

Managing Catalogs

A feature of Coupa is the ability to add commonly used items (i.e., rates) into a catalog. Catalogs allow for easy updating of rates, and these updates are automatically sent to ERCO for approval.

Creating New Catalog Items

If you have new items (rates) to provide ERCO, please reach out to your site contact for a copy of the rate template. You can also [find the template linked here](#).

Note: All rates on the template must be in the same currency.

	C	D	E	F	G	K	BO	BP	BQ	BI
1	Assign the name of the rate (will become the item name)	Assign the description of the rate (will become the item description)								
2	Name	Description	Price	Currency	Unit of Measure (Use dropdown)	Commodity (Use dropdown)				
3	Electrician - General Foreman - Regular Time	Electrician - General Foreman - Regular Time	100	USD	Hour	Electrical Contractors				
4	Electrician - Apprentice - Overtime	Electrician - Apprentice - Overtime	90	CAD	Hour	Electrical Contractors				
5	Scaffolder - Regular Time									

Step 1:
This is an example of the item (rate) template. Shaded in grey are two example rates for reference.

All columns marked in Green are required.

	C
1	Assign the name of the rate (will become the item name)
2	Name
3	Electrician - General Foreman - Regular Time
4	Electrician - Apprentice - Overtime
5	Scaffolder - Regular Time

Step 2:
Name

The Name field will be the name of the rate. Names should be concise and descriptive.

	C	D
1	Assign the name of the rate (will become the item name)	Assign the description of the rate (will become the item description)
2	Name	Description
3	Electrician - General Foreman - Regular Time	Electrician - General Foreman - Regular Time
4	Electrician - Apprentice - Overtime	Electrician - Apprentice - Overtime
5	Scaffolder - Regular Time	Minimum 2 scaffolders per job.

Step 3:
Description

The Description field can be used to provide more information about a rate, such as a minimum number of hours charged.

E	F
Price	Currency
100	USD
90	CAD
40.15	CAD

Step 4: Price and Currency

Enter the price for the rate, and select either CAD or USD as the currency.

Note: All rates on the template must be in the same currency.

E	F	G	
Price	Currency	Unit of Measure (Use dropdown)	Co
100	USD	Hour	Ele
90	CAD	Hour	Ele
40.15	CAD	Hour	
		Gallons	
		Gas Liter	
		Gross	
		Hour	
		Hours X Hours Worked	
		Hundred Cubic Feet	
		Hundred Feet	
		Hundred Gas Liter	

Step 5: Unit of Measure

ERCO has many units of measure pre-loaded for use, sorted in alphabetical order. This field is a dropdown, and you can select the appropriate unit of measure.

K
) Commodity (Use dropdown)
Electrical Contractors
Electrical Contractors
Civil Contractors
Civil Contractors
Electrical Contractors
Equipment Rental
Equipment Service Contractors
General Contractors
HVAC Contractors
Insulation Contractors
Specialized Contractors

Step 6: Commodity

Like the Unit of Measure field, this field is a dropdown. Please select the most appropriate Commodity for this rate.

AutoSave • ON | Coupa Contractor Rate Template.xlsx | Search

File Home Insert Page Layout Formulas Data Review View Developer Help

Clipboard Font Alignment Number Styles Cells Editing Analysis Sensitivity

BP19

	C	D	E	F	G	K	BO	BP	BQ	BI
1	<i>Assign the name of the rate (will become the item name)</i>		<i>Assign the description of the rate (will become the item description)</i>							
2	Name	Description	Price	Currency	Unit of Measure (Use dropdown)	Commodity (Use dropdown)				
3	Electrician - General Foreman - Regular Time	Electrician - General Foreman - Regular Time	100	USD	Hour	Electrical Contractors				
4	Electrician - Apprentice - Overtime	Electrician - Apprentice - Overtime	90	CAD	Hour	Electrical Contractors				
5	Scaffolder - Regular Time	Minimum 2 scaffolders per job.	40.15	CAD	Hour	Civil Contractors				
6	Scaffolder - Overtime	Minimum charge of 2 hours overtime. Minimum 2 scaf	60.23	CAD	Hour	Civil Contractors				
7	Scaffolding Equipment - Daily Fee	Scaffolding Equipment - Daily Fee	200	CAD	Days	Equipment Rental				
8	Pipefitter - Regular Time	Pipefitter - Regular Time	45	CAD	Hour	General Contractors				
9	Pipefitter - Overtime	Pipefitter - Overtime	60	CAD	Hour	General Contractors				
10	Pipefitter Foreman - Regular Time	Pipefitter Foreman - Regular Time	55	CAD	Hour	General Contractors				
11	Pipefitter Foreman - Overtime	Pipefitter Foreman - Overtime	75	CAD	Hour	General Contractors				
12	Mileage	Mileage fee for contractors travelling to site.	0.3	CAD	Kilometers	General Contractors				
13										
14										
15										
16										
17										
18										
19										
20										
21										
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24										
25										
26										
27										

