

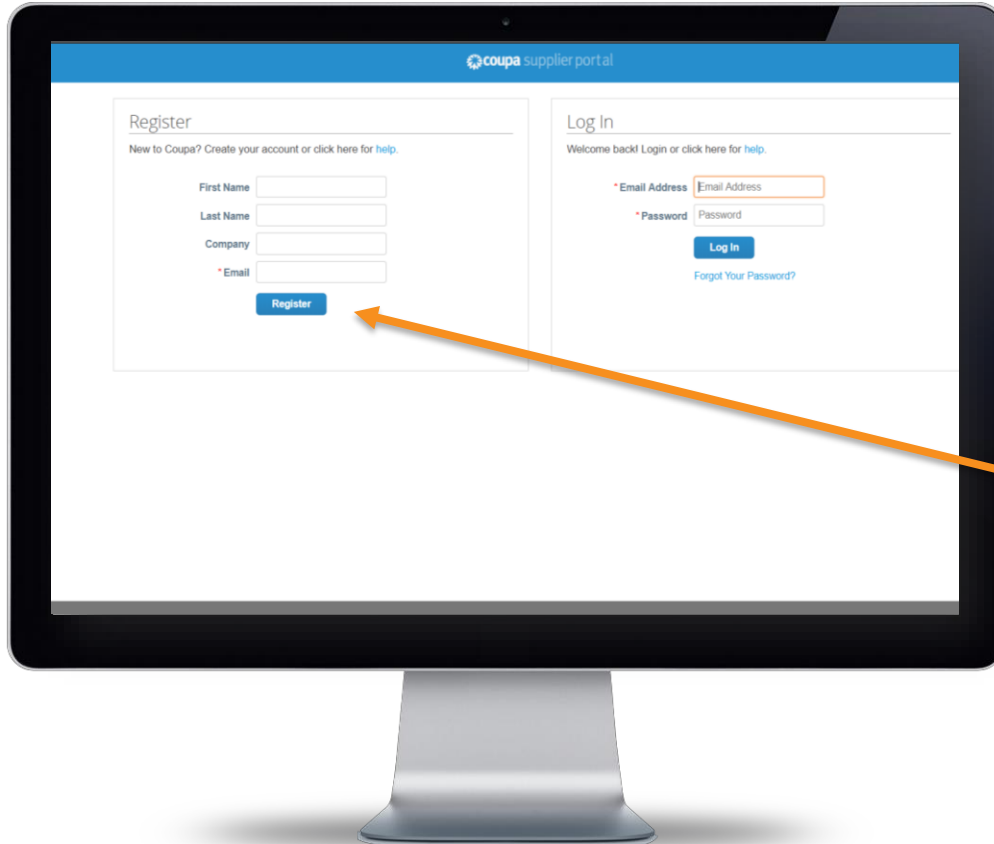
Coupa Supplier Portal Suppliers Guide



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1. Registering to use the Coupa Supplier Portal

