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Coupa for Vendors – Purchase Orders

User Guide | March 2024

Content

Purchase Orders

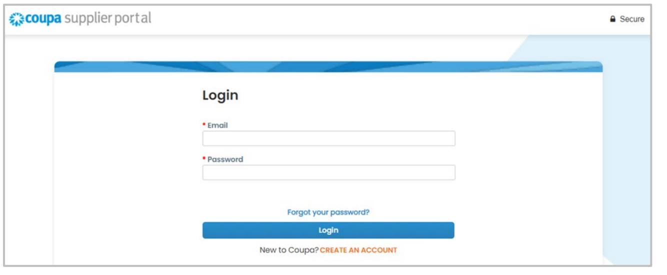
Managing Deloitte Purchase Orders (POs) in Coupa

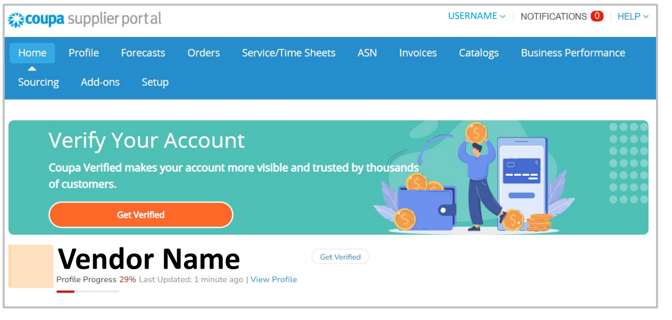
After the subcontract agreement is fully executed, you will receive Deloitte GPS's Purchase Orders ("POs") in the Coupa Supplier Portal (CSP). You will be able to view POs within Coupa as well monitor status and submit invoices against the POs.

NOTE: If you have not registered in CSP, refer to the **Vendor Setup for Coupa Supplier Portal (CSP) Quick Reference Guide** to create a CSP account or register to be linked to your organization's existing CSP account.

Accessing the Coupa Supplier Portal

- Go to https://supplier.coupahost.com/sessions/new and enter your CSP User Credentials
- Click **Login**.
- Your screen is now on your **CSP Home Page**.

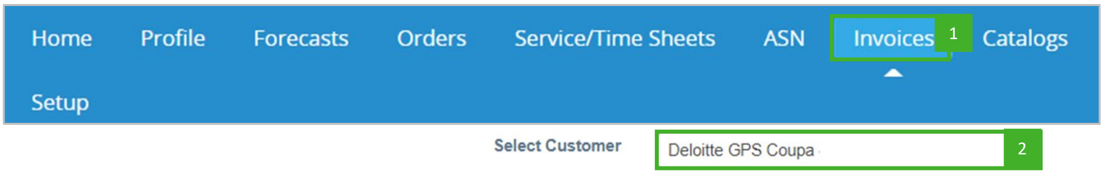




Select Deloitte GPS as the Customer

Before you can submit an invoice, Deloitte GPS Coupa must be selected as the customer which enables you to locate Deloitte issued POs.

1. On the **Home** bar, click on **Invoices**.
2. In the **Select Customer** field, select **Deloitte GPS Coupa**.



Purchase Orders

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An Introduction to the Deloitte Purchase Order in Coupa

Understanding Purchase Orders

A Deloitte Purchase Order ("PO") represents authorized funding for a specific base or option period under the terms of a subcontract. Whereas a Contract (subcontract) represents an Award amount and terms for that award, a PO represents funding for specific items under that award.

Deloitte may use multiple Purchase Orders per contract. Each PO contains one Header and Lines and may have up to 100 Lines.

