration Date', 'Status', 'Unanswered Comments', and 'Error'.



On the Catalog Edit page, fill in at least the mandatory field (*).

Loading of Individual Items

- 1 From the 'Catalogs' tab for an individual item load, go to the section **Items Included in Catalog**, click on 'Create' and fill in the relevant information. Mandatory fields are marked with the red asterisk (*).
Mandatory fields are marked with the red asterisk (*).
- 2 Please consider for any catalog or article creation to be logged in with the language of the catalog/ item you are loading. You can select the language of the bottom of the page.
- 3 You can select the Unit of Measure (Each, Box, Set etc.) from the provided dropdown list. In addition, you can add an image of the product by clicking 'Browse'.

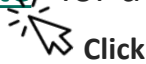
The screenshot displays the 'Items Included in Catalog' interface. At the top, there are buttons for 'Create', 'Load from file', and 'Export to'. Below this is a table with columns: Name, Part Number, Status Change, Price, Price Change, Currency, Other Fields Changed, and Actions. The table currently shows 'No rows.' and pagination options for 15, 45, and 90 items per page. Below the table is the 'Catalogue Item Create' form. The form includes fields for 'Item Type' (set to 'Item'), '* Name' (set to 'Item 1'), '* Description', '* Unit of Measure' (set to 'Activity unit'), 'Manufacturer Name', and 'Manufacturer Part Number'. Below these are 'Supplier Item Attributes' including 'Part Number', 'Auxiliary Part Number', 'Manufacturer', 'Lead Time', 'UNSPSC', 'Contract', 'Pricing Type' (set to 'Fixed Price'), '* Price', '* Currency' (set to 'USD'), 'Savings %', 'Order Increment', and 'Minimum Order Quantity'. A 'Browse...' button for adding an image is present. A language dropdown menu is open, showing options: Français (Canada), Français (France), Français (Luxembourg), Français (Suisse), Italiano (Italia), Italiano (Svizzera), Magyar, Nederlands (België), and Deutsch (Deutschland). The 'Save' button is highlighted in blue.

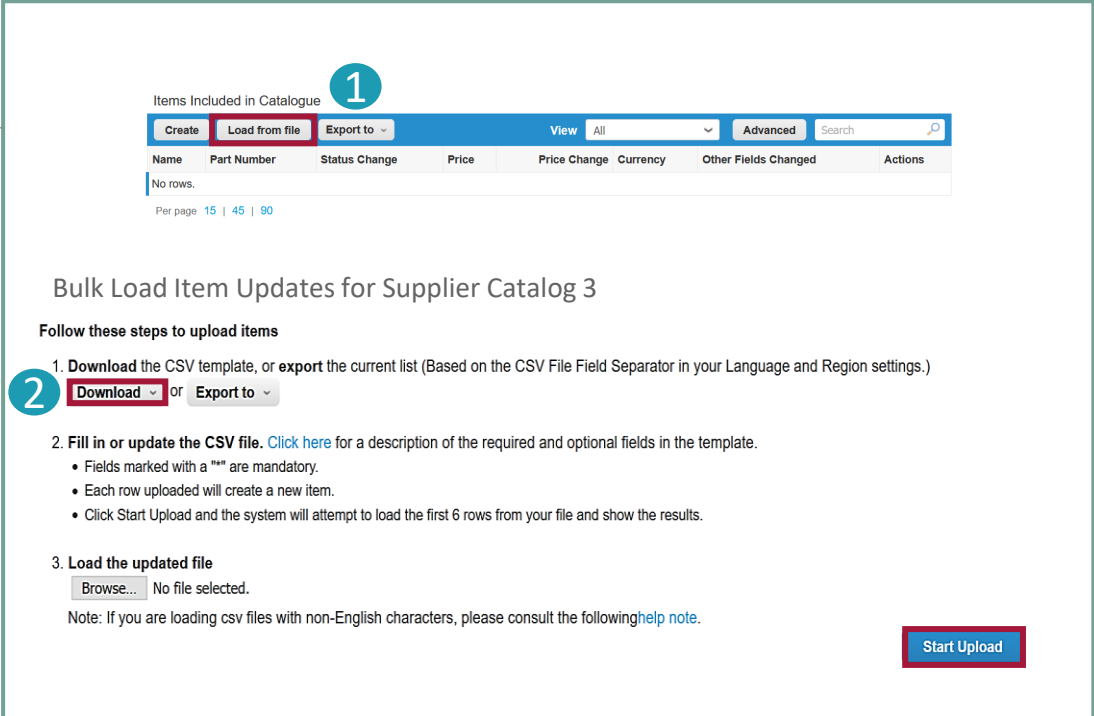


Note:

As long as the Catalog is in 'Draft' status and not submitted for approval you can edit or delete the item after saving it. As soon as the catalog is approved, and you want to do changes you will need to re-submit for approval.

Bulk Upload Items (1/3)

- 1 From the 'Catalogs' tab in case of bulk upload of items, click the "Load from file" button in the section "Items included in the catalog".
 - 1) To receive a blank CSV file as baseline for your new Catalog, click on the 'Download' dropdown list and select the format, which is suitable for you. (Please consider to be logged in in the matching system language, when downloading the CSV file)
 - 2) Refer to "[How-To-Complete](#)" for detailed field descriptions of the CSV file.
 
