

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.

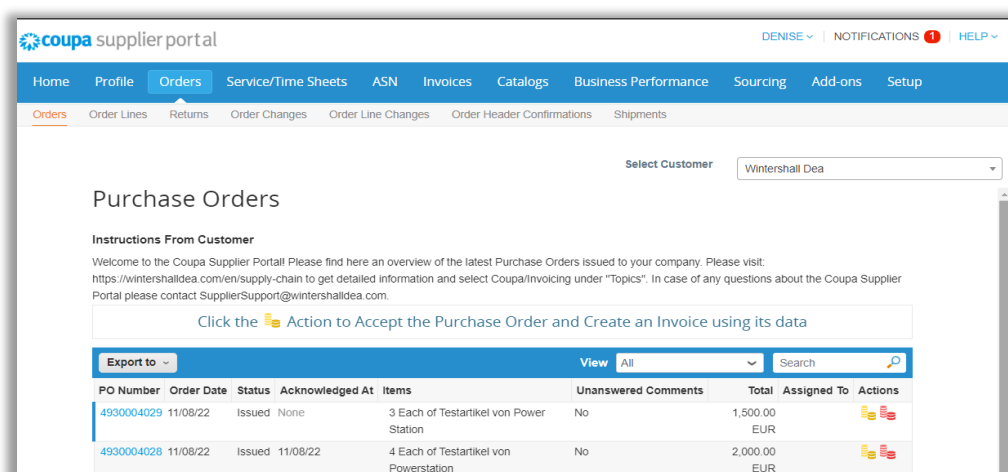
Once you select the “Orders” tab you will see all your purchase orders listed with their various statuses. You can also use the Purchase order number or create your own report view to navigate directly to the Purchase Order you wish to see.

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.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders (selected), Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the navigation bar, there are sub-tabs for Orders, Order Lines, Returns, Order Changes, Order Line Changes, Order Header Confirmations, and Shipments. A 'Select Customer' dropdown menu is set to 'Wintershall Dea'. The main heading is 'Purchase Orders'. Below this, there is a section for 'Instructions From Customer' with a welcome message and a link to the Coupa Supplier Portal. A button labeled 'Click the Action to Accept the Purchase Order and Create an Invoice using its data' is visible. Below the instructions, there is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains two rows of data.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
4930004029	11/08/22	Issued	None	3 Each of Testartikel von Power Station	No	1,500.00 EUR		
4930004028	11/08/22	Issued	11/08/22	4 Each of Testartikel von Powerstation	No	2,000.00 EUR		

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2. Purchase Order Status Definition

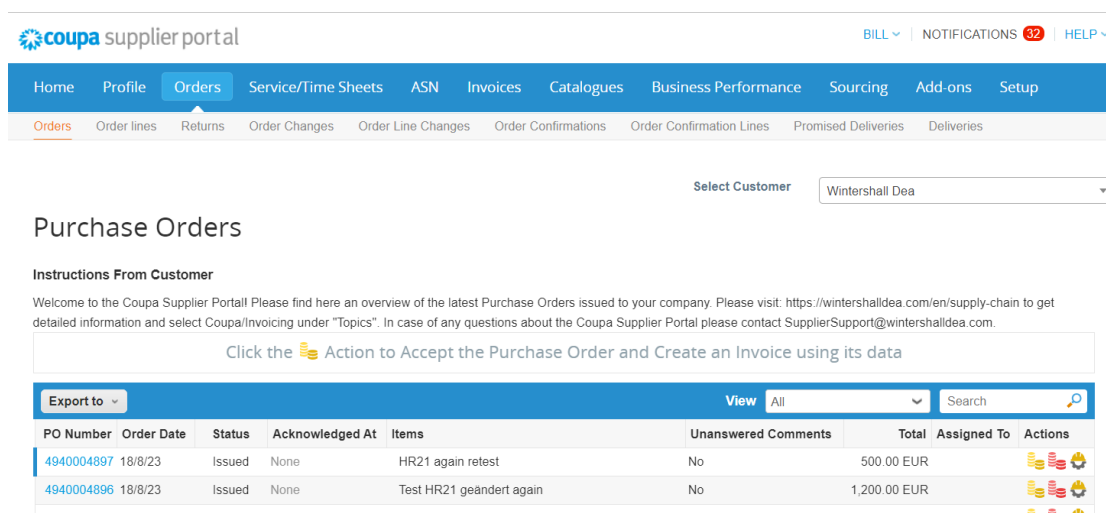
Purchase Orders will have one of the following statuses.

