

Job Aid – Supplier: How to Create a Hosted Catalog – Coupa Tool

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)**

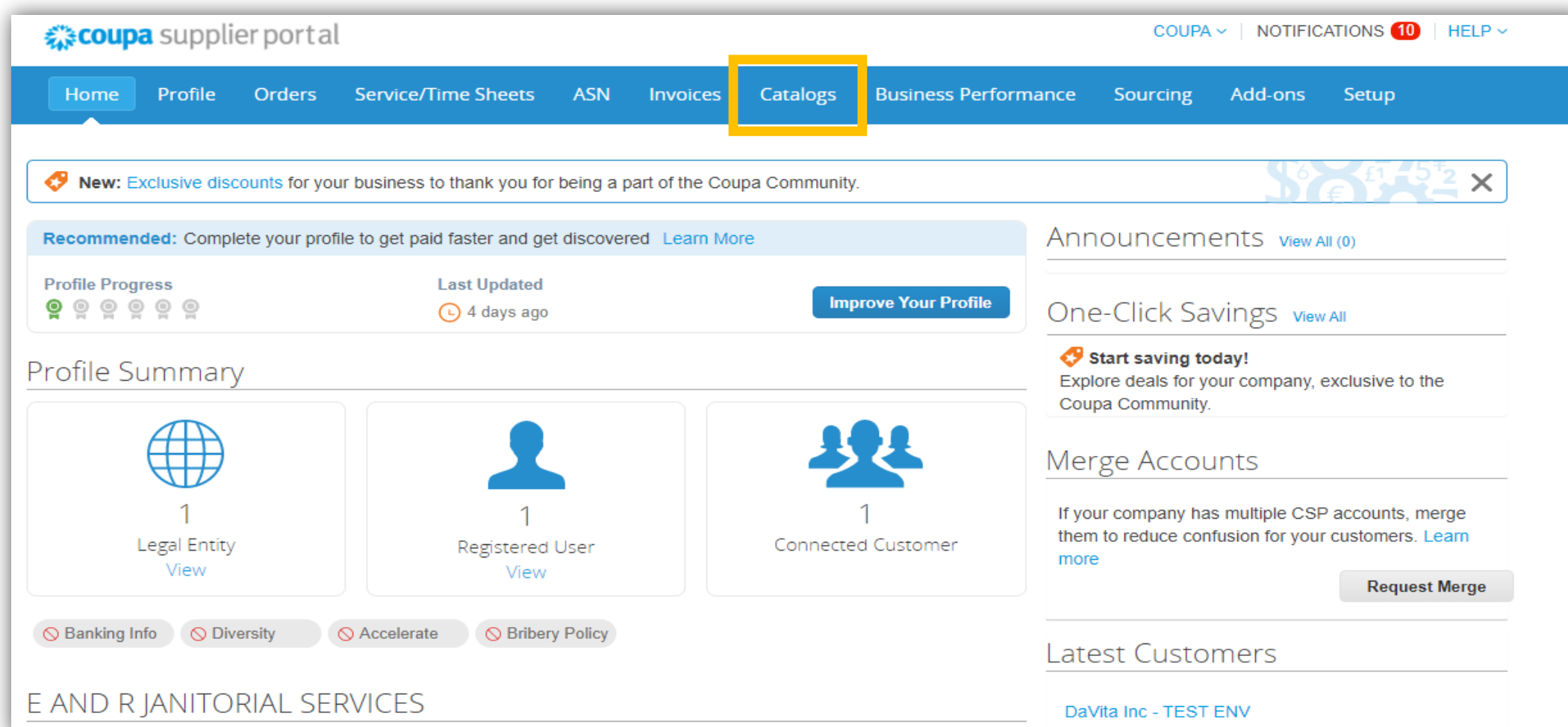
This document is a step-by-step guide on creating Supplier Managed Hosted catalogs via the CSP. Supplier Managed Hosted catalogs allow a supplier to submit items directly to DaVita to make available to Teammates for purchase.

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.coupa.com>). On the homepage, click on the “Catalogs” tab.

