

COUPA QUICK GUIDE FOR DHL GROUP SUPPLIERS

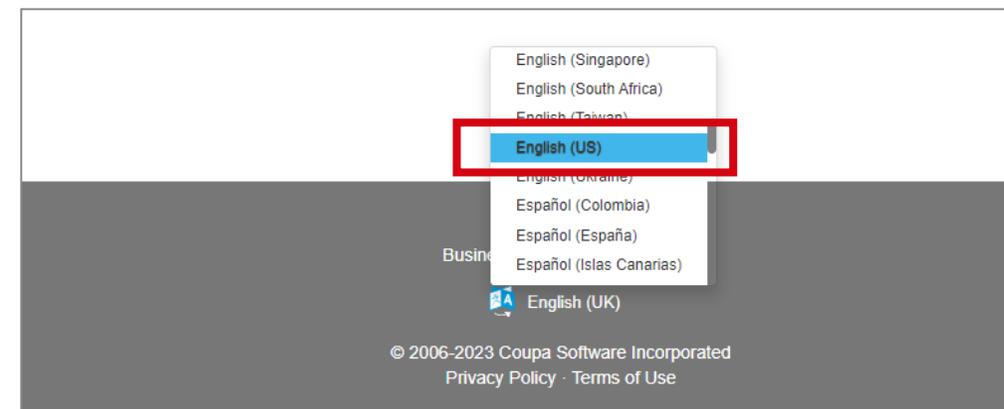
HOW TO MAINTAIN CATALOGS IN COUPA SUPPLIER PORTAL





Language Settings in Coupa Supplier Portal (CSP)

- 01 Language settings in Coupa CSP play a very important role during the catalogue creation and catalogue upload.
- 02 The language of the catalogue upload template (the headers of the file) needs to match the language being used while uploading the file to CSP, while the content of the Catalogue (product names and descriptions) can be maintained in a different language.
- 03 When creating new catalogue, it is highly recommended to set Coupa CSP to English. Using English (US) language settings in connection with English catalogue upload template leads to the fewest issues during file uploads.



- 04 Alternatively, setting Coupa CSP to the respective “catalogue language” is also an option. However, corresponding upload template needs be used as well.

Example: Change the system/user language to Italian if you are loading a catalogue for Italy with Italian article descriptions using Catalogue upload template with Italian column headers.

Careful:

- As the first option please use Coupa CSP in preferably with English (US) language settings.
- Or use the language of the catalogue content in connection with corresponding local upload template.



Managing Catalogues in the Coupa Supplier Portal (CSP)

01 Under the tab Catalogues you will be able to create and then also update and manage catalogue items for DHL Group.

02 In case DHL Group has already created an internally DHL managed catalogue in Coupa, this catalogue will be visible by clicking on the tab “Catalogues”.

Also catalogue content previously loaded to Coupa for DHL will be always visible there and can be used as the basis for Catalogue content updates.

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'TEST | NOTIFICATIONS 99+ | HELP' is on the right. A navigation bar contains several tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues (highlighted with a red box), Business Performance, Sourcing, Add-ons, and Setup. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'Deutsche Post DHL - 2.1.1 TEST SUPPLIER 2' and a 'Configure Punchout' button. The main content area is titled 'Catalogs' and features a toolbar with 'Create', 'Export to', 'View' (set to 'All'), 'Advanced', and a search field.

Careful:

- Please ensure that you have chosen “DHL Group” as selected customer within the dropdown list.
- Information on how to update previously loaded catalogue can be found on page 10 and further.



Creating a Catalogue in CSP (1/2)

01 To create a new Catalogue, click on the 'Create' button.

02 Fill in the fields:

- Change the default catalogue title generated by Coupa in the mandatory field "Catalogue Name" from:
[Your Company Name] [Catalogue (Number)]
to a name following DHL Group naming convention
- Select a start for your catalogue
- Select expiration date or leave this field blank
- Select a currency to be applied to your catalogue items

DHL Group Catalogue Naming Convention:

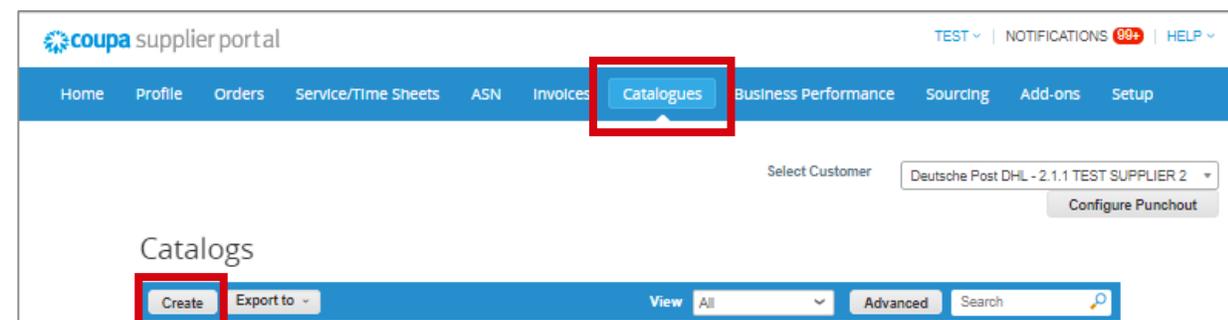
[Supplier Managed]_<region code>_<country code>_<Supplier Name>_<Catalogue version>

Example: **[Supplier Managed]_EMEA_UK_ABC Packaging_V2**

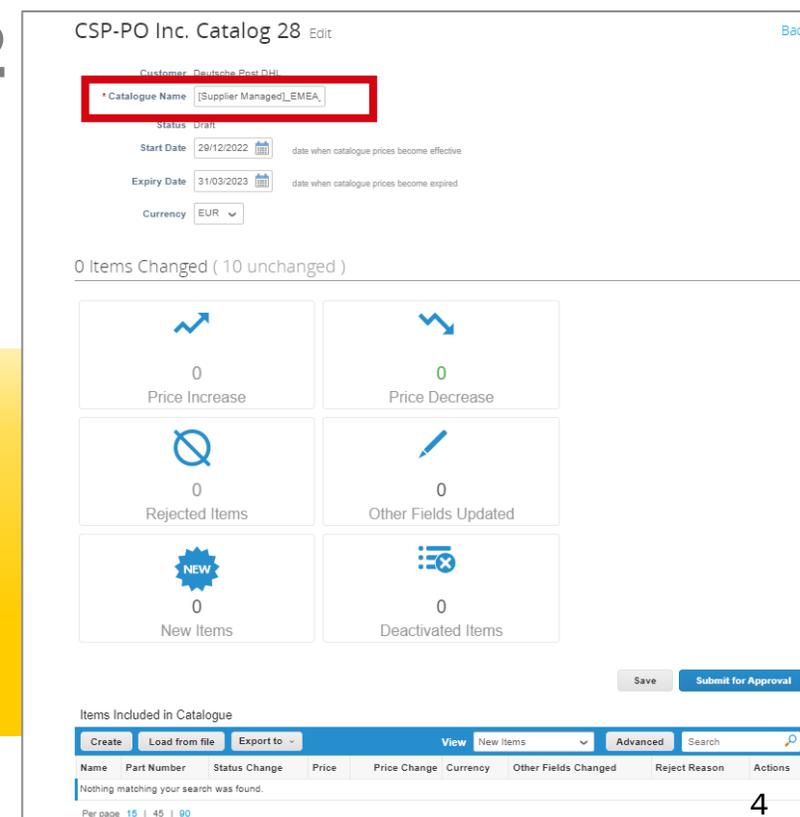
Careful:

- Applying DHL naming convention is very important for follow on processes, e.g., for catalogue approval.
- When setting up first catalogue correct name will be provided by DHL Supplier enablement team
- If you are unsure about a correct catalogue name, please contact DHL Supplier enablement team

01



02





Creating a Catalogue in CSP (2/2)

01 If the catalogue is in the draft status, i.e.: not yet submitted for approval, basic catalogue details like Catalogue Name can still be updated and changed if required using the pencil icon under Actions.

Once the catalogue is approved, these details cannot be changed any more and new version would have to be created.

