How to Create a Supplier Managed Hosted Catalog

In this job aid:

✓ **How to Create a Supplier Managed Hosted Catalog in the Coupa Supplier Portal (CSP)**

This document is a step-by-step guide on creating Supplier Managed Hosted catalogs via the CSP. Supplier Managed Hosted catalogs allow a supplier to submit items directly to DaVita to make available to Teammates for purchase.

Supplier Managed Hosted Catalog Overview

- Navigate to the Catalogs window within the CSP
- Add items to your catalog
- Submit the catalog to DaVita for Approval
- Manage/update your catalog
- If you have questions regarding the CSP, please refer to our Procurement webpage, https://www.davita.com/about/suppliers.

Process – Navigate to Create New Catalog Window

1. Login to the Coupa Supplier Portal (https://supplier.coupahost.com). On the homepage, click on the "Catalogs" tab.
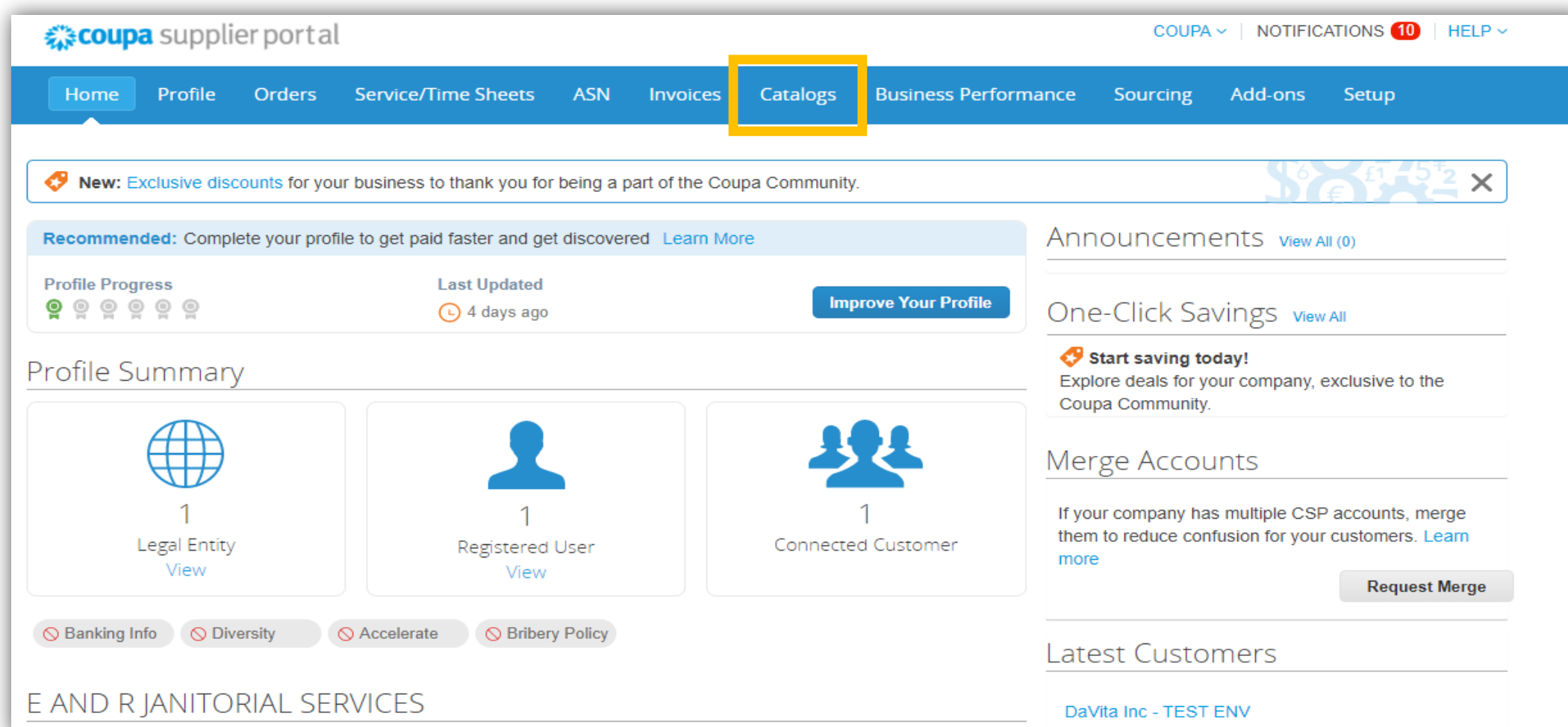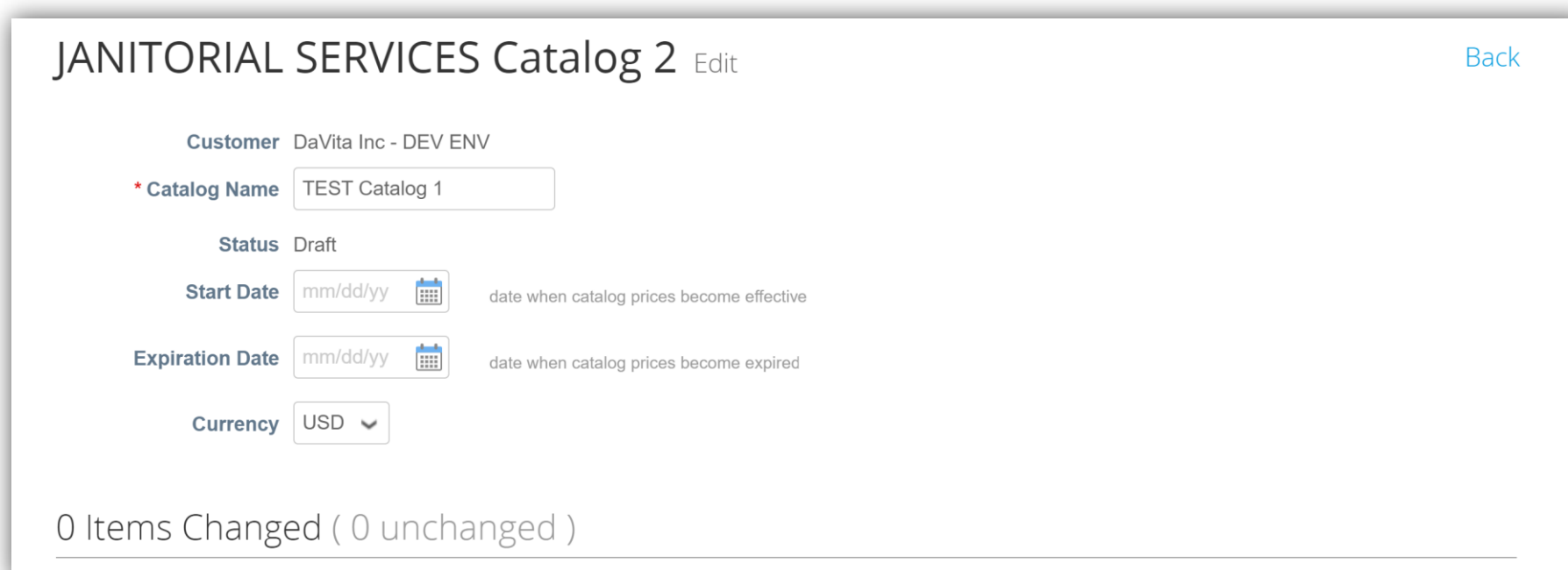
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Process – Navigate to Create New Catalog Window