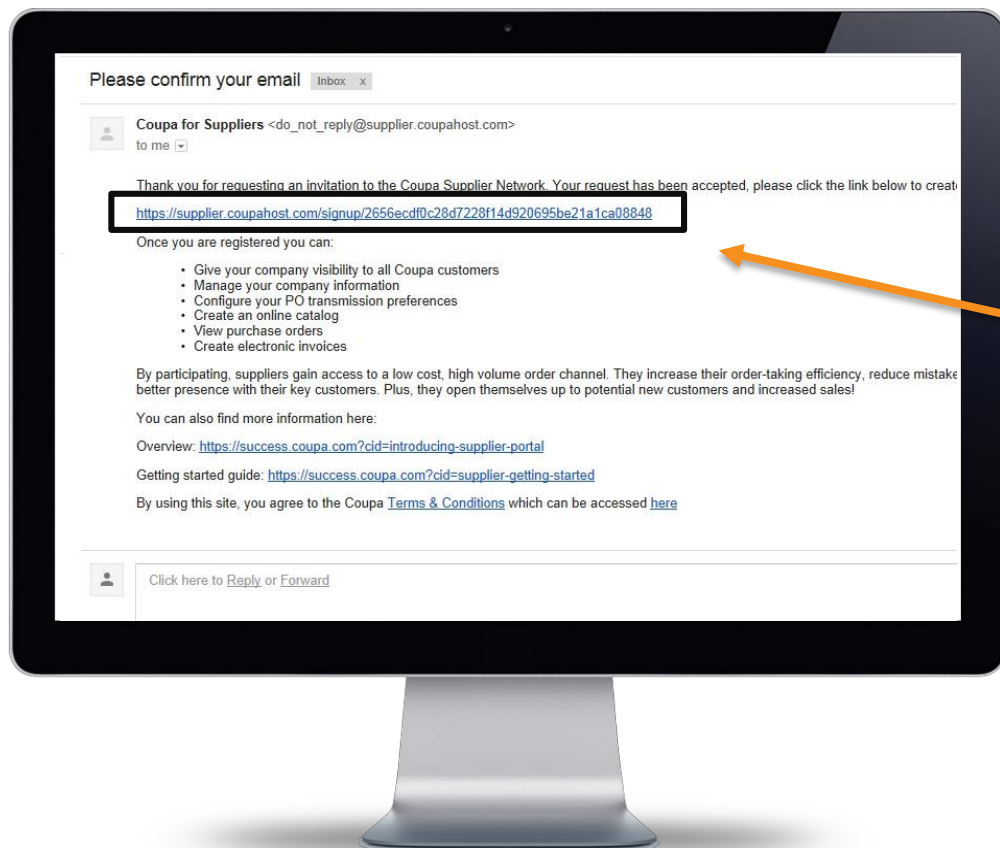


The image shows a computer monitor displaying the Coupa Supplier Portal. The page has a blue header with the 'coupa supplier portal' logo. There are two main sections: 'Register' and 'Log In'. The 'Register' section includes fields for 'First Name', 'Last Name', 'Company', and 'Email', followed by a blue 'Register' button. The 'Log In' section includes fields for 'Email Address' and 'Password', followed by a blue 'Log In' button and a 'Forgot Your Password?' link. An orange arrow points from the 'Register' button to the text in the adjacent list.

Step 1 and 2 - Complete fields and hit register

- Navigate to <https://supplier.coupahost.com/>
- Complete the fields under the 'Register' section.
- Once you have entered all the relevant details please click the **Register** button.

1. Registering to use the Coupa Supplier Portal



Step 3 - Create password

- You will now receive an email in order to confirm and validate the details that you entered when you registered.
- **Please note** – To activate the account you have created you will need to select the link within the email.
- Click the link and create a password for your Coupa Supplier Portal account.
- You will now be able to access the Coupa Supplier Portal and explore the functionality available.

1. Registering to use the Coupa Supplier Portal

Step 4 - Complete survey to confirm registration

- Please click the link below to complete the **Coupa Supplier Portal Sign Up Confirmation Survey**, you only need to answer 4 questions.
- To access the survey you will need to **hold the Ctrl key on your keyboard and click the link below**. Alternatively, please type this link into your browser:
<https://www.surveymonkey.co.uk/r/7R3LJMV>
- You will need to **complete your Vendor Number, Vendor Primary Contact Name** (used for Coupa Supplier Portal Sign Up) and **Vendor Primary Contact Email Address** (used in Coupa Supplier Portal Sign Up)
 - The confirmation survey requires you to confirm your Vendor number. This is an **8 digit number and can be located on your National Grid purchase order**
- When you have submitted your survey, this will **notify National Grid that you have completed your onboarding obligations**.

Coupa Supplier Portal Sign Up Confirmation Survey

Coupa Supplier Portal Sign Up Survey

Welcome to the National Grid onboarding form - you must ensure that you complete this form as accurately as possible.

National Grid UK is transitioning from its current procurement system to a cloud based solution provided by Coupa and will be rolling out towards the end of 2018.

Throughout this transition the National Grid Supplier Enablement team will be supporting your company through the Coupa Supplier onboarding process.

In order to conclude the registration process, please complete the form below to confirm the details you have used as part of the CSP sign-up

nationalgrid

National Grid is a trading name for
National Grid Gas plc
Registered Office: 1-3 Strand London WC2N 5EH
Registered in England and Wales number: 2006000
VAT Registration Number: GB247263011

Vendor number : 8300 XXXX

To :

Order number:

Order contact:

Queries Email:
frontdesk.sharedservices@nationalgrid.com

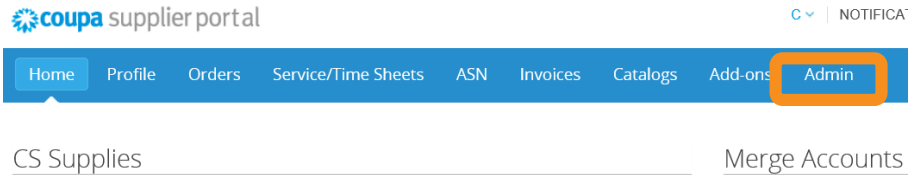
Conditions Of Purchase:

1. Goods supplied or services provided pursuant to this purchase shall be subject to the following conditions:
a) Our General Conditions of Contract for the Purchase of Goods shall apply (as applicable);
b) Any Terms & Conditions agreed or stipulated as part of any purchase order shall apply;
c) Copies of the appropriate conditions are available from front desk address: National Grid, Shared Services, PO Box 7004, Woking, Surrey GU24 0BA, UK
2. No other conditions of contract shall apply to this Purchase
3. authorised representative.
4. Unless otherwise specified, payment or part payment (as applicable) shall be made by the Buyer to the Seller on receipt of a valid invoice by the Shared Services center to the invoice address. Failure to quote an order number or an invoice number and delay in payment.
5. Payment shall be by BACS transfer unless otherwise agreed.
6. For all goods supplied, or services provided, the laws of the United Kingdom shall apply.
7. The Seller agrees that the Buyer may use the Seller's good customers and that the Buyer may incur loss and liability to lost revenue or profit because of the Seller's breach of any of the above conditions.