Catalog Load Template 03-09-21 (View Only) Commodity List (View Only) UOM

Step 7:
 When you have completed the template, save and send to your ERCO contact. They will work with the ERCO Coupa Administrators to load your rates.

Manually Editing Rates


Note: This is more appropriate for editing a small number of rates. If you wish to edit many rates, please refer to the [Catalog Bulk Uploading section](#).

You can reach the Catalogs by clicking the “Catalogs” tab at the top of any page in Coupa:



	<p>Step 1: Navigate to Catalogs ensure that the selected customer is “ERCO Worldwide”.</p> <p>Click “Create”.</p>																																								
<h3>Test Catalog <small>Edit</small></h3> <p>Customer ERCO Worldwide (Test)</p> <p>* Catalog Name <input type="text" value="Test Catalog"/></p> <p>Status Draft</p> <p>Start Date <input type="text" value="2020-12-01"/> date when catalog prices become effective</p> <p>Expiration Date <input type="text" value="2020-12-31"/> date when catalog prices become expired</p> <p>Currency <input type="text" value="CAD"/></p> <p>Items Offered to ERCO Worldwide (Test)</p> <table border="1"><thead><tr><th>Name</th><th>Description</th><th>Part Number</th><th>Price</th><th>Currency</th><th>UOM</th><th>Purchasable</th><th>Last Submitted to Buyer</th><th>Catalog</th><th>Actions</th></tr></thead><tbody><tr><td>Waste Disposal</td><td>Waste Disposal</td><td>123456-000001</td><td>500.00</td><td>CAD</td><td>Each</td><td>Yes</td><td>2021-04-12</td><td>SAMPLE CATALOG</td><td></td></tr><tr><td>Hourly Rate</td><td>Hourly rate for demo purposes</td><td>123456-000002</td><td>30.00</td><td>CAD</td><td>Hour</td><td>Yes</td><td>2021-04-09</td><td>SAMPLE CATALOG</td><td></td></tr><tr><td>Construction Material</td><td>Generic rate for demo purposes</td><td>123456-000003</td><td>100.00</td><td>CAD</td><td>Each</td><td>Yes</td><td>2021-04-09</td><td>SAMPLE CATALOG</td><td></td></tr></tbody></table>	Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions	Waste Disposal	Waste Disposal	123456-000001	500.00	CAD	Each	Yes	2021-04-12	SAMPLE CATALOG		Hourly Rate	Hourly rate for demo purposes	123456-000002	30.00	CAD	Hour	Yes	2021-04-09	SAMPLE CATALOG		Construction Material	Generic rate for demo purposes	123456-000003	100.00	CAD	Each	Yes	2021-04-09	SAMPLE CATALOG		<p>Step 2: At the top of the page, you will be prompted to enter details such as the catalog name, the Start and End dates, and the currency.</p> <p>Further down the page, you can see the list of items to include in this catalog, and a list of items previously entered into other catalogs.</p>
Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions																																
Waste Disposal	Waste Disposal	123456-000001	500.00	CAD	Each	Yes	2021-04-12	SAMPLE CATALOG																																	
Hourly Rate	Hourly rate for demo purposes	123456-000002	30.00	CAD	Hour	Yes	2021-04-09	SAMPLE CATALOG																																	
Construction Material	Generic rate for demo purposes	123456-000003	100.00	CAD	Each	Yes	2021-04-09	SAMPLE CATALOG																																	

Items Offered to ERCO Worldwide (Test)

Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions
Waste Disposal	Waste Disposal	123456-000001	500.00	CAD	Each	Yes	2021-04-12	SAMPLE CATALOG	

Step 3:
Update an existing item.

