

Create and Manage Catalog Items

About this Guide

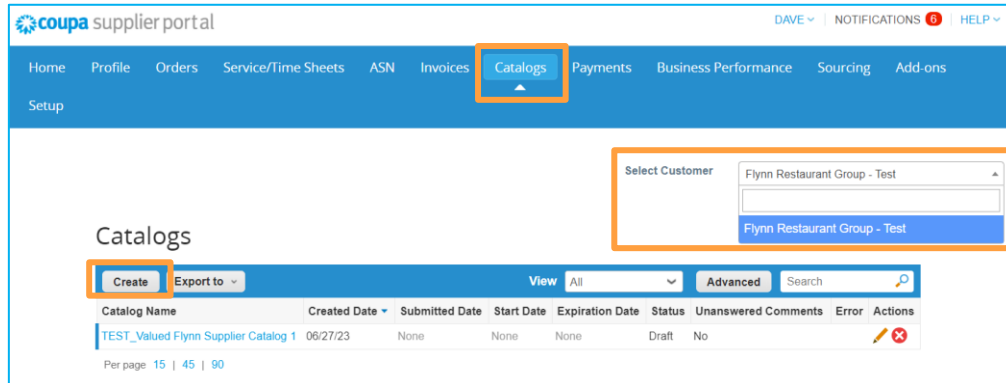
This guide is intended to show suppliers how to create, manage, and update Catalog Items. Updates to catalog items can include updating pricing, adding new items, removing old items, and more. Please coordinate with the Flynn team to understand your responsibility with managing catalogs.

This guide contains the following sections:

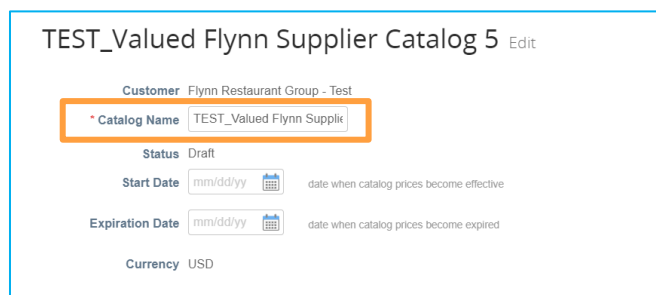
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Creating Catalog Items

1. Login to the Coupa Supplier Portal (CSP). On the main menu, click on the **Catalogs** tab. If you are connected to more than one Coupa customer, select Flynn from the **Select Customer** dropdown menu. Then select **Create**.



2. From the **Create** screen you will need to add a **Catalog Name**. Other fields are optional but recommended.



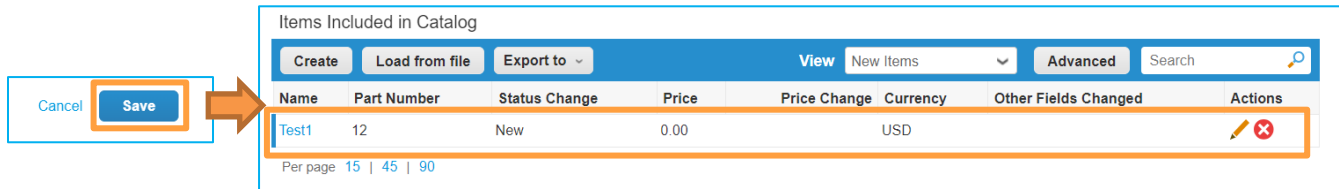
- At the bottom of the page you will see the Items included in the Catalog. To add items to the new catalog you have the option to **Create** new catalogs which will be done one by one or **Load from file** will allow a bulk upload of items and changes.

Single Catalog Upload:

- To create a catalog Item, click on **Create**. Inside under **Catalog Item** you will be asked to fill out required fields such as the **Name** of the item, **Description** of the item, and **Units of Measure (UOM)**. Please note that adding an Image is *strongly recommended*.

