Viewing and Managing PO's on the CSP

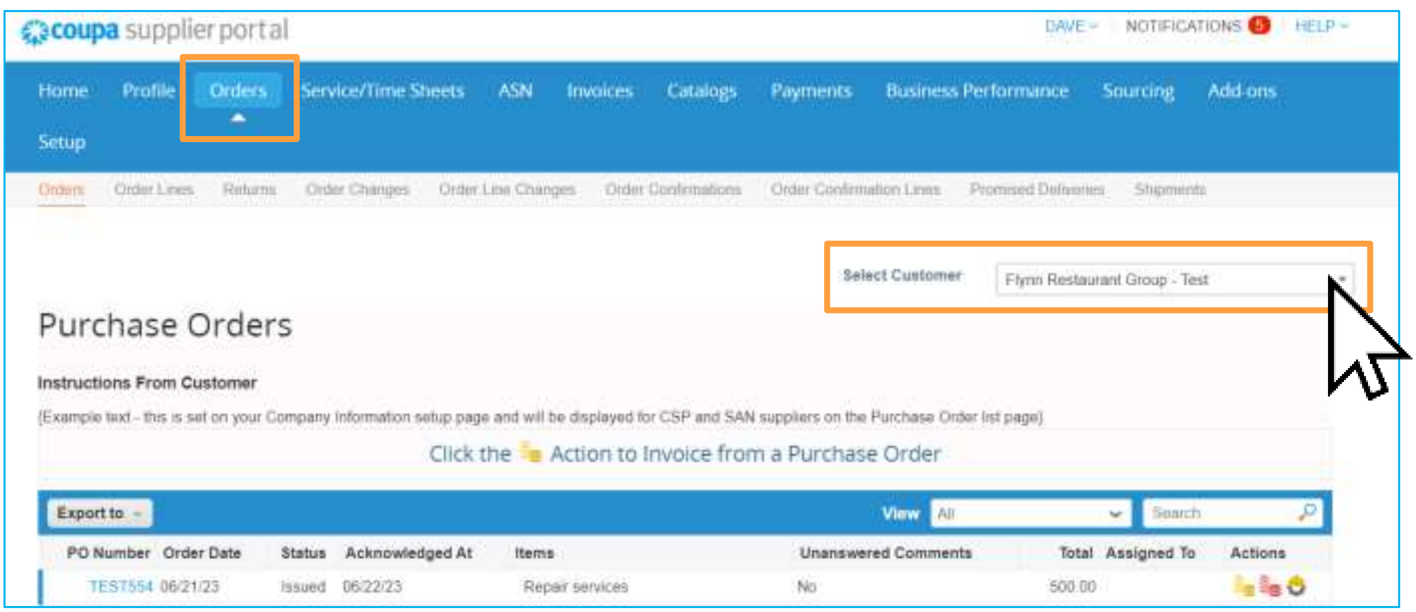
About this Guide

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

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**.



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.

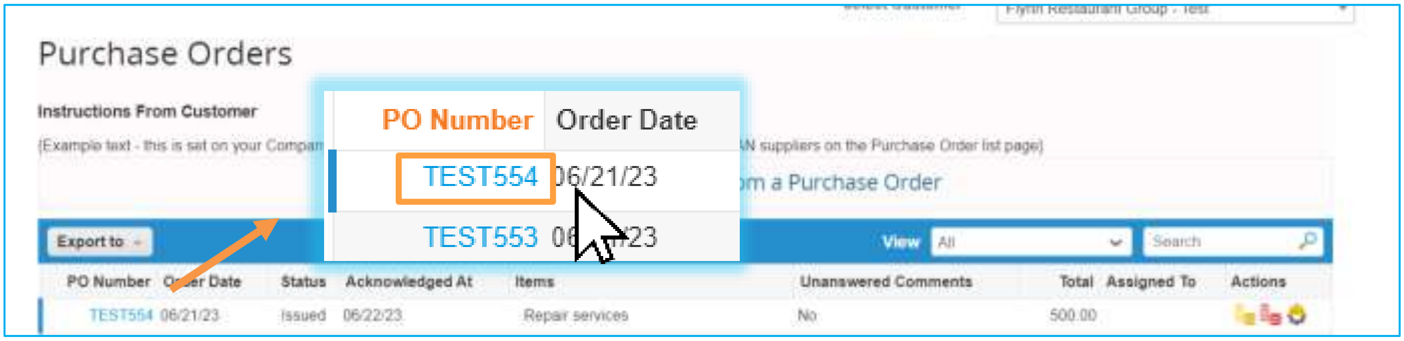
3. Depending on the catalog line item, you will see various icons in the far-right **Actions** column allowing the user to take different actions including:

- **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.

