CMC Supplier Hosted Catalog Creation Instructions

03-10-2022

Creation of a Supplier Catalog – By Supplier

For an **Externally Hosted Catalog**, the supplier will update the Catalog content **using the below steps**, and the Catalog will be routed to CMC Content Manager for approval

1 Suppliers will click on the **Catalogs** tabs after logging into the **Coupa Supplier Portal**

2 They will then select the **Create** button to start the catalog creation process

3 The below details will be required of them

 a. **Catalog Name:** Enter a suitable catalog name (CAT-Supplier Name)

 b. **Start Date:** Date when the catalog items become effective

 c. **Expiry Date:** Date when catalog prices expire

 d. **Currency:** Set the currency for the catalog

Creation of a Supplier Catalog – By Supplier Contd.

4 New items can be included in the catalog by:

a. Clicking on the **Create** button

b. Uploading items from a **file**

5 To create new items individually, follow the below steps:

a. Click on the **Create** button

b. Fill in the required details

c. Select **Save**

Creation of a Supplier Catalog – By Supplier Contd.

CMC Test Supplier 4 Catalog - Jack Edit **6**   Back

Catalog item was successfully updated.   ✕

Customer	Commercial Metals Company
* Catalog Name	CMC Test Supplier 4 Catalo
Status	Draft
Start Date	mm/dd/yy 📅 date when catalog prices become effective
Expiration Date	mm/dd/yy 📅 date when catalog prices become expired
Currency	USD

6 The prompt will appear once the items have been successfully updated

Creation of a Supplier Catalog – By Supplier Contd.

Items Included in Catalog

| Create | Load from file | Export to ˅ | View | All ˅ | Advanced | Search 🔍 |

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

Per page 15 | 45 | 90

7a

Configure Punchout

Bulk Load Item Updates for CMC Test Supplier 4 Catalog - Jack

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.)

   [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.

   7b

3. **Load the updated file**

   [Choose File] No file chosen

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

   Start Upload

---

7 To create more than one new items at once, start by clicking on the **Load From file** button before following the below steps:

a. Click on the **Load from file** button

b. To get a blank CSV file to build your new catalog, click on the download button. To add or modify items from your existing catalog, click on the Export To button

After making the changes, click on the Choose File button and navigate to your modified CSV file, click Open, and then **Start Upload**

Creation of a Supplier Catalog – By Supplier Contd.

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.

	Row 1	Row 2
	New	New
Supplier Part Num*	458765	458766
Supplier Aux Part Num		
Name*	Widget 3	Widget 4
Description*	Test item for catalog 1	Test item for catalog 2
Price*	8.75	9
Currency*	USD	USD
UOM code*	EA	EA
active*	Yes	Yes
Item Classification Name		
Lead Time		
Manufacturer		
Minimum Order Quantity		
Order Increment		
Contract Number		
Contract Term		
Savings %		
Availability		
Availability Date		
Manufacturer Name		
Manufacturer Part Number		
Price (Tier 1)		
Price (Tier 2)		
Price (Tier 3)		
Price (Tier 4)		
Price (Tier 5)		
Price (Tier 6)		

7c Finish Upload Cancel

7 c. Verify the data of the first five items uploaded and then click on **Finish Upload**

© CMC

6

Creation of a Supplier Catalog – By Supplier Contd.

Upload completed successfully **7d**

Upload completed successfully. 2 rows processed, creating 2 new rows and updating 0 rows.

[Done]

7 **d.** A success message will appear once the items have been uploaded successfully

Creation of a Supplier Catalog – By Supplier Contd.

8 The details of newly created items will be visible on the catalog creation page towards the bottom:

a. [x] Items Changed ([x] Unchanged): Total number of items that changed and did not change

b. Price Increase: Total number of items in the catalog that increased in price. New items don't appear in this count

c. Price Decrease : Total number of items in the catalog that decreased in price. New items don't appear in this count

d. Rejected Items: Total number of items that were rejected from inclusion in the catalog

e. Other Fields Updated: Total number of items that were modified in a way other than a change in price

f. New Items: Total number of new items included in the catalog since the last upload or creation of new items

g. Deactivated Items: Total number of items that are no longer available in the catalog or by searching within Coupa

Creation of a Supplier Catalog – By Supplier Contd.

