HOW TO MANAGE PURCHASE ORDERS IN COUPA SUPPLIER PORTAL

Coupa Supplier Portal (CSP) – User Guide

Version 1.0 (August 2023)

1. General Information

You can manage your Purchase Orders (POs) from within Coupa by selecting the "Orders" tab on the main menu.
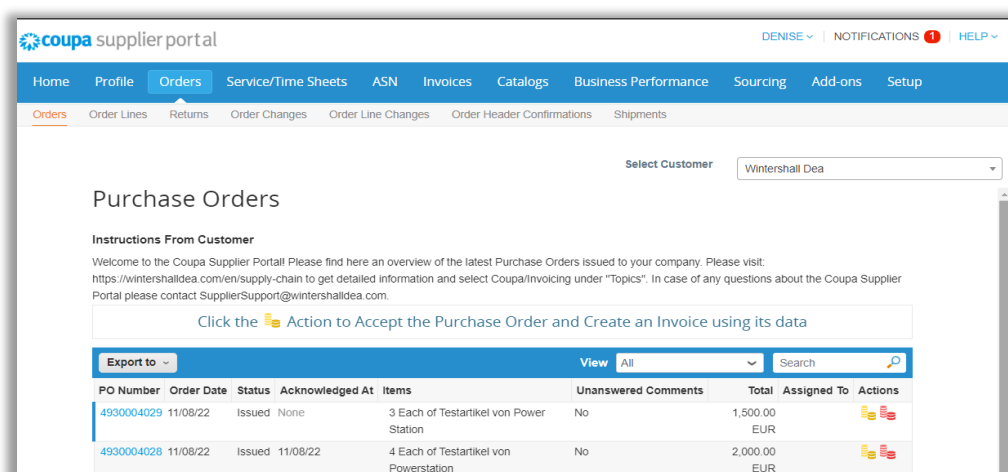
Once you select the "Orders" tab you will see all your purchase orders listed with their various statuses. You can also use the Purchase order number or create your own report view to navigate directly to the Purchase Order you wish to see.

You can manage your purchase orders from Coupa by selecting the "Orders" tab on main menu. In this view you will see all your orders. You can choose between customers or also generate your own view for the orders.
Under "Select customer" you change the view to another customer which is using CSP. Under "View" you can use the selection "Create view" to set up a individually list of orders.

The search field can be used to search for any column in the order list, e.g. the PO number. All columns can also be sorted in ascending or descending order.

Via the button "Export to" the displayed list can be saved locally.

2. Purchase Order Status Definition
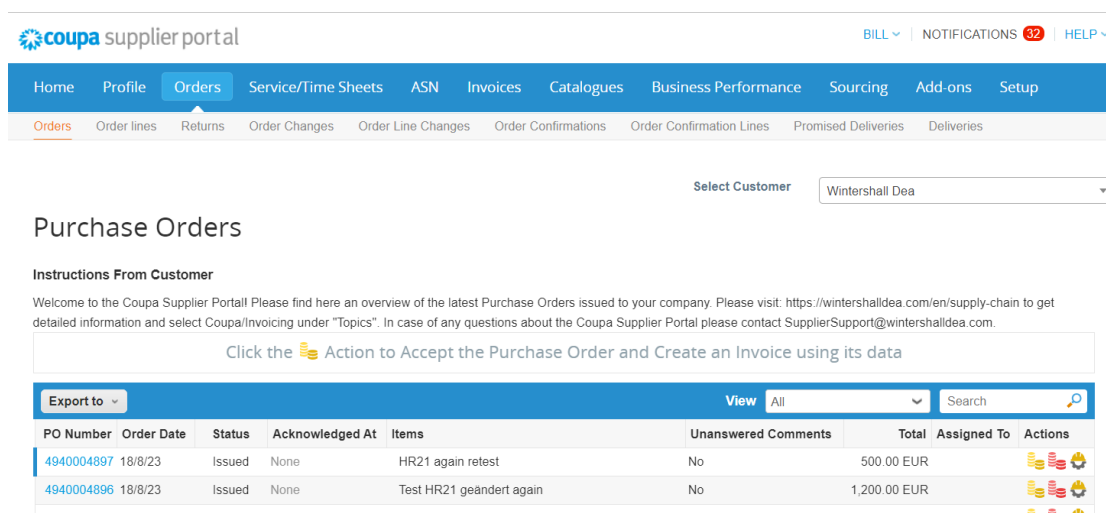
Purchase Orders will have one of the following statuses.