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 screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with links like Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. Below this, there's a sub-navigation bar with links like Orders, Order lines, Returns, Order Changes, Order Line Changes, Order Confirmations, Order Confirmation Lines, Promised Deliveries, and Deliveries. A 'Select Customer' dropdown menu is set to 'Wintershall Dea'. The main heading is 'Purchase Orders'. Below this, there's a section 'Instructions From Customer' with a welcome message and a link to get detailed information. A button 'Click the Action to Accept the Purchase Order and Create an Invoice using its data' is visible. Below this, there's a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table lists three purchase orders, with the first two highlighted in blue.


PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
4940004897	18/8/23	Issued	None	HR21 again retest	No	500.00 EUR		  
4940004896	18/8/23	Issued	None	Test HR21 geändert again	No	1,200.00 EUR		  
4940004895	18/8/23	Issued	None	Aspic test HR21	No	1,000.00 EUR		  

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

Purchase Order #4940004897

 General Info

 Shipping

Status Issued - Pending Manual
Order Date 18/8/23
Revision Date 18/8/23
Requester Michaela Drews
Email michaela.drews@wintershaldea.com
Payment Term 4500 - Within 45 days Due net
Sourcing type None
Offshore Delivery No
Attachments None
Acknowledged ☐

Ship-To Address Wintershall Dea Deutschland GmbH 1600-0000
Am Lohsepark 8
20457 Hamburg
Germany
Location Code: 1600-0000
Attn: Michaela Drews
Terms DDP

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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".

Lines

Advanced

Search

Sort by Line Number: 0 → 9

1	Type	Item	Price	Total	Invoiced
<input type="checkbox"/>		HR21 again retest	500.00	500.00	0.00
<div> <div> * Service Start Date 18/8/23 </div> <div> Resource Manager Michaela Drews </div> <div> Confirmed 0.00 </div> <div> Pending Approval 0.00 </div> <div> Pending Rework 0.00 </div> <div> Discarded 0.00 </div> <div> Supplier Part Number None </div> </div>					
<div> <div> Manufacturer Name None </div> <div> Manufacturer Part Number None </div> </div>					

Per page 15 | 45 | 90

Total EUR 500.00

Create Invoice

Create Service/Time Sheets


Request Change

Save

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".

 Comments


[Mute Comments](#)

Enter Comment

Add File | URL

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

Add Comment

 History


[History](#)

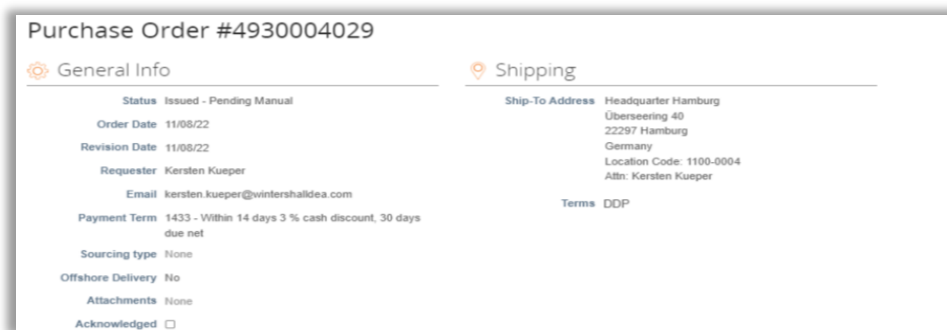
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The functions just mentioned will now be explained in detail.
Please notice that the button "Create invoice" is explained in detail in the user guide "09_WDH_Creating Invoice in CSP" and the button "Create service/time sheet" is explained in detail 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 within all details, you can perform your order confirmation in the CSP by ticking the check box 'Acknowledged'.