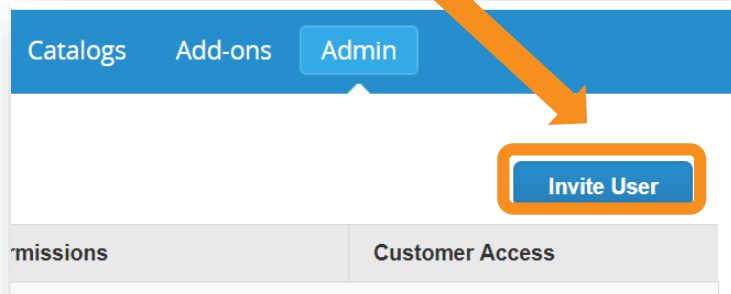
2. Inviting Additional Users to the Coupa Supplier Portal

Step 1

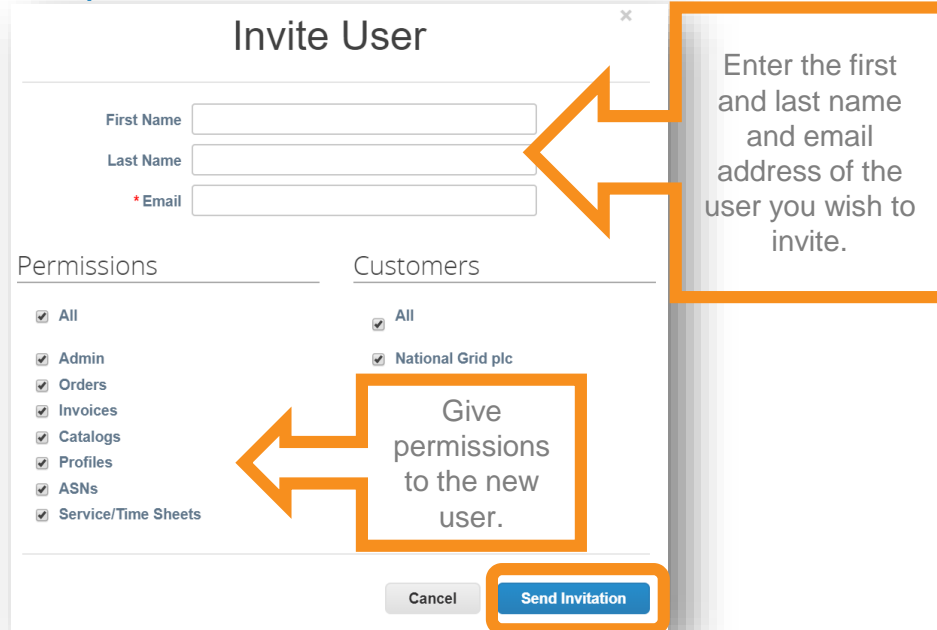
- When you log in to the CSP you will land on the Home page. At the top of the page you can find multiple tabs.
- To invite additional users to Coupa Supplier Portal click on the **Admin** tab.



- Click the **Invite User** button.



Step 2



Invite User

First Name

Last Name

*Email

Permissions

Customers

☒ All

☒ Admin

☒ Orders

☒ Invoices

☒ Catalogs

☒ Profiles

☒ ASNs

☒ Service/Time Sheets

☒ All

☒ National Grid plc

Give permissions to the new user.

Cancel

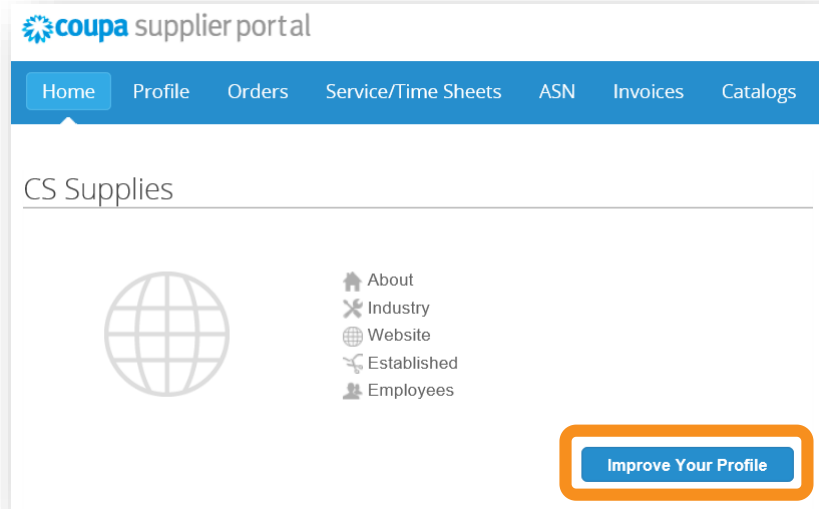
Enter the first and last name and email address of the user you wish to invite.

