

# **STAR – Catalogs Preparation (csv File)**

eProcurement / Coupa

Job Aid



# Table of Contents

**01**

**Catalogs Preparation (csv File)**

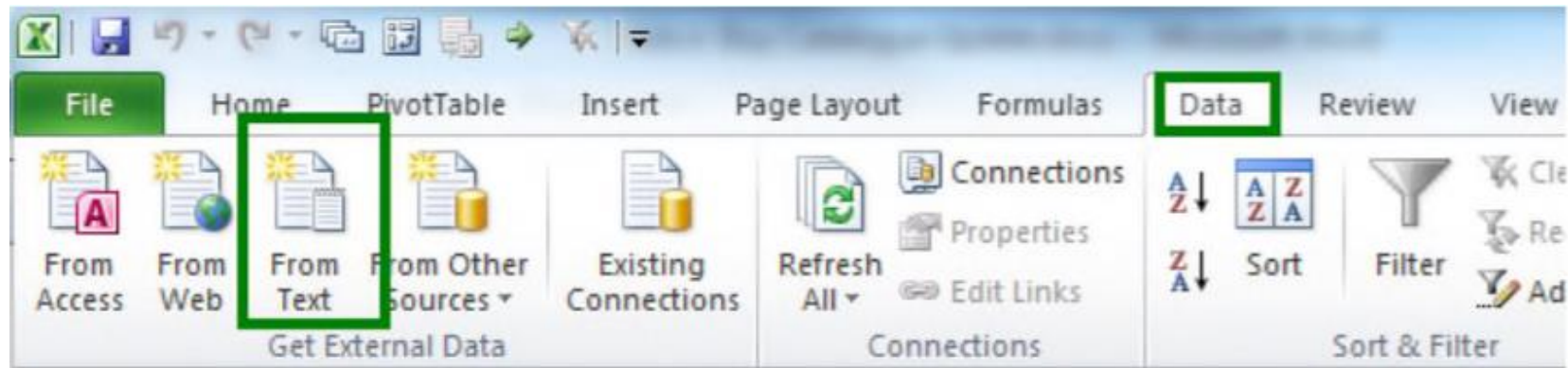
---

# Catalogs Preparation

## CSV file creation

### Changing the CSV file format

- Please follow the procedure below:
  - Open a blank Excel sheet
  - Click on the “Data” tab and “From Text” in the “Get External Data” section