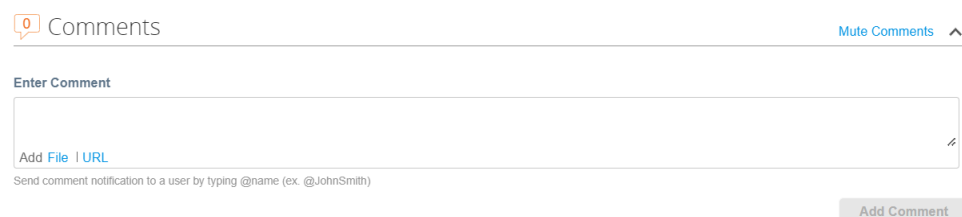
 There is no need to send an additional order confirmation via email if you use this functionality.



Purchase Order #4930004029	
General Info	Shipping
Status: Issued - Pending Manual	Ship-To Address: Headquarter Hamburg
Order Date: 11/08/22	Überseering 40
Revision Date: 11/08/22	22297 Hamburg
Requester: Kersten Kueper	Germany
Email: kersten.kueper@wintershalidea.com	Location Code: 1100-0004
Payment Term: 1433 - Within 14 days 3 % cash discount, 30 days due net	Attn: Kersten Kueper
Sourcing type: None	Terms: DDP
Offshore Delivery: No	
Attachments: None	
Acknowledged: <input type="checkbox"/>	

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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.



Comments Mute Comments ^

Enter Comment

[Add File](#) | [URL](#)

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

Add Comment

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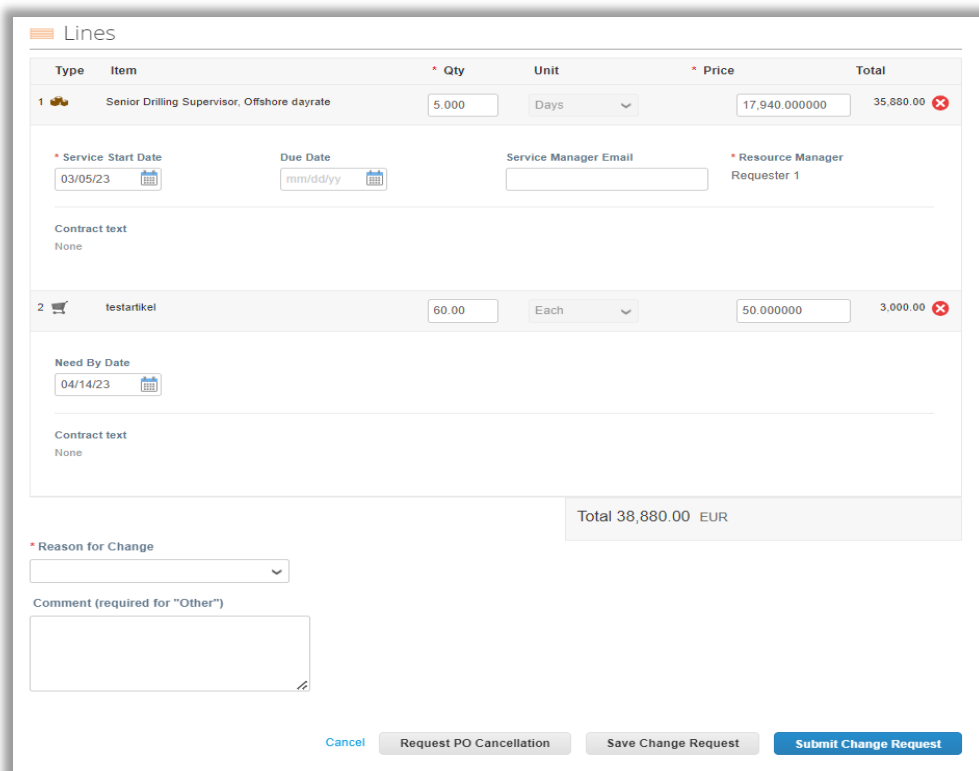
5. Request Change

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.



The screenshot shows a web form titled "Lines" with a table of items and a summary section.