- Click **Send Invitation**. This will send an email to the user and they will be asked to set up a password.
- The new user will now have access to CSP.

3. Enriching Company Profile on Coupa Supplier Portal

Step 1

- When you log in to CSP you will land on the Home page.



- Click on the button **Improve Your Profile** to change or update your company information.

Step 2

- Scroll down and click **Edit Profile** button.



3. Enriching Company Profile on Coupa Supplier Portal

Step 3

- A new window opens where you can edit information fields.

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

Profile Public Profile

General Information

* Name CS Supplies

Logo Browse...

Industry Growing of rice

Year Established

Short Description

About

Cancel Save

- Mandatory fields are marked with a red asterisk.
- Please note that the information you add in your CSP account is available to search for within Coupa Systems.

Step 4

- Click **Save** once you have filled in all necessary information.

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

Profile Public Profile

General Information

* Name CS Supplies

Logo Browse...

Industry Growing of rice

Cancel Save

- If you have missed any mandatory fields you will get a message asking you to fix errors.

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

Profile Public Profile

General Information

Please fix the errors below.

* Name CS Supplies

Cancel Save

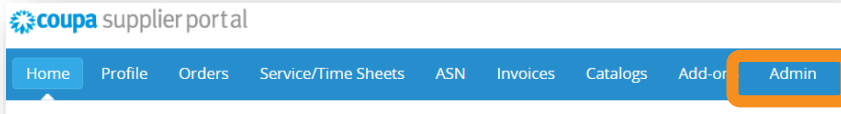
- Otherwise you will get a message confirming that the information has been saved successfully.

Your company info was successfully updated.

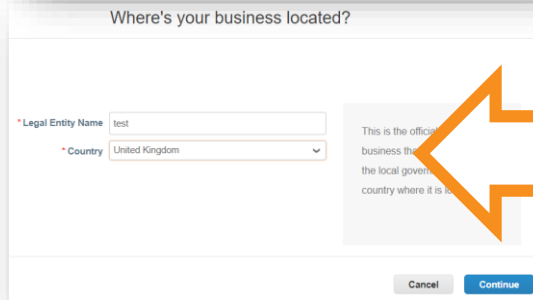
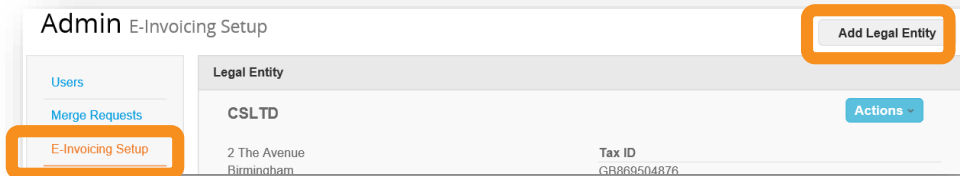
4. Setting up e-Invoicing in the Coupa Supplier Portal

Step 1

- To submit e-invoices to National Grid through the Coupa Supplier Portal, you will first need to add a **Legal Entity**. To do this, click on **Admin** in the top tool bar.



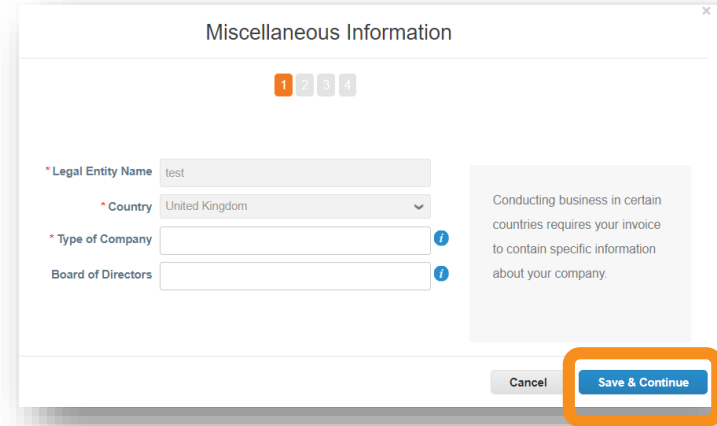
- Click E-Invoicing Setup and then click Add Legal Entity.



A pop-up will appear prompting you to add the Legal Entity Name and the Country where it is registered. Enter details and click **Continue**.

Step 2

- Add Miscellaneous Information. Once all mandatory fields are complete, click **Save & Continue**.



- The next window in the pop-up will ask you for additional information:

4. Setting up e-Invoicing in the Coupa Supplier Portal

Step 3

- The next window in the pop-up will ask you for additional information:

Tell your customers about your organization

1 2 3 4

What address do you intend to use for e-invoicing?

Add your e-invoicing address.