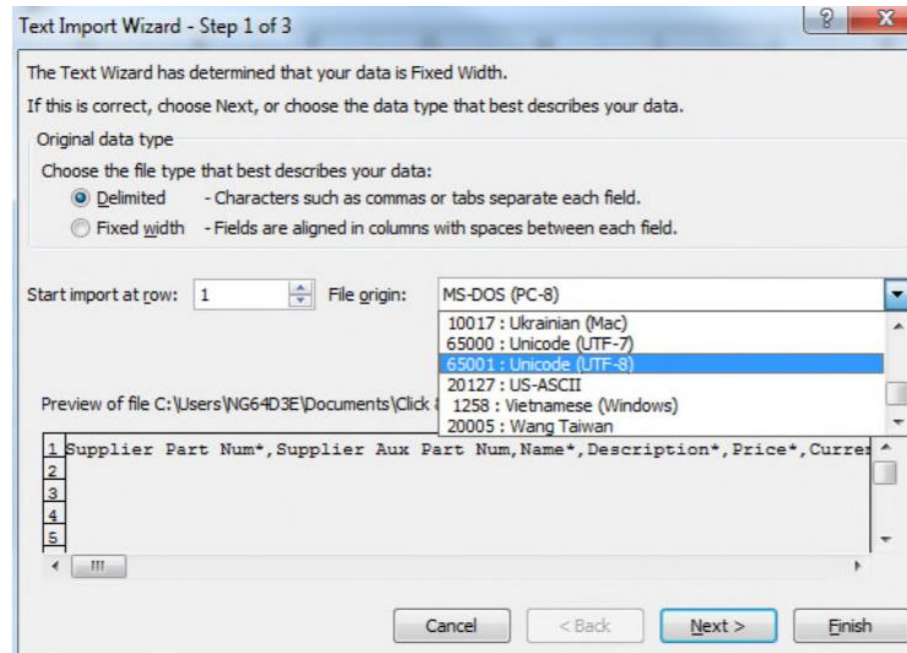


# Catalogs Preparation

## CSV file creation

### Changing the CSV file format

- Select the file “Coupa\_CSV\_Template” you downloaded in the CSP, and click “Import”
- In the popup window, select “Delimited”; select File Origin: “65001: Unicode UTF-8” and press the button “Next ”

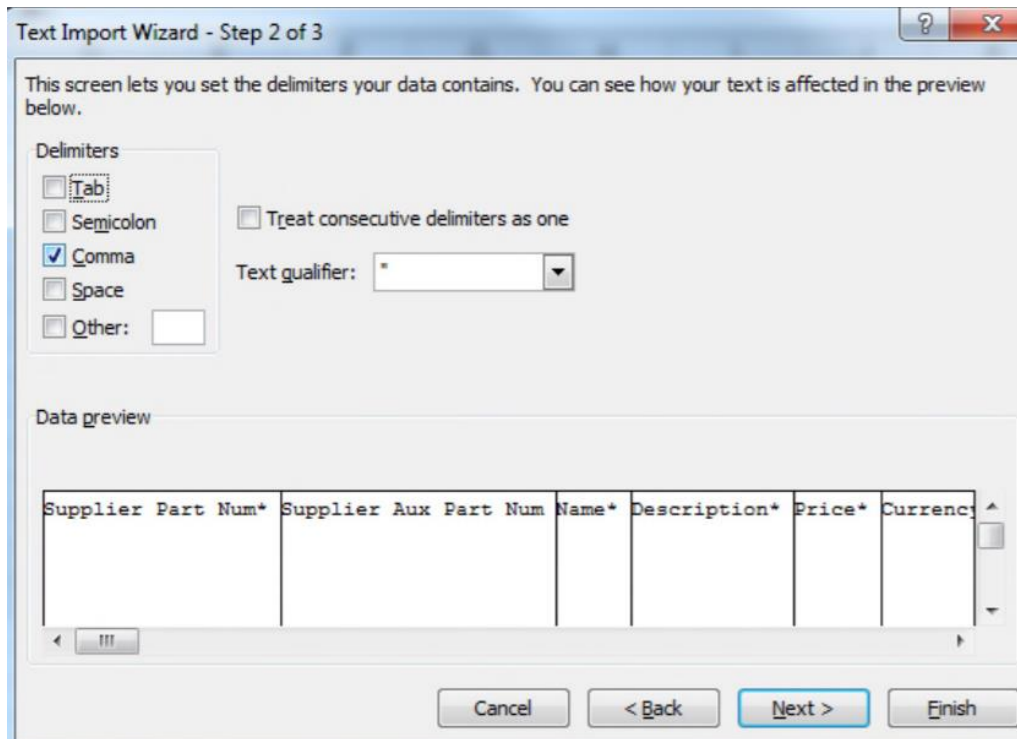


# Catalogs Preparation

## CSV file creation

### Changing the CSV file format

- Select “Comma” and “Next” again:



Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

- Tab
- Semicolon
- Comma
- Space
- Other:

Treat consecutive delimiters as one

Text qualifier:

Data preview

Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency

Buttons: Cancel, < Back, Next >, Finish

# Catalogs Preparation

## CSV file creation

### Changing the CSV file format

- In the section “Data preview” you can see there is only the first column selected (in black). To select all the columns, scroll to the last column and while holding the “Shift” button on your keyboard, scroll the data preview to the right until the end, and left click on the last column title. As a result, all columns should be selected (cf. below). Then, select the “Text” radio button as “Column data format” and press the “Finish” button.

