



How to manage Purchase Orders through the Coupa Supplier Portal (CSP) Suppliers Guide For Avient Suppliers

The Coupa Supplier Portal (CSP) is a no-cost tool for suppliers that makes working with your clients, such as Avient, easier and smoother. In this training guide specific to Avient suppliers, we will define:

- How to view and manage Avient POs through the CSP
- How to view PO lines
- How to add shipment tracking information to a PO
- How to view and manage Advanced Shipment Notifications (ASN)
- How to create costume views for reports

View and manage POs

Click on the **Orders** tab on the main menu. The **Orders** page with the **Purchase Orders** table will then appear.

From the **Select Customer** drop-down list in the top right corner, select Avient.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following tabs: Home, Profile, Orders (selected), Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Add-ons, and Admin. Below the navigation bar, there is a sub-menu with the following items: Orders (selected), Order Lines, Order Changes, and Order Line Changes. In the top right corner, there is a "Select Customer" dropdown menu set to "Coupa" and a "Configure PO Delivery" button. Below the navigation bar, there is a section titled "Purchase Orders" with a message: "Click the 📄 Action to Invoice from a Purchase Order". Below this message is a table of Purchase Orders. The table has the following columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The table contains three rows of data:

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
3050	05/31/17	Issued	None	200 Each of Purple Spiral Notebook	No	100.00 USD	📄 📄 📄 📄 📄 📄 📄 📄 📄 📄
3049	05/31/17	Issued	None	1 Box of Blue Pens	No	90.00 USD	📄 📄 📄 📄 📄 📄 📄 📄 📄 📄
2818	07/31/19	Issued	08/19/19	Print Services	No	200.00 USD	📄 📄 📄 📄 📄 📄 📄 📄 📄 📄

The **Purchase Orders** table will display the following information for all the POs received from Avient:

Column	Description
PO Number	PO number generated by Coupa. Click on it to view the PO
Order Date	Date PO was created
Status	Current status of the PO. For more information, see the PO status list below
Acknowledged At	<p>Date when the supplier acknowledged the receipt of the PO, or "None" if not acknowledged.</p> <p>You can choose to let Avient know that you received their PO by selecting the "Acknowledged At" checkbox on the PO.</p> <p>When you select the checkbox, the current date appears in the "Acknowledged At" column. This checkbox is a simple toggle, so you can also un-acknowledge an invoice by deselecting the checkbox. If you re-acknowledge at a later time, the new date will appear.</p> <p><i>Note: You cannot reject a PO, but if you do not accept it, you can add a comment on it. It is recommended you contact Avient directly if you plan on not fulfilling the order.</i></p>
Items	List of items on the PO
Unanswered Comments	<p>Your comments on the PO for Avient as well as Avient's comments that you need to respond to. You can see all comments when you open the PO.</p> <p><i>Note: If urgent communication with Avient is needed, please contact Avient directly</i></p>
Total	Total amount of the PO
Actions	<p>Each Icon is tied to a different action:</p> <ul style="list-style-type: none">  Create (flip the PO into) an invoice.  Create a credit note.  Create (flip the PO into) an advance ship notice (ASN)

If desired, you can export the **Purchase Order** table to CSV or Excel.

You can also print the PO. Click on the **PO Number** link to open the PO and, at the end of the PO, click on the **Print View** button.

You can filter the **Purchase Orders** table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering. For more information, see **Create Custom Views** section in this guide.

POs can have the following statuses:

Status	Description
Buyer Hold	The PO is approved but pending buyer review
Cancelled	The PO is cancelled and does not need to be fulfilled
Closed	The issued PO was received and then closed, either manually or automatically within Coupa
Currency Hold	The PO is on hold due to a currency exchange rate issue
Issued	The PO was approved and sent to you (the supplier)
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Error	Something is wrong with the PO. Contact your customer Avient representative to get the PO back on track.

View PO lines

Click on the **Order Lines** tab to see information on the PO lines for each PO.

The screenshot shows a navigation bar with the following tabs: Home, Profile, **Orders**, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Add-ons, and Admin. Under the 'Orders' tab, there are sub-tabs: Orders, **Order Lines**, Order Changes, and Order Line Changes. Below the navigation bar, there is a 'Select Customer' dropdown menu with 'Coupa' selected and a 'Configure PO Delivery' button.

Purchase Order Lines

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total
3050	1	Issued	200 Each of Purple Spiral Notebook	100	100.00
3048	3	Issued	1 Box of Pen 101	1	90.00
3048	2	Issued	1 Box of Pen 102	1	80.00
3048	1	Issued	1 Box of Pen 103	1	100.00

Make sure you select Avient from the **Select Customer** drop-down list in the top right corner.