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country United Kingdom

☒ Use this address for Remit-To ⓘ

☒ Use this for Ship From address ⓘ

Enter the registered address of your legal entity. This is the same location where you receive government documents. ⓘ

If these boxes remain ticked, your Remit-To and Ship From address remain as above.

What is your Tax ID? ⓘ

Country

* VAT ID

☐ I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code

Preferred Language

Add your Invoice From Code - this is the same code as in your ARP system

Banking Information ⓘ

Bank Name:

Beneficiary Name:

Account Number:

Routing Number (ABA):

IBAN:

Sort Code:

SWIFT Code:

Leave Banking Information blank. Click Save & Continue when ready.

Assign Customers

Who do you want to see this?

☒ All

☒ National Grid plc

4. Setting up e-Invoicing in the Coupa Supplier Portal

Step 4

- Confirm or edit your **Remit-To** address in the next window, then click **Next**.

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To	Banking Information	Status	
test test n12 5ab United Kingdom	None	Active	Manage

Deactivate Legal Entity Cancel Next

Where do you ship goods from?

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
test test n12 5ab United Kingdom	Active	Manage

Deactivate Legal Entity Done

Confirm or edit
your **Ship
From** address.
Then click
Done.

Setup Complete

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

Go to Orders

Go to Invoices

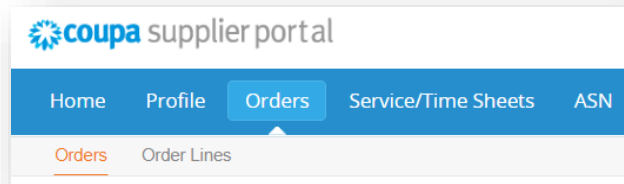
Return to Admin

You will see a message
confirming that your e-invoicing
setup is now complete.

5. Viewing Purchase Orders in the Coupa Supplier Portal

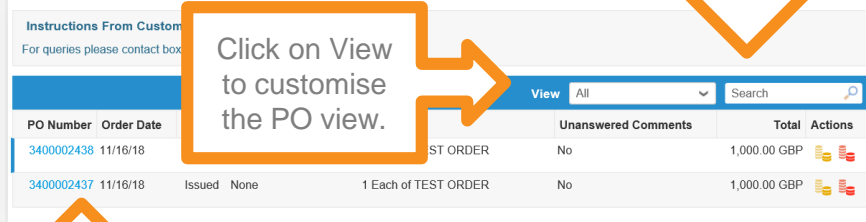
Step 1

- To view your Purchase Orders in the Coupa Supplier Portal click on the Orders tab in the top toolbar. This will show a list with all the POs raised by NG.



Use the Search functionality to search for a particular PO.

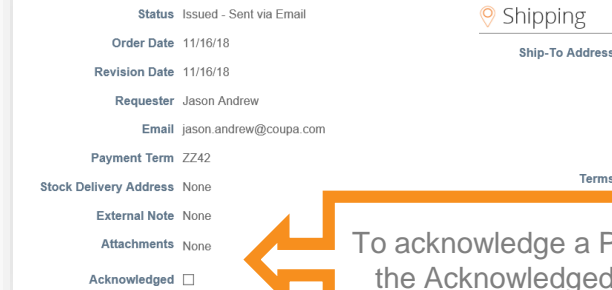
Purchase Orders



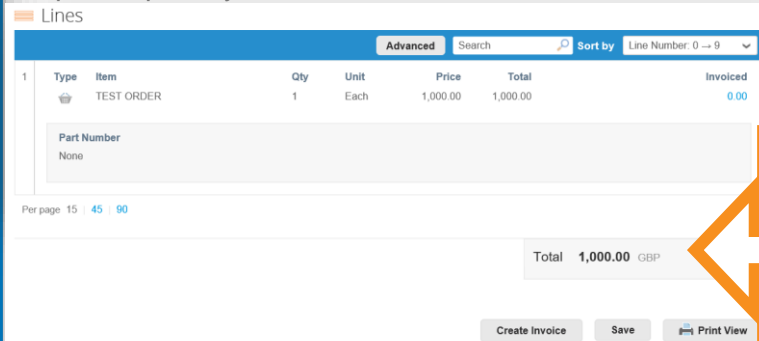
Click on the PO number to open a PO.

- In the PO window you can view details of the purchase order.

Purchase Order #3400002438



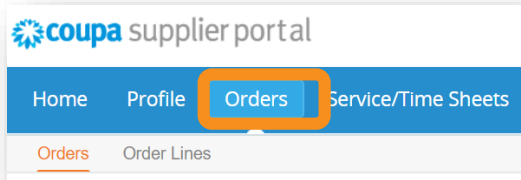
- Scroll down to PO Lines to see the description of the item, the unit price, quantity and the total value of the PO.



6. Submitting Invoices in the Coupa Supplier Portal

Step 1

- Invoices can be submitted directly through the Coupa Supplier Portal.
- Click on the Orders tab in the top tool bar.