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format:

General  
 Text  
 Date: DMY  
 Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Data preview

General	General	General
Price Validity End Date	Minimum Order Quantity	Hazardous Material*

Cancel < Back Next > Finish

# Catalogs Preparation

## CSV file creation

### Changing the CSV file format

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General

Text

Date: DMY

Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Data preview

Text	Text	Text	Text	Text	Text
Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency

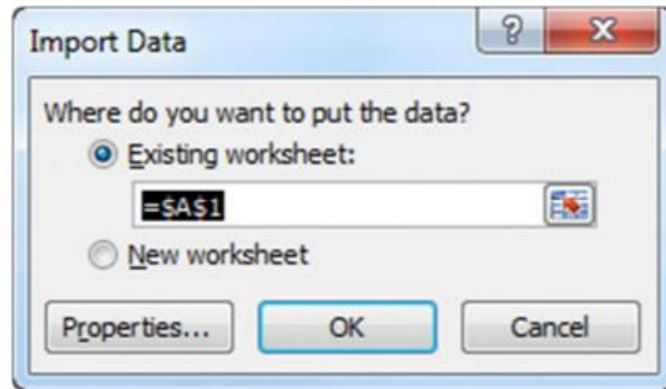
Cancel < Back Next > Finish

# Catalogs Preparation

## CSV file creation

### Changing the CSV file format

- In the next popup window, simply press the “OK” button:



- You now have your template in Excel ready to be filled in:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*	Item Classification Name	UNSPSC Code	Lead Time	Manufacturer	Contract Number



# Catalogs Preparation

## CSV file creation

### Formatting the data in Coupa Format

- Before finalizing your file, please make sure that:
  - You entered the contract number given to you by your ARLANXEO contact buyer in the columns “Supplier Aux Part Num”, “Contract Number” and in the Item Name
  - You did not enter any price validity date
  - The value in columns « Active » or « Hazardous Material » is “Yes/No” and not “YES/NO” as it is case sensitive.



	A	B	C	D	E	F	G	H	I	J	
1	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*	Item Classification Name	UNSPSC Code	Lead
2	12344		Mechar Maintenance		1000	USD	EA	Yes	Test ClassificationA	30141509	
3	12345		Mechar Maintenance		100	USD	EA	Yes	Test ClassificationB	30141509	
4	12346		Mechar Maintenance		49	EUR	EA	Yes	Test ClassificationA	30141509	
5	12347		Mechar Maintenance		2500	EUR	EA	Yes	Test ClassificationB	30141509	
8	12348		Mechar Maintenance		2025	EUR	EA	Yes	Test ClassificationA	30141509	
7	12349		Mechar Maintenance		2469	EUR	EA	Yes	Test ClassificationB	30141509	
8	12350		Mechar Maintenance		2914	EUR	EA	Yes	Test ClassificationA	30141509	
9	12351		Mechar Maintenance		3359	EUR	EA	Yes	Test ClassificationB	30141509	
10	12352		Mechar Maintenance		3804	EUR	EA	Yes	Test ClassificationA	30141509	

# Catalogs Preparation

## CSV file creation

### Formatting the data in Coupa Format

- In order to avoid any potential issue on the next step (convert your Excel file into CSV format), please follow the procedure below:
  - Make sure the decimals in the **Price column are dots and not commas.**
  - Select all the cells, either by pressing Ctrl + A on your keyboard, or clicking the top left arrow:



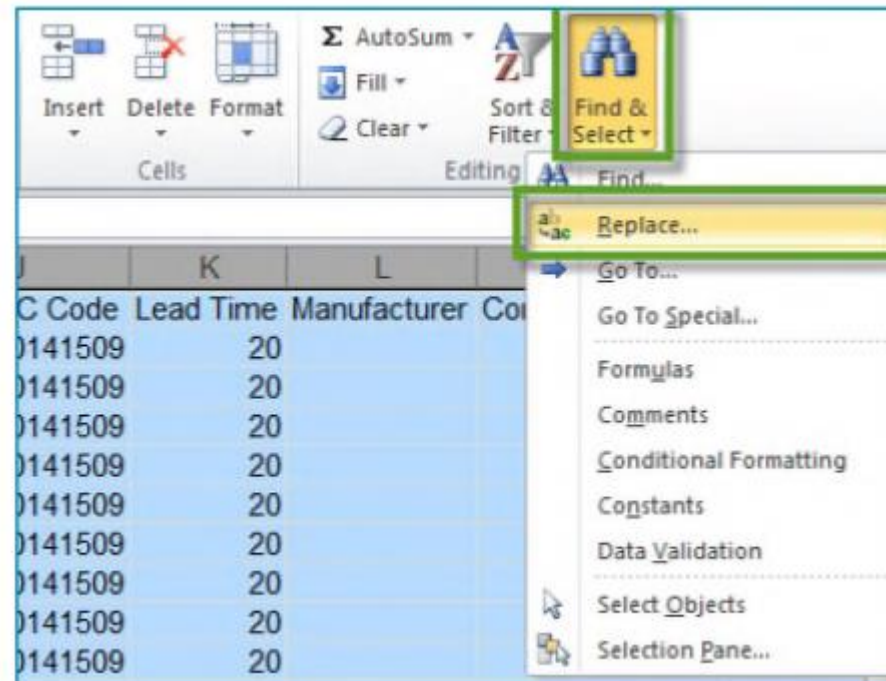
	A	B	C	D	E	F	G	H	I	J	K
1	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*	Item Classification Name	UNSPSC Code	Lead
2	12344		Mechar Maintenance		1000	USD	EA	Yes	Test ClassificationA	30141509	
3	12345		Mechar Maintenance		100	USD	EA	Yes	Test ClassificationB	30141509	
4	12346		Mechar Maintenance		49	EUR	EA	Yes	Test ClassificationA	30141509	
5	12347		Mechar Maintenance		2500	EUR	EA	Yes	Test ClassificationB	30141509	
6	12348		Mechar Maintenance		2025	EUR	EA	Yes	Test ClassificationA	30141509	
7	12349		Mechar Maintenance		2469	EUR	EA	Yes	Test ClassificationB	30141509	
8	12350		Mechar Maintenance		2914	EUR	EA	Yes	Test ClassificationA	30141509	
9	12351		Mechar Maintenance		3359	EUR	EA	Yes	Test ClassificationB	30141509	
10	12352		Mechar Maintenance		3804	EUR	EA	Yes	Test ClassificationA	30141509	

# Catalogs Preparation

## CSV file creation

### Formatting the data in Coupa Format

- In the “Home” tab, click on “Find & Select” at the right of your screen and select “Replace...”

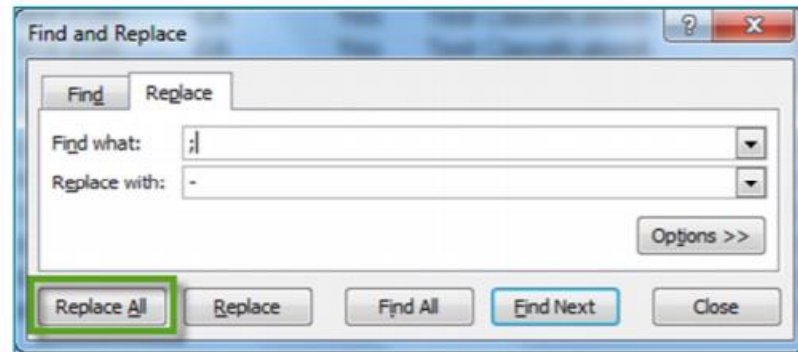
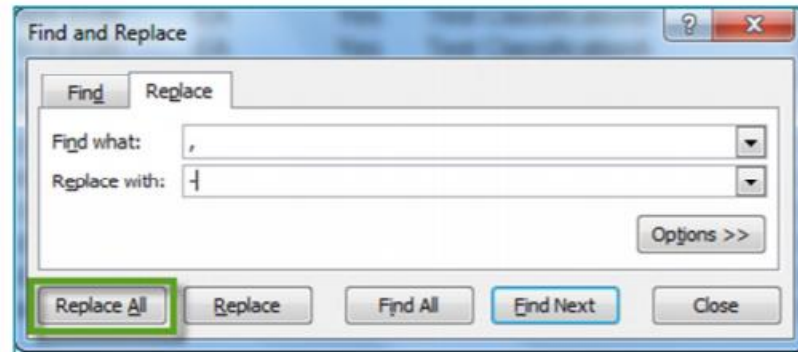