You can click on the pencil icon on an item in the section “Items Offered to ERCO Worldwide” to edit an existing item.

You can use the Search to more quickly find an item you wish to update.

Waste Disposal Edit

* Name

* Description

* Unit of Measure

Purchasable



Browse... No file selected.

Manufacturer Name

Manufacturer Part Number

Supplier Item Attributes

* Part Number

Auxiliary Part Number

Manufacturer

Lead Time

Unspsc Code

Contract

Pricing Type

* Price

* Currency

Savings %

Order Increment

Minimum Order Quantity







Cancel

Save



Step 4:
The following screen will appear. You can make the needed changes to the item (fields marked in **Green**) and click “Save”. The item will be added to the new catalog.

Please do not remove the “UNSPSC code” or the “Contract” from the item, or change the Currency (marked in **Red).**

1 Item Changed (2 unchanged)

 1 Price Increase	 0 Price Decrease	 0 Rejected Items
 0 Other Fields Updated	 0 New Items	 0 Deactivated Items

Items Included in Catalog

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
Waste Disposal	123456-000001	<u>Updated</u>	600.00	<u>20.00 %</u>	CAD			 

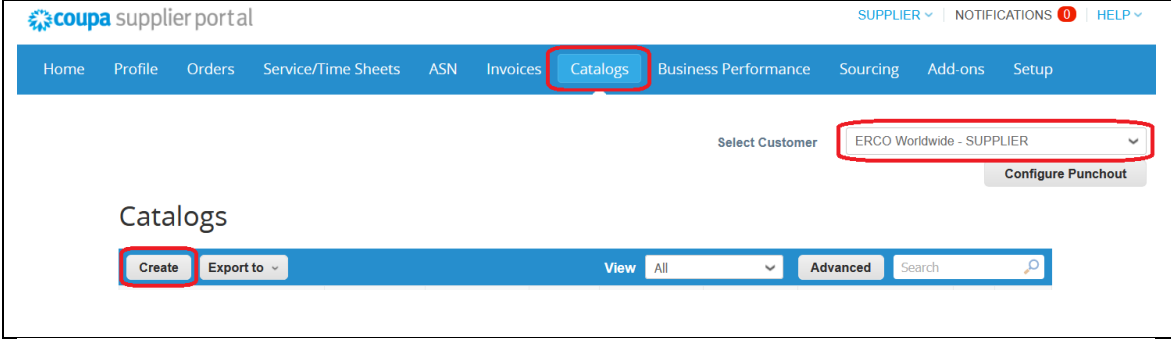
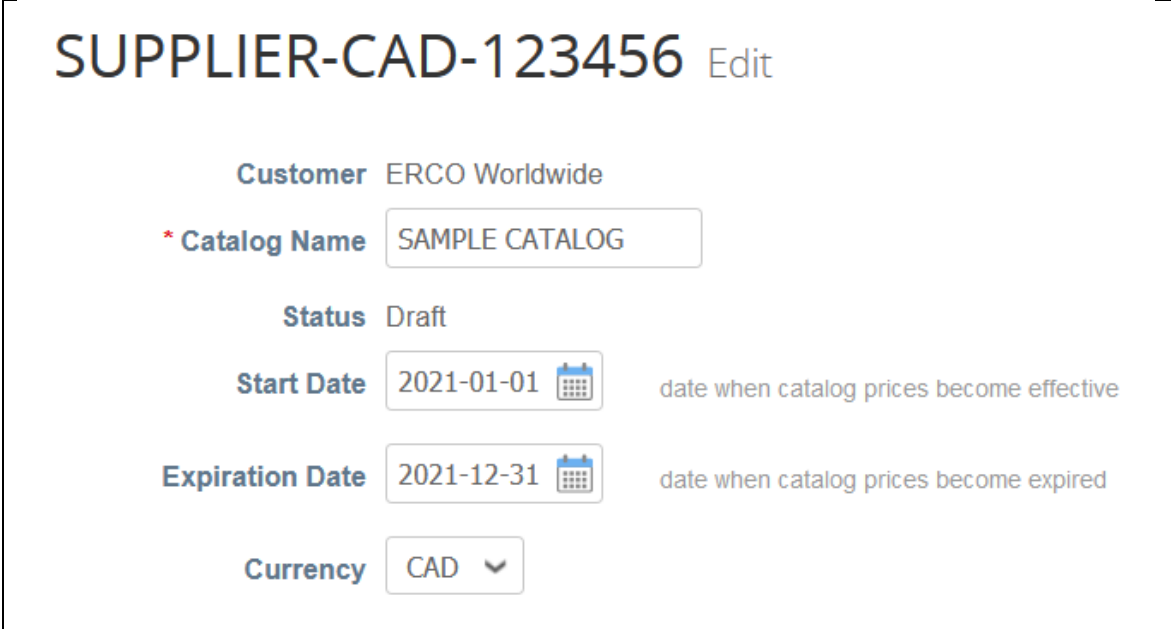
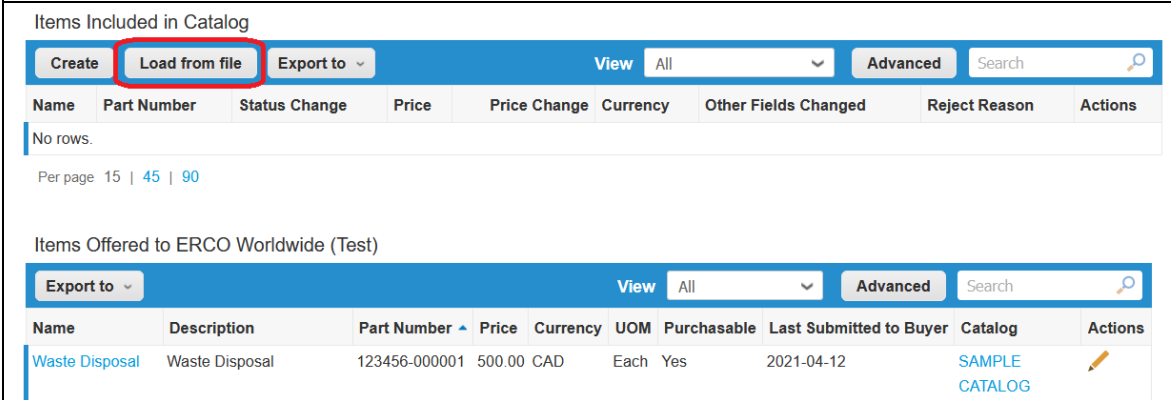
Step 5:
You can see a summary of changes under the Header “Items Included in Catalog”.

When you have updated all items, you can submit the catalog to ERCO by clicking “Submit for Approval”.

Once the catalog has been reviewed and approved by ERCO, you can begin to use the items when invoicing ERCO.

Catalog Bulk Updating

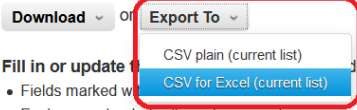
Once your catalog has been uploaded by an ERCO, you have the option to manage your rates in bulk. Bulk-updating rates is preferable when you have more than a few rates to update.

