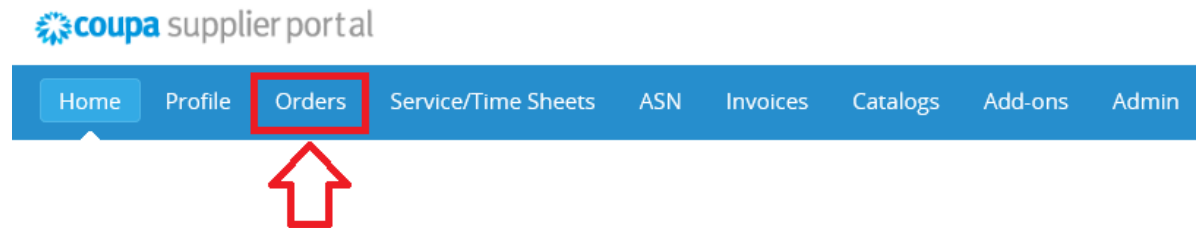


ACKNOWLEDGING & UPDATING A PURCHASE ORDER

Acknowledging a Purchase Order

Once a Purchase Order has been created, the first step is to acknowledge that you have received it. To do this, sign into the Coupa Supplier Portal (CSP) and click on 'Orders'.




This screen will display a list of all open Purchase Orders. Click on the PO number you wish to acknowledge to open it.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
831589	06/18/20	Issued	06/18/20	1 Each of PO acknowledging order	No	250.00 GBP	
831588	06/16/20	Cancelled	None	1 Each of Removing attachment test	No	250.00 GBP	
831587	06/17/20	Issued	None	1 Each of Requester change test	No	1,000.00 GBP	

Tick the 'Acknowledged' box to update both the CSP and the FirstPort P2P portal.

End Date

Attachments

Acknowledged 

Updating a Purchase Order

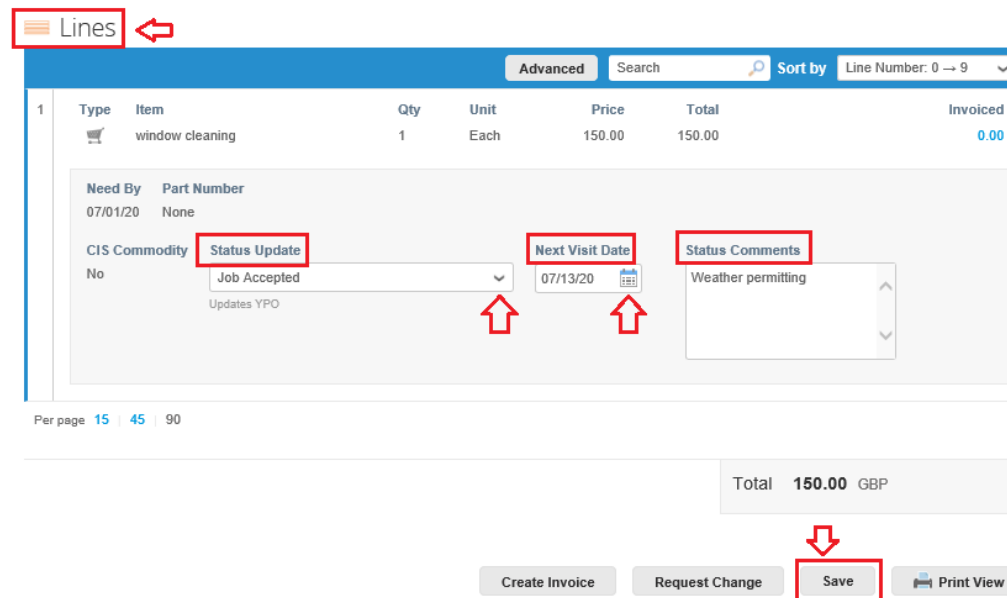
Updating a purchase order gives visibility to both the Development/Property Manager and residents living on site. It is therefore important to keep purchase orders up to date. This will update CSP, P2P (for managers' visibility) and Your Property Online (YPO) (for residents' visibility)

To update a purchase order, scroll down to the 'Lines' section. The key fields to update are 'Status Update' and 'Next Visit Date'.

Click on the drop-down list and select the relevant 'Status Update' – Job Accepted, Job Rejected, etc. The 'Next Visit Date' will also need to be selected. This will either be the date you intend to visit or the date the work was carried out (if you are making the job as complete).

Note! *If the order is an annual/planned order, you will need to update the Next Visit Date after each visit.*

Add any additional comments in the 'Status Comments' field, then click on 'save' to finish updating the purchase order.



The screenshot shows the 'Lines' section of a purchase order. The table below is a representation of the data shown in the interface:

Type	Item	Qty	Unit	Price	Total	Invoiced
1	window cleaning	1	Each	150.00	150.00	0.00

Below the table, the following fields are visible:

- Need By:** 07/01/20
- Part Number:** None
- CIS Commodity:** No
- Status Update:** Job Accepted (dropdown menu)
- Next Visit Date:** 07/13/20 (calendar icon)
- Status Comments:** Weather permitting (text area)

At the bottom of the page, the total is 150.00 GBP. The 'Save' button is highlighted with a red box and a downward arrow.

VERSION CONTROL

Version:	2.1
Author:	Susana Santos
Date:	30/12/2020
Authorised by:	Vedant Prajapati
Date:	30/12/2020

Document Review

The document will be reviewed annually to ensure the procedures remain accurate.

Review Details		
Author	Summary of changes	Date
Matthew Rossall	Guide rewritten taking into account R25 changes	05/06/2020
Susana Santos	Guide reviewed into account R28 upgrade	30/12/2020