# Catalogs Preparation

## CSV file creation

### Formatting the data in Coupa Format

- Replace all commas (,) and semicolons (;) by dashes (-)



# Catalogs Preparation

## CSV file creation

### Saving your file in CSV format

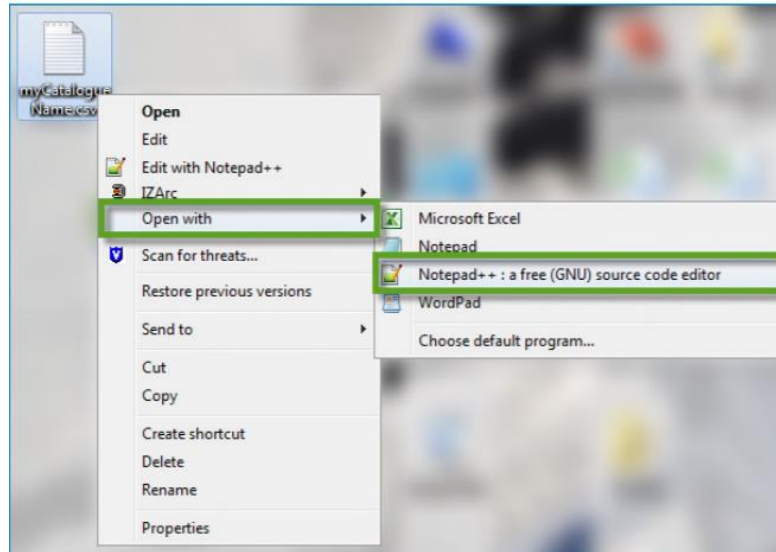
- Before moving forward, we recommend you to save your catalogue Excel file on your hard drive (xls or xlsx format), for future updates. Once your catalogue Excel file is complete, please follow the procedure below:
  1. Click on “File” and “Save As”.
  2. Write your Catalogue name to the field “File name” using the catalogue naming convention.
  3. Select the value “CSV (Comma delimited) (\*.csv)” in the field “Save as type” and click on the button “Save”.
  4. Close your Excel file.

# Catalogs Preparation

## CSV file creation

### Finalising your catalog file

- Before moving forward, we recommend you to download and install “Notepad++”. This is a freeware (free-of-charge) available for download here (<https://notepad-plus-plus.org/download/>). Please follow the procedure below:
  - Right click on the CSV file you just saved, select “Open with” and “Notepad++”