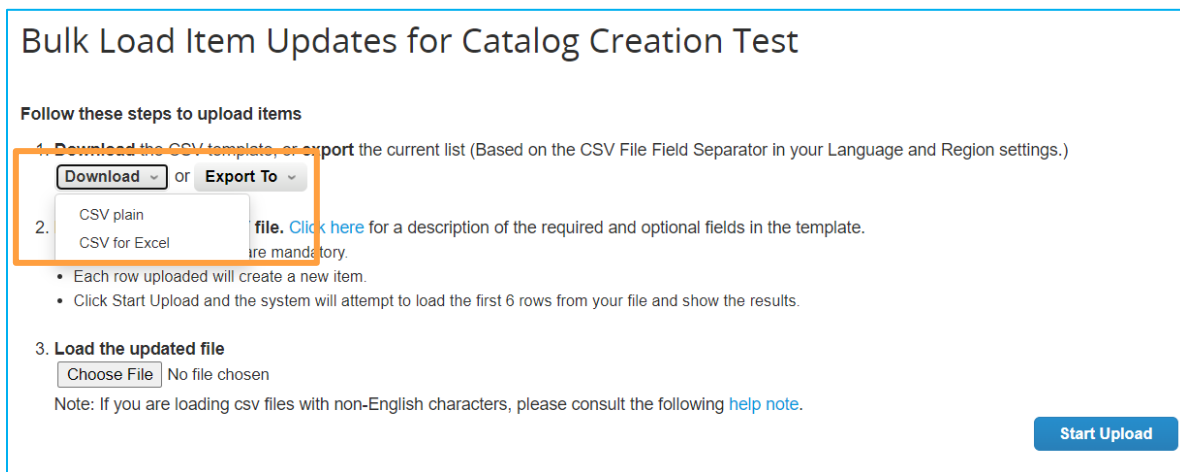
- Under the **Supplier Item Attributes**, fill out the required fields that include the **Part Number**, **Price**, and **Currency**. Please fill out as many fields as you can, as this will provide a better purchasing experience for our Flynn team.

- Once all those fields have been filled click **Save**. You will be able to view the Catalog you just created in the table view.



Bulk Catalog Upload:

- To mass upload catalog items from a file, click on **Load from file**. Click on the **Download** drop-down and select either the **CSV Plain** option or the **CSV for Excel** option to download a template for you to fill out in order to accurately bulk upload items to the new catalog. (Note: The field names in the template match the options presented in the system in Option 1)



- Open the CSV file. Once opened, fill in the mandatory fields marked by the asterisk next to the column name (*). Note that each row will be a different item and will become the details for the catalog.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Item Type	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*	Item Class	UNSPSC Code	Lead Time
2												
3												
4												

- In the CSV, photos must have a public URL for them to show. Attaching a photo is *highly recommended*.

- Once all the items are added to the file and their mandatory details are included, upload the filled out CSV file by selecting the Choose File button. Once selected, click on **Start Upload**.

3. Load the updated file

Choose File No file chosen

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

Start Upload

- If you get an **Error Generating Sample** after uploading your file, simply click on **Back**, correct the error within the uploaded CSV file, and then re-upload the file. If you encounter an error please reach out to your Flynn contact.

Error Generating Sample

The system found 6 errors in lines when attempting to load the sample rows.

Record	Field	Your Value	Error
Row 1: Item	UOM code	Each	Each is not a valid UOM code.
Row 2: Item	UOM code	Each	Each is not a valid UOM code.
Row 3: Item	UOM code	Each	Each is not a valid UOM code.
Row 4: Item	UOM code	Each	Each is not a valid UOM code.
Row 5: Item	UOM code	Each	Each is not a valid UOM code.
Row 6: Item	UOM code	Each	Each is not a valid UOM code.

Back

- Once your upload is complete, Coupa will scan the uploaded file and show you the **Verify Data** screen so you can check the items extracted from the file.

Verify Data

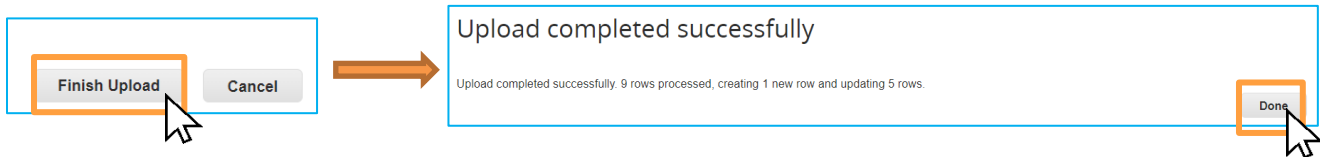
The first rows of your upload have been loaded. All changes or additions are highlighted in **orange**.

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	New
Item Type	Item	Item
Supplier Part Num*	Test	Test
Supplier Aux Part Num		
Name*	Test #1	Test #2
Description*	Test Test	Test Test
Price*	171	171
Currency*	USD	USD
UOM code*	EA	EA
active*	Yes	Yes

7. Once you are satisfied with your Data, scroll down and select **Finish Upload**. A **Upload Completed Successfully** message will appear. Click on the **Done** button to proceed.