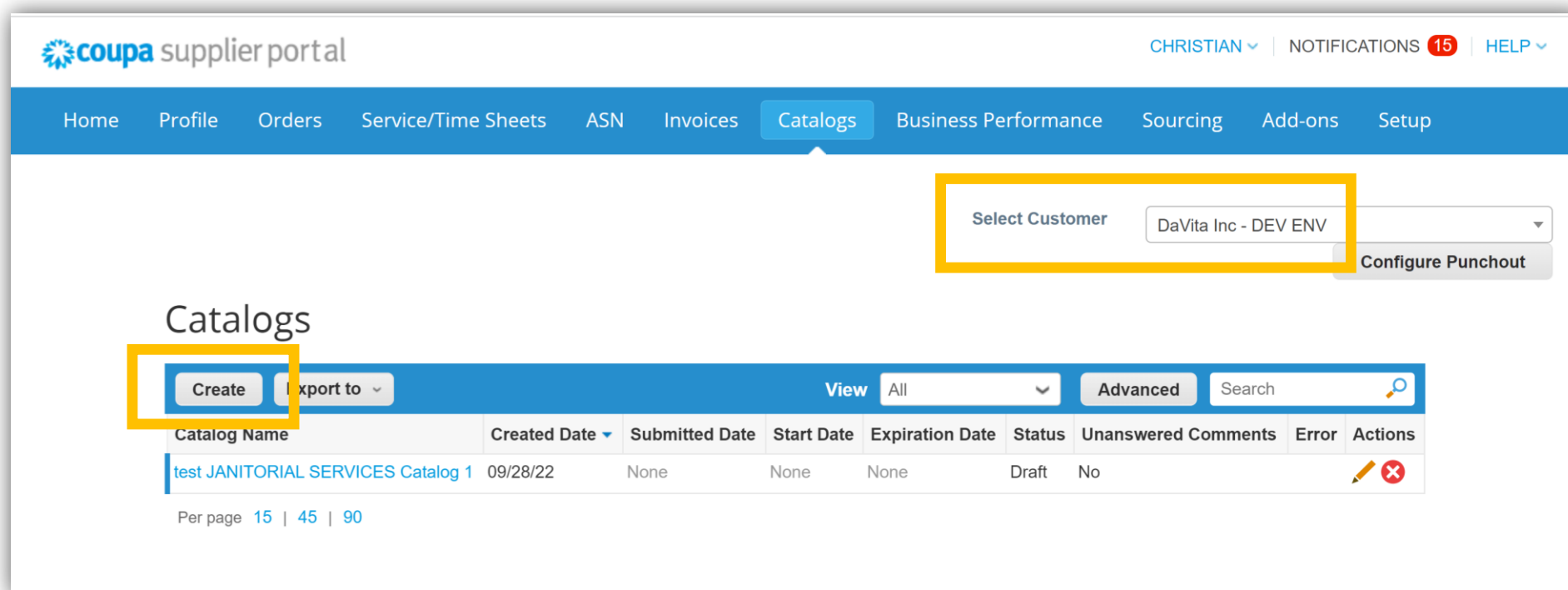


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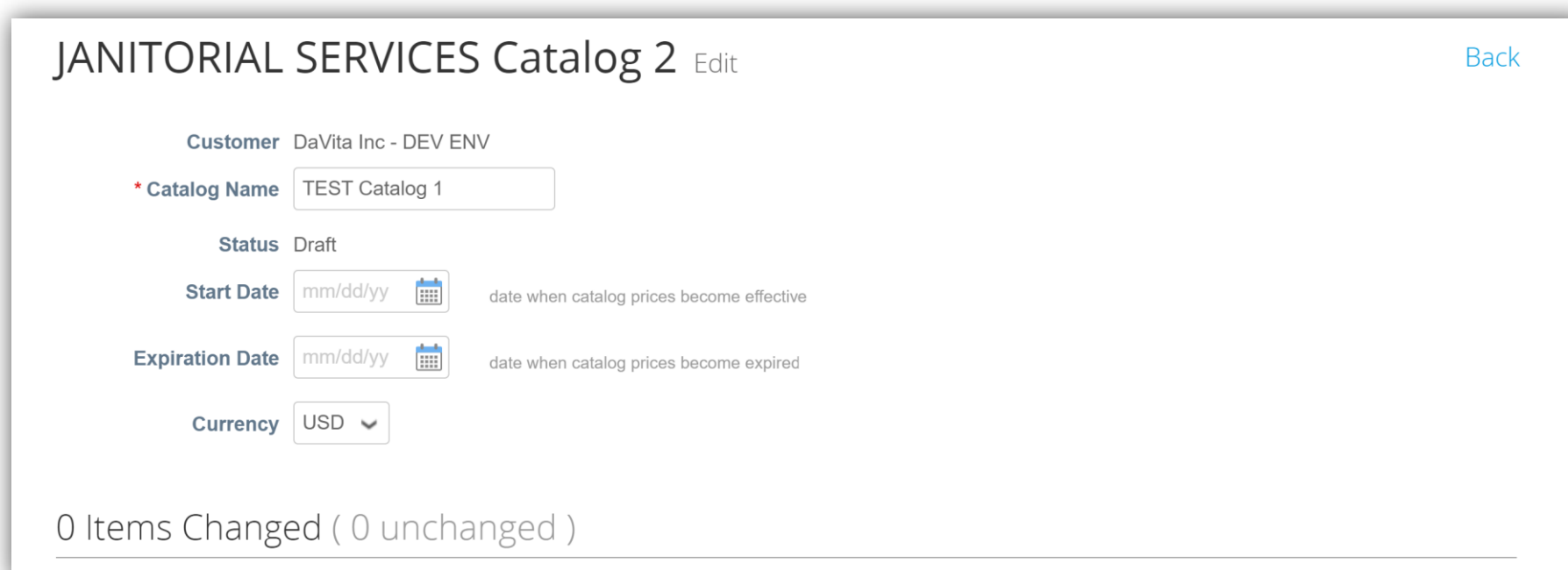
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Process – Navigate to Create New Catalog Window

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

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

Items Included in Catalog

Save Submit for Approval

Create Load from file Export to View All Advanced Search

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

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Items Offered to DaVita Inc - DEV ENV

Export to View All Advanced Search

Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions
No rows.									

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- 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.

Catalog Item Create

* Name Item 1

* Description Test Item Number 1

* Unit of Measure EA

Purchasable

Manufacturer Name

Manufacturer Part Number

Catalog Attachment Choose File No file chosen

Supplier Item Attributes

* Part Number 12345678

Auxiliary Part Number

Manufacturer

Lead Time

UNSPSC

Contract

Pricing Type Fixed Price

* Price 100.00

* Currency USD

Savings %

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Process – Add Items to the New Catalog

- To upload multiple items, click “Load from file”.

Items Included in Catalog

Save Submit for Approval

Create Load from file Export to View All Advanced Search

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

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Items Offered to DaVita Inc - DEV ENV

Export to View All Advanced Search

Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions
No rows.									

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- Click “Export” to download item upload template. Fill out the template with necessary items.