PO Header

An Invoice Header identifies, among other data:

- PO Number
- Vendor Name
- Order Date
- Requester
- Payment Term (for informational purposes)
- Legal Entity
- Active Period of Performance dates
- Procurement Professional
- Primary Place of Performance

Order Line

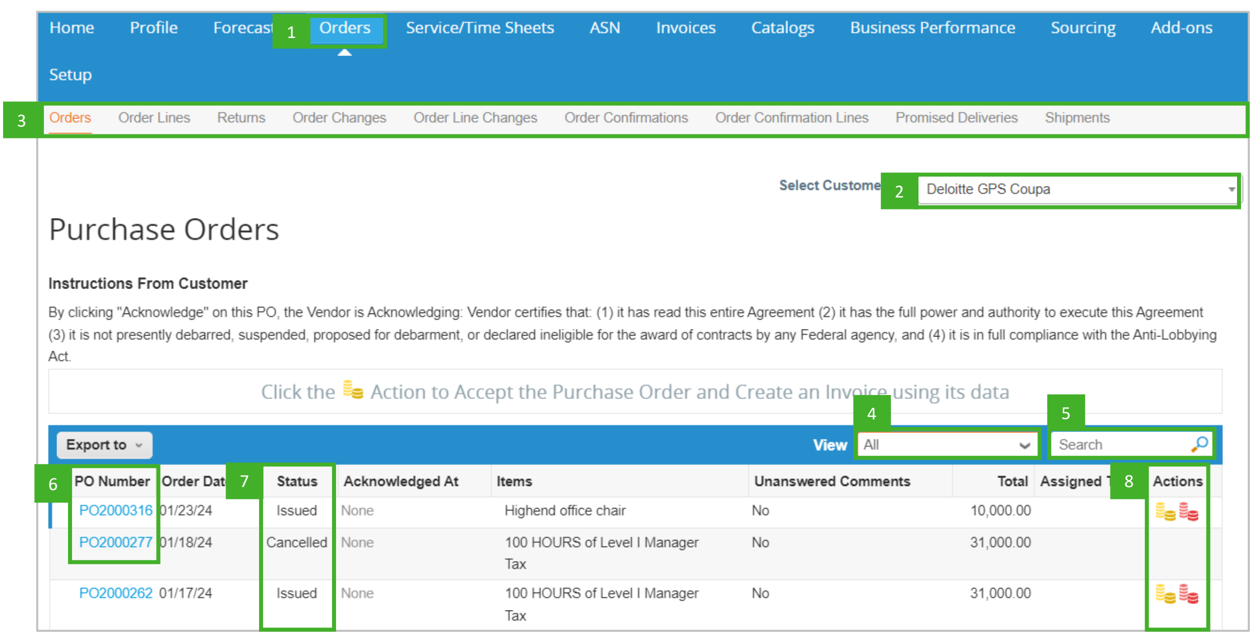
Each PO Line represents a funded item and identifies, among other data:

- A description of the funding line
- If the funding is lump-sum or per-unit
- Quantity, per-unit price, and total amount
- Subcontract of the funded item
- Period of performance of the funded item
- Whether charges against the funding must specify Vendor Employee Names and hours
- Exchange currency information
- Line-specific period of performance dates

PO Dashboard

The Purchase Order (PO) Dashboard contains POs issued for the contract agreements issued via Coupa. You may view, print and submit invoices from the PO Dashboard.

1. From the Home Page, click **Orders**.
2. Select **Deloitte GPS Coupa** the customer.
3. Select different PO view options to display POs in the table based on criteria set for that particular view.
4. There are various views from which to choose. The **All** view will display PO **Status**. Refer to [Monitoring POs](#) for detail on selecting and creating different views.
5. To locate a specific **PO Number**, enter the **PO Number** in the **Search** field and select the **Search icon**.
6. Click on the **PO Number** to view the PO.
7. The **Status** column displays various invoice stages.
   - **Issued** status indicates a PO has been released to the vendor and is open for invoicing.
   - **Cancelled** status indicates the PO has been rendered null and is not open for invoicing.
   - **Closed** or **Soft-Closed**: the PO has been closed and is not open for invoicing.
8. Select the **Gold coin** to submit an **Invoice** or the **Red coin** to create a **Credit Note**.



POs cannot be closed if there are any Pending Approval or Disputed invoices against them.

