



## Viewing and Managing PO's on the CSP

## **About this Guide**

This guide provides suppliers with an overview for Viewing and Managing Purchase Orders (POs) on the Coupa Supplier Portal. It also provides suppliers with instructions on how to create a PO and fill out the necessary fields in order to submit an Invoice to Flynn.

This guide contains the following sections:

- Purchase Orders Overview
- <u>Accessing a Purchase Order</u>
- Creating and filling out an Invoice for a PO

## **Purchase Orders Overview**

1. To view and manage Purchase Orders, log onto the Coupa Supplier Portal. From the Home page, click on the **Orders** tab. From the **Select Customer** drop-down list in the top right corner, select **Flynn**.

coupa supplier po	ortal			DAV	E= NOTIFICATIO	NS 🚹 HELP -
Home Profile	ers Service/Time Sheets	ASN Invoices	Catalogs Paymen	ts Business Performance	Sourcing A	dd ons
Orders Order Lines Re	turns Order Changes Order	Line Changes Order	Continuations Order Co	vlimation Lines Promised Defin	ones Shipments	
			[	Select Customer Flynn Ros	taurant Group - Test	ĸ
Purchase Orc	lers					
Instructions From Custom	er					N
(Example text - this is set on y	our Company Information setup pag	e and will be displayed to the 🝓 Action to I	r CSP and SAN suppliers o nvoice from a Purc	i the Purchase Order list page) hase Order		
Export to -				View All	- Search	P
PO Number Order Date	Status Acknowledged At	Items	Unar	swered Comments To	tal Assigned To	Actions
TES7554 06/21/23	issued 06/22/23	Repair services	No	500	00	le 8





2. To search for a purchase order, use the **Search** function to find the PO, or you can use the **View** drop down menu to filter through different categories.

Export to -					View	All V Search	P
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comm	Confirmations Awaiting Buyer Review	Actions
TEST554	06/21/23	Issued	05/22/23	Repair services	No	Open Orders Orders not acknowledged	le le 🗘
TEST653	06/21/23	Issued	None	Repair services	No	Orders not invoiced Orders past due	le le O
TEST544	06/21/23	issued	None	5 Box of Kitech Commodily	No	Orders Pending Confirmation Orders with pending changes Overdue Confirmations POS Pending Rework POS with service lines Create View	le le

- **3.** Depending on the catalog line item, you will see various icons in the far-right **Actions** column allowing the user to take different actions including:
  - Create Invoice for PO (gold coin Icon) allows you to Create a new Invoice for a PO
  - Create Credit Note (red coin icon) allows you to create a credit note against an Invoice. Issuing a credit note for an open invoice decreases the amount due on an Invoice.

Export to -				View 1	-	Search	P.
CSV plain (current columns)	atus	Acknowledged At	Items	Unanswered Comm		igned To	Actions
CSV for Excel (current columns)	sued	06/22/23	Repair services	No			le le O
Excel (current columns)	_sued	None	Repair services	No	500.00		le le 0
TEST544 06/21/23	Issued	None	5 Box of Kitech Commodity	No	1,000.00		le Se

**4.** If needed, you can export Purchase Orders in CSV and Excel format. To export, click on the **Export To** menu dropdown. Clicking on your desired format will prompt a download of a file to your computer.

Export to				View, All		- Search	P
CSV plain t columns)	atus	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CSV for Electrourrent columns)	sued	06/22/23	Repair services	No	500.00		le le O
Excel (current columns)	_sued	None	Repair services	No	500.00		le le O
TEST544 06/21/23	Issued	Nona	5 Box of Kitech Commodity	No	1,000.00		ie Se





## **Accessing a Purchase Order**

1. To access the Purchase Order itself, click on the blue highlighted **PO Number** on the lefthand side of the table.

urchase Orders					
structions From Customer	PO Numb	er Order Date	N suppliers on the Purchase Order int o	agel	
	TESTS	54 06/21/23	om a Purchase Order		
Export to +	TESTS	53 06 23	View All	- Search	P
PO Number Order Date Status	Acknowledged At	Items	Unanswered Comments	Total Assigned To	Actions
TEST554 06/21/23 Issued	06/22/23	Repair services	No	500.00	le le O

2. Once inside the Purchase Order, you will be able to view the **General Info** of the Purchase Order as well as the **Shipping Information**.

Purchase Order	#TEST554				
🔅 General Info		0	Shipping		
Status la ued -	Sent via Email		Ship-To Address	6200 Oak Tree Blvd, Ste 250	
Order Date 06/21/23				Independence, OH 44131 Unland States	
Revision Date 06/21/23				Location Code: Support/CenterCLE	
Requester Steven				Attn.	
Email			Terms	None	
Payment Term None		5	Shipment T	Tracking	•
Attachments None		No	shipment tracking.		
Acknowledged					

**3.** Under the **Lines** section, you will see the details of the order. This section includes the Type of Item, Item category, Price, and Total.

	Type It	tem tepair services			Price 500.00	Total 500.00	Invoiced 0.00
	Confirmed 0.00	Pending Approval	Pending Rework	Discarded 0.00	Supplier Part Number None	Manufacturer Name None	Manufacturer Part Number None
er j	page 15 ; 45	5   90					





4. At the bottom of the page, a **Comments** section provides the option to enter a comment in the form of text, a **File**, and a **URL**. These comments can be seen by your Internal Team as well as the Flynn Team.

Comments	Mute Comments	~
Enter Comment		
Add File   URL		ж
Send Comment polification to a user by typing @name (ex. @JohnSenth)		
	Add Commer	nit.

5. Lastly, after viewing the Purchase Order, you can Create an Invoice by clicking Create Invoice. This is the same action as clicking on the gold coin icon outlined in the steps above. Suppliers can also Save the Purchase Order with the changes made (i.e. comments) or Print the page.

		lated Late	Fight Restaut	unt Group - Tierre Tarrel
General lofo	2	Shipping		
Derics armite. Eine Date Atrices Presente Paie Atrices Presente Paie Atrices Presente Paie Atrices Present Paie Atrices Pagement Paie Attricement Paie Attricement Paie		Mig- In Address 11(2). Mig- In Address 11(2). Lawer Lawer Adress Access Terms Access Shipment Track To adjust to the	Adecorn Smeet IIIN van SA 19419 States n Entre Agradeest 403 inen fundaren	0
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