9 The below details will be visible on the catalog creation page regarding any **Status Change** of newly created items:

a. New: The item is new and has not been offered to this customer before. If the item is already listed in Items offered to CMC, make sure the part number is correct since this is the unique identifier

b. Updated: The item has been updated and something has changed

c. Deactivated : The item is no longer available for purchase

10 **Items Offered to CMC –** this table lists all the items that have been accepted and published and are available in CMC's Coupa environment

11 Click on **Submit for Approval** to route the updated catalog for CMC review

12 A green success message will appear on screen once the catalog has been successfully submitted

Fields within the Catalog Template

Supplier to provide if available

Required for Suppliers to provide

Item Bulk Upload Template
This will help you fill out the fields in the item bulk loader.

Field	Requirement	Description
Item Type	Optional	A valid item type for Service Items
Supplier Part Num	Required	Supplier Part Number
Supplier Aux Part Num	Optional	Supplier Auxiliary Part Number
Name	Required	Item Short Name
Description	Required	Full Item Description
Price	Required	Item price for supplier
Currency	Required	Item price currency. Must exist and be active in Coupa.
UOM code	Required	A valid UOM code that has already been configured in Coupa
active	Required	Existing supplier items will be destroyed if set to No
Item Classification Name	Optional	Item Classification Name that has already been configured in Coupa
UNSPSC Code	Optional	United Nations Standard Products and Services Code
Lead Time	Optional	Items Lead Time in Days
Manufacturer	Optional	Manufacturer name
Contract Number	Optional	Contract Number. Must exist in coupa
Contract Term	Optional	The Contract Term by which the pricing tier is decided. Created beforehand in Coupa
Savings %	Optional	Savings %
Price (Tier 1)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 2)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 3)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 4)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 5)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 6)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 7)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 8)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 9)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased

Field	Requirement	Description
Price (Tier 10)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 11)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 12)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 13)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 14)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 15)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 16)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 17)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 18)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 19)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Price (Tier 20)	Optional	Price at different contract spend tiers. Typically goes down as more items are purchased
Image Url	Optional	A valid and publically accessible URL where a product image can be downloaded from
Link 0 Title	Optional	If adding URL Links, This is the Title of the Link
Link 0 URL	Optional	If adding URL Links, This is the URL of the Link
Link 1 Title	Optional	If adding URL Links, This is the Title of the Link
Link 1 URL	Optional	If adding URL Links, This is the URL of the Link
Link 2 Title	Optional	If adding URL Links, This is the Title of the Link
Link 2 URL	Optional	If adding URL Links, This is the URL of the Link
Link 3 Title	Optional	If adding URL Links, This is the Title of the Link
Link 3 URL	Optional	If adding URL Links, This is the URL of the Link
Link 4 Title	Optional	If adding URL Links, This is the Title of the Link
Link 4 URL	Optional	If adding URL Links, This is the URL of the Link
Link 5 Title	Optional	If adding URL Links, This is the Title of the Link
Link 5 URL	Optional	If adding URL Links, This is the URL of the Link
Image 0 Url	Optional	If adding images, This is a valid and publically accessible URL for an image

Fields within the Catalog Template

Image 1 Url	Optional	If adding images, This is a valid and publically accessible URL for an image
Image 2 Url	Optional	If adding images, This is a valid and publically accessible URL for an image
Image 3 Url	Optional	If adding images, This is a valid and publically accessible URL for an image
Image 4 Url	Optional	If adding images, This is a valid and publically accessible URL for an image
Image 5 Url	Optional	If adding images, This is a valid and publically accessible URL for an image
Use Pack Weight	Optional	Has the item calculate with the Pack Weight instead of item weight
Pack Quantity	Optional	Quanitity of items in a pack
Pack Weight	Optional	The weight of one pack
Pack Weight UOM	Optional	The UOM for a Pack
Net Weight	Optional	The weight of one item
Net Weight UOM	Optional	The UOM for one Item
Receive Catch Weight	Optional	Forces the item to be received as catch weight
Item Number	Optional	Item Identification Number

© CMC

11