- Load the updated file by clicking “Choose File” and select “Start Upload”.

Select Customer DaVita Inc - DEV ENV Configure Punchout

Bulk Load Item Updates for TEST Catalog 1

Follow these steps to upload items

- Download the CSV template, or export the current list (Based on the CSV File Field Separator in your Language and Region settings.)
Download Export To
- 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.
- 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

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Process – Add Items to the New Catalog

- 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.
- 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.

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 New	Row 2 New
Supplier Part Num*	TESTING-12345	TESTING-12346
Supplier Aux Part Num		
Name*	Test Item 1	Test Item 2
Description*	Test Item 1	Test Item 2
Price*	100	101
Currency*	USD	USD
UOM code*	EA	EA
active*	Yes	Yes
Item Classification Name		

- After you have verified data for the first few rows of your file, scroll to the bottom of the page and select “Finish Upload.”
- Coupa will indicate successfully loaded items.

Upload completed successfully

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

Done

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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.

2 Items Changed (0 unchanged)

0
Price Increase

0
Price Decrease

0
Rejected Items

0
Other Fields Updated

2
New Items

0
Deactivated Items

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	Reject Reason	Actions
Test Item 1	TESTING-12345	New	100.00		USD			
Test Item 2	TESTING-12346	New	101.00		USD			

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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.