02 Once the header of the new Catalogue is created, it is then possible to:

- either create individual catalogue items directly in the system via an easy UI
- or it is possible to load items in bulk

01

coupa supplier portal

TEST | NOTIFICATIONS 89+ | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Select Customer Deutsche Post DHL - 2.1.1 TEST SUPPLIER 2 Configure Punchout

Catalogs

Create Export to View All Advanced Search

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Errors	Actions
EMEA_UK_ABC LTD_v1	24/10/2022	None	24/10/2022	31/12/2022	Draft	No		

02

Items Included in Catalogue

Create Load from file Export to View New Items Advanced Search

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
[DEMO] Test Item	3112022	New	1,500.00		USD			

Per page 15 | 45 | 90

Careful:

- Always make sure that you apply DHL Group naming convention when creating new catalogues.



Creating Individual Catalogue Items

01 From the 'Catalogues' tab go to the section Items Included in Catalogue, click on 'Create' and fill in the relevant information.

Mandatory fields are marked with the red asterisk (*).

02 You can select the Unit of Measure (Each, Box, Set etc.) from the provided dropdown list.

In addition, you can add an image of the product by clicking 'Browse'.

Careful:

- **Lead Time, UNSPSC and Contract** fields need to be filled in as well, even though these are not mandatory fields from system perspective. Items with these fields left blank will be rejected by DHL catalogue approvers.
- If the catalogue is in 'Draft' status and not submitted for approval, you can edit or delete the item after saving it.
- In Pending Approval status, you can withdraw the catalogue, do necessary changes and submit it again.
- As soon as the catalog is approved, and you want to do changes, you will need to create a new catalogue version. Accepted catalogue cannot be changed anymore.

01

02

03



Updating Individual Catalogue Items

01 If you created the items manually or loaded them via bulk upload, it is possible to update or delete individual items directly in the system, if the catalog has not yet been submitted to approval.

To update the item simply click on the pencil.

To remove an item, just use the Delete option.

Please note, items from the catalogue that has been already published cannot be updated – a new version of the catalogue needs to be created.

01

Items Included in Catalogue								
Create			Load from file		Export to		View	
							New Items	
							Advanced	
							Search	
Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
Corrugate box 800x400x200	BOX600x400	New	100.00		EUR			 
EPI - 4 sessions dans 1 journée soit 4x7 pers. Camion -7.5T	20220509-akr-1-fr	New	50.00		EUR			 
Préparation à l'habilitation électrique du personnel non électricien BS BE ManŒuvre	20220509-akr-2-fr	New	51.00		EUR			 

Careful:

- If the Catalogue is in 'Draft' status and not submitted for approval, you can edit or delete the item after saving it.
- If the Catalogue is waiting for approval, but not yet approved, you can still withdraw it from approval, update items as required and then submit again.



Creating Items via Bulk Upload (1/2)

01 From the 'Catalogues' tab in case of bulk upload of items, click the "Load from file" button in the section "Items included in the catalogue".

02 To get a blank CSV file as a baseline for your new Catalogue, click on the 'Download' dropdown list and select the format, which is suitable for you. *(Please consider **to change the language settings preferably to English** or to the language matching your Catalogue content when downloading the CSV file).*

03 For detailed fields descriptions of the CVS file please use „DPDHL_Coupa_Catalog_Field_Descriptions“ guide.

01

Items Included in Catalogue

Create **Load from file** Export to View New Items Advanced Search 🔍

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
Nothing matching your search was found.								

Per page 15 | 45 | 90

02

Bulk Load Item Updates for CSP-PO Inc. Catalog 25

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 or 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

Careful:

- Please don't change the headlines of the columns in the .csv file.
- Use preferable English language settings or the system language that fits to the language of the catalogue items that you want to upload.
- Each catalogue must be approved by DHL before it becomes available for DHL users in Coupa search results.



Creating Items via Bulk Upload (2/2)

04 Once the CSV file is completed, click on the 'Choose File' button and select your CSV file, click Open and click on the button 'Start Upload'.

05 After completing the upload, Coupa checks your file and shows you the Verify Data screen. Here you have the possibility to check your new added items (highlighted in orange) and to finish the upload.

If the uploaded data is correct, click 'Finish Upload' and you will receive a message that the upload has been completed successfully.

