



National Grid - Supplier Enablement

Frequently Asked Questions for Suppliers

National Grid
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Frequently Asked Questions

As part of our continuous engagement with our suppliers, National Grid has put together various frequently asked questions suppliers would like answered about Coupa. We have grouped these questions and provided responses.

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Coupa

What is Coupa?

The Coupa system is a cloud-based purchase-to-pay tool which allows National Grid to connect directly with our suppliers. Through Coupa, we will be able to raise and issue purchase orders to our suppliers and offer our users visibility of the products and services being supplied by you.

Through joining the Coupa Supplier Portal (CSP) as a National Grid supplier, you will be able to view and acknowledge your purchase orders, submit invoices and view your invoice status in real time. There is no cost for registering and using the CSP and no additional software is required.

What are the benefits of using Coupa?

The major benefits of the introduction of Coupa are:

- To improve the purchase to pay process, making us an easier organisation to transact with
- Reduce costs of transactional processes for both ourselves and our suppliers
- Eliminate the use of paper when issuing purchase orders and receiving invoices
- Improved operating efficiency and business relationships

The benefits to your business:

- Immediate receipt of electronic purchase orders
- Acknowledge and comment on a purchase order electronically through the CSP
- Visibility of all purchase orders through the CSP
- Flip a purchase order to create an invoice, which provides a guaranteed invoice match to the purchase order
- Real time visibility of invoice status – improved transparency which removes the requirement for you to track down the status of your invoice.

Coupa Supplier Portal

How do I sign up to the Coupa Supplier Portal (CSP)?

To sign up to use the Coupa Supplier Portal, you need to complete the registration process as set out in the [CSP Registration Guide](#) on our website. Please ensure that you complete STEP 4 and email us your CSP account details. We can then link your account to National Grid and you will be able to see us as a customer.

We are already signed up to Coupa for a different customer. How do we link National Grid to it?

Email us your account details as outlined in Step 4 of the [CSP Registration Guide](#). National Grid will then link your account.

How do I know that I have successfully registered on the Coupa Supplier Portal?

Log-in using the credentials you used to register. If you can login, you have successfully registered and can access your account.

If we sign up after the Go-live date how long will it take to link our account with National Grid?

Once you have provided us with your account details, we will aim to link your account to National Grid within 48 hours. If after a week your account still has not been linked, please get back in touch to box.SCM.MDVendors@nationalgrid.com

Is it mandatory to sign up to Coupa?

Moving forward any new agreements we let with suppliers will contain provisions to support National Grid ways of working which will include the use of the Coupa Supplier Portal.

Will National Grid still use Achilles Utilities Vendor Database (UVDB)

National Grid will still use Achilles to identify suppliers for sourcing activities. The Coupa system is replacing our existing purchase to pay platform which covers the raising of requisitions, issuing of purchase orders and invoice creation/submission.

Will Coupa be replacing Ariba & Egress systems?

The Coupa system will not be replacing Ariba or Egress. National Grid will still use Ariba to undertake sourcing activities and Egress to issue commercially sensitive documentation externally.

As Quotations are submitted to the Coupa Portal, will there subsequently be visibility of status of the Quote?

Coupa will only be used for Spot Buys which are cut down versions of a RFQ, RFI or RFP process. Coupa will not impact existing RFX processes.

Where do I find Coupa's terms and conditions?

Click on the admin tab from the Coupa homepage, then click on Terms of Use on the left hand menu.

I have multiple Coupa accounts. Can I merge them into one?

Yes, on the homepage there is a button labelled "merge requests" where you are able to request multiple accounts to be merged. Please click [here](#) to for a step by step guide that Coupa have provided.

We have consolidated vendor numbers under 1 CSP account, what impact will this have on us?

Purchase orders for those vendor numbers will be released to the same Coupa account. You can filter on the orders tab between purchase orders raised under different vendor numbers.

