



wintershall dea

HOW TO MANAGE PURCHASE ORDERS IN COUPA SUPPLIER PORTAL

Coupa Supplier Portal (CSP) – User Guide

Version 1.0 (August 2023)

1. General Information

You can manage your Purchase Orders (POs) from within Coupa by selecting the **"Orders"** tab on the main menu.

Once you select the **"Orders"** tab you will see all your purchase orders listed with their various statuses. You can also use the Purchase order number or create your own report view to navigate directly to the Purchase Order you wish to see.

You can manage your purchase orders from Coupa by selecting the **"Orders"** tab on main menu. In this view you will see all your orders. You can choose between customers or also generate your own view for the orders.

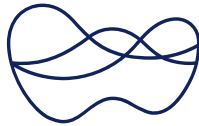
Under **"Select customer"** you change the view to another customer which is using CSP. Under **"View"** you can use the selection **"Create view"** to set up a individually list of orders.

The search field can be used to search for any column in the order list, e.g. the PO number. All columns can also be sorted in ascending or descending order.

Via the button **"Export to"** the displayed list can be saved locally.

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, Business Performance, Sourcing, Add-ons, and Setup. Below the navigation bar, there is a sub-menu with the following items: Orders, Order Lines, Returns, Order Changes, Order Line Changes, Order Header Confirmations, and Shipments. The main content area is titled 'Purchase Orders' and includes a 'Select Customer' dropdown menu set to 'Wintershall Dea'. Below the title, there is a section for 'Instructions From Customer' with a welcome message and a link to the company's supply chain information. A button labeled 'Click the Action to Accept the Purchase Order and Create an Invoice using its data' is also visible. At the bottom, there is a table of purchase orders with the following columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains two rows of data:

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
4930004029	11/08/22	Issued	None	3 Each of Testartikel von Power Station	No	1,500.00 EUR		
4930004028	11/08/22	Issued	11/08/22	4 Each of Testartikel von Powerstation	No	2,000.00 EUR		



wintershall dea

2. Purchase Order Status Definition

Purchase Orders will have one of the following statuses.

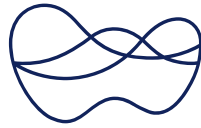
Status	Definition
Cancelled	The PO is cancelled.
Closed	The issued PO was received, delivery has been fulfilled and invoices have been paid and the PO is then closed.
Issued	The PO was approved and sent to you.
Soft Closed	The PO is closed but can be re-opened. You cannot invoice against a soft closed PO. However if you do need to send an invoice, speak to your contact person in Supply Chain at Wintershall Dea.

3. View your Purchase Order

To view the details of your Purchase Order, select the **blue PO Number link** to open the PO.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'coupa supplier portal' on the left and 'BILL', 'NOTIFICATIONS 32', and 'HELP' on the right. Below this is a main menu with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Under 'Orders', there are sub-links: 'Orders', 'Order lines', 'Returns', 'Order Changes', 'Order Line Changes', 'Order Confirmations', 'Order Confirmation Lines', 'Promised Deliveries', and 'Deliveries'. A 'Select Customer' dropdown menu is set to 'Wintershall Dea'. The main heading is 'Purchase Orders'. Below this is a section titled 'Instructions From Customer' with a welcome message and a link to detailed information. A button says 'Click the Action to Accept the Purchase Order and Create an Invoice using its data'. At the bottom, there is a table with columns: 'Export to', 'View', 'Search', 'PO Number', 'Order Date', 'Status', 'Acknowledged At', 'Items', 'Unanswered Comments', 'Total', 'Assigned To', and 'Actions'. The table contains three rows of data.

Export to	View	All	Search	PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
				4940004897	18/8/23	Issued	None	HR21 again retest	No	500.00 EUR		
				4940004896	18/8/23	Issued	None	Test HR21 geandert again	No	1,200.00 EUR		
				4940004895	18/8/23	Issued	None	Assis test HR21	No	1,000.00 EUR		



wintershall dea

The order is divided into **"General info"**, the **"Shipping"** and the **"Lines"**.

Purchase Order #4940004897

General Info

Status Issued - Pending Manual
Order Date 18/8/23
Revision Date 18/8/23
Requester Michaela Drews
Email michaela.drews@wintershalldea.com
Payment Term 4500 - Within 45 days Due net
Sourcing type None
Offshore Delivery No
Attachments None
Acknowledged

Shipping

Ship-To Address Wintershall Dea Deutschland GmbH 1600-0000
Am Lohsepark 8
20457 Hamburg
Germany
Location Code: 1600-0000
Attn: Michaela Drews
Terms DDP

In addition, under the positions of each order there are the buttons **"Create invoice"**, if it is about a service in the order **"Create service/time sheet"**, **"Request change"**, **"Save"** and **"Print view"**.