2. Select Customer "Davita Inc"

3. Click Create.
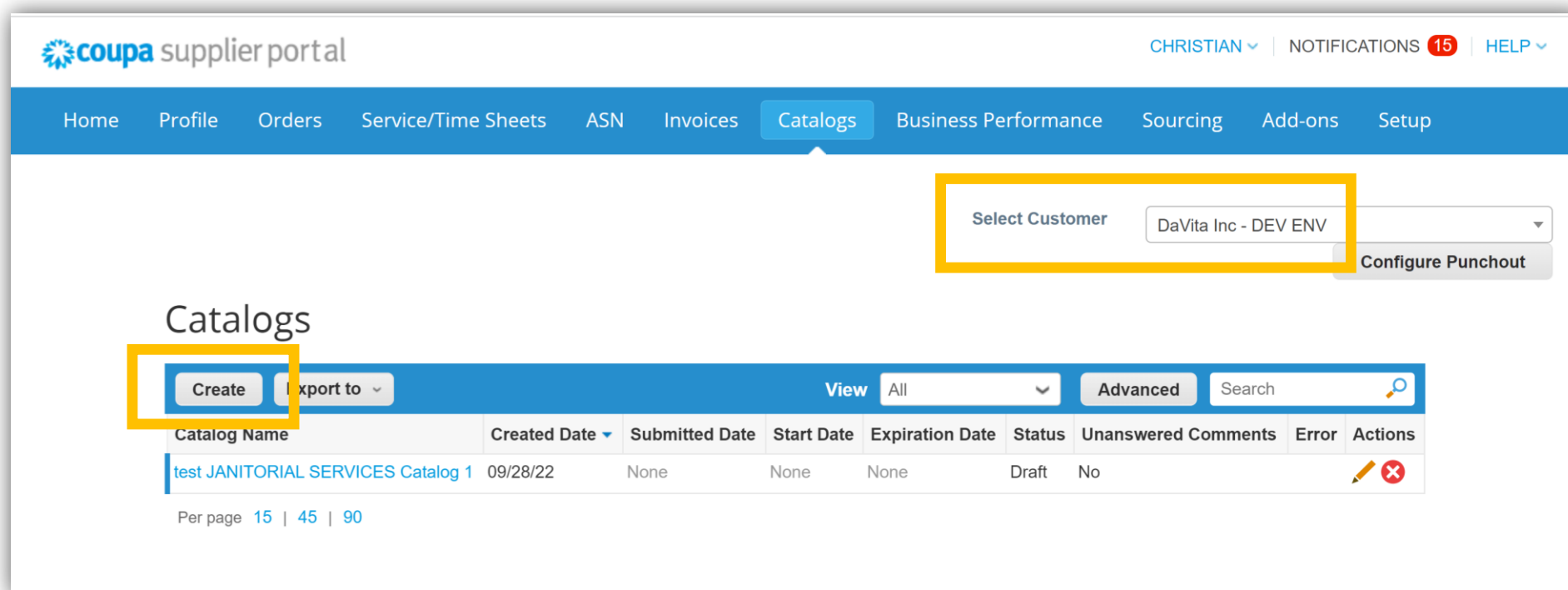
3. After clicking on the create button, Coupa will display the catalog workbench which highlights all your items on one page. Start Date and End Date are not required fields.

Process – Add Items to the New Catalog

1. You are allowed to create items individually and via the bulk upload option.

2. If you are submitting more than 10 items, we recommend using bulk upload.

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Process – Add Items to the New Catalog

3. To upload individual items, click on the create button.

4. Fill in all mandatory fields highlighted with a red asterisk. UNSPSC is also a mandatory field for DaVita that must be filled in – all other fields are optional.

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Process – Add Items to the New Catalog

5. To upload multiple items, click "Load from file".

6. Click "Export" to download item upload template. Fill out the template with necessary items.

7. Load the updated file by clicking "Choose File" and select "Start Upload".

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Process – Add Items to the New Catalog

8. If there is an error in the header row or one of the first 6 rows is not formatted correctly, Coupa will notify the user of the error and require it to be fixed before upload can be completed.

9. Verify your data – Coupa will show the first few rows of data from the file that was uploaded. Only updated data will appear in orange. For example, if you reupload an item with a price change and all other fields left unchanged, the new price would be the only value highlighted in orange for that row.

10. After you have verified data for the first few rows of your file, scroll to the bottom of the page and select "Finish Upload."

11. Coupa will indicate successfully loaded items.

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Process – Add Items to the New Catalog

12. The Items Changed section will update. Add, remove, or edit individual catalog items as needed.

Process – Submit Catalog for DaVita Review

1. After creating all items for the catalog, please click on the "Submit for Approval" button which will send to DaVita for review.