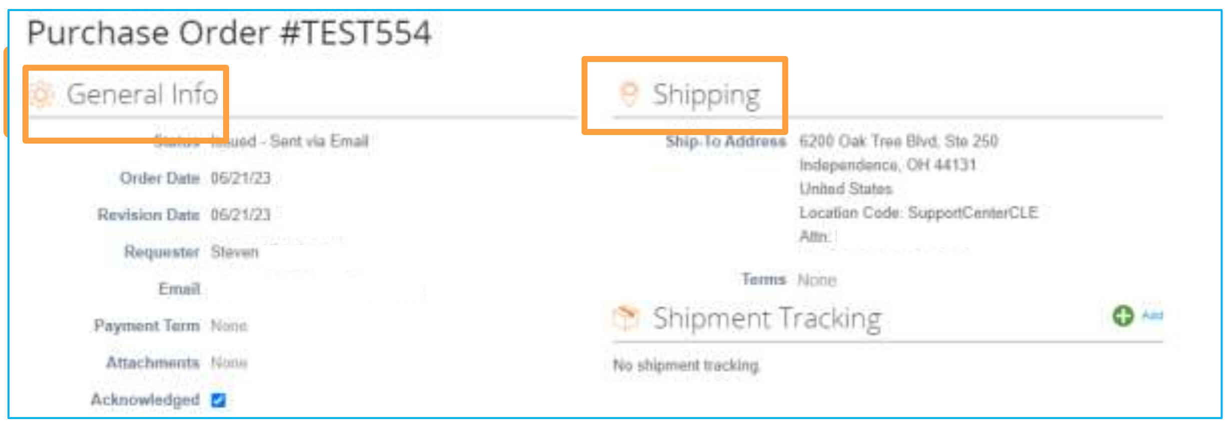
4. If needed, you can export Purchase Orders in CSV and Excel format. To export, click on the **Export To** menu dropdown. Clicking on your desired format will prompt a download of a file to your computer.

Accessing a Purchase Order

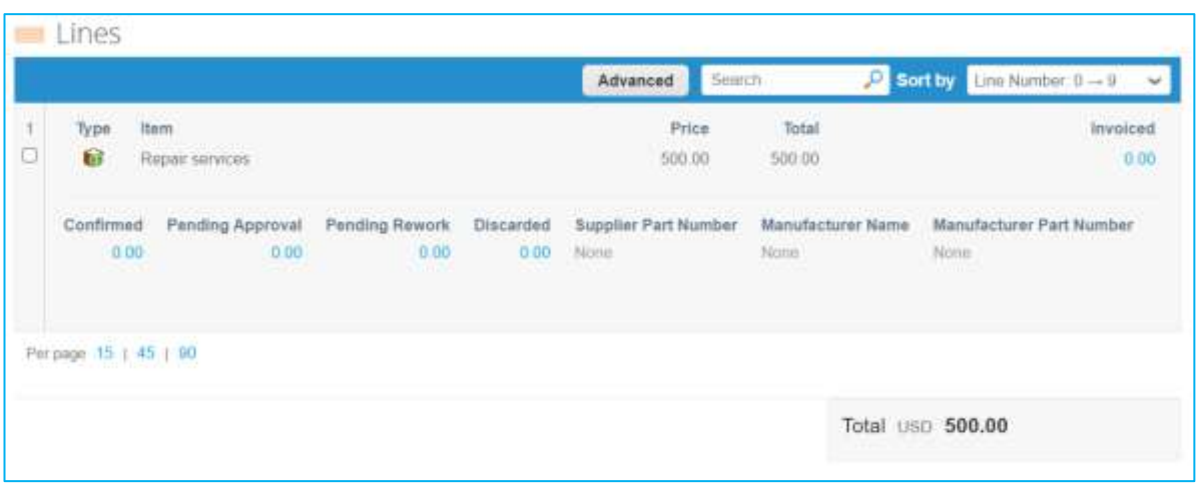
1. To access the Purchase Order itself, click on the blue highlighted **PO Number** on the left-hand side of the table.



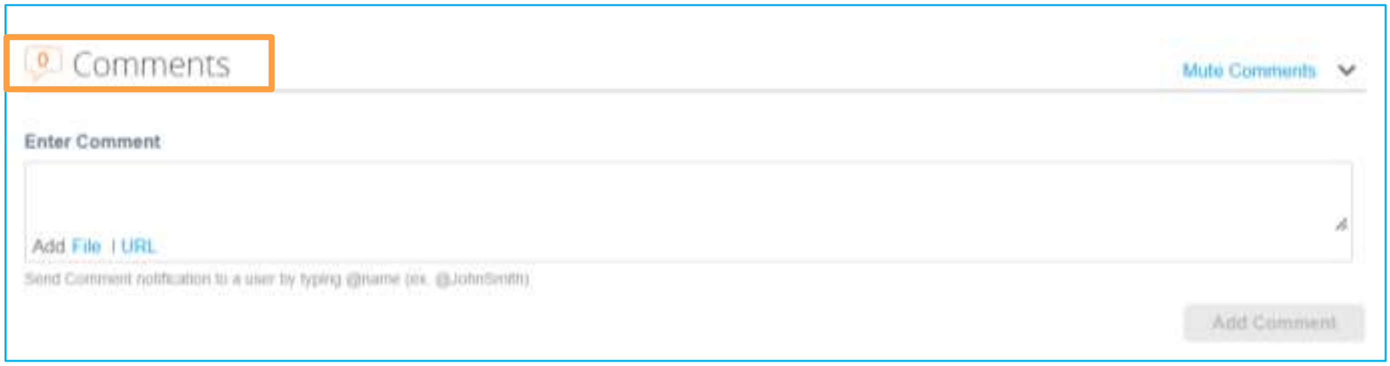
2. Once inside the Purchase Order, you will be able to view the **General Info** of the Purchase Order as well as the **Shipping Information**.



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.



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.



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.