What password do additional users need to enter when they have been added to an existing CSP account?

Additional users create their own password.

When a CSP account administrator wishes to add an additional user, they input the email of the individual they would like to add and send the request. The user then receives an email asking them to confirm this and are then asked to create their own password.

Purchase Orders

If we are asked to perform extra work during an existing contract which has started, do we need a new purchase order number for the extra work or should it be added to the original purchase order?

National Grid will either issue a new purchase order or amend the existing PO. This process can be agreed between yourselves and the relevant National Grid requisitioner or buyer.

We currently have a lump sum under one PO number to cover the whole contract. Will each individual job covered need a separate PO?

National Grid can release an amount based purchase order and you will be able to part deliver/invoice against this.

Can a supplier acknowledge a Purchase Order through Coupa?

Yes a purchase order can be acknowledged through Coupa, by accessing the order and clicking the 'Acknowledge Order' button. This will send a notification to the National Grid requisitioner informing them that the order has been acknowledged by the supplier.

When you acknowledge the order, is that acknowledging receipt of the order or everything on the whole order?

When you acknowledge an order in the CSP you will acknowledge everything on the order.

Will PO values sometimes be hidden?

Yes, purchase order requisitioners can choose to hide the value of a purchase order before it is released to you.

We have registered on the CSP, will we still receive purchase orders via email?

Yes you will continue to receive purchase orders to the email address you have nominated as well as being able to view them within your CSP account. Purchase orders can also be sent to additional email addresses for other users if you wish. This can be edited in the admin tab.

Can you change who receives PO's via email from within the system?

Yes on the orders tab on the homepage there is a box called 'Configure PO Delivery' where you can edit the email address that will receive purchase orders.

Will there be a change in the PO format compared to POs pre-Coupa?

Although the layout will be subtly different, purchase orders will contain all information that was on POs previously

We have bespoke questions/issues regarding a purchase order?

Consult our suppliers webpage and see if you are able to resolve the issue. If you are still unsure, please contact Box.frontdesk.businessservices@nationalgrid.com and they will look in to your issue and help to resolve.

How are Call off PO's handled on Coupa & then turned into invoices as we never know what quantity we are delivering?

All that needs to be done is for you to ask the requisitioner of the original purchase order to make a revised version. Purchase orders can be edited even after they have been actioned against.

If we are getting a large number of POs in, is it possible to consolidate them under 1 invoice via the CSP?

Yes, it will be possible. Our consolidated billing process will not be changing but liaise with your National Grid buyer/contract manager for guidance.

Will we be informed each time one of our existing POs is migrated across to Coupa?

Old purchase orders are not being migrated across to Coupa. Either the balance or a new purchase order will need to be created in Coupa by your requisitioner/buyer.

Invoices

How do I submit my invoice to National Grid?

Invoices can be submitted to National Grid in a number of ways:

- Through utilising the PO flip functionality within the CSP. This action will flip the purchase order into an invoice which can be submitted through the CSP
- Submitting invoices in PDF format via email to invoices+credits@nationalgrid.coupa.com
- Through cXML (if system to system integration has been established)

Can I still submit paper invoices to National Grid?

No - with immediate effect we will no longer be accepting paper invoices. National Grid will still accept PDF invoices emailed to invoices+credits@nationalgrid.coupa.com. However our long term approach is to receive invoices through the Coupa Supplier Portal.

How should a supplier be submitting consolidated invoices once Coupa has gone live?

Consolidated invoices will still be issued to National Grid via email submission, including the necessary backing data to accompany your invoice

Can we attach documents to the CSP invoice?

It is possible to attach invoice backing data/information to a CSP invoice, however the National Grid Coupa system does not require any PDF invoice attachments created from supplier systems to be attached.

How do we query delayed payments?

Query delay invoice payments can be managed in two ways. If you have submitted your invoice in Coupa, you can view the status of your invoice within your Coupa Supplier Portal. Click on the 'Invoices' tab at the top of the home screen to access your invoices.