2 Items Changed (0 unchanged)

0
Price Increase

0
Price Decrease

0
Rejected Items

0
Other Fields Updated

2
New Items

0
Deactivated Items

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	Reject Reason	Actions
Test Item 1	TESTING-12345	New	100.00		USD			
Test Item 2	TESTING-12346	New	101.00		USD			

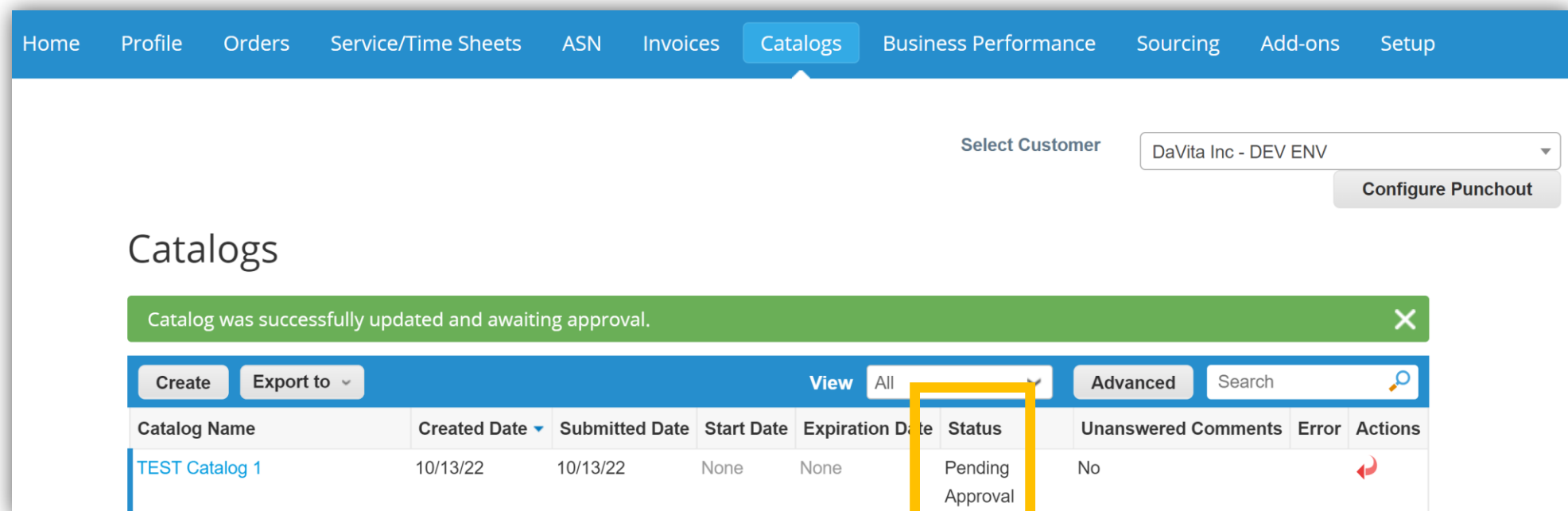
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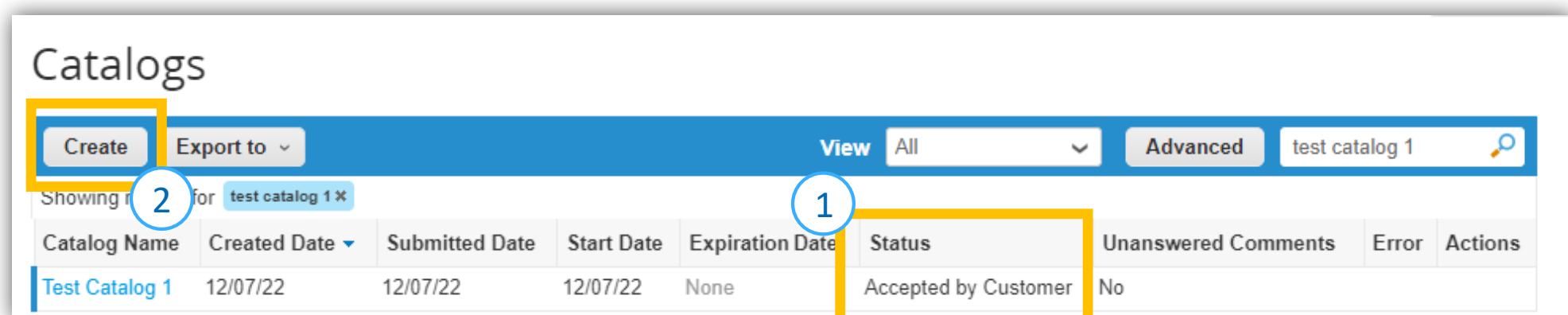
Process – Submit Catalog for DaVita Review

