

# Coupa Supplier Portal Suppliers Guide

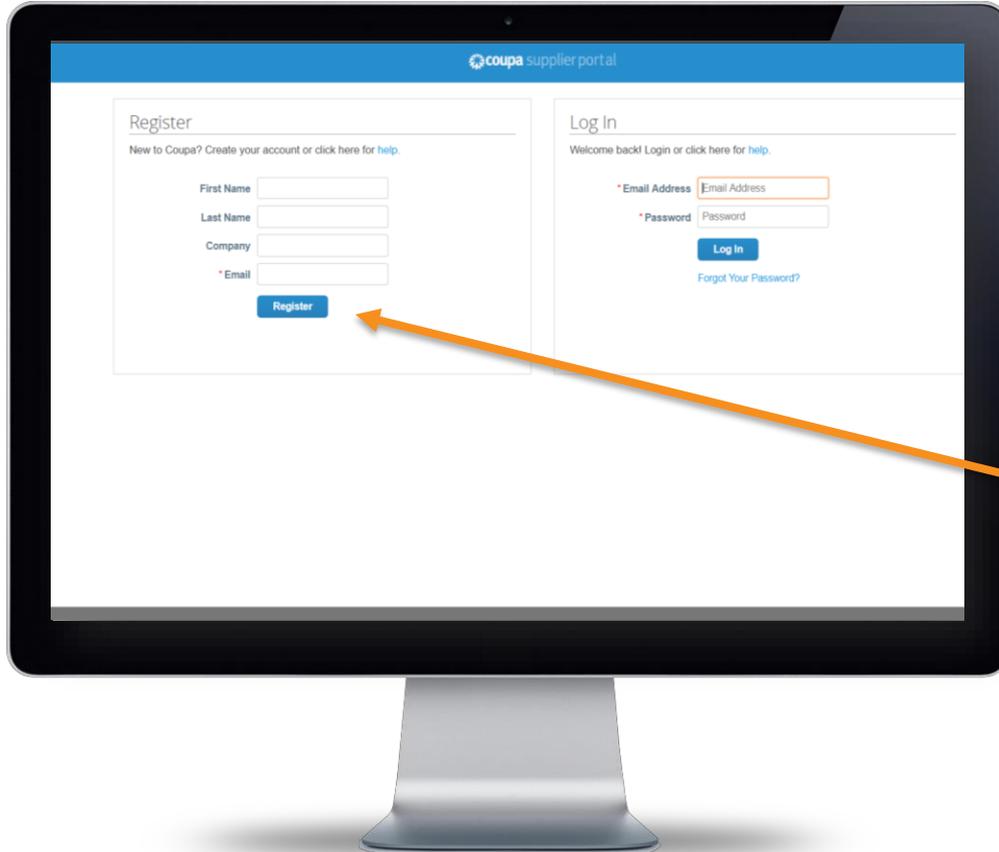


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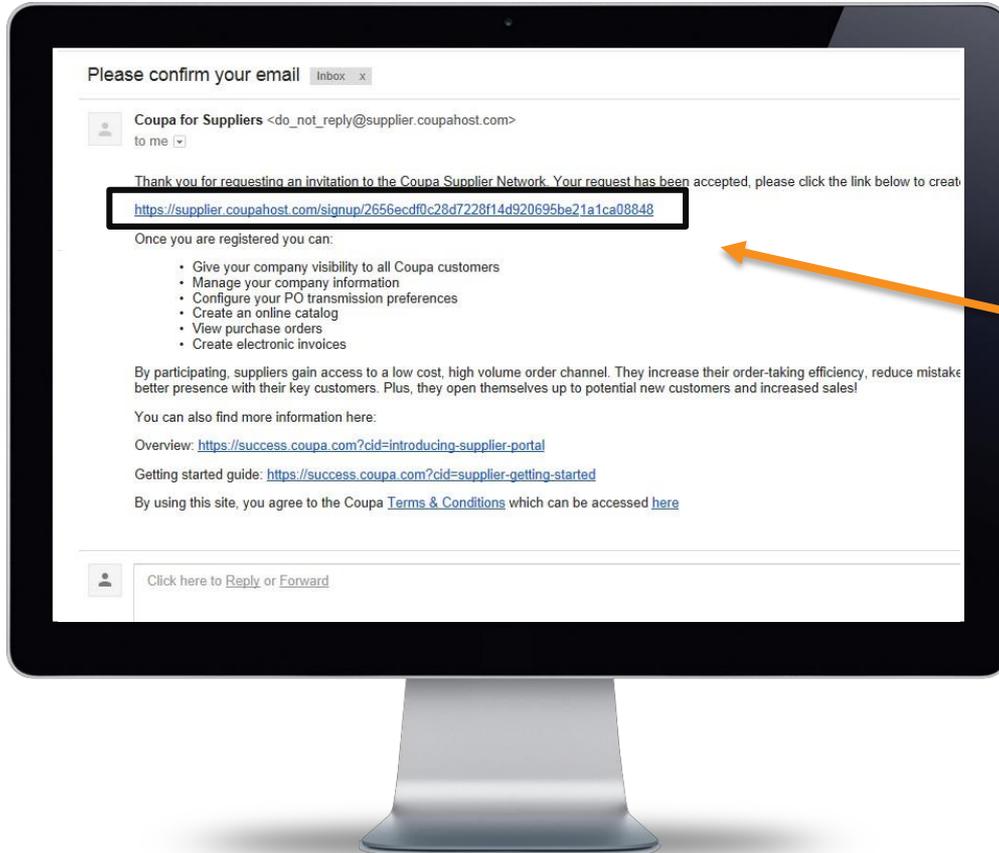
# 1. Registering to use the Coupa Supplier Portal