8. Lastly, you will be prompted to the Catalog page where you can **Save**, **Edit** or **Publish** your Catalog. To publish the newly created catalog, scroll down and locate the **Public Catalog Button**. Please note that you must publish your catalog in order for Flynn to view it. Flynn Procurement will have to approve the catalog before it is available in the Flynn Marketplace for purchase.

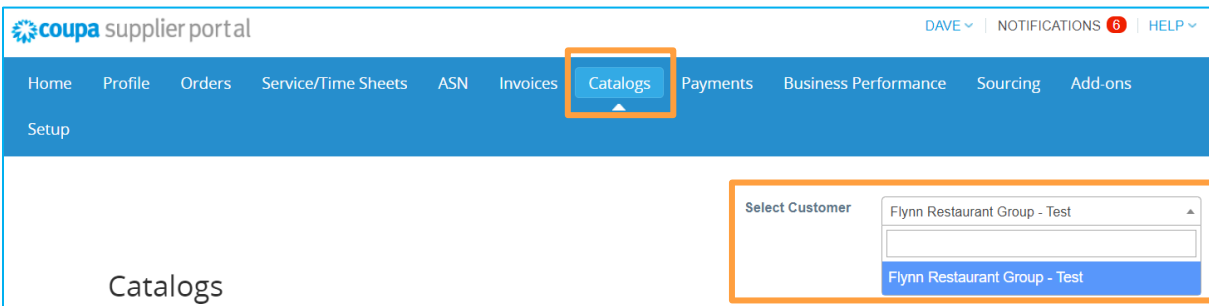
The screenshot shows a summary of catalog changes. At the top, it says '1 Item Changed (2 unchanged)'. Below this are five summary cards:

- Price Increase: 0 (indicated by an upward arrow icon)
- Price Decrease: 0 (indicated by a downward arrow icon)
- Other Fields Updated: 0 (indicated by a pencil icon)
- New Items: 1 (indicated by a starburst icon with the word 'NEW' inside)
- Deactivated Items: 0 (indicated by a list icon with an 'X' over it)

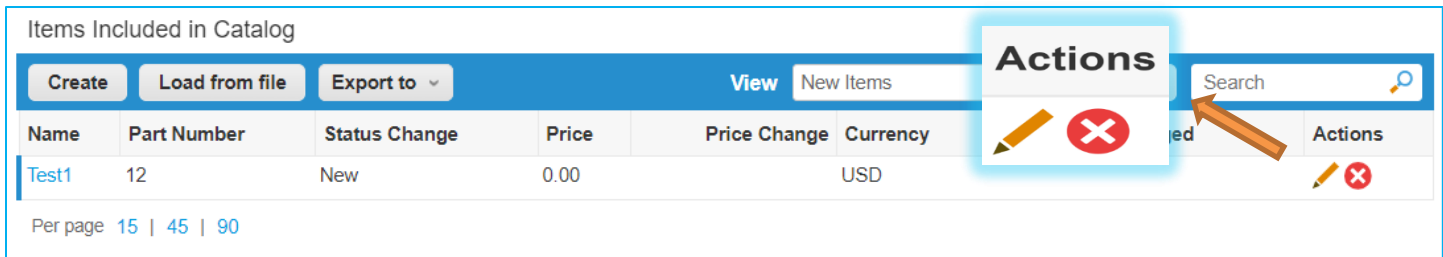
At the bottom right of the summary area, there are two buttons: a grey 'Save' button and a blue 'Publish Catalog' button.

Manage Catalog Items

1. If you would like to edit, delete or update a catalog Item head over to the **Catalogs** tab. If you are connected to more than one Coupa customer, select Flynn from the **Select Customer** dropdown menu.



2. From the table view you can [create a new catalog](#), edit or/and delete a catalog. To edit a catalog click on the pencil icon on the far right of the table under **Actions**. To delete a catalog click on the X icon on the far right of the table under **Actions**.



3. Clicking on the pencil icon to edit a catalog will prompt you to the catalog page. There you can edit the name of the catalog, view the changes to items, and create, edit or delete specific items within a catalog. Once changes are made click on **Publish Catalog**.

Catalog Item Create

Item Type:

Name:

Description:

Unit of Measure:

Purchasable:

Manufacturer Name:

Manufacturer Part Number:



No file chosen

1 Item Changed (2 unchanged)

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

- At the bottom of the page, identify the item you would like to edit or delete. To edit the item refer to step 4 under [Creating Catalog Items](#). To delete an Item click on the X icon. A pop-up will appear that asks you to confirm your decision.

Items Included in Catalog

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Actions
Test1	12	New	0.00		USD		 

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- Note that the changes and updates will only be published after approval from the Flynn team.