2. Monitor the status of your submitted catalog(s) in the “Catalogs” window.

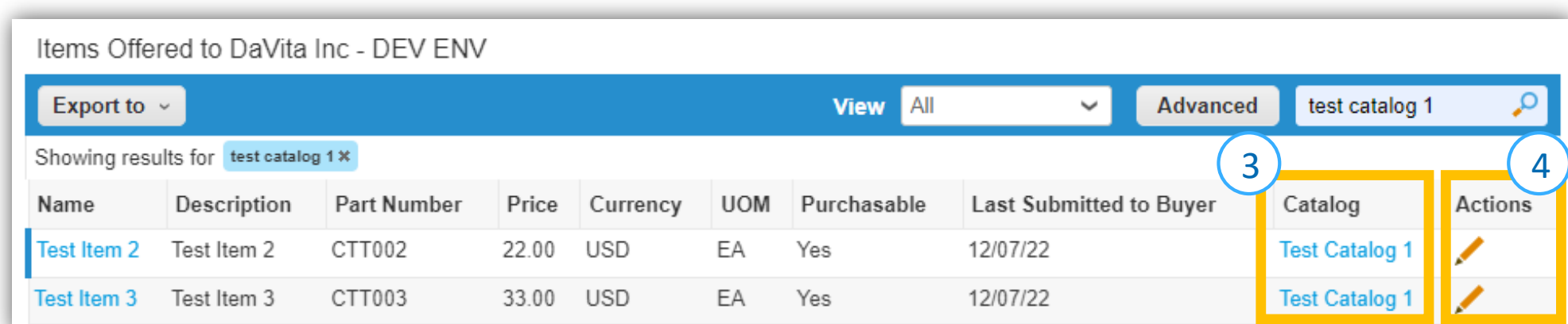


Process – Manage/Update Items Available to DaVita

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.

Test Item 2 Edit

* Name: Test Item 2

* Description: Updated Description

* Unit of Measure: EA

Purchasable:

Manufacturer Name:

Manufacturer Part Number:

Catalog Attachment: No file chosen

Supplier Item Attributes

* Part Number: CTT002

Auxiliary Part Number:

Manufacturer:

Lead Time:

UNSPSC: 1234567

Contract: Janitorial Services Demo

Pricing Type: Fixed Price

* Price: 30.00

* Currency: USD

Savings %:

Order Increment:

Minimum Order Quantity:

Availability:

Availability Date: mmm/dd/yy

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”.

The screenshot displays two sections of the Coupa interface. The top section, 'Items Included in Catalog', features a table with columns: Name, Part Number, Status Change, Price, Price Change, Currency, Other Fields Changed, Reject Reason, and Actions. A row for 'Test Item 2' (Part Number CTT002) is shown with a status of 'Updated', a price of 30.00, and a price change of 36.36%. The 'Other Fields Changed' column lists 'Description, UNSPSC'. Callout 13 points to the 'Create' and 'Load from file' buttons. Callout 11 points to the 'Other Fields Changed' column. Callout 12 points to the 'Price' column. The bottom section, 'Items Offered to DaVita Inc - DEV ENV', shows a table with columns: Name, Description, Part Number, Price, Currency, UOM, Purchasable, Last Submitted to Buyer, Catalog, and Actions. It lists 'Test Item 2' (Price 22.00) and 'Test Item 3' (Price 33.00). Callout 12 points to the 'Price' column in this section.

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”.

