



CSP Supplier Manual

April 2024

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Course Outline

Description

This course explains how to manage purchase orders on the Coupa supplier portal.

Objectives

After completing this course, you will be able to:

1. Receive purchase orders
2. Acknowledge purchase order
3. Add comments on purchase order



02

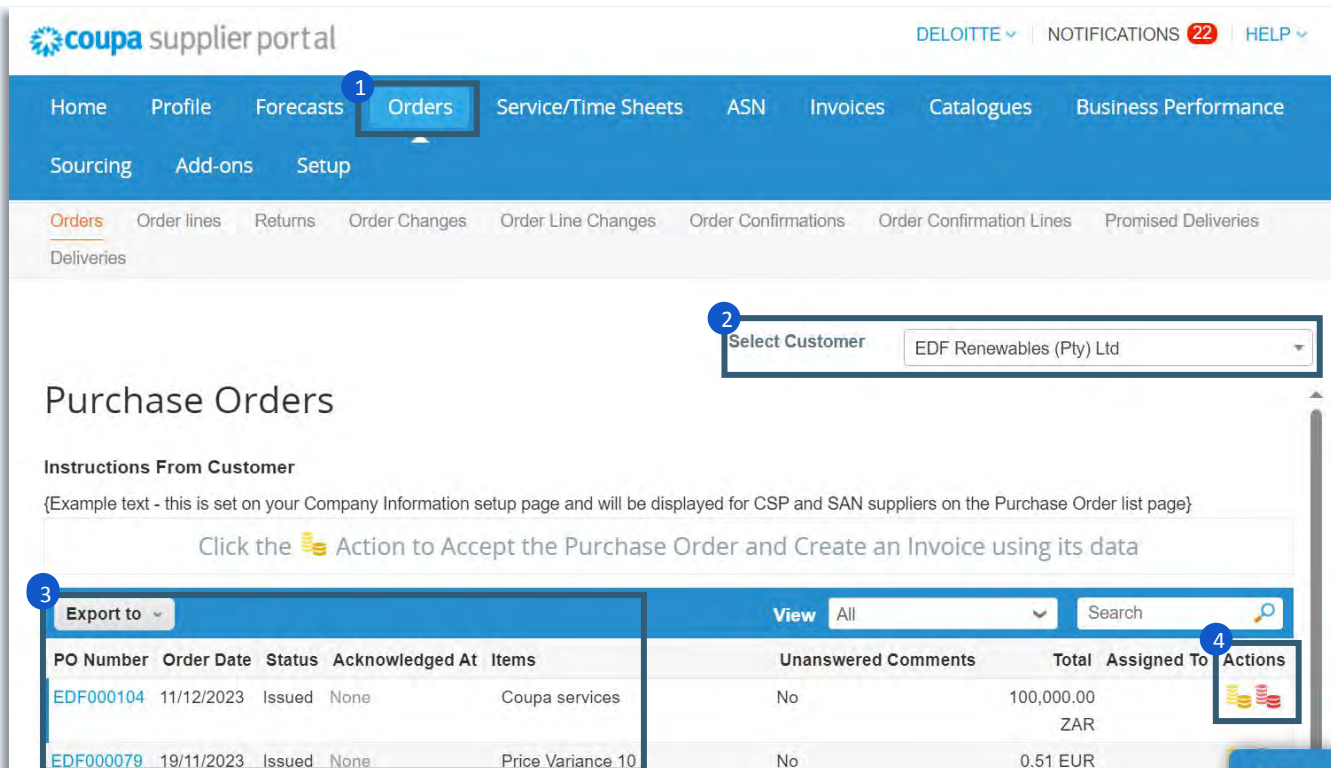
How To Manage POs

Managing Purchase Orders

To manage purchase orders, click on 'Orders' on header bar.

Process Steps:

- 1 Click on 'Orders' on header bar
- 2 Select Customer 'EDF Renewables (Pty) Ltd' if you have more than 1 customer on your portal
- 3 All customer purchase orders will be listed Click on PO hyperlink to view details
- 4 Actions – create invoices and create credit notes against open PO
 - a. Click the gold coins  to create Invoice
 - b. Click the red coins  to create Credit note



coupa supplier portal

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Sourcing Add-ons Setup


Orders Order lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Deliveries

Select Customer EDF Renewables (Pty) Ltd





Purchase Orders

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
EDF000104	11/12/2023	Issued	None	Coupa services	No	100,000.00 ZAR		 
EDF000079	19/11/2023	Issued	None	Price Variance 10	No	0.51 EUR		 

Managing Purchase Orders

To view purchase orders, click on 'Purchase Order' screen.

Process Steps:

- 5 Click on the 'Purchase Order number' of the PO to be viewed.
- 6 Check the "Acknowledge" tick box to notify the requester that you have received the purchase order from EDF Renewables
- 7 Populate the name of the employee you want to assign the purchase order to within your company
- 8 View the line items of the purchase orders to see goods/services requested by EDFR

The screenshot displays the Coupa interface for Purchase Order #EDF000104. At the top, there is a table listing purchase orders with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row, PO Number EDF000104, is highlighted with a blue box and a callout '5' pointing to the PO Number field.

Below the table, the 'Purchase Order #EDF000104' details are shown. The 'General Info' section includes fields for Status (Issued - Sent via Email), Order Date (11/12/2023), Revision Date (11/12/2023), Requester (Yumna Barthus), Email (yumna.barthus@edf-re.co.za), and Payment Term (30 DAYS). The 'Shipping' section shows the Ship-to Address (1 Oakdale Road, Newlands, Cape Town, 7700, South Africa, Attn: Yumna Barthus) and Terms (None). The 'Attachments' section has a callout '6' pointing to the 'Acknowledged' checkbox, which is currently unchecked. Below it, the 'Assigned to' field has a callout '7' pointing to the dropdown menu.

The 'Lines' section at the bottom shows a table of line items. The first line item is 'Coupa services' with a price of 100,000.00 and a total of 100,000.00. The 'Invoiced' column shows 0.00. A callout '8' points to the 'Invoiced' column. Below the line items, there are fields for Supplier Part Number, Supplier Auxiliary Part Number, Manufacturer Name, and Manufacturer Part Number, all of which are currently empty.

Managing Purchase Orders

To enquire about a purchase order, navigate to the PO comments section.

Process Steps:

- 9 Enter a comment to the requester if you have any questions or comments regarding the PO

Note : You can @ the requester when typing the comment
- 10 Once you have typed out your comment click “Add Comment” to send the comment to the requester
- 11 You can view the history of the purchase order

You can attach files in the comment section by clicking on “File” e.g. updated quote with increased price

The screenshot shows the 'Comments' section of a purchase order interface. At the top right is a 'Mute Comments' link with a dropdown arrow. Below it is a large text area labeled 'Enter Comment' with a blue border. Inside the text area, there is a blue '@' symbol for tagging users and a link that says 'Add File | URL'. Below the text area is a small note: 'Send comment notification to a user by typing @name (ex: @JohnSmith)'. To the right of the text area is a blue circle with the number '9'. Below the text area is a grey button labeled 'Add Comment' with a blue circle and the number '10' next to it. Below the 'Add Comment' button is a 'History' section with a clock icon and a blue circle with the number '11' next to it. A right arrow is visible to the right of the 'History' section.



Thank You!