The **Purchase Order Lines** table shows the following information for all the PO lines:

Column	Description
PO Number (Header)	PO number generated by Coupa. Click on it to see the PO line.
Line	PO line number.
Order Status (Header)	Current status of the PO. For more information, see View and Manage POs .
Item	List of items on each PO line.
Total Item Quantity	Total quantity of the PO line.
Line Total	Total amount of the PO line.

For your custom view, you also add the following additional information: ASN lines, carrier, confirmed quantity, delivery date, invoiced, line level text, need by date, received, ship method, ship note, shipment date, shipped quantity, and tracking number.

If desired, you can export the PO lines table in CSV or Excel format.

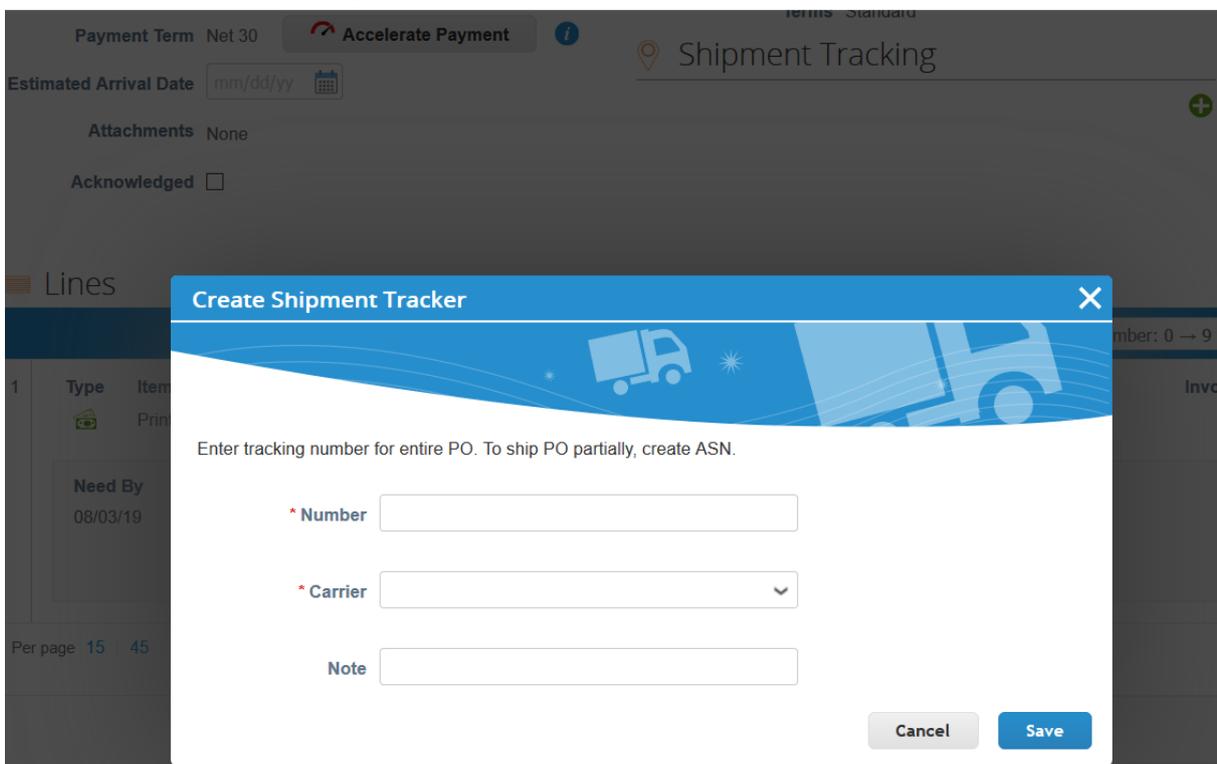
You can filter the table by columns by using the search bar, or click on the **View** drop-down for advanced filtering. For more information, see **Create Custom Views** section in this guide.

Add shipment tracking information

Note: You can add shipment tracking information to POs if your customer enables real-time shipment tracking.

In the **Shipment Tracking** section on the PO, click the **Add** icon. In the **Create Shipment Tracker** popup window, enter the tracking number for the entire PO, select a carrier (FedEx, USPS, UPS) from the drop-down window, and add a note (optional).

Note: You can only enter one tracking number on a PO. For partial shipments, you can create an advance shipping notice (ASN).



The screenshot shows a software interface with a 'Shipment Tracking' section. A 'Create Shipment Tracker' popup window is open, featuring a blue header with a truck icon. The popup contains the following fields:

- Text input: "Enter tracking number for entire PO. To ship PO partially, create ASN."
- Text input: "* Number" (mandatory field)
- Dropdown menu: "* Carrier" (mandatory field)
- Text input: "Note" (optional field)
- Buttons: "Cancel" and "Save"

The background interface includes a 'Payment Term' of 'Net 30', an 'Accelerate Payment' button, an 'Estimated Arrival Date' field, and a 'Lines' table with columns for 'Type' and 'Item'.

