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.

	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.
	Step 2: Name The Name field will be the name of the rate. Names should be concise and descriptive.
	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	Co
Price	**Currency**	**Unit of Measure (Use dropdown)**	Ele
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.

Name	Description	Price	Currency	Unit of Measure (Use dropdown)	Commodity (Use dropdown)
Electrician - General Foreman - Regular Time	Electrician - General Foreman - Regular Time	100	USD	Hour	Electrical Contractors
Electrician - Apprentice - Overtime	Electrician - Apprentice - Overtime	90	CAD	Hour	Electrical Contractors
Scaffolder - Regular Time	Minimum 2 scaffolders per job.	40.15	CAD	Hour	Civil Contractors
Scaffolder - Overtime	Minimum charge of 2 hours overtime. Minimum 2 scaf	60.23	CAD	Hour	Civil Contractors
Scaffolding Equipment - Daily Fee	Scaffolding Equipment - Daily Fee	200	CAD	Days	Equipment Rental
Pipefitter - Regular Time	Pipefitter - Regular Time	45	CAD	Hour	General Contractors
Pipefitter - Overtime	Pipefitter - Overtime	60	CAD	Hour	General Contractors
Pipefitter Foreman - Regular Time	Pipefitter Foreman - Regular Time	55	CAD	Hour	General Contractors
Pipefitter Foreman - Overtime	Pipefitter Foreman - Overtime	75	CAD	Hour	General Contractors
Mileage	Mileage fee for contractors travelling to site.	0.3	CAD	Kilometers	General Contractors

Note: Column C header: "Assign the name of the rate (will become the item name)". Column D header: "Assign the description of the rate (will become the item description)".

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:

	Step 1: Navigate to Catalogs ensure that the selected customer is "ERCO Worldwide". Click "Create".
	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. 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.

Items Offered to ERCO Worldwide (Test)

Export to ⌄				View	All ⌄	**Advanced**	Search 🔍		

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**	Waste Disposal
* **Description**	Waste Disposal
* **Unit of Measure**	Each ⌄
Purchasable	☑
Manufacturer Name	
Manufacturer Part Number	

📷

Browse... No file selected.