## Step 1 and 2 - Complete fields and hit register

- Navigate to <https://supplier.couphost.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



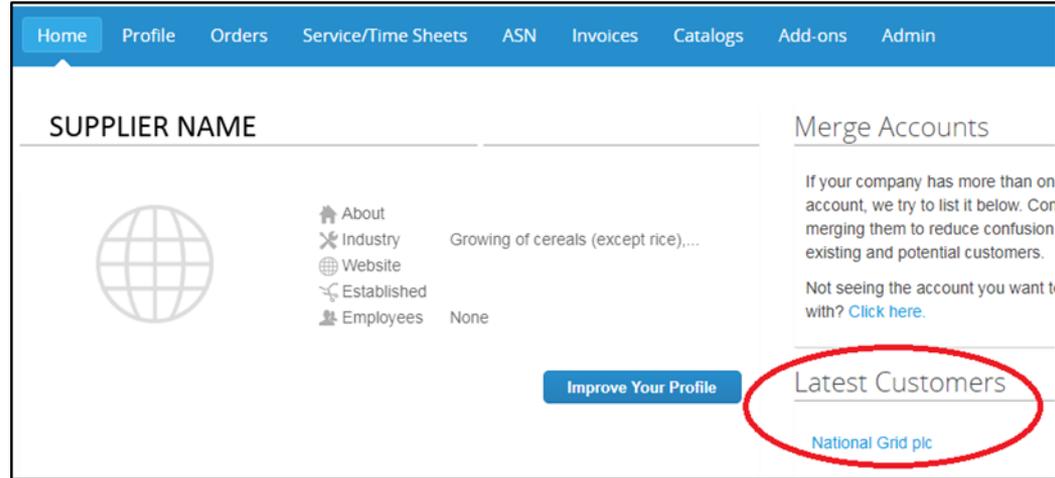
## Step 3 - Create password

- 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 – Provide your Account Details

- All that remains is to **link accounts with National Grid** in order to see us as a customer.
- Please email the following details to [box.SCM.MDVendors@nationalgrid.com](mailto:box.SCM.MDVendors@nationalgrid.com):
  - Your National Grid **Vendor Number**
  - **Company Name** (Used for Coupa Supplier Portal Registration)
  - **Primary Contact Name** (Used for Coupa Supplier Portal Registration)
  - **Email Address** (Used for Coupa Supplier Portal Registration)

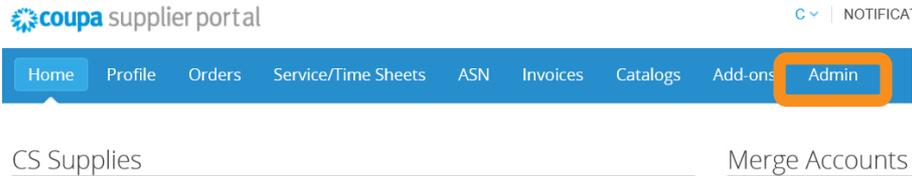


- **N.B.** your **vendor number** starts with the number 8 and consists of 8 digits in total (e.g. 8XXXXXXX). You can find it on any National Grid purchase order.
- National Grid will then take these account details and link to your account.
- You will then receive a **confirmation email** and will now be able to see National Grid as a customer. If this does not happen please get back in touch.