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Process – Submit Catalog for DaVita Review

2. Monitor the status of your submitted catalog(s) in the "Catalogs" window.
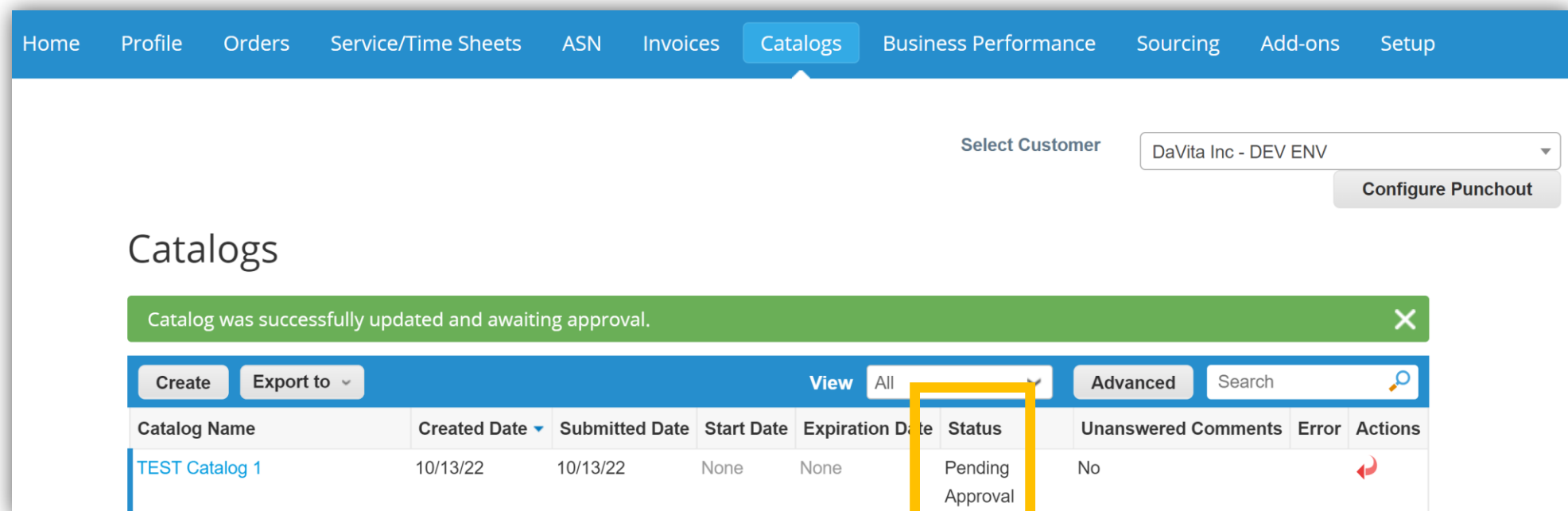
Process – Manage/Update Items Available to DaVita

1. Approved catalogs containing items available for purchase by DaVita Teammates will have the "Accepted by Customer" status in the CSP.

2. To edit items in the catalog or to add new items to the catalog, click "Create" to build a new Catalog.
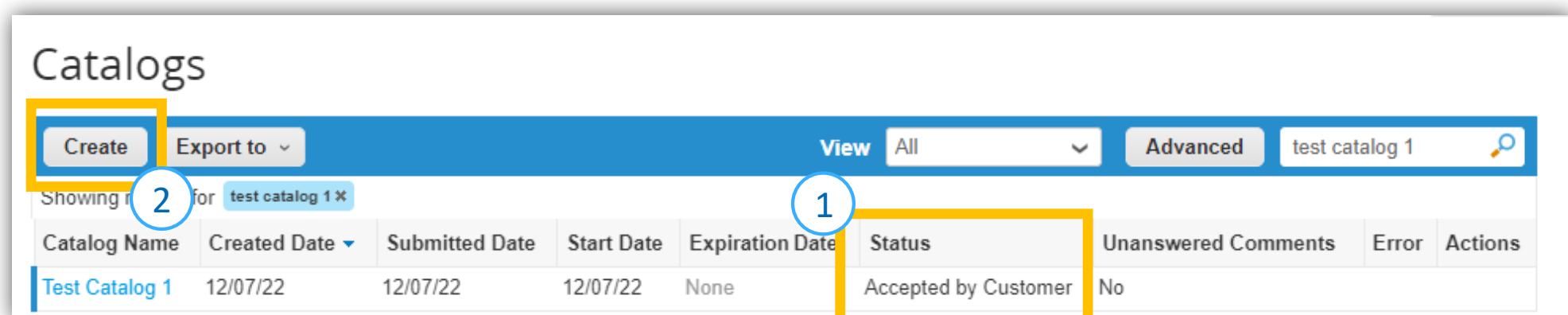