Status	Definition
Cancelled	The PO is cancelled.
Closed	The issued PO was received, delivery has been fulfilled and invoices have been paid and the PO is then closed.
Issued	The PO was approved and sent to you.
Soft Closed	The PO is closed but can be re-opened. You cannot invoice against a soft closed PO. However if you do need to send an invoice, speak to your contact person in Supply Chain at Harbour Energy.

3.
View your Purchase Order

To view the details of your Purchase Order, select the blue PO Number link to open the PO.

The order is divided into "General info", the "Shipping" and the "Lines".

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In addition, under the positions of each order there are the buttons "Create invoice", if it is about a service in the order "Create service/time sheet", "Request change", "Save" and "Print view".

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Also there is a field "Comments" which can be freely written. At the bottom of the page, changes or comments to the order can be viewed at any time under "History".

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The functions just mentioned will now be explained in detail.
Please notice that the button "Create invoice" is explained in detail in the user guide "09_WDH_Creating Invoice in CSP" and the button "Create service/time sheet" is explained in detail in the user guide "08_WDH_Creating Service/Time Sheet in CSP".

4. Acknowledged - Order confirmation in CSP

In case you can confirm the PO whithin all details, you can perform your order confirmation in the CSP by ticking the check box 'Acknowledged'.

⚠️ There is no need to send an additional order confirmation via email if you use this funtionality.

Purchase Order #4930004029

General Info

Status	Issued - Pending Manual
Order Date	11/08/22
Revision Date	11/08/22
Requester	Kersten Kueper
Email	kersten.kueper@wintershalldea.com
Payment Term	1433 - Within 14 days 3 % cash discount, 30 days due net
Sourcing type	None
Offshore Delivery	No
Attachments	None
Acknowledged	☐

Shipping

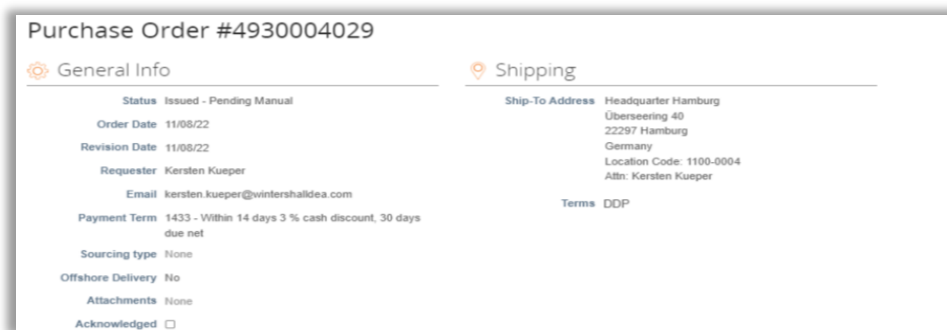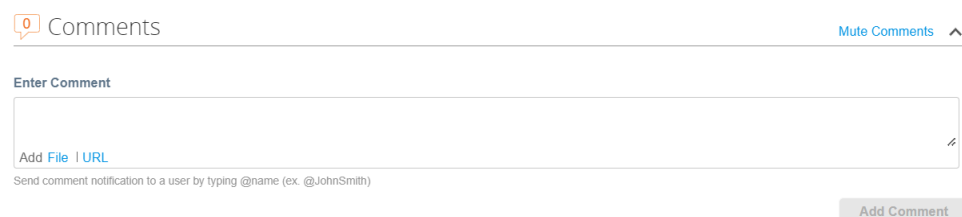|	
Ship-To Address	Headquarter Hamburg Überseering 40 22297 Hamburg Germany Location Code: 1100-0004 Attn: Kersten Kueper
Terms	DDP

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If you do not agree with the content of the purchase order, you are welcome to use the comment function to submit a change of order or note to Harbour Energy.
To do so, please always start with the @-sign and search for the respective contact person at Harbour Energy using the first name. Then click on the contact person in the selection list and compose the message.
Click the "Add Comment" button to send the message to the person, who can then also reply in this comments field.

