



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.

coupa supplier portal

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

Orders Order Lines Order Changes Order Line Changes

Select Customer Coupa

Configure PO Delivery

Purchase Orders

Click the Action to Invoice from a Purchase Order

| 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 the Coupa navigation bar with the following tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Payments, Add-ons, Admin. The 'Orders' tab is active, and 'Order Lines' is highlighted. 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.

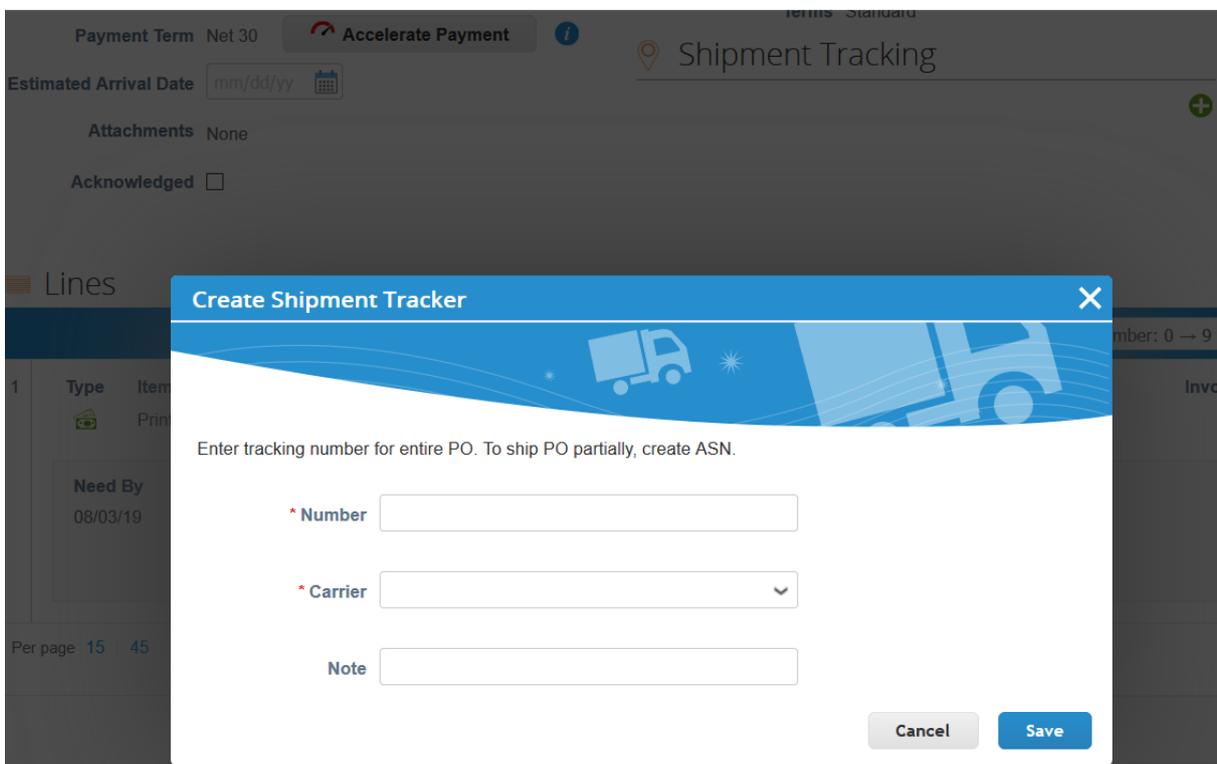
You can filter the table by columns by using the search bar, or click on the **View** drop-down for advanced filtering. For more information, see **Create Custom Views** section in this guide.

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 and a close button. The main content area is white and contains the following elements:

- Instructional text: "Enter tracking number for entire PO. To ship PO partially, create ASN."
- A mandatory text input field labeled "* Number".
- A mandatory dropdown menu labeled "* Carrier".
- An optional text input field labeled "Note".
- Two buttons at the bottom right: "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 | |

Comments

[Cancel](#) [Save](#) [Submit](#)

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.

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

Select Customer

Advance Ship Notices

| 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.