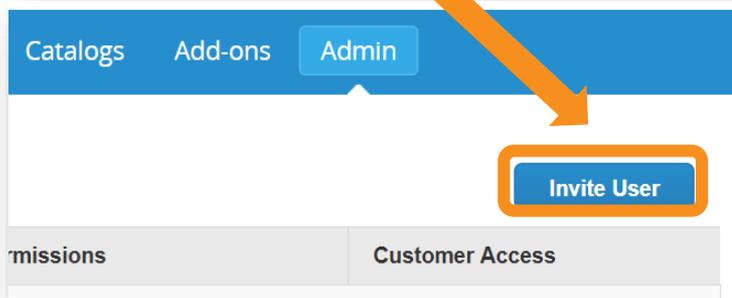
## 2. Inviting Additional Users to the Coupa Supplier Portal

### 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  All

Admin  National Grid plc

Orders

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Give permissions to the new user.

Cancel

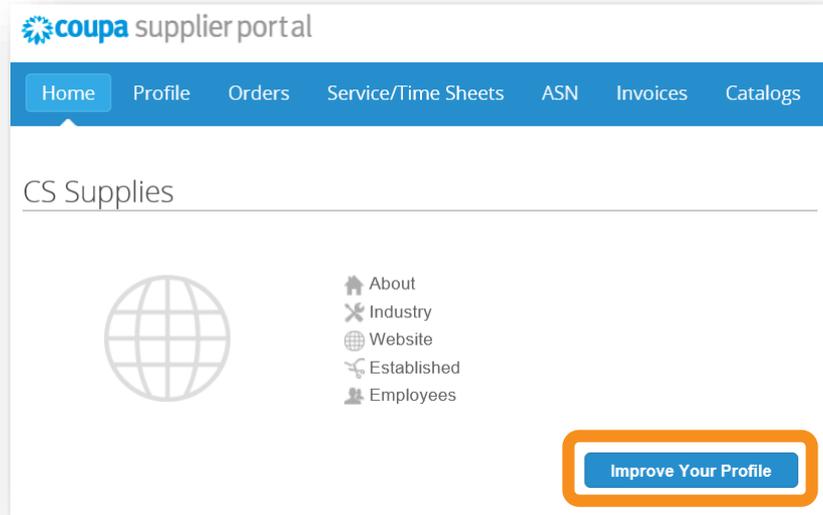
Enter the first and last name and email address of the user you wish to invite.

- 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

Cancel Save

General Information

\* Name CS Supplies

Logo Browse...

Industry Growing of rice

Year Established

Short Description

About

- 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

Cancel Save

General Information

\* Name CS Supplies

Logo Browse...

Industry Growing of rice

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

Cancel Save

General Information

\* Please fix the errors below.

\* Name CS Supplies

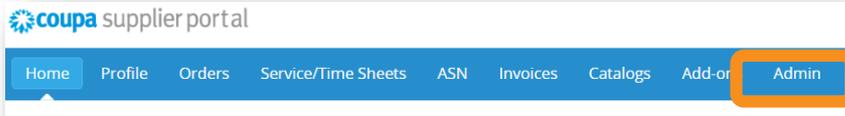
- Otherwise you will get a message confirming that the information has been saved successfully.

Your company info was successfully updated.

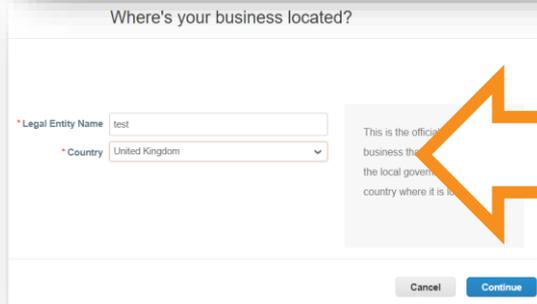
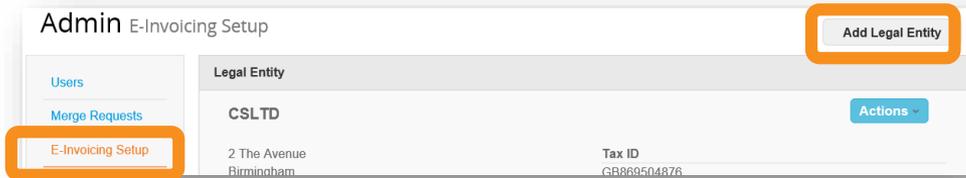
# 4. Setting up e-Invoicing in the Coupa Supplier Portal