Lines

Advanced Search Sort by Line Number: 0 → 9

Type	Item	Price	Total	Invoiced
	HR21 again retest	500.00	500.00	0.00

* Service Start Date	Resource Manager	Confirmed	Pending Approval	Pending Rework	Discarded	Supplier Part Number
18/8/23	Michaela Drews	0.00	0.00	0.00	0.00	None

Manufacturer Name	Manufacturer Part Number
None	None

Per page 15 | 45 | 90

Total EUR 500.00

[Create Invoice](#) [Create Service/Time Sheets](#) [Request Change](#) [Save](#) [Print View](#)

Also there is a field **"Comments"** which can be freely written. At the bottom of the page, changes or comments to the order can be viewed at any time under **"History"**.

Comments

Mute Comments ^

Enter Comment

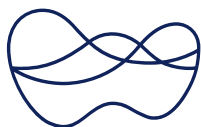
Add File | URL

Send comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

History

>



wintershall dea

The functions just mentioned will now be explained in detail.

Please notice that the button **"Create invoice"** is explained in detail in the user guide "09_WDH_Creating Invoice in CSP" and the button **"Create service/time sheet"** is explained in detail in the user guide "08_WDH_Creating Service/Time Sheet in CSP".

4. Acknowledged - Order confirmation in CSP

In case you can confirm the PO within all details, you can perform your order confirmation in the CSP by ticking the check box **'Acknowledged'**.



There is no need to send an additional order confirmation via email if you use this functionality.

Purchase Order #4930004029	
General Info	Shipping
Status: Issued - Pending Manual	Ship-To Address: Headquarter Hamburg
Order Date: 11/08/22	Überseering 40
Revision Date: 11/08/22	22297 Hamburg
Requester: Kersten Kueper	Germany
Email: kersten.kueper@wintershaldea.com	Location Code: 1100-0004
Payment Term: 1433 - Within 14 days 3 % cash discount, 30 days due net	Attn: Kersten Kueper
Sourcing type: None	Terms: DDP
Offshore Delivery: No	
Attachments: None	
Acknowledged: <input type="checkbox"/>	

If you do not agree with the content of the purchase order, you are welcome to use the comment function to submit a change of order or note to Wintershall Dea.

To do so, please always start with the **@-sign** and search for the respective contact person at Wintershall Dea using the first name. Then click on the contact person in the selection list and compose the message.

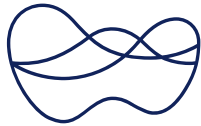
Click the **"Add Comment"** button to send the message to the person, who can then also reply in this comments field.

Comments Mute Comments ^

Enter Comment

Add [File](#) | [URL](#)

Send comment notification to a user by typing @name (ex. @JohnSmith)



wintershall dea

5. Request Change

You can request changes to purchase orders and submit them to Wintershall Dea for approval. You can use the **"Request Change"** button to change existing items, you cannot add missing items or services. If an item or service is missing from the purchase order, use the comment function for this.

With the button **"Request Change"** the various fields become changeable.

Please note that the price cannot be changed if this item or service is from a Catalogue. In this case, the Catalogue Item must be corrected first. To do this, please contact your purchasing contact at Wintershall Dea.

It is not possible to make changes to orders that have already been completed.

The screenshot shows a web interface titled "Lines" with a table of items and a form for requesting changes. The table has columns for Type, Item, Qty, Unit, Price, and Total. Two items are listed: "Senior Drilling Supervisor, Offshore dayrate" and "testartikel". Below the table, there are fields for "Service Start Date", "Due Date", "Service Manager Email", and "Resource Manager". There are also "Contract text" fields for each item. At the bottom, there is a "Reason for Change" dropdown, a "Comment (required for 'Other')" text area, and four buttons: "Cancel", "Request PO Cancellation", "Save Change Request", and "Submit Change Request".

Type	Item	* Qty	Unit	* Price	Total
1	Senior Drilling Supervisor, Offshore dayrate	5.000	Days	17,940.000000	35,880.00
2	testartikel	60.00	Each	50.000000	3,000.00

* Service Start Date: 03/05/23
Due Date: mm/dd/yy
Service Manager Email:
* Resource Manager: Requester 1

Contract text: None

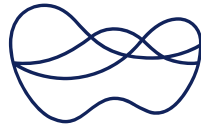
Need By Date: 04/14/23

Contract text: None

Total 38,880.00 EUR

* Reason for Change:
Comment (required for "Other"):

Buttons: Cancel, Request PO Cancellation, Save Change Request, Submit Change Request



wintershall dea

You can **save any changes** you make to a Purchase Order, whilst you are working on the PO, without submitting the change to Wintershall Dea.

When clicking the Button **"Submit Change Request"**, the following warning message will appear:

Warning from Wintershall Dea

This Order Header has the following warning:

- Please select the Condition of Contract applicable for this Purchase Order.

