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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.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 – 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:
  - 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**
- Enter the first and last name and email address of the user you wish to invite.
- Give permissions to the new user.
- 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.

About

Primary Contact
- Address
- Primary Contact: Chris Skipp
- Work Phone: jason.andrew+cs@coupa.com
3. Enriching Company Profile on Coupa Supplier Portal

Step 3
- A new window opens where you can edit information fields.
- 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.
- If you have missed any mandatory fields you will get a message asking you to fix errors.
- Otherwise you will get a message confirming that the information has been saved successfully.
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.

Step 2
- Add Miscellaneous Information. Once all mandatory fields are complete, click Save & Continue.

- 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.

- 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:
  - Add your e-invoicing address.
  - If these boxes remain ticked, your Remit-To and Ship From address remain as above.
  - Scroll down to enter your VAT ID.
  - Add your Invoice From Code - this is the same code as in your ARP system.
  - Leave Banking Information blank. Click Save & Continue when ready.
Step 4

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

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

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

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

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.

Click on View to customise the PO view.

Click on Print View to see a PDF version of the PO.

Click on the PO number to open a 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.

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.
- 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.

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

- 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.

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

- Include a VAT rate.

- Remove an item from the invoice by clicking on
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.

**Step 2**
- You can now view all details in the invoice.
- To view the Legal Invoice, click on **download** next to it.
- This will open a pdf version of the VAT Legal invoice, which you can print or save in your local files.
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.

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.

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.
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.

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

- 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.

- 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.

- 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.

If you want to save the credit note for later, simply click on **Save as draft**.
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.
- Fill in the general information.
- Select **Conditions** to customise view. Click the green plus button to add more conditions.
- Simply drag and drop the columns you want to see in the view.
- Scroll down to **Default Sort Order** and then click **Save** at the bottom of the page.
- 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 by clicking on the respective button.
- Send comments about this PO to the buyer.
- When you click on **Create Invoice** a new screen opens where you can edit the invoice information.

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.

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

Add your **VAT Rate**.
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