As the last step, please do not forget to Submit your catalog for approval.

Careful:

- Coupa pre-checks only first six items in the CSV file and displays the preview shown above.
- In case, you need correct any data in the CSV file, click 'Cancel', do the changes and upload the corrected CSV file again.
- In case first six lines are correct, but there are some issues linked to other items in the CSV file, you will receive an error message and list of incorrect lines after you click on Finish Upload. Also in this case, correct the CSV file and load it again.

04

Bulk Load Item Updates for CSP-PO Inc. Catalog 25

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

vendor man... S-12324.csv

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

05

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
	New
Item Type	Item
Supplier Part Num*	03182022-4
Supplier Aux Part Num	
Name*	Catalog Creation
Description*	Test catalog creation
Price*	1,000
Currency*	USD
UOM code*	EA
active*	Yes



Updating Items via Bulk Upload (1/3)

01 Please note, catalogue that has been already published cannot be updated – a new version of the catalogue needs to be created. In the new version, new catalogue item(s) can be added, or the existing ones can be updated.

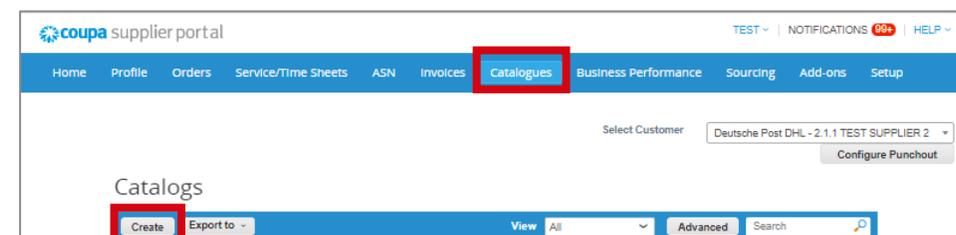
To update the catalogue via Bulk, go to the 'Catalogues', click the „Create“ button and populate catalogue header details (make sure, that the new catalogue version name follows DHL catalogue naming convention).

02 Go to section Items Included in Catalogue and click on „Load from file“.

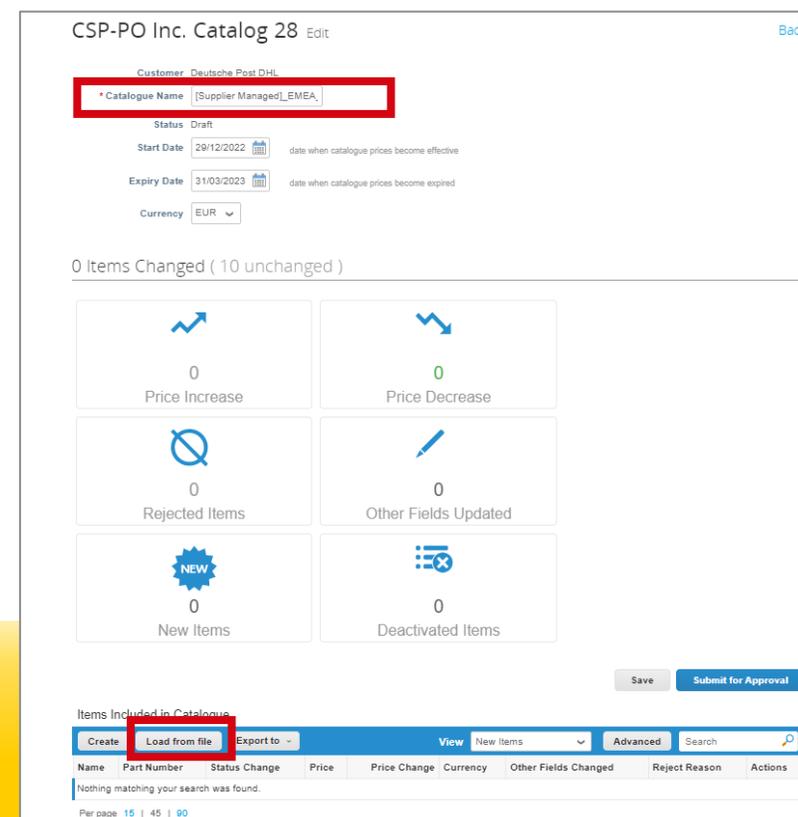
Careful:

- Using correct catalogue name is important for follow on processes.
- If you are unsure about a correct catalogue name, please contact DHL Supplier enablement team.