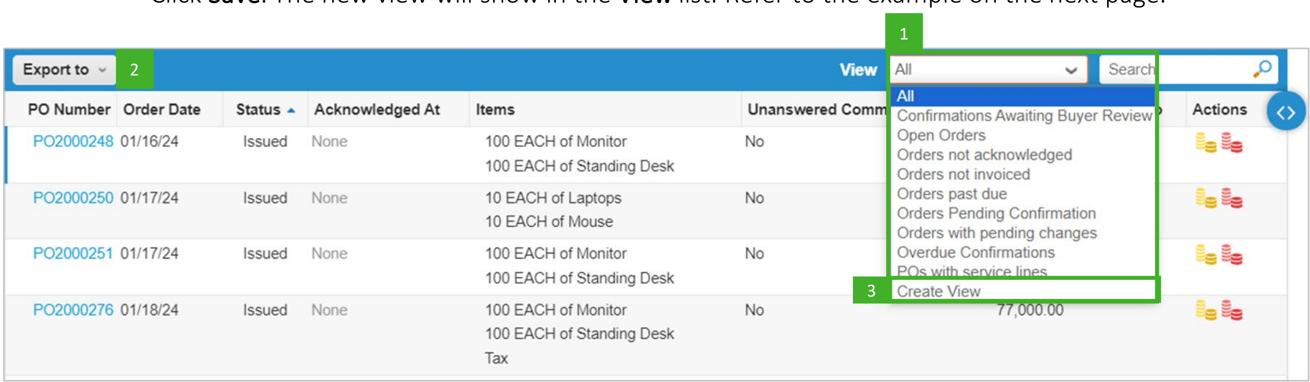
Monitoring POs

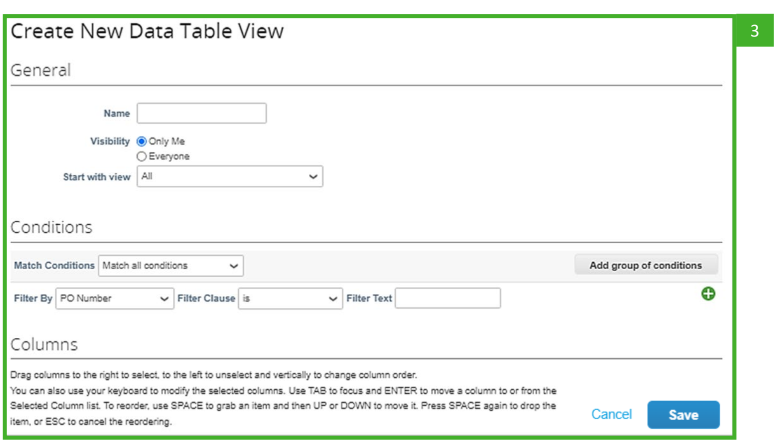
At any time, you may select a **View** to change which POs display on the PO Dashboard as well as which attributes will display in the view.

PO Search with Different Views

You may perform basic searches for POs using the Search bar in the header of the Orders table as well as view only a subset of POs, such as those that are still open or those which have not been invoiced.

1. Click on the **View** drop-down and select an option appropriate to your need, such as:
   - **Open Orders:** POs that have Active Period of Performance End Dates (not expired).
   - **Orders past due:** POs that with Need-By dates in the past.
   - **Order with pending changes:** POs that have a pending modification.
2. Click on **Export** to download a report of the current view.
3. You may also create custom views that show POs and their attributes based on settings you establish.
   - From the **View** drop-down, click **Create View**. Then, enter desired settings:
     - **Name:** The name of the view that will show in the view list.
     - **Visibility:** Do you want the View visible to everyone in your organization assigned to view Deloitte POs?
     - **Start with view:** Select which view to you want to customize.
     - **Conditions:** The filters that determine which Invoices will display.
     - **Columns:** The data attributes of the invoices the view will display.
     - **Default Sort Order:** Assign display sort order.
   - Click **Save**. The new view will show in the **View** list. Refer to the example on the next page.