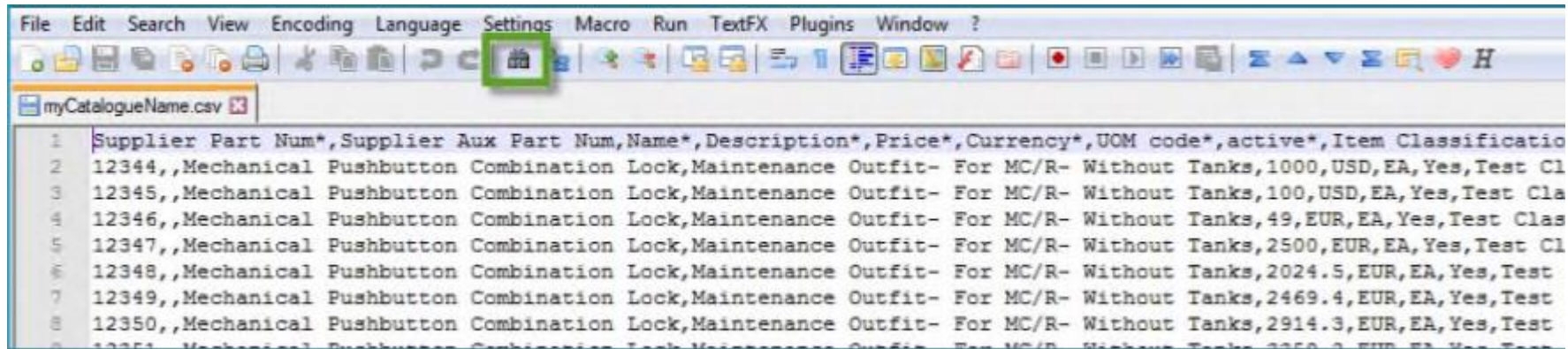


# Catalogs Preparation

## CSV file creation

### Finalising your catalog file

- Once in Notepad++, select the field glasses icon

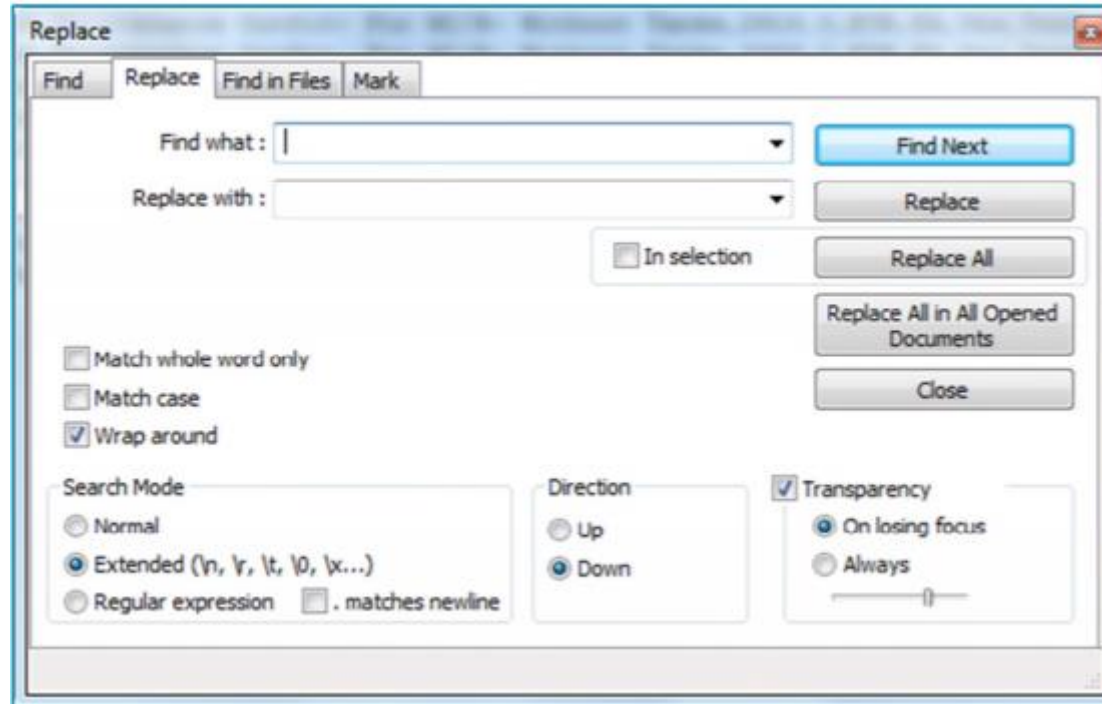


# Catalogs Preparation

## CSV file creation

### Finalising your catalog file

- Click on the “Replace” tab and make sure all settings are aligned with the screenshots below (e.g. Wrap around ticked, Extended search mode selected, etc.)