- You can create an invoice by either clicking on the yellow coins in the right hand side **or** by clicking on the PO number.

Purchase Orders

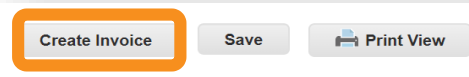
Instructions From Customer

For queries please contact box.frontdesk.BusinessServices@nationalgrid.com

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
3400002438	11/6/18	Issued	None	1 Each of TEST ORDER	No	1,000.00 GBP	 
3400002437	11/16/18	Issued	None	1 Each of TEST ORDER	No	1,000.00 GBP	 

Step 2

- In the PO view, scroll down to the bottom of the page and click **Create Invoice**.



- This will take you to the Create Invoice page. Many fields have been populated from the PO, but there are still a few fields to complete, some of which are mandatory and marked with a red asterisk.

Create Invoice

General Info

* Invoice #
 * Invoice Date 11/05/18
 Payment Term ZZ42
 Date of Supply 11/05/18
 * Currency GBP
 Delivery Number
 Status Draft
 Image Scan [Choose File](#) No file chosen

From

* Supplier
 * Supplier VAT ID
 * Invoice From Address
 * Remit-To Address

Supplier Note

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

Cash Accounting Scheme

Early Payment Provisions

Margin Scheme

Your supplier details have been populated from your **invoicing setup**.

Please leave the **Cash Accounting Scheme** and **Margin Scheme** blank

6. Submitting Invoices in the Coupa Supplier Portal

Step 3

- Scroll down to see the items you are looking to invoice against. The quantity and price can be amended.
- Please note to include a VAT rate for each PO line.

Lines

Type	Description	Price

PO Line Contract

Billing

Taxes

VAT Rate	VAT Amount	Tax Reference
	200.00	

Remove an item
from the invoice by
clicking on

Include a VAT rate.

- When you have completed all fields, click **Calculate**. This will calculate the total value of the invoice.

Totals & Taxes

Subtotal	1,000.00
Total VAT	200.00
Gross Total	1,200.00

Delete Cancel Save as draft **Calculate** Submit

- You can now **Save** the invoice as a draft, **Delete** it or press **Submit** if you are happy to proceed with the invoice.
- When you click Submit, you will get a pop-up message. Click **Send Invoice** to continue.

Are You Ready to Send?

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

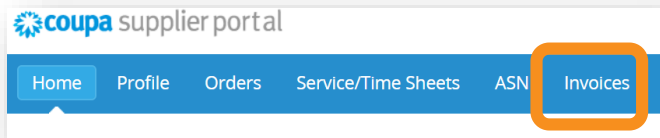
Continue Editing **Send Invoice**

- You can now view the newly submitted invoice in the Invoices tab.
- You have now created a legally compliant invoice in CSP.

7. Viewing Invoices in the Coupa Supplier Portal

Step 1

- In the Coupa Supplier Portal you can view invoices and their status.
- From the Home page click on the tab **Invoices** in the top tool bar.



- On the Invoices page you can see a list of invoices you submitted to National Grid.

Invoices

Instructions From Customer
For queries please contact box.frontdesk.BusinessServices@nationalgrid.com

Export to: View: All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	11/16/18			1,200.00 GBP	No	
None				1,200.00 GBP	No	
None				1,200.00 GBP	No	
None	11/16/18			1,200.00 GBP	No	
None	11/16/18	Draft	3400002438	1,200.00 GBP	No	

Click on **View** to filter invoices

Click on **invoice number** to open invoice.

Use the search functionality to search for a PO or invoice number.

Step 2

- You can now view all details in the invoice.
- To view the Legal Invoice, click on **download** next to it.

Invoice #234324 [Back](#)

Invoice # 234324
Invoice Date 10/18/18
Payment Term ZZ42
Delivery Date 10/15/18
Currency GBP
Delivery Number None
Status Pending Approval

Supplier
Invoice From
Test company details
Supplier Registered Company
Remit To

[Legal Invoice](#) [download](#)

Image Scan None

- This will open a pdf version of the VAT Legal invoice, which you can print or save in your local files.

VAT Invoice
234324

To
Address
National Grid Gas plc
Business Services
PO Box 7004
Wolverhampton
WV1 5YR
United Kingdom

Ship To
National Grid Gas plc
National Grid House
Warwick Technology Park Gallows
Hill
Warwick
Warwickshire
CV34 6DA
United Kingdom