0 Comments   Mute Comments ⌃

Enter Comment

Add File | URL

Send comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

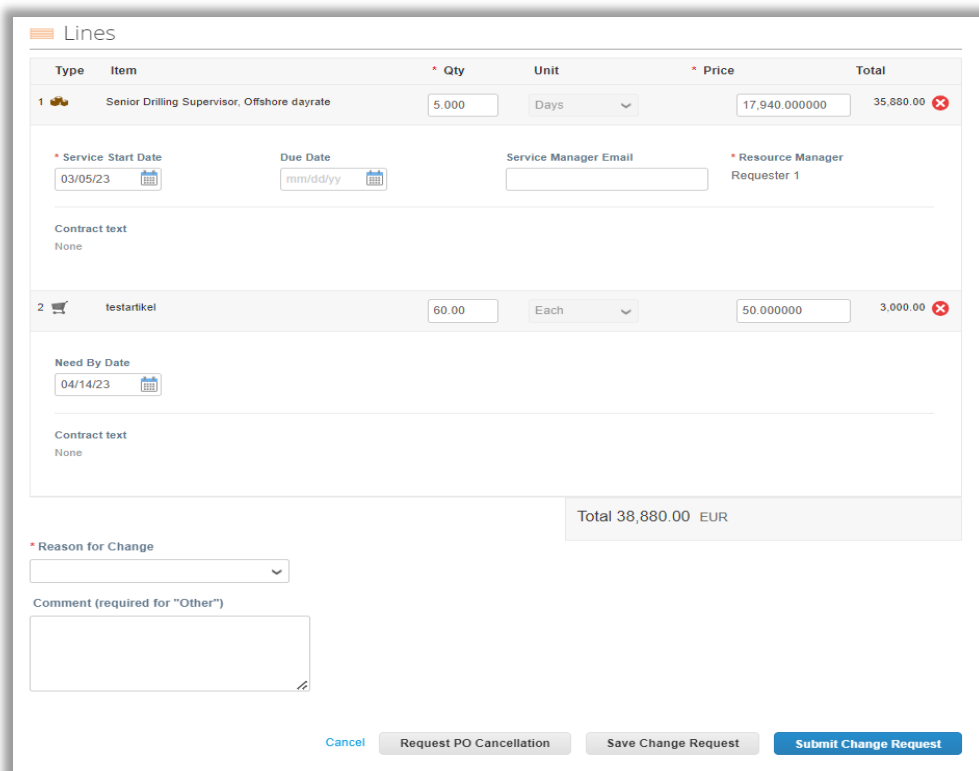This is an Example for Illustrative Purposes only

5. Request Change

You can request changes to purchase orders and submit them to Harbour Energy for approval. You can use the "Request Change" button to change existing items, you cannot add missing items or services. If an item or service is missing from the purchase order, use the comment function for this.
With the button "Request Change" the various fields become changeable.

Please note that the price cannot be changed if this item or service is from a Catalogue. In this case, the Catalogue Item must be corrected first. To do this, please contact your purchasing contact at Harbour Energy.

It is not possible to make changes to orders that have already been completed.

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You can save any changes you make to a Purchase Order, whilst you are working on the PO, without submitting the change to Harbour Energy.

When clicking the Button "Submit Change Request", the following warning message will appear:

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Please select the "Submit" button to send your changes to Harbour Energy.

Changes are effective when a change request is approved. When a PO change request is rejected by either the Requester or Buyer, you will receive a notification that the change you have requested has not been approved.

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You can withdraw your change request by locating and opening your Purchase Order. Select "Click to view pending changes" on the yellow line.