Create, view and manage ASNs

When you receive a purchase order, you can flip it into an ASN and send it to Avient by clicking on the **Flip to ASN** icon in the **Purchase Orders** table. See **View and Manage POs** section in this guide for more information.

To edit a draft ASN or update one in pending receipt status, click on the Edit icon in the **Advance Ship Notices** table.

On the **Create Advance Ship Notice** page, fill in the mandatory fields (marked with a red asterisk).

Create Advance Ship Notice

General Info

• ASN #

Status draft

Ship Date

Delivery Date

Ship To

Address 123 Value Drive
San Mateo, CA 94402
USA

Shipping Info

Tracking Number

Carrier

Shipping Method

Ship Note

Lines

1	Description	Quantity	UOM	Received Quantity	Status
	Blue Pens	<input type="text" value="0.00"/>	Box	0	draft
	Supplier Part Num	PO #	PO Line	Po Line Quantity	
	123456789	3049	1	100.0	
	Invoice Num Reference	Invoice	Invoice Line	Invoice Line Qty	
<p>Comments</p> <input style="width: 100%; height: 40px;" type="text"/>					

Click on the **Submit** button to send the ASN to Avient, or on the **Update** button if you are sending an updated ASN.

Note: When you send an ASN, the PO status changes to Issued even if you have not sent an invoice yet.

To view and manage ASNs, click on the **ASN** tab on the main menu. The **Advance Ship Notices** page appears.

SUPPLIERNAME ▾ | NOTIFICATIONS 2 | HELP ▾

Home
Profile
Orders
Service/Time Sheets
ASN
Invoices
Catalogs
Add-ons
Admin

Select Customer

Advance Ship Notices

Export to ▾					View	All ▾	Search <input style="width: 80%; border: none;" type="text"/>
ASN Number	Status	Delivery Date ▲	Last Updated By	Last Updated Date	Actions		
111	Draft	None	John Doe	06/09/17	✎ ✖		
222	Pending Receipt	06/02/17	Jane Doe	05/31/17	✎ ↺		

Select Avient from the **Select Customer** drop-down list in the top right corner.

The Advance Ship Notices table will then show the following information for all the ASNs you sent to Avient.

Column	Description
ASN Number	ASN number generated by Coupa. Click on it to view the ASN.
Status	Current status of the ASN. For more information, see the ASN status list below.
Delivery Date	Date when the ASN was sent.
Last Updated By	Name of the person who updated the ASN for the last time.
Last Updated Date	Date when the ASN was updated for the last time.
Actions	<p>Click on the icons for the following actions:</p> <ul style="list-style-type: none">  - Edit the ASN.  - Delete the ASN.  - Cancel the ASN. <p>You can edit ASNs in draft or pending receipt status. You can delete ASNs in draft status. You can cancel ASNs that are pending receipt.</p>

ASNs can have the following statuses:

Status	Description
Draft	The ASN has been created, but it has not been submitted to your customer
Cancelled	The ASN has been cancelled
Partially Received	The customer has received a part of your shipment
Pending Receipt	The customer is waiting for the shipment
Received	The customer has received your shipment

You can export the ASNs table in CSV or Excel format.

You can also filter the table by columns by using the search bar or click on the **View** drop-down list to perform advanced filtering.

Create Custom Views

You can create custom views depending on what information you want to see relating to orders, invoices, catalogs, or ASNs.

You can create custom views (tables for reports) for orders, order lines, order changes, order line changes, advance ship notices (ASN), invoices and catalogs.

With a custom view you can create a set of advanced search filters.

1. On the main menu, click on the tab for the function for which you want to create a custom view.
2. At the top of the table whose view you want to change, click **Create View** in the **View** drop-down list.

- On the **Create New** data table view page, select Avient from your customer list, and then specify the settings you want to use for your custom view, including filtering conditions, columns to include, and sorting criteria.

You can use the following settings when creating or editing a custom view for a CSP table.

Group	Setting	Description
General	Name	Name of the custom view, visible from the View drop-down list at the top of the table.
	Visibility	Defines whether this view can be visible to only you or all the other users that can see the main table.
	Start with view	Use this option to load the settings from another view, and then modify those settings to fit your needs for this view.
Conditions	Apply	All - Displays results only for objects that meet all of the conditions you add in this list. Any - Displays results for objects that meet at least one of the conditions you add in this list.
	Conditions	Create conditions based on the data available in the CSP.
Columns	Available columns	This list depends on the table you work with in the CSP. You can select any of these columns to add to your custom view.
	Selected columns	These are all the columns displayed in this custom view. They appear from left to right, in the same order that you set them up here.
Default Sort Order		Choose the column by which you want results to be sorted and define whether to sort them in ascending or descending order.

- Once complete, save your settings.

To delete a custom view, open the view for editing by clicking on the **Edit View** icon and click on the **Delete** button at the bottom of the page.