3. A new catalog will open ("Test Catalog 2" in this of interest. In this example, the description and price fields for "Test Item 2" will be updatedexample), scroll down to the bottom and you will see all the items that are currently offered to DaVita, including the catalog associated with each item.

4. To edit an item already in your catalog, select the pencil icon next to the item .
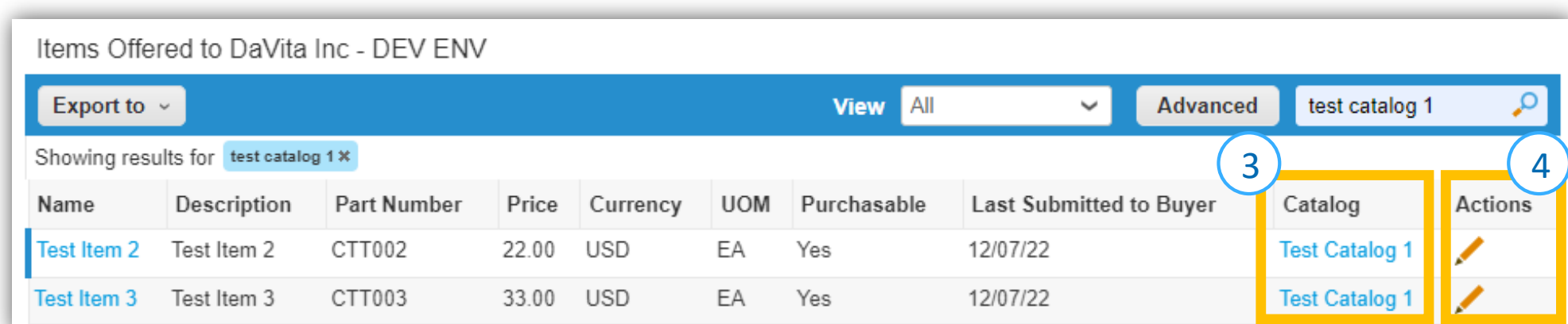
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Process – Manage/Update Items Available to DaVita

4. An edit window will open for the selected item.

5. Notice all fields can be updated except for part number, this is because a new part number would indicate a new item.

6. In this example, the values for "Description" and "Price" were updated.

7. Make sure all mandatory fields highlighted with a red asterisk are filled in. UNSPSC is also a mandatory field for DaVita that must be filled – all other fields are optional.

8. When satisfied with your updates, scroll to the bottom and select "Save".

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Process – Manage/Update Items Available to DaVita

9.   The CSP will return to the window for your new catalog, "Test Catalog 2" in this example.

10. Scroll down to view the "Items Included in Catalog" section which will include all updated and new catalog items.

11. Note that the CSP indicates which fields have been changed for updated items.

12. The "Items Offered to DaVita Inc" section will show all currently approved items available to DaVita Teammates for purchasing. Note the pricing difference between the recently updated item and the currently active price available to DaVita Teammates to purchase "Test Item 2".

13. If needed, add new items to the catalog individually by selecting "Create". As covered on page 4 of this job aid, items can also be mass uploaded to the catalog by selecting "Load from file".