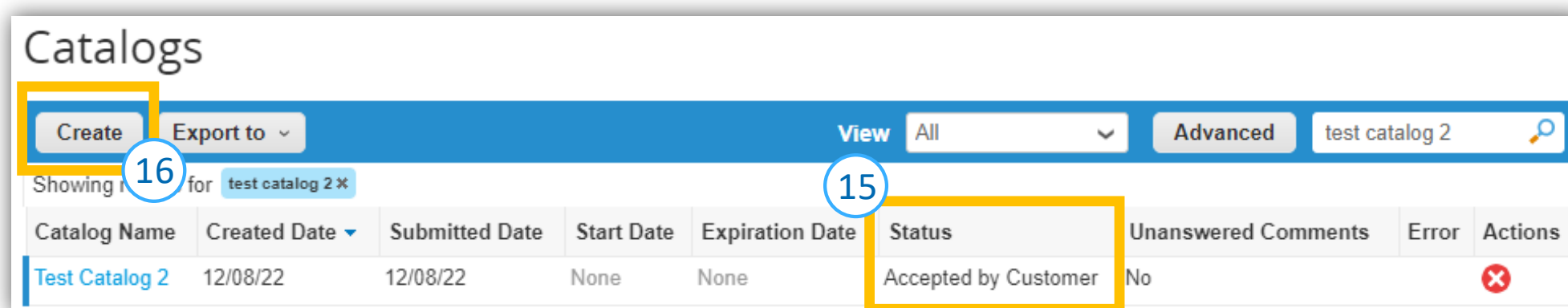
This screenshot shows the top right corner of the Coupa interface. The 'Save' button is greyed out, and the 'Submit for Approval' button is highlighted with a yellow border. Below this, the 'Items Included in Catalog' table is visible, showing 'Test Item 2' (Price 30.00) and 'Test Item 4' (Part Number CTT004, Status New, Price 45.00).

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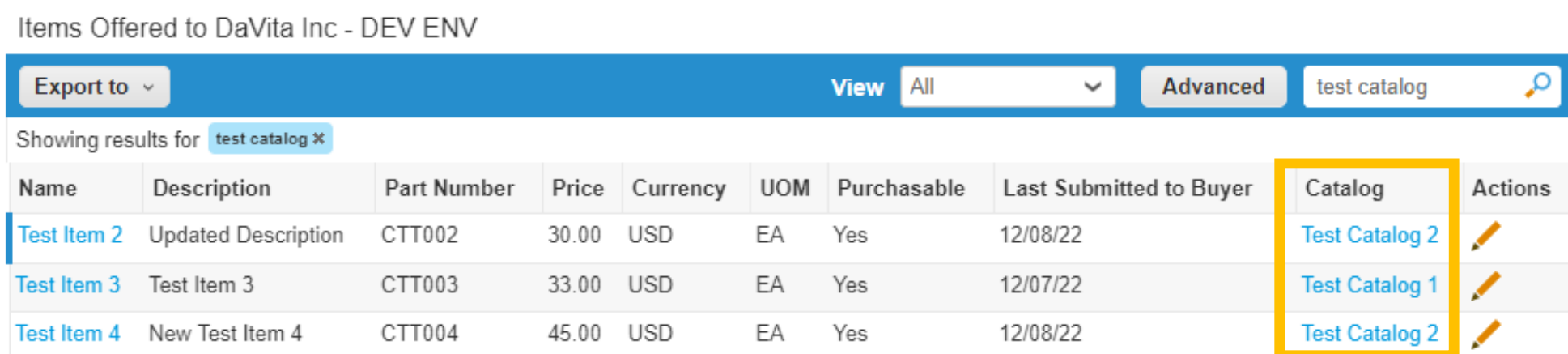
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Process – Manage/Update Items Available to DaVita

- Once the catalog has been approved by DaVita, you will see the “Accepted by Customer” status in the CSP.
- To view all items available to DaVita or to make additional catalog edits, select “Create” within the “Catalogs” window.



- 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.



- If there are no other necessary catalog edits at this time, return to the “Catalogs” window.
- 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.
- Keep the number of “Draft” catalogs to a minimum by selecting the edit/pencil icon next to the draft catalog instead of selecting “Create”.