Monitoring POs

You can view POs through various search options, create invoices from POs, review PO history and communicate with Deloitte regarding the PO.

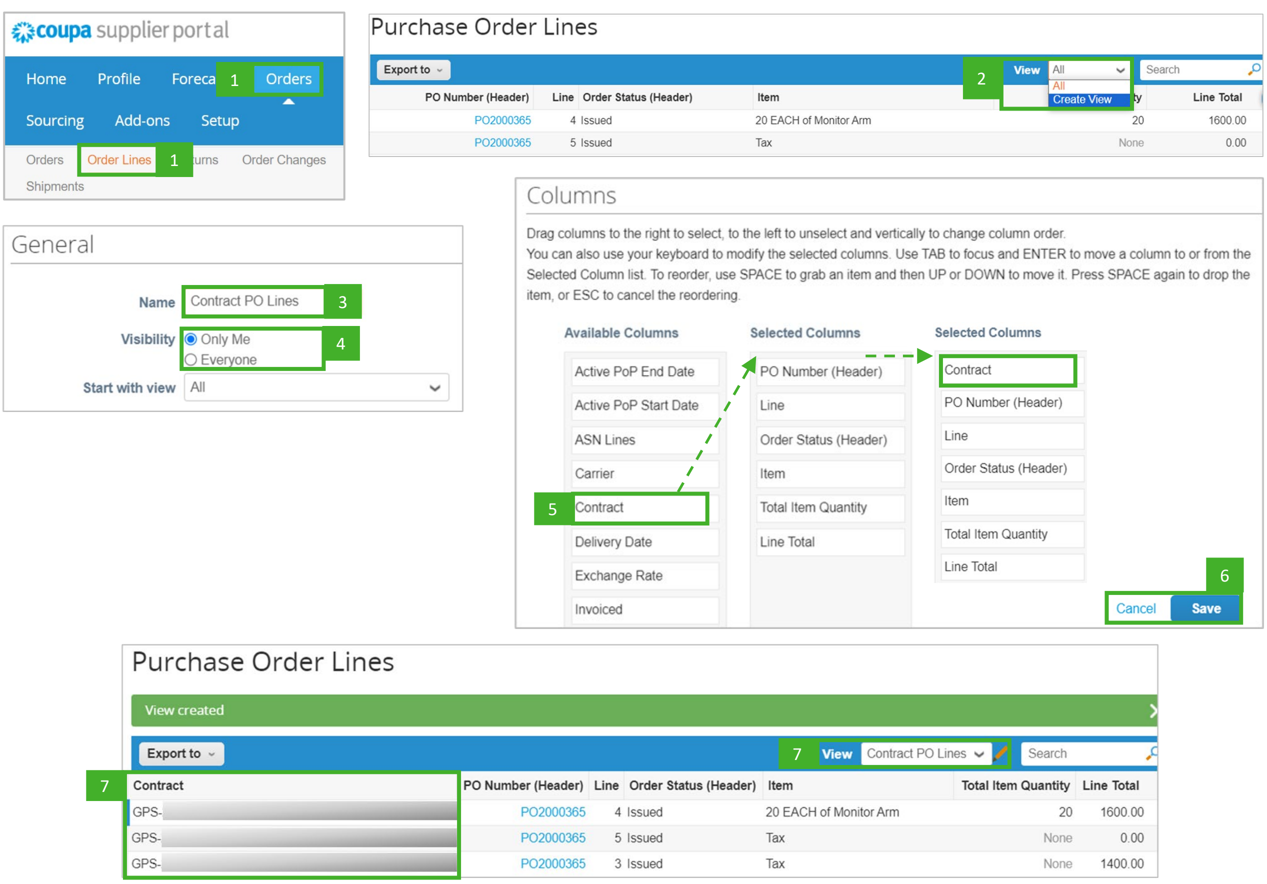
Filtering PO Lines by Contract (Create View)

Deloitte uses a Purchase Order to represent funding released for a given period under the terms of a contract. Deloitte may use multiple Purchase Orders per contract, i.e., subcontracts with many option periods..