## 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.

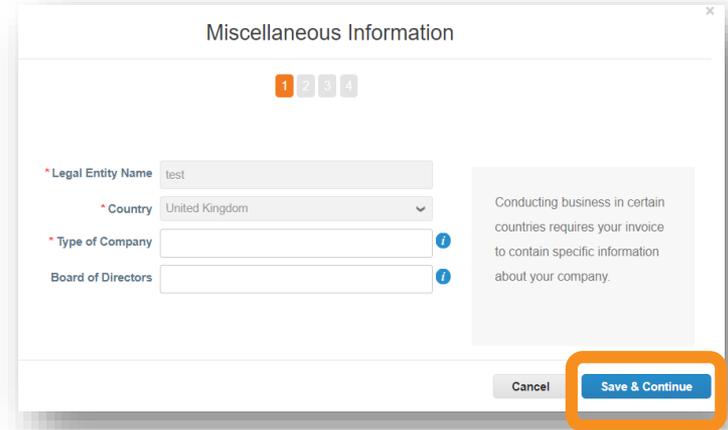


The screenshot shows a pop-up form titled 'Where's your business located?'. It contains fields for 'Legal Entity Name' (with the value 'test') and 'Country' (with the value 'United Kingdom'). There is also a text box for additional information and 'Cancel' and 'Continue' buttons at the bottom.

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 screenshot shows the 'Miscellaneous Information' form. It includes fields for 'Legal Entity Name' (test), 'Country' (United Kingdom), 'Type of Company', and 'Board of Directors'. There is a help icon for the 'Type of Company' and 'Board of Directors' fields. A text box on the right explains that conducting business in certain countries requires specific information. The 'Save & Continue' button is highlighted with an orange box.

- 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	<a href="#">Manage</a>

[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	<a href="#">Manage</a>

[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.

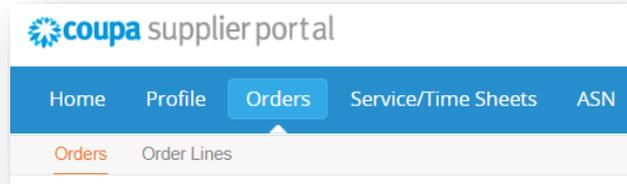
[Go to Orders](#) [Go to Invoices](#) [Return to Admin](#)

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

Instructions From Customer  
For queries please contact box

Click on View to customise the PO view.

PO Number	Order Date	Item	Unanswered Comments	Total	Actions
3400002438	11/16/18	ST ORDER	No	1,000.00 GBP	[Icons]
3400002437	11/16/18	Issued None 1 Each of TEST ORDER	No	1,000.00 GBP	[Icons]

Click on the PO number to open a PO.

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

### Purchase Order #3400002438

Status	Issued - Sent via Email	Shipping
Order Date	11/16/18	Ship-To Address
Revision Date	11/16/18	
Requester	Jason Andrew	
Email	jason.andrew@coupa.com	
Payment Term	ZZ42	Terms
Stock Delivery Address	None	
External Note	None	
Attachments	None	
Acknowledged	<input type="checkbox"/>	

To acknowledge a PO, tick the Acknowledged box.

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

### Lines

Advanced Search Sort by Line Number: 0 → 9

Type	Item	Qty	Unit	Price	Total	Invoiced
1	TEST ORDER	1	Each	1,000.00	1,000.00	0.00
Part Number: None						
Total					1,000.00 GBP	

Per page 15 45 90

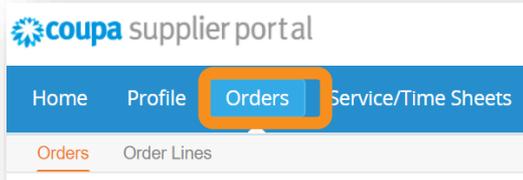
Create Invoice Save Print View

Click on Print View to see a PDF version 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	11/06/18	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 Create

**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  No file chosen

Supplier Note

Attachments Add File | URL | Text

Cash Accounting Scheme

Early Payment Provisions

Margin Scheme

**From**

\* Supplier

\* Supplier VAT ID

\* Invoice From Address

\* Remit-To Address

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.