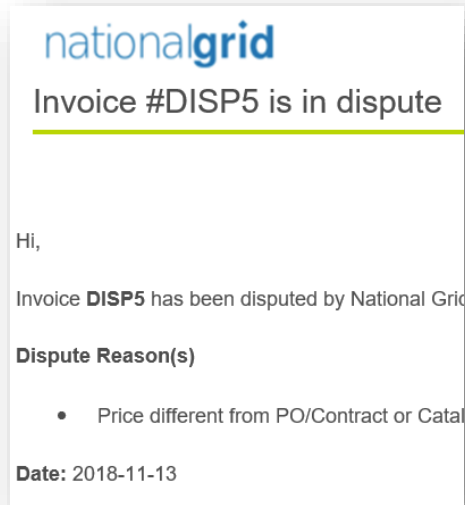
From
Invoice From
test

Buyer VAT ID
Supplier VAT ID

8. Submitting Credit Notes in the Coupa Supplier Portal

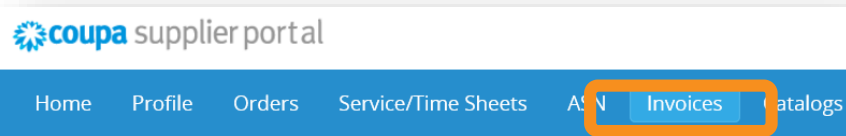
If you have already invoiced National Grid and we dispute the invoice, you will receive an email notification as per the one below.

The email will show the invoice that is in dispute, the reason, date and additional comments.








Step 1

Log in to the Coupa Supplier Portal. Click on **Invoices** in the bar at the top of the page. This will display a list of all your invoices.



The invoice that is in dispute shows an icon in the Actions column.

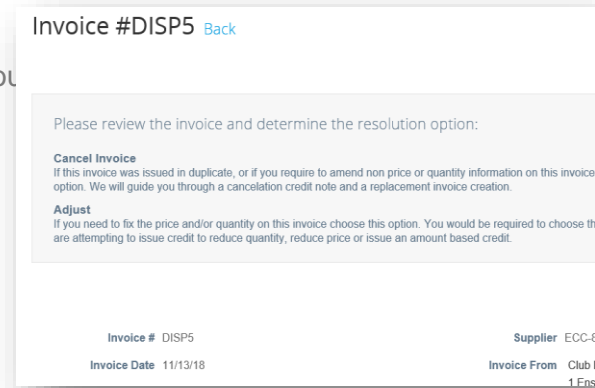
Export to				View	All	Search
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	11/16/18	Draft	3400002438	1,200.00 GBP	No	 
None	11/16/18	Draft	3400002438	-1,440.00 GBP	No	 
INV222	11/16/18	Disputed	3400002438	1,440.00 GBP	No	
INV111	11/16/18	Disputed	3400002437	1,320.00 GBP	No	

Step 2

- Click on the disputed invoice. The Invoice screen will appear – at the top you will see a message explaining the resolution options. You can choose to:

a) **Cancel Invoice** – this will create a credit note for the full amount invoiced.

b) **Adjust** – this will take you to an editable screen.



8. Submitting Credit Notes in the Coupa Supplier Portal

Step 3

- Scroll down at the bottom of the page and click either **Cancel Invoice** or **Adjust** to create a credit note.

Cancel Invoice

Adjust

- The Create Credit Note screen will appear. Complete fields – please note that mandatory fields are marked with a red asterisk.

Create Credit Note Create

This credit note applies to invoice [INV222](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

From

* Credit Note #

* Supplier CS Supplies

* Credit Note Date 11/16/18

* Supplier VAT ID GB869504876

Payment Term ZZ42

* Invoice From Address
CSLTD
2 The Avenue LTD
Birmingham
BB5 6RT
United Kingdom

Original Date of Supply 11/16/18

* Currency GBP

Delivery Number

* Remit-To Address CSLTD

- Scroll down to edit the lines in the credit note.

N.B. Totals on Credit Notes must be negative

- If the line is quantity based, enter a negative quantity and leave the price as positive.
- If the line is price based, and only contains a price field, enter a negative price.

Lines

Adjustment Type

Type	Description	Qty	UOM	Price	
	TEST ORDER	-1	Each	1,200.00	-1,200.00

PO Line

3400002438-1

Contract

Supplier Part Number

Commodity

ADHESIVES & SEALANTS

[1.01.2300]

Billing

N-2560120-K-CC421

Taxes

VAT Rate	VAT Amount	Tax Reference
20.0%	-240.00	

- Add the tax description rate. Note that you will have to add taxes at the line level.


8. Submitting Credit Notes in the Coupa Supplier Portal

Step 4

- Scroll further down to see the Totals & Taxes section.
- Click **Calculate** to finalise the totals and taxes and then click **Submit** to send us your credit note.


Totals & Taxes

Subtotal	-1,200.00
Total VAT	-240.00
Gross Total	-1,440.00

 Delete [Cancel](#) **Save as draft** **Calculate** **Submit**

- Finally, confirm that you wish to **Send Credit Note** in the popup confirmation window.

You can also add a comment to your Credit Note which sends an email to National Grid. Just write your comment in the box and click **Add Comment**. This will automatically send your comment to the buyer. When National Grid responds, you will receive a notification and will also be able to see our response here.


 Comments

Add Comment

If you want to save the credit note for later, simply click on **Save as draft**.