If you would like to view each funding line across all POs for a given contract, you can create a view to display funding lines.

1. Click **Orders** on the **Home Bar**, then click **Order Lines**.
2. Click the **View** drop-down menu in the PO Lines table, then click **Create View.**
3. Under the General section, enter a name for this view, such as “Contract PO Lines.”
4. Assign **Visibility** as desired.
5. Scroll to the Columns section. In the **Available Columns** list, click and hold your cursor over **the Contract** box and drag it over to the **Selected Columns** list. Position **Contract** wherever you want it to appear in the view. Repeat this step for other items under Available Columns that you would like to appear in the view.
6. Click **Save.**
7. Your screen will switch to an updated View in the PO Lines table that provides the name of each PO Line’s connected to its respective contract.

At any time, you may click the View drop-down menu and click **All to return to the Order Lines normal view**.



Monitoring POs

You can view POs through various search options, create invoices from POs, review PO history and communicate with Deloitte regarding the PO.

Edit, Rename or Delete Created View

You can modify any view you have created.

First, access the Created View:

1 On the **Home Page**, click **Orders**. Below the **Home Bar**, click **Order Lines** or any view type containing the **Created View**.

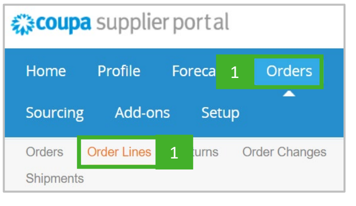
2 Click the **View** drop-down menu and select the **View Name**.

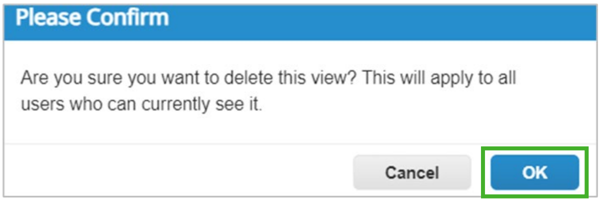
3 Click the **Edit** icon next to the View menu.

Edit: Modify the view settings, scroll to the bottom of the screen, and click **Save**.

Rename: In the Name field, modify the name as desired, scroll to the bottom of the screen, and click **Save**.

Delete: Scroll to the bottom of the screen and select **Delete**, then select **OK** to confirm deletion.





Monitoring POs

You can view POs through various search options, create invoices from POs, review PO history and communicate with Deloitte regarding the PO.

Amounts Invoiced Against a PO

Each PO dynamically tracks transactional activities connected to it, such as pending and approved invoices. The total of these invoiced amounts are visible on each PO Line.

1 Navigate to your PO.

2 Scroll to the PO Lines. The total amount invoiced-to-date will appear under the **Invoiced** title in blue 

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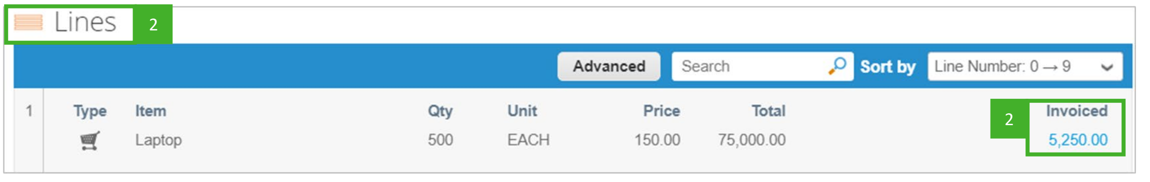
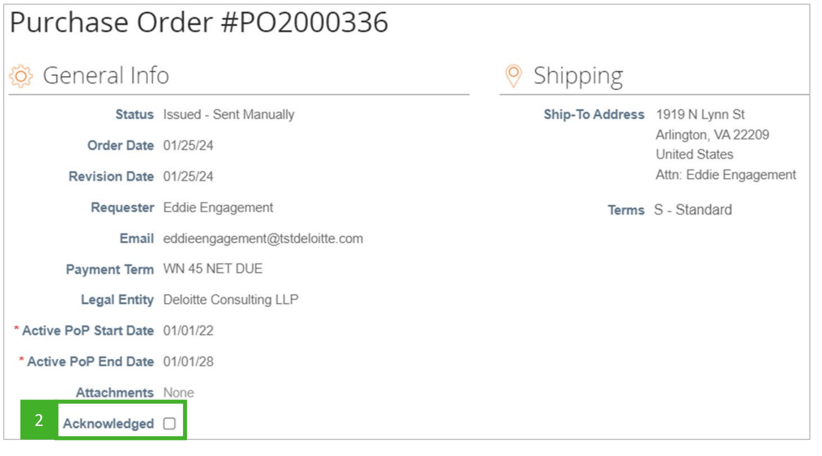