Continue Editing Submit

Please select the **"Submit"** button to send your changes to Wintershall Dea.

Changes are effective when a change request is approved. When a PO change request is rejected by either the Requester or Buyer, you will receive a notification that the change you have requested has not been approved.

Purchase Order #4930004756

Change request for Purchase Order #4930004756 has been submitted for approval.

There is a pending change request on this purchase order. [Click to view pending change](#)

General Info

Status Issued - Pending Manual

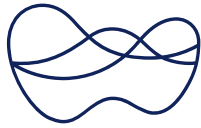
Order Date 27/6/23

Shipping

Ship-To Address Headquarter Hamburg
Überseering 40
22297 Hamburg

You can withdraw your change request by locating and opening your Purchase Order. Select **"Click to view pending changes"** on the yellow line.

Scroll to the bottom of the page. Add any further **"Comments"** to support your need to withdraw the change request by select the **"Withdraw"** button.



wintershall dea

Lines

Type	Item	Qty	Unit	Price	Total
1	Testing Tolerance	2 4	Each	10.00 EUR	20.00 40.00 EUR

* Service Start Date	* Resource Manager	Supplier Service Manager Email
30/6/23	Ruxandra Coltea	None

Total **20.00**
~~40.00~~ EUR

Withdraw

Once selected you will then receive a notification that your change request has been withdrawn.

coupa supplier portal

FRANCESCA | NOTIFICATIONS 2 | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons Setup

Orders Order Lines Returns Order Changes Order Line Changes Order Header Confirmations Shipments

Select Customer Wintershall Dea

Purchase Orders

Order change withdrawn

Instructions From Customer

Welcome to the Coupa Supplier Portal! Please find here an overview of the latest Purchase Orders issued to your company. Please visit: <https://wintershalldea.com/en/supply-chain> to get detailed information and select Coupa/Invoicing under "Topics". In case of any questions about the Coupa Supplier Portal please contact SupplierSupport@wintershalldea.com.

In the tab "Orders" > "Purchase Order Changes" you can see every change you forwarded on the Order Changes and the current status.

coupa supplier portal

BILL | NOTIFICATIONS 32 | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons Setup

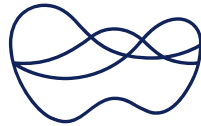
Orders Order lines Returns **Order Changes** Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Deliveries

Select Customer Wintershall Dea

Purchase Order Changes

Load from file Export to View All Advanced Search

PO Change #	Order #	Version #	Ship To User	Status	Items	Total	Supplier Initiated	Created By	Reason Code	Assigned To
	923 4930004756		Ruxandra Coltea	Draft	2 Each of Testing Tolerance	20.00 EUR	Yes	bill finger	Cannot fulfill order quantity/amount	
	903 4930004758		Ruxandra Coltea	Approved	1 Each of Testing Tolerance 3	100.00 EUR	Yes	bill finger	Cannot fulfill orders by the Need-by date	
	887 4930004758		Ruxandra Coltea	Approved	1 Each of Testing Tolerance 3	100.00 EUR	Yes	bill finger	Cannot fulfill order quantity/amount	



wintershall dea

6. Print view

You can also print Purchase Orders. Select the **PO Number link** to open the PO and scroll to the bottom of the PO. Select the **Print View** button.

Type	Item	Price	Total	Invoiced
1	Print Services	200.00	200.00	0.00

Need By: 08/03/19 | Part Number: None | Additional Information: Job Type: Poster • Binding • Color Prints? • Yes • Need By Date: 08/07/19 • Additional Instructions

Total 200.00 USD

Print View



wintershall dea

Wintershall Dea Deutschland GmbH BESTELLUNG

Bilfinger Engineering & Maintenance GmbH
An der Gehespitz 50
reew
Neu Isenburg, 63263
Attn: bill finger
xxxorder-processing-center.EMS@bilfinger.com

GESELLSCHAFT HRB 161722
Wintershall Dea Deutschland GmbH

Versand an/Ort
Wintershall Dea Deutschland
GmbH 1600-0000
Wintershall Dea Deutschland
GmbH 1600-0000

PO NUMBER 4940004897
LIEFERANT NR 1007346
DATE 18/8/23
PAYMENT TERMS 4500 - Within 45 days Due net
SHIPPING TERMS DDP
CURRENCY EUR
CONTRACT
CONTACT Michaela Drews
michaela.drews@wintershallidea.com

Rechnung an
Wintershall Dea Deutschland
GmbH
Am Lohsepark 8



In some purchase orders, you may not see a price on the line. This is because 'HIDE PRICE' function was chosen.

This could be the case if a limit order (Budget order) was created. This has no influence of the invoice process. You can create your invoices in the CSP as normal with the appropriate costs detailed.