 <p>The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs' (highlighted with a red box), 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below the navigation bar, there is a 'Select Customer' dropdown menu with 'ERCO Worldwide - SUPPLIER' selected (highlighted with a red box). A 'Configure Punchout' button is visible next to the dropdown. The main heading is 'Catalogs'. Below the heading, there is a 'Create' button (highlighted with a red box) and an 'Export to' dropdown menu. There are also 'View' and 'Advanced' options, and a search bar.</p>	<p>Step 1: Navigate to Catalogs ensure that the selected customer is “ERCO Worldwide”.</p> <p>Click “Create”.</p>
 <p>The screenshot shows the 'SUPPLIER-CAD-123456 Edit' page. The customer is 'ERCO Worldwide'. The 'Catalog Name' is 'SAMPLE CATALOG'. The status is 'Draft'. The start date is '2021-01-01' and the expiration date is '2021-12-31'. The currency is 'CAD'. There are calendar icons next to the date fields and explanatory text: 'date when catalog prices become effective' and 'date when catalog prices become expired'.</p>	<p>Step 2: Fill out the catalog name, start and end dates (if applicable), and the currency.</p>
 <p>The screenshot shows two sections: 'Items Included in Catalog' and 'Items Offered to ERCO Worldwide (Test)'. The 'Items Included in Catalog' section has a 'Load from file' button (highlighted with a red box) and an 'Export to' dropdown. Below it is a table with columns: Name, Part Number, Status Change, Price, Price Change, Currency, Other Fields Changed, Reject Reason, and Actions. The table is empty with the text 'No rows.' and 'Per page 15 45 90'. The 'Items Offered to ERCO Worldwide (Test)' section has an 'Export to' dropdown and a table with columns: Name, Description, Part Number, Price, Currency, UOM, Purchasable, Last Submitted to Buyer, Catalog, and Actions. The table contains one row: 'Waste Disposal' with description 'Waste Disposal', part number '123456-000001', price '500.00', currency 'CAD', UOM 'Each', purchasable 'Yes', last submitted '2021-04-12', and catalog 'SAMPLE CATALOG'.</p>	<p>Step 3: About halfway down the page, under the “Items Included in Catalog” section, click on “Load from file”.</p>

Bulk Load Item Updates for Test Catalog

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. **Fill in or update** the CSV file with the description of the required and optional fields in the template.

- Fields marked with an asterisk (*) are required.
- 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](#).

Step 4:

You can export the list of all items to a .csv file by clicking on “Export To”, then either “CSV plain” or “CSV for Excel”.

This will download a list of all items loaded.

	A	B	C	D	E	F	G	H	I	J	K
1	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*	Item Classification Name	UNSPSC Code	Lead Time
2	123456-000001		Waste Disposal	Waste Disposal	500	CAD	EA	Yes		72110000	
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											

Step 5:

A CSV file will be created with your rates.

You can edit the prices in column E. Please do not edit columns other than column E.

Note: CSV files do not retain any formatting changes you may apply (including multiple worksheets)

	A	B	C	D	E	F	G	H	I	J	K
1	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*	Item Classification Name	UNSPSC Code	Lead Time
2	123456-000001		Waste Disposal	Waste Disposal	600	CAD	EA	Yes		72110000	
3											
4											
5											
6											
7											
8											
9											
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Step 6:

When you have edited the price, save the file in an accessible folder. This is the file you will upload to update your rates in Coupa.

Bulk Load Item Updates for Test Catalog

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**

item_list.csv

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

Step 7:

On the page in Coupa where you exported your rates, load the updated file, then click "Start Upload".

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.

The CSV Field Separator is the Comma (,) character. You can change it in the [Language and Region Settings](#).

Row 1

	Existing	Updated
Supplier Part Num*	123456-000001	123456-000001
Supplier Aux Part Num		
Name*	Waste Disposal	Waste Disposal
Description*	Waste Disposal	Waste Disposal
Price*	500	600
Currency*	CAD	CAD
UOM code*	EA	EA
active*	Yes	Yes


Step 8:

You will see a short summary of the rates that are changing with this upload. Look over this summary to make sure only what you have edited is highlighted in orange.

Note: Coupa will only show the first 6 rates here as a preview. If everything looks correct, click "Finish Upload" at the bottom of the page.

Loading items

Filename: item_list.csv

Status: Loading 

Rows Processed:

The CSV Field Separator is the Comma (,) character. You can change it in the [Language and Region Settings](#).

Upload completed successfully

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



Step 9:

Coupa will automatically process your rates. This may take a few minutes, depending on how many rates were included in your file.

When the upload is complete, you will see the message "Upload completed successfully".

Save **Submit to buyer**

Items Included in Catalog

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
Waste Disposal	100385-00000	Updated	600.00	20.00 %	USD		 

Per page 15 | 45 | 90

Step 10:
Confirm that the items included appear correctly under the header “Items Included in Catalog”. You will see a percent change from the previous revision, if applicable.

Click “Submit to Buyer” to send these rates to ERCO for evaluation.