 - 3) To add or modify items from your existing Catalog, click on 'Export to' for the current list of items. After completing your changes, click on the 'Browse' button and select your modified CSV file, click Open and click on the button 'Start Upload'.



Items Included in Catalogue **1**

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

Per page 15 | 45 | 90

Bulk Load Item Updates for Supplier Catalog 3

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.)
 - 2 **Download** or **Export to**
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 selected.

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



Note:

- Please **don't change the headlines** of the columns in the .csv file
- You have to work in the **system language** that **fits** to the **language of the catalog items** that you want to upload.
- Each Catalog must be approved by Schaeffler before it can be included in Coupa search results.

Bulk Upload Items (2/3)

Example of a populated csv when clicking 'Download':

To add or update any images for Catalog items please use the image URL column for links or .png format.

- 1 After completing the changes, click on the 'Browse' button and select your CSV file, click 'Open', and click on the button 'Start Upload' (see previous slide).



Note:
Do not change the column header names in the .csv file.

Item Type	Supplier ID	Supplier Name	Description	Price	Currency	UOM	Code	Active	Item Class	Lead Time	Image URL 1	Image URL 2	Image URL 3	Image URL 4	Image URL 5	Image URL 6	Image URL 7	Image URL 8	Image URL 9	Image URL 10	Image URL 11	Image URL 12	Image URL 13	Image URL 14	Image URL 15
RES002	Item 1	Item 1		300	MYR	E.A.		Yes			https://s3.amazonaws.com/coupa-images-us-east-1-1131870132/products/Res-Chev-400-parts_8024.jpg?sr=1513958096														
RES003	Item 2	Item 2		300	MYR	E.A.		Yes			https://s3.amazonaws.com/coupa-images-us-east-1-1131870132/products/Res-Chev-400-parts_8024.jpg?sr=1513958096														
RES004	Item 3	Item 3		300	MYR	E.A.		Yes			https://s3.amazonaws.com/coupa-images-us-east-1-1131870132/products/Res-Chev-400-parts_8024.jpg?sr=1513958096														
RES005	Item 4	Item 4		300	MYR	E.A.		Yes			https://s3.amazonaws.com/coupa-images-us-east-1-1131870132/products/Res-Chev-400-parts_8024.jpg?sr=1513958096														
CAP0001	Item 5	Item 5		250	MYR	E.A.		Yes			https://images.vttiber.com/product_main_x3/product/2048/6615178.png														
CAP0003	Item 6	Item 6		300	MYR	E.A.		Yes			https://images.vttiber.com/product_main_x3/product/2048/6615178.png														
CAP0004	Item 7	Item 7		300	MYR	E.A.		Yes			https://images.vttiber.com/product_main_x3/product/2048/6615178.png														
CAP0005	Item 8	Item 8		450	MYR	E.A.		Yes			https://images.vttiber.com/product_main_x3/product/2048/6615178.png														

Bulk Load Item Updates for Supplier Catalog 3

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 selected.

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

Bulk Upload Items (3/3)

Once the upload is complete, Coupa checks your file and shows you the **Verify Data** screen. Here you have the possibility to check your changes and to finish the upload (all changes are highlighted in orange).

- Click *'Cancel'* if you need to correct any data in the .csv file and upload the new .csv file again.
- If you are happy with the changes, click *'Finish Upload'* and you will receive a message that the upload has been completed successfully.






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.

	Row 1 New	Row 2 New
Supplier Part Num*	4.05001E+12	4.05001E+12
Supplier Aux Part Num	415971	465333
Name*	CASE CARAMILK EGG 34G BULK	CASE KING SIZE CARAMILK
Description*	CAN	CAN
Price*	611.88	826.43
Currency*	USD	USD
UOM code*	EA	EA
active*	Yes	Yes
Item Classification Name		
UNSPSC Code	Ship & Pack Material (ILMLO1002)	Ship & Pack Material (ILMLO1002)
Lead Time		
Manufacturer		
Contract Number		
Contract Term		

Finish Upload Cancel

8 Items Changed (5 unchanged)

 8 Price Increase	 0 Price Decrease	 8 Other Fields Updated
 0 New Items	 0 Deactivated Items	

Save Submit to buyer



Note:

The **Item(s) Changed** section is updated with your changes.

Catalog status in the Coupa Supplier Portal

Catalog Status	Description
Draft	The Catalog has been created, but further information to be added before submitting to Schaeffler
Error	Something is wrong with the Catalog, please contact Schaeffler for clarification.
Awaiting/Pending Approval	The Catalog has been received by Schaeffler, but it has not gone through the approval chain yet.
Accepted	The Catalog has been accepted by Schaeffler, and all the items in it are now available for the organization to request within Coupa.
Rejected	The Catalog has been rejected, please contact Schaeffler for clarification.

**Note:**

Every update to the Catalog will be submitted to Schaeffler team to review/approve the changes/supplements. Once Schaeffler has approved, this will be updated in the Coupa Supplier Portal as 'Accepted'.