Scroll to the bottom of the page. Add any further "Comments" to support your need to withdraw the change request by select the "Withdraw" button.
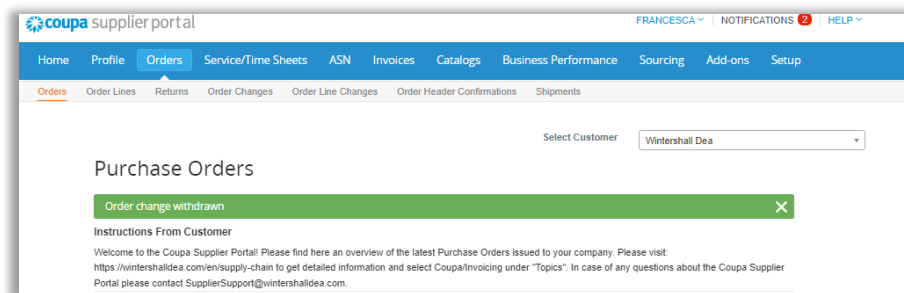
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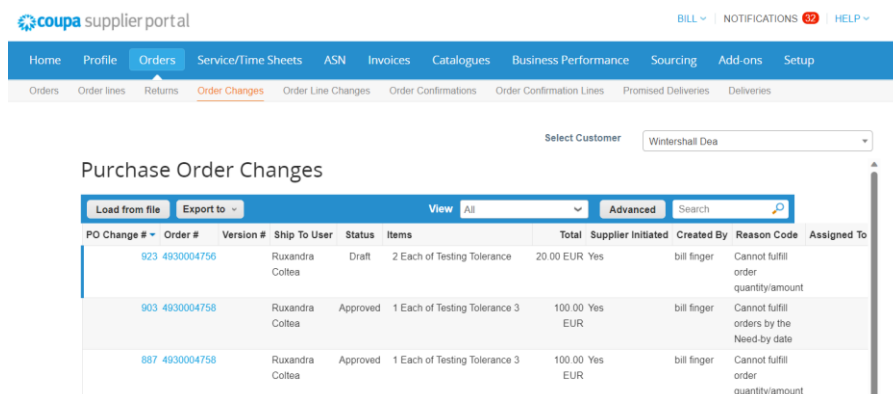
Once selected you will then receive a notification that your change request has been withdrawn.

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In the tab "Orders" > "Purchase Order Changes" you can see every change you forwarded on the Order Changes and the current status.
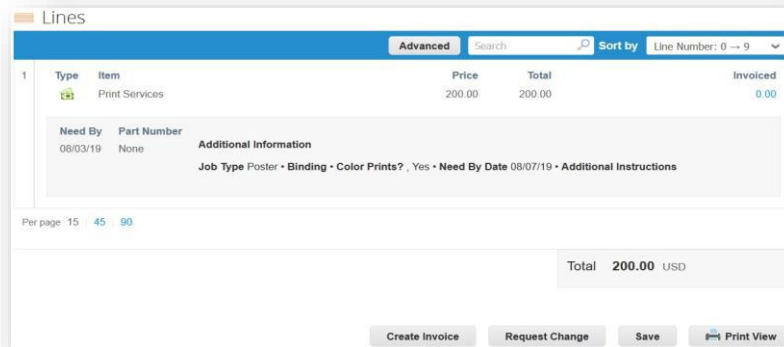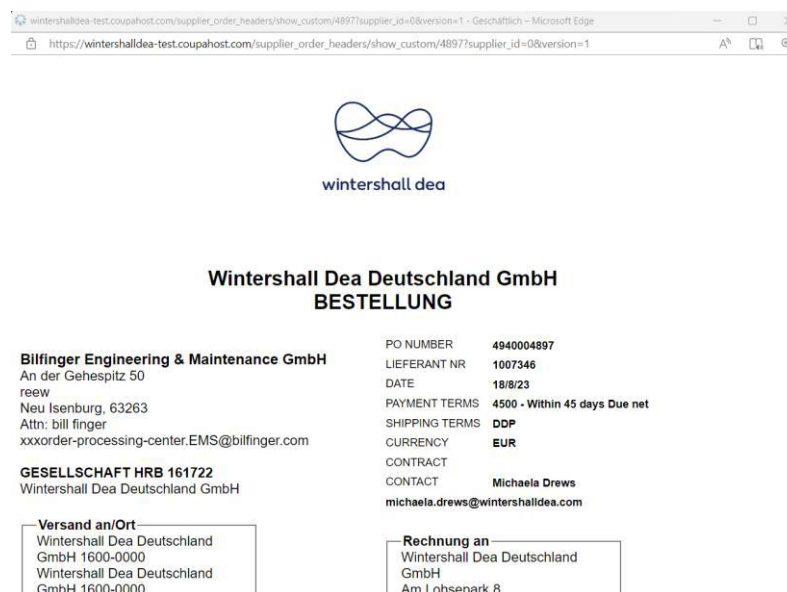

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6. Print view

You can also print Purchase Orders. Select the PO Number link to open the PO and scroll to the bottom of the PO. Select the Print View button.

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In some purchase orders, you may not see a price on the line. This is because 'HIDE PRICE' function was chosen.

This could be the case if a limit order (Budget order) was created. This has no influence of the invoice process. You can create your invoices in the CSP as normal with the appropriate costs detailed.