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
<b>Gross Total</b>	<b>1,200.00</b>

Buttons: 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.

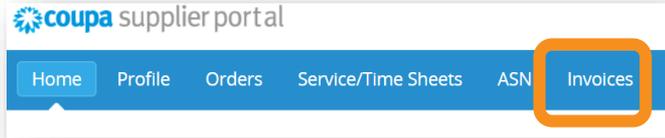
Buttons: Continue Editing Send Invoice

- 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](#)

- 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: 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

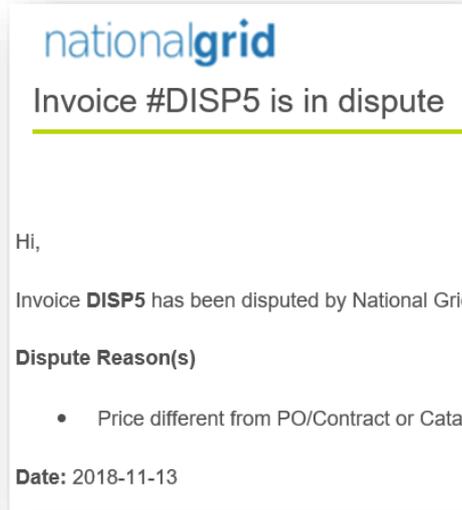
From: Invoice From  
test

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.

coupa supplier portal

Home Profile Orders Service/Time Sheets **AS N Invoices** Catalogs

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

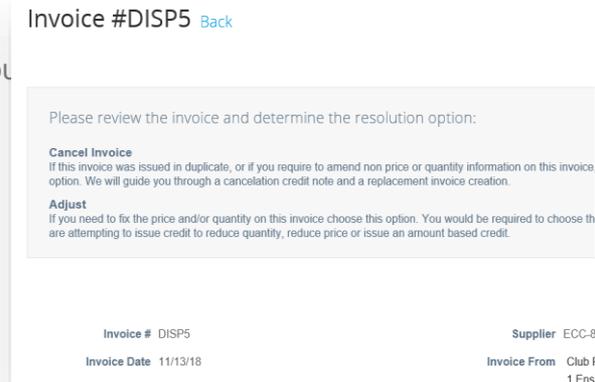
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
None	11/16/18	Draft	3400002438	1,200.00 GBP	No	
None	11/16/18	Draft	3400002438	-1,440.00 GBP	No	
INV222	11/16/18	Disputed	3400002438	1,440.00 GBP	No	
INV111	11/16/18	Disputed	3400002437	1,320.00 GBP	No	

### 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

\* Credit Note #

\* Credit Note Date

Payment Term

Original Date of Supply

\* Currency

Delivery Number

#### From

\* Supplier

\* Supplier VAT ID

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

\* Remit-To Address

- 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  Contract

Supplier Part Number

Commodity

Billing

Taxes

VAT Rate	VAT Amount	Tax Reference
<input type="text" value="20.0%"/>	<input type="text" value="-240.00"/>	<input type="text" value=""/>

- 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
<b>Gross Total</b>	<b>-1,440.00</b>

- 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

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

Gross Total

-1,440.00

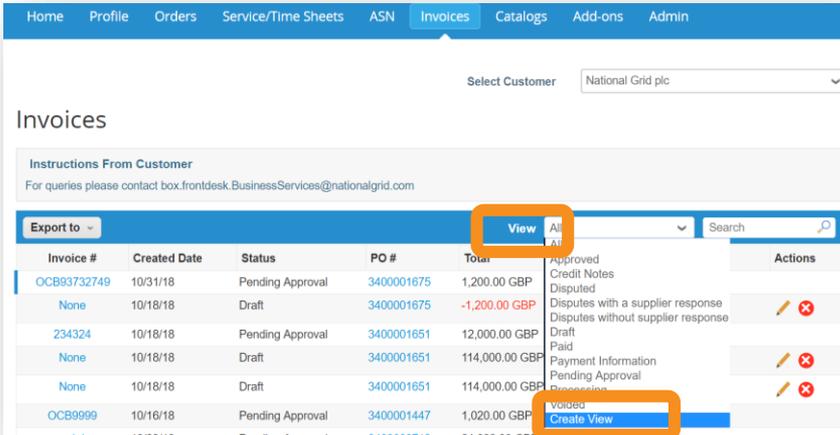
# 9. Reporting in the Coupa Supplier Portal