Type	Item	* Qty	Unit	* Price	Total
1	Senior Drilling Supervisor, Offshore dayrate	5,000	Days	17,940.000000	35,880.00
<div> <div>* Service Start Date 03/05/23</div> <div>Due Date mm/dd/yy</div> <div>Service Manager Email</div> <div>* Resource Manager Requester 1</div> </div> <div>Contract text None</div>					
2	testartikel	60.00	Each	50.000000	3,000.00
<div>Need By Date 04/14/23</div> <div>Contract text None</div>					
					Total 38,880.00 EUR

Below the table, there is a section for "Reason for Change" with a dropdown menu and a "Comment (required for 'Other')" text area.

At the bottom, there are four buttons: "Cancel", "Request PO Cancellation", "Save Change Request", and "Submit Change Request".

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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:

Warning from Wintershall Dea

This Order Header has the following warning:

- Please select the Condition of Contract applicable for this Purchase Order.

Continue Editing

Submit

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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.

Purchase Order #4930004756

Change request for Purchase Order #4930004756 has been submitted for approval.

There is a pending change request on this purchase order. [Click to view pending change](#)


General Info	Shipping
<div><div>Status</div><div>Issued - Pending Manual</div></div> <div><div>Order Date</div><div>27/6/23</div></div>	<div><div>Ship-To Address</div><div>Headquarter Hamburg Überseering 40 22297 Hamburg</div></div>

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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.

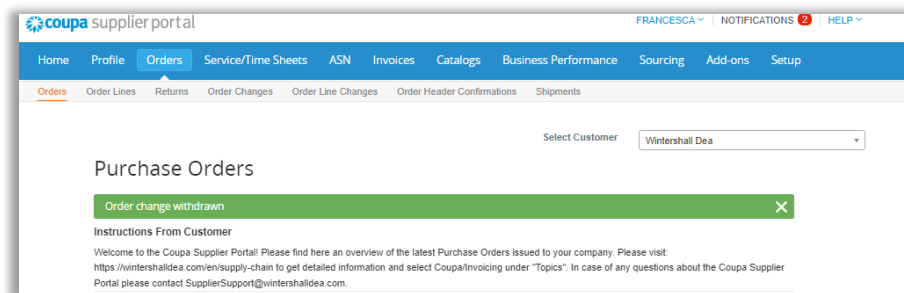
Lines

Type	Item	Qty	Unit	Price	Total
1	 Testing Tolerance	2 4	Each	10.00 EUR	20.00 40.00 EUR
<div> <div>* Service Start Date</div> <div>30/6/23</div> </div> <div> <div>* Resource Manager</div> <div>Ruxandra Coltea</div> </div> <div> <div>Supplier Service Manager Email</div> <div>None</div> </div>					
Total					20.00 40.00 EUR

Withdraw

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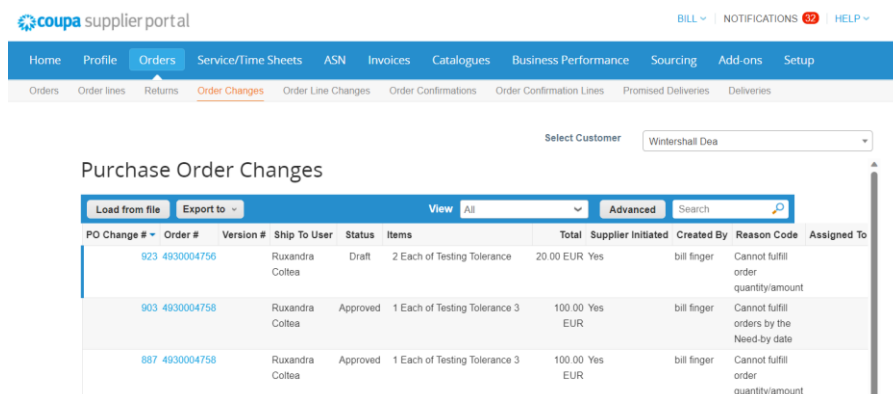
Once selected you will then receive a notification that your change request has been withdrawn.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The 'Orders' tab is selected. Below the navigation bar, there is a 'Select Customer' dropdown menu with 'Wintershall Dea' selected. The main content area is titled 'Purchase Orders' and displays a green notification banner that reads 'Order change withdrawn'. Below the banner, there is a section titled 'Instructions From Customer' with a welcome message and a link to the Coupa Supplier Portal.