Acknowledging a PO

Acknowledging a PO provides Deloitte GPS with a trackable indicator that you have received the PO. However, it is not a formal acceptance. Executing the subcontract agreement constitutes formal acceptance and will be followed by a PO.

1 Navigate to your PO.

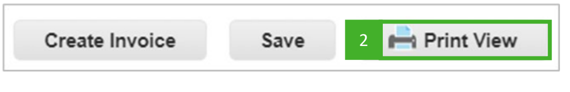
2 Click the **Acknowledged** checkbox located under the General Info. Deloitte will receive a notice that you've acknowledged the PO.



Print a PO

1 Navigate to your PO.

2 Scroll to the bottom of the PO and select **Print View**.



Monitoring POs

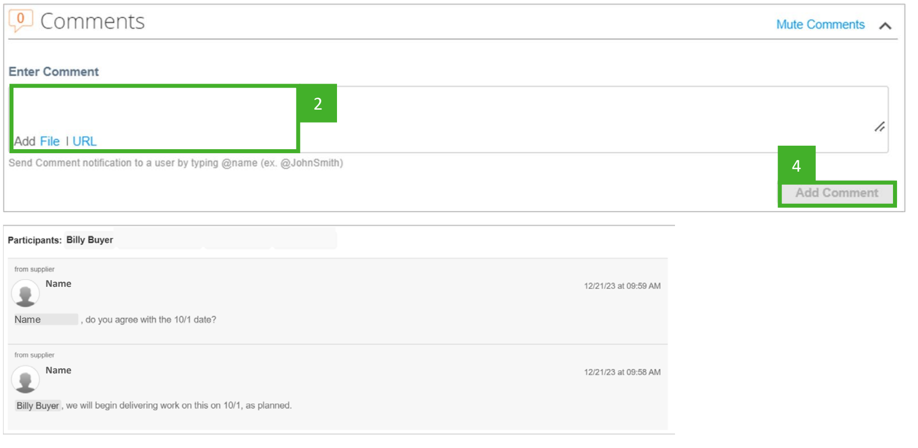
You can view POs through various search options, create invoices from POs, review PO history and communicate with Deloitte regarding the PO.

Communicating with Deloitte

You can leave comments on a PO to communicate with Deloitte on this PO. Comments are an effective tool to discuss a PO since all comments will be displayed in Coupa on the PO record.

1. Navigate to your PO and scroll to the **Comments** section at the bottom of the page.
2. Enter the text of a comment you need. If you need to tag other users so that they receive a notification of the comment, use the “@” symbol and type their name, then select it from the drop-down list.
3. You can add file and URL attachments to these comments if needed.
4. When you are ready to post a comment, click **Add Comment**.