01



02





Updating Items via Bulk Upload (2/3)

03 To modify content of your existing catalog, click on „Export to“ and select „CSV for Excel (current list)“.

You may do following changes in the exported file:

- Update item details
- Deactivate existing catalogue item by tagging „Active“ column to „No“
- Adding new items as new rows
- Remove rows that do not need any update

04 Once the CSV file has been populated and updated, click on the „Choose file“ button and upload the CSV file. Once the file has been uploaded click on „Start Upload“.

03 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. description of the required and optional fields in the template.

 - Fields marked with "*" 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
 No file chosen

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

04 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
 vendor man...S-12324.csv

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

Careful:

- Please don't change the headlines of the columns in the .csv file.
- Use preferably English language settings or the system language that fits to the language of the catalogue items that you want to upload.
- For detailed fields descriptions of the CVS file please use „How to fill in a CSV file“ guide.

Updating Items via Bulk Upload (3/3)

05 After completing the upload, Coupa checks your file and shows you the Verify Data screen. Here you have the possibility to check your changes (highlighted in orange) and to finish the upload.

06 Once items are loaded/updated, click “Submit for Approval” button.

05

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	Existing	Updated
Item Type	Item	Item	Item
Supplier Part Num*	3112022	03112022-3	03112022-3
Supplier Aux Part Num			
Name*	[DEMO] Test Item	TEST - Approve whole Catalog	TEST - Approve whole Catalog
Description*	Test Item	Approve whole Catalog	Approve whole Catalog
Price*	1,500	1,000	1,000
Currency*	USD	USD	USD
UOM code*	EA	EA	EA
active*	Yes	Yes	No
Item Classification Name			
UNSPSC Code	44120000A		

Finish Upload Cancel

06

8 Items Changed (5 unchanged)

 2 Price Increase	 0 Price Decrease	 0 Rejected Items
 3 Other Fields Updated	 7 New Items	 1 Deactivated Items

Save Submit for Approval

Careful:

- Coupa pre-checks only first six items in the CSV file and displays the preview shown above.
- In case, you need correct any data in the CSV file, click ‘Cancel’, do the changes and upload the corrected CSV file again.
- In case first six lines are correct, but there are some issues linked to other items in the CSV file, you will receive an error message and list of incorrect lines after you click on Finish Upload. Also in this case, correct the CSV file and load it again.



Catalogue status in the Coupa Supplier Portal

Catalog Status	Description
Draft	The catalogue has been created, but further information to be added before submitting to DHL.
Error	Something is wrong with the catalogue, please contact DHL for clarification.
Awaiting / Pending Approval	The catalogue has been received by DHL, but it has not gone through the approval chain yet.
Accepted	The catalogue has been accepted by DHL, and all the items in it are now available for the organization to request within Coupa.
Rejected	The catalogue has been rejected with rejection reason stated. Please correct / rework the catalogue, upload it and submit again. In case of questions, please contact DHL for clarification.

Careful:

- Every update to the catalogue will be submitted to DHL Sourcing manager to review/approve the changes. Once DHL Sourcing manager has approved, this will be updated in the Coupa Supplier Portal as 'Accepted'.



How to work with CSV file (1/3)

Sometimes it is not possible to open the csv file downloaded from Coupa by simply clicking on it. If such a case, please follow these steps:

01 Open Excel and open a new blank workbook

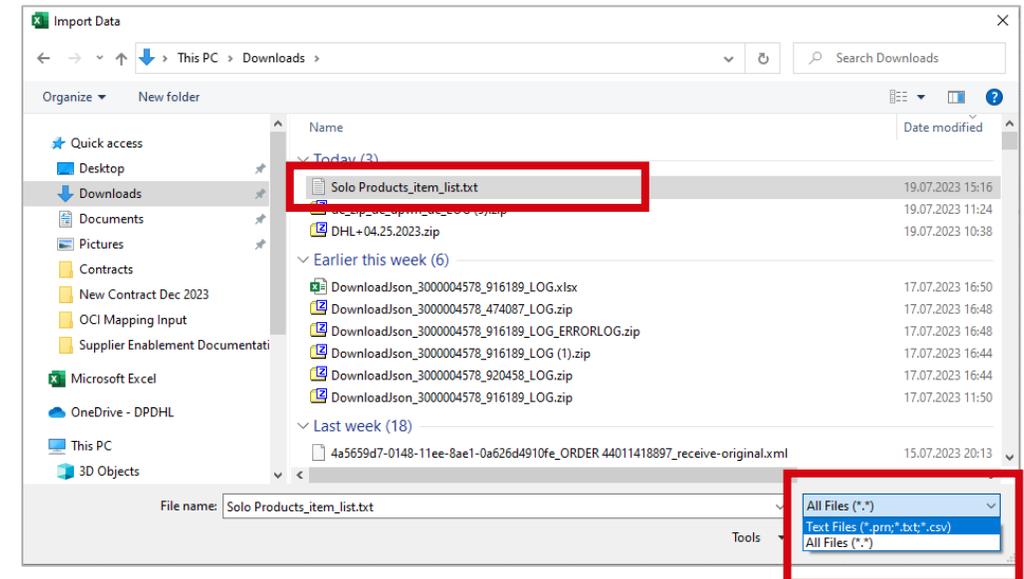
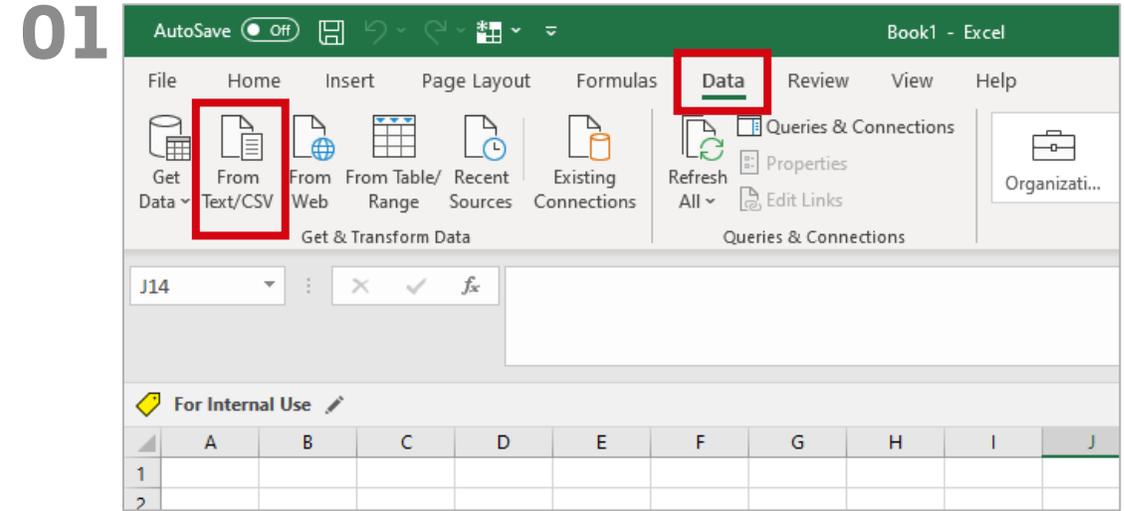
Click on the Data tab

Click "From Text/CSV"

02 Navigate to the CSV-formatted file saved on your computer, select it and then click on Import.

Careful:

- When browsing to find the file saved on your computer, set browser to look for All Files or for Text Files.