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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.



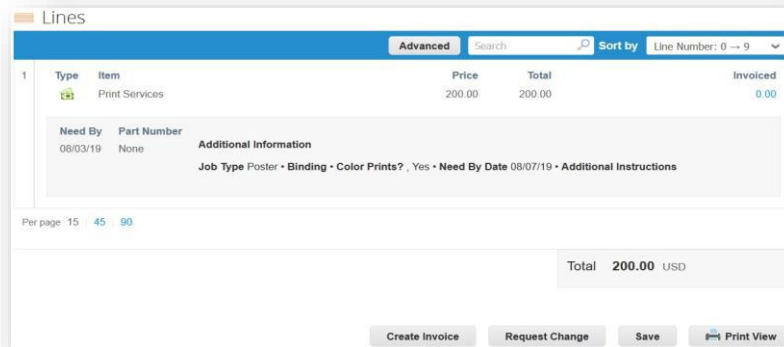
The screenshot shows the Coupa Supplier Portal interface with the 'Purchase Order Changes' tab selected. The top navigation bar is the same as the previous screenshot. The 'Purchase Order Changes' tab is selected, and the 'Select Customer' dropdown menu is set to 'Wintershall Dea'. The main content area displays a table of purchase order changes. The table has columns for PO Change #, Order #, Version #, Ship To User, Status, Items, Total, Supplier Initiated, Created By, Reason Code, and Assigned To. The table contains three rows of data, each representing a different purchase order change.

PO Change #	Order #	Version #	Ship To User	Status	Items	Total	Supplier Initiated	Created By	Reason Code	Assigned To
923	4930004756		Ruxandra Coltea	Draft	2 Each of Testing Tolerance	20.00 EUR	Yes	bill finger	Cannot fulfill order quantity/amount	
903	4930004758		Ruxandra Coltea	Approved	1 Each of Testing Tolerance 3	100.00 EUR	Yes	bill finger	Cannot fulfill orders by the Need-by date	
887	4930004758		Ruxandra Coltea	Approved	1 Each of Testing Tolerance 3	100.00 EUR	Yes	bill finger	Cannot fulfill order quantity/amount	

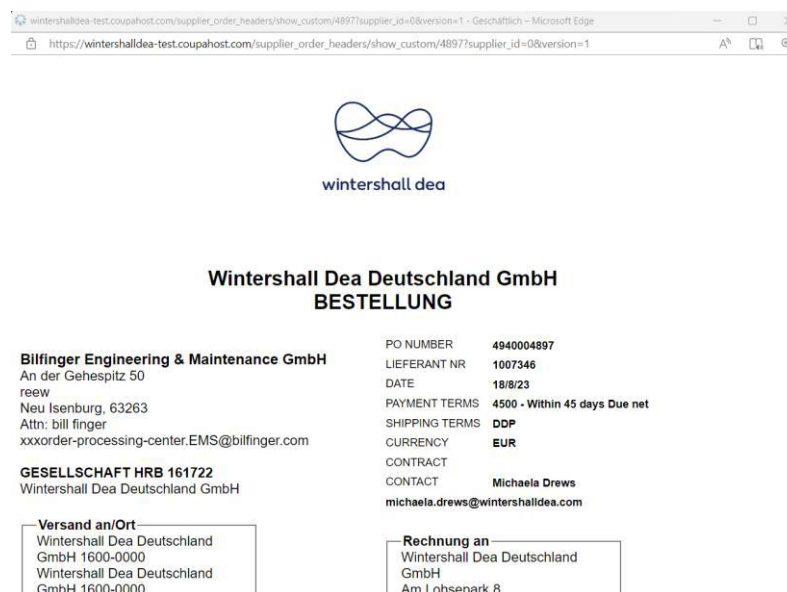
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6. Print view

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.



This is an Example for Illustrative Purposes only



This is an Example for Illustrative Purposes only



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.