14. Review all updated and new catalog items and send to DaVita by selecting "Submit for Approval".
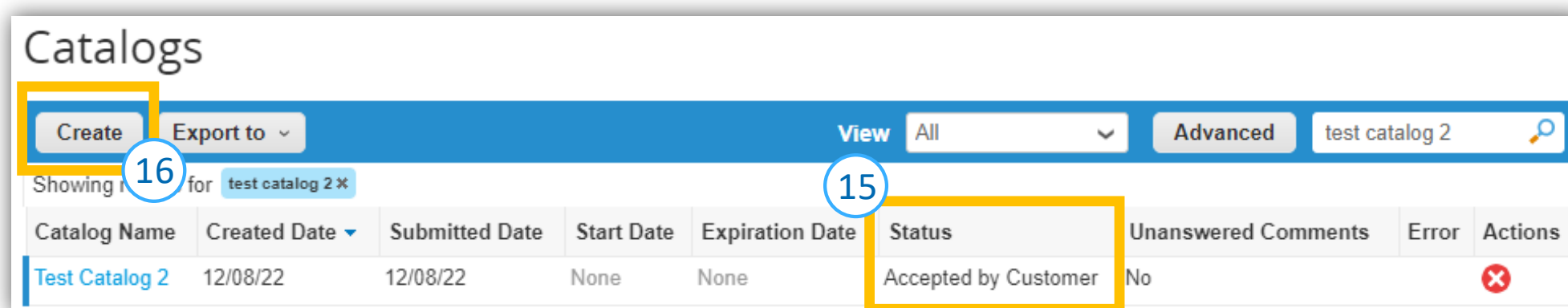
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Process – Manage/Update Items Available to DaVita

15. Once the catalog has been approved by DaVita, you will see the "Accepted by Customer" status in the CSP.

16. To view all items available to DaVita or to make additional catalog edits, select "Create" within the "Catalogs" window.

17. A new catalog will open ("Test Catalog 3" in this example), scroll down to the bottom and you will see all the items that are currently available to DaVita, including the catalog associated with each item.
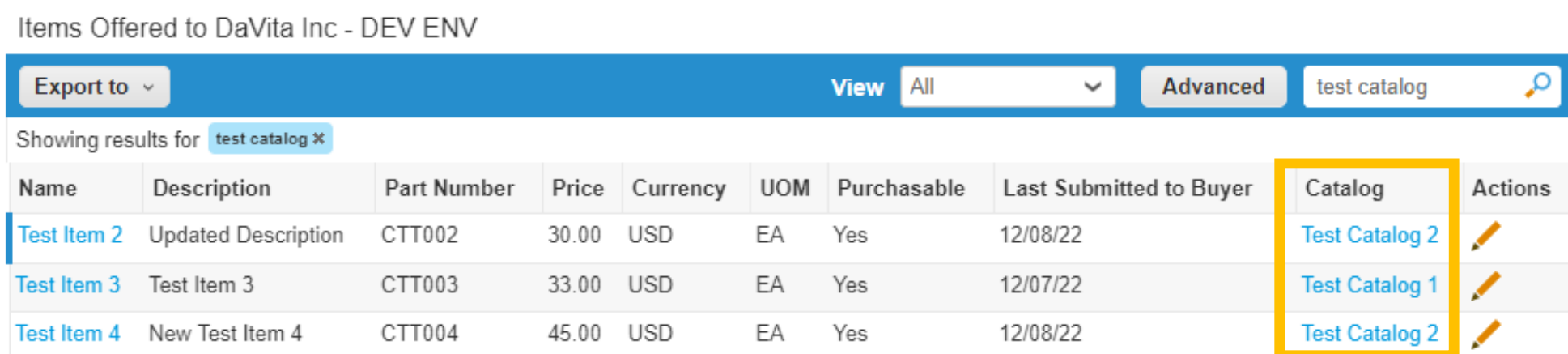
18. If there are no other necessary catalog edits at this time, return to the "Catalogs" window.

19. You will see a new catalog appear as a draft. This is because every time you select to "Create" a new catalog, the CSP will make a new catalog and save it as a draft until it is deleted or submitted.

20. Keep the number of "Draft" catalogs to a minimum by selecting the edit/pencil icon next to the draft catalog instead of selecting "Create".