How to work with CSV file (2/3)

03 In the Import Step check that the File Origin is UTF-8 file

Select the delimiter in line with your Coupa settings (either comma or semicolon)

Click on “Load”

04 The excel with headers and details is visible and you can start updating data using all Excel features

03

Solo Products_item_list.txt

File Origin: 65001: Unicode (UTF-8) | Delimiter: Comma | Data Type Detection: Based on first 200 rows

Item Type	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency
Item	AC2115090201000		Solo Products Inc	Attached Lid Container (21" x 15" x 9")	11.24	USD
Item	AC2115120201000		Solo Products Inc	Attached Lid Container (21"x15"x12")	12.57	USD
Item	AR2420120201000		Solo Products Inc	Attached Lid Container (24" X 20" X 12")	26.93	USD
Item	BF484429001000		Solo Products Inc	Fixed Wall Bulk Box (48x44x29)	240.97	USD
Item	BG4840460263008		Solo Products Inc	Blue Bin 2 Drop Doors (48x40x46)	293.93	USD
Item	DHL Container Repair		Solo Products Inc	DHL Container Repair	45	USD
Item	DL2115090201000		Solo Products Inc	Detached Lid Container (21x15x9)	12.83	USD
Item	SW151205F101000		Solo Products Inc	Straight Wall Tote (21"x15"x9") light grey	13.89	USD
Item	SW15120703000		Solo Products Inc	Straight Wall Containers 15 x 12 x 7"	6.38	USD
Item	SW241505F101000		Solo Products Inc	Straight Wall Container 24" x 15" x 5"	13.89	USD
Item	SW241509F101000		Solo Products Inc	Straight Wall 24" x 15" x 9"	13.26	USD
Item	SW242214F101000		Solo Products Inc	Straight Wall Container 24" x 22" x 14"	17.99	USD
Item	SW321508A209000		Solo Products Inc	Straight Wall Container 32" x 15" x 7.5"	23.9	USD
Item	TL4844030010000		Solo Products Inc	Bulk Box Lid 48" x 44" x 3"	99.48	USD
Item	BA2926068405000		Solo Products Inc	Bakery Tray (29"x 26" x 06")	16.64	USD
Item	BT2822052209006		Solo Products Inc	Bakery Tray (28"x 22" x 05") blue	14.31	USD
Item	BT2822072202010		Solo Products Inc	Bakery Tray (28"x 22" x 07") red	16.82	USD
Item	BN4845342010000		Solo Products Inc	Extra Duty Bulk, 2 Drop Doors, Collapsible (48" x 45" x...	170.24	USD
Item	BN4845442010000		Solo Products Inc	Extra Duty Bulk, 2 Drop Doors, Collapsible (48" x 45" x...	262.01	USD
Item	TS4840020063000		Solo Products Inc	Bulk Box Lid (48" x 40" x 2")	79.61	USD

Load Transform Data Cancel

04

For Internal Use | Unclassified (Public) | For Internal Use | Restricted | Confidential

	A	B	C	D	E	F	G	H	I
	Item Type	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*
1	Item	AC2115090201000		Solo Products Inc	Attached Lid Container (21" x 15" x 9")	11.24	USD	EA	Yes
2	Item	AC2115120201000		Solo Products Inc	Attached Lid Container (21"x15"x12")	12.57	USD	EA	Yes
3	Item	AR2420120201000		Solo Products Inc	Attached Lid Container (24" X 20" X 12")	26.93	USD	EA	Yes
4	Item	BF484429001000		Solo Products Inc	Fixed Wall Bulk Box (48x44x29)	240.97	USD	EA	Yes
5	Item	BG4840460263008		Solo Products Inc	Blue Bin 2 Drop Doors (48x40x46)	293.93	USD	EA	Yes
6	Item	DHL Container Repair		Solo Products Inc	DHL Container Repair	45	USD	EA	Yes
7	Item	DL2115090201000		Solo Products Inc	Detached Lid Container (21x15x9)	12.83	USD	EA	Yes
8	Item	SW151205F101000		Solo Products Inc	Straight Wall Tote (21"x15"x9") light grey	13.89	USD	EA	Yes
9	Item	SW15120703000		Solo Products Inc	Straight Wall Containers 15 x 12 x 7"	6.38	USD	EA	Yes
10	Item	SW241505F101000		Solo Products Inc	Straight Wall Container 24" x 15" x 5"	13.89	USD	EA	Yes

How to work with CSV file (3/3)

05 Once the final version of the file is ready, it needs to be saved again in CSV UTF-8 format.

To do this go to Save As option in Excel and select the correct Save as type from the dropdown list:

- Search specifically for CSV UTF-8
- Do not select regular CSV format