Gross Total

-1,440.00

 Delete [Cancel](#) **Save as draft** **Calculate** **Submit**

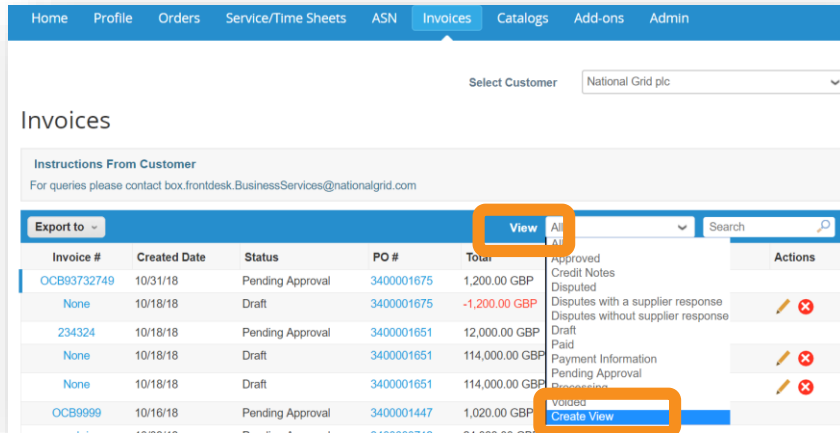
9. Reporting in the Coupa Supplier Portal

Step 1

- You can use the reporting functionality of the CSP to create customised views of invoices or purchase orders.
- Click on the **Invoices** tab at the top of the page. The Invoices page opens.



- Click into **View** and select either one of the pre-determined views or select **Create View** to create a personalised view.



Step 2

- The Create View page opens.

The screenshot shows the 'Create New data table view' page. It has three main sections: General, Conditions, and Columns.

General: Fields for Name, Visibility (radio buttons for Only Me, Everyone), and Start with view (dropdown menu).

Conditions: A dropdown for 'Match all conditions', a search bar, and an 'Add group of conditions' button. A green plus button is also visible.

Columns: A list of 'Available Columns' and 'Selected Columns'. The 'Selected Columns' list includes Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions.

Annotations with orange boxes and arrows point to the 'Fill in the general information' box, the 'Select Conditions' box, and the 'Simply drag and drop the columns you want to see in the view' box.

- A message will appear at the top of the page to confirm that your personalised view has now been created successfully.

10. Unregistered Supplier - Receive POs and Invoice National Grid

If you are not registered to the CSP, you will receive Coupa released POs from National Grid by email, as per the image below – These emails are called **Supplier Actionable Notifications (SAN)**. In the email you will find the following buttons which allow you to:

Click **Create Notification** to open a new screen where you can invoice National Grid directly.

Notify us that you received the order

Send comments about this PO to the buyer

The image shows a screenshot of an email interface for a National Grid Purchase Order. At the top, there are three buttons: 'Create Invoice' (highlighted in blue), 'Acknowledge PO', and 'Add Comment'. Below these buttons is a 'Login' button. The National Grid logo is prominently displayed in the center, with the text 'National Grid PURCHASE ORDER' underneath it.

When you click on **Create Invoice** a new screen opens where you can edit the invoice information.

The 'Create Invoice' form is divided into two main sections: 'General Info' and 'From'.
General Info: Includes fields for 'Invoice #' (with a red asterisk), 'Invoice Date' (set to 11/13/18 with a calendar icon), 'Payment Term' (set to ZZ42), 'Date of Supply' (set to 11/13/18 with a calendar icon), and 'Currency' (set to GBP with a dropdown arrow).
From: Includes fields for 'Supplier' (with a red asterisk), 'Supplier VAT ID' (with a red asterisk), and 'Invoice From Address' (with a red asterisk).
 At the top right of the form, there is a 'Create' button.

This section shows the 'Lines' table for a Purchase Order. The table has columns for 'Type', 'Description', and 'Qty'. The first row shows a line item for 'iPad9.7-128GB/Gold (WiFi) NewConn' with a quantity of 1. Below the table, there are fields for 'PO Line' (3400001143-1), 'Contract', 'Commodity', and 'Billing'. A 'Taxes' section includes a 'VAT Rate' dropdown and a 'VAT Amount' field (set to 90.00). At the bottom, there are 'Add Tag' and 'Add Line' buttons.

Scroll down to see the PO lines. You can add a new line by clicking

on [+ Add Line](#)

Add your VAT Rate

Scroll further down to find the total of the invoice. Click on **Calculate** to calculate the final amount and then click **Submit** to send the invoice to National Grid.

The summary table shows the following values:
 Subtotal: 450.00
 Total VAT: 90.00
Gross Total: 540.00
 At the bottom of the table, there are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate', and 'Submit'.



Further Support

For further information, please access our website to view our video tutorials, FAQ guide, webinar recordings and more Coupa information:
<https://www.nationalgrid.com/group/suppliers/existing-suppliers>