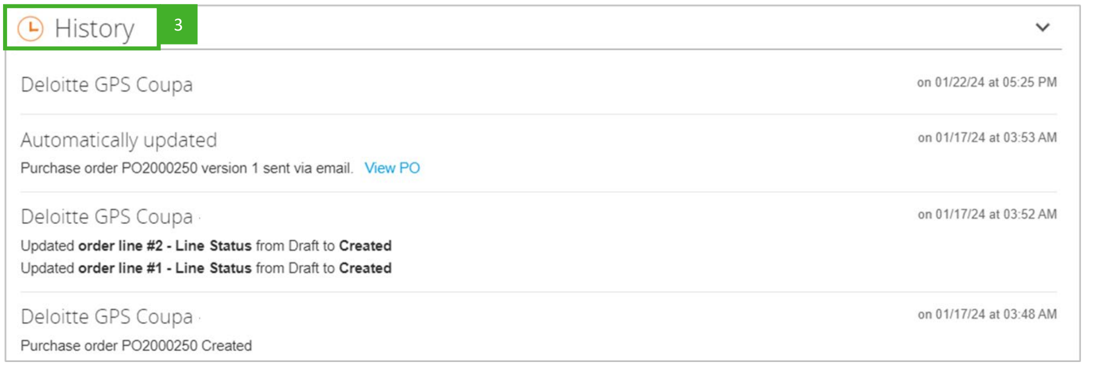
Tagged Deloitte users will receive notifications when a comment is posted that tags them. They can comment or reply directly in the notification. Comments you add to a PO are always visible to Deloitte. Vendors should not enter any internal communications in the Comments section.



Reviewing PO History

The CSP also provides a History of changes made to a PO over time, including who made changes, the nature of those changes, and when those changes were made. You may review the history of a PO at any time.

1. Navigate to your PO.
2. Scroll to the **History** section.
3. Expand it by selecting the **Expand icon** >



Create Invoice from PO Dashboard

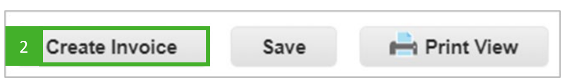
An invoice can be created from the PO Dashboard or from within the PO.

Create an Invoice from the PO Dashboard

1. Select **Orders** from the **Home Page**.
2. Navigate to your PO.
3. Select the **Gold coin** to the right of the PO.
4. Refer to **CSP Invoicing Quick Reference Guide** for details on creating invoices.

Create an Invoice within the PO

1. Navigate to your PO.
2. Open the PO, scroll to the bottom and select **Create Invoice**.
3. Refer to **Coupa for Vendors – Invoicing Quick Reference Guide** for details on creating invoices.



Resources

Quick Reference Guides and Support Information

Below are reference material to assist you in navigating various transactions with Deloitte GPS and obtaining support.

Quick Reference Guides

- Vendor Setup for Coupa Supplier Portal (CSP)
- Sourcing Instructions for Vendors
- Contract Authoring
- Purchase Orders
- CSP Invoicing

NOTE: The Quick Reference Guides are also available in two locations:

- GPS Vendor Connect Coupa Supplier Portal page; select **Coupa Supplier Portal**
- Your GPS Vendor Portal dashboard under the **Coupa User Guides Links** tile

Support Contacts	
Topic	**Who to Contact**
Coupa Supplier Portal Registration	• Access Coupa Chat in the lower right of the screen • Utilize Help feature in the upper right of the screen • Contact Coupa Support at supplier@coupa.com
MFA Questions – Coupa only	• Contact Coupa Support at supplier@coupa.com
Invoice and Payment Status	• Contact Deloitte GPS Accounts Payable at invoices@deloitte-gps.coupahost.com
Purchase Orders Status	• Contact your Deloitte Procurement Representative • Contact GPS Vendor Portal System Management team at usgpsvendorportalsystemmgt@deloitte.com
Contracting and DocuSign	• Contact your Deloitte Procurement Representative
Other Coupa questions related to transactions with Deloitte	• Contact your Deloitte Procurement Representative • Contact GPS Vendor Portal System Management team at usgpsvendorportalsystemmgt@deloitte.com
Other questions related to Coupa functionality	• Access Coupa Chat in the lower right of the screen • Utilize Help feature in the upper right of the screen • Contact Coupa Support at supplier@coupa.com

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