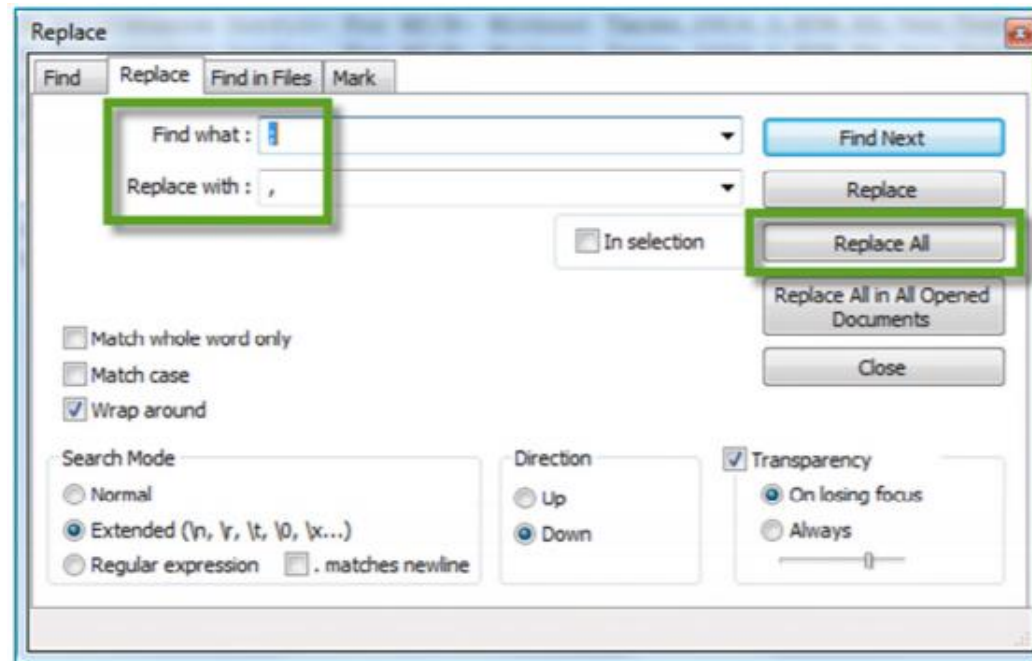


# Catalogs Preparation

## CSV file creation

### Finalising your catalog file

- If your country setting sets delimiter as a semicolon instead of a comma, replace all semicolons by commas. This is because Coupa requires comma as delimiter.



# Catalogs Preparation

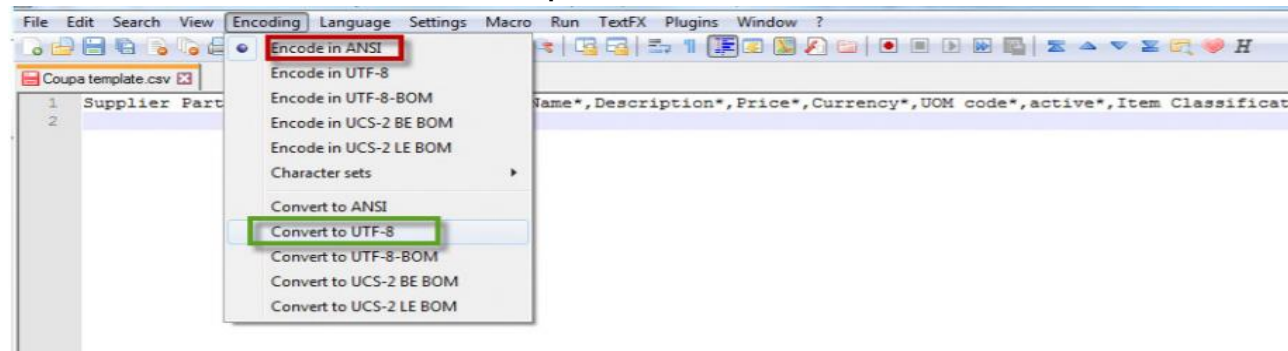
## CSV file creation

### Finalising your catalog file

- Save your file with the Coding set to **UTF-8**



- If “Encode in UTF-8” is not checked please click on “convert to UTF-8”



- The above steps ensure that the special characters (é, â, ù, ä, ö, ü, ...) are preserved. Now that you have finalized your catalogue file, you are ready to upload it to CSP.

ARLANXEO

Performance Elastomers