## 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.

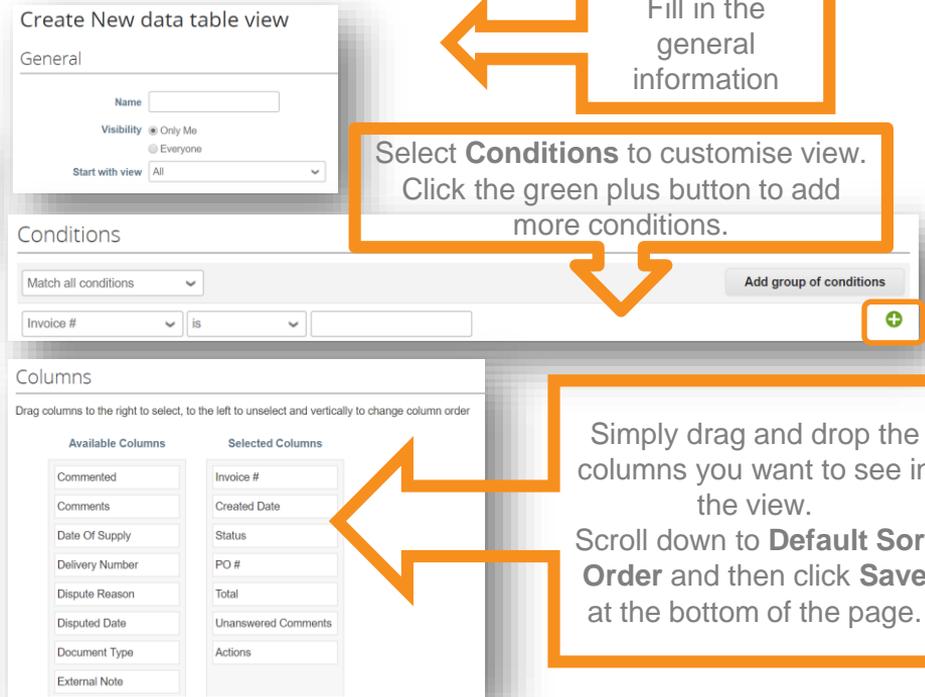


- Click into **View** and select either one of the pre-determined views or select **Create View** to create a personalised view.



## Step 2

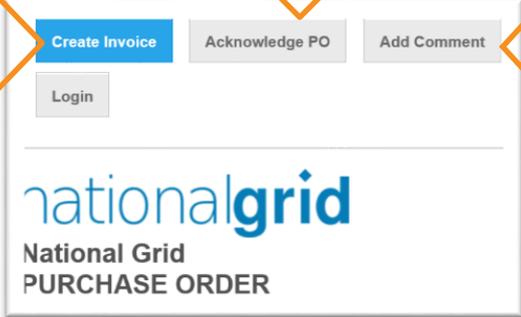
- The Create View page opens.



- 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

Buttons: **Create Invoice**, Acknowledge PO, Add Comment, Login

Logo: nationalgrid  
National Grid PURCHASE ORDER

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

### Create Invoice Create

<b>General Info</b>	<b>From</b>
* Invoice # <input type="text"/>	* Supplier
* Invoice Date 11/13/18 <input type="text"/>	* Supplier VAT ID
Payment Term ZZ42	* Invoice From Address
Date of Supply 11/13/18 <input type="text"/>	
* Currency GBP <input type="text"/>	

### Lines

Type	Description	Qty
	iPad9.7-128GB/Gold (WiFi) NewConn	1

PO Line 3400001143-1 Contract

Commodity Billing

Taxes

VAT Rate  VAT Amount 90.00

[Add Tag](#)

[Add Line](#)

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.

Subtotal	450.00
Total VAT	90.00
<b>Gross Total</b>	<b>540.00</b>

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



## Further Support

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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>