Supplier Item Attributes

* **Part Number**	123456-000001
Auxiliary Part Number	
Manufacturer	
Lead Time	
Unspsc Code	72110000
Contract	SAMPLE CONTRACT ⌄
Pricing Type	Fixed Price ⌄
* **Price**	500.00
* **Currency**	CAD ⌄
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).
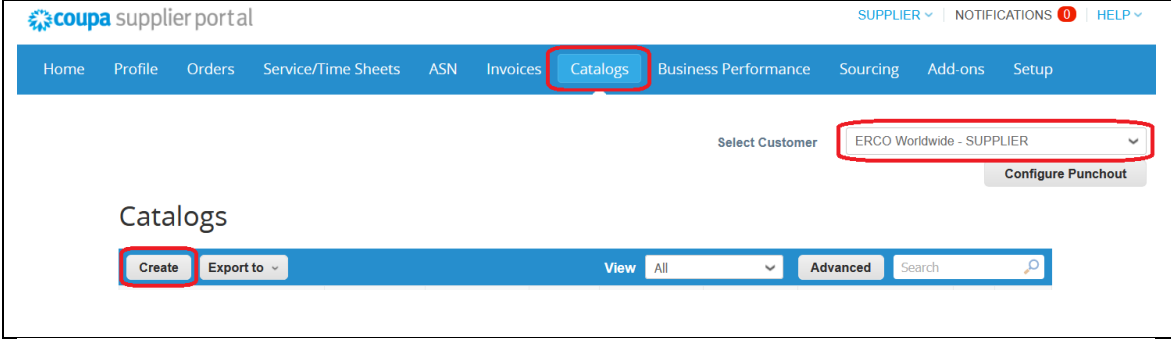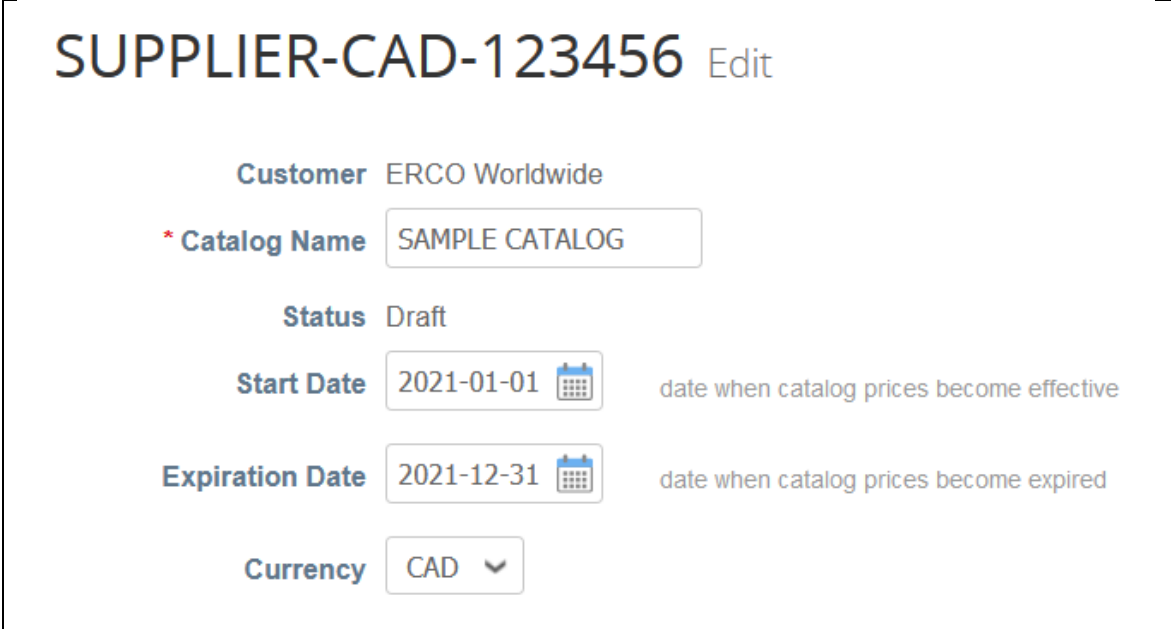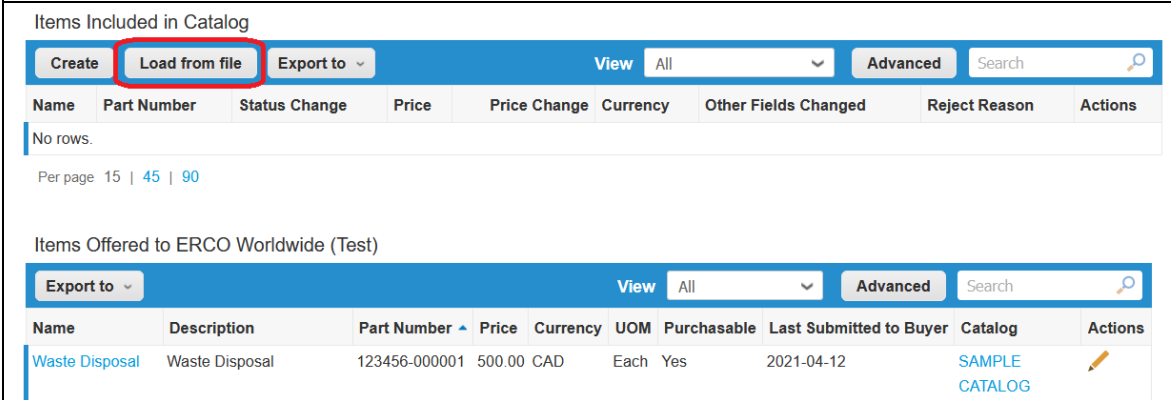
Step 5:
You can see a summary of changes under the Header "Items Included in Catalog".

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.
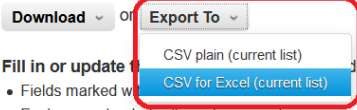
Catalog Bulk Updating

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

Step 1:
Navigate to Catalogs ensure that the selected customer is "ERCO Worldwide".

Click "Create".

Step 2:
Fill out the catalog name, start and end dates (if applicable), and the currency.

Step 3:
About halfway down the page, under the "Items Included in Catalog" section, click on "Load from file.

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.

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)

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

   [Start Upload]

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.

	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

[Finish Upload]   [Cancel]

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".

Items Included in Catalog

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

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

Save   **Submit to buyer**

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.