If you have sent your invoices via email, you can contact Box.frontdesk.businessservices@nationalgrid.com and a member of our Business Services team will provide more information on the status of your invoice.

If an invoice is saved as draft in the CSP, will it allow you to modify before submitting?

Yes, you will be able to modify draft invoices before submitting.

Will the CSP provide us a consolidated view of all invoices with status for a date range and for how long a period will we be able to download the data for?

The CSP can be used to view the status of all invoices submitted to National Grid.

If any invoice is rejected in the Coupa Supplier Portal will it provide a reason for rejection?

If National Grid rejects an invoice, commentary will be added within the CSP as to the reason for the rejection by the person who rejected the invoice

Can we apply different payment terms to different invoices?

No, the payment terms are determined by the vendor record and the commercial agreement that you have negotiated with National Grid.

Can I still part invoice against a purchase order in the CSP?

Yes, Coupa provides the functionality to part invoice. Purchase orders can be raised either via a quantity based PO or an amount based PO. It is recommended you discuss with your Procurement contact to ensure the PO is structured correctly to enable you to part invoice against.

What happens when an invoice is generated against a purchase order that doesn't display any value?

If the price on the purchase order is hidden, you will still be able to flip the PO into an invoice and manually enter the invoice value before submitting through the portal.

Can multiple deliveries/invoices be assigned against a purchase order?

The CSP allows a supplier to raise multiple deliveries/invoices against a purchase order.

Can one invoice cover multiple purchase order lines?

One invoice can only cover one Purchase Order across multiple lines. One invoice cannot cover multiple purchase orders.

Can part quantities be invoiced against a purchase order?

Yes. You will be able to amend the quantity supplied on your invoice if the relating order has been part shipped.

How are invoice queries going to be dealt with in the CSP

Coupa is a self-service system so there will be details of the requestor on the initial Purchase order so that you can follow up if you have any queries. There is also a new comments facility which enables you to comment against a PO



or Invoice and this is then sent back to National Grid. This is an auditable track of communication which can be used to resolve any PO or invoice questions.

How do we include retention within our invoicing?

There will be no change to how retentions are managed once we have migrated to Coupa. If you submit a payment application currently you will continue to do this through Conject and submit invoices through the Coupa Supplier Portal once your payment application has been approved.

My invoices show quite a detailed breakdown re-rates charged per person, how can I show that on this system?

The Supporting documentation relating to Time and Materials can be attached to your invoice within the Coupa Portal.

If you currently provide National Grid a consolidated invoice (one invoice with multi line backing data on a separate document), please continue to issue these via email until further notice.

Our computer system automatically emails invoices. Will this still be ok or will that have to change?

National Grid will still accept invoices sent in PDF format to our designated email address invoices+credits@nationalgrid.coupa.com.

Please note however, we will be fully migrating our invoice receipt process into Coupa during the course of 2019

When you flip a PO to create an invoice is there a facility to invoice for additional items or do you have to obtain a PO for all additional items.

There is **no** option to add additional invoice lines, including shipping. All items must be included on the purchase order issued by National Grid.

If there is no shipping charged advised on the purchase order and shipping is to be paid by National Grid in accordance with any contractual arrangement, suppliers will be required to contact the requisitioner and inform them that an additional line for shipping needs to be added to the purchase order.

The purchase order will need to be amended by National Grid, approved and re-issued to suppliers in order for shipping to be invoiced.

Will Purchase Orders from National Grid's current system be migrated across to the new system?

Not immediately. There will be a transition period where both systems will be operating in parallel.

In the short term, all existing purchase orders will remain in our current system and invoiced as per National Grid's invoice channels. It is our intention to operate two systems until February 2019. Any open purchase orders live in

our existing system come February will be migrated in Coupa. Suppliers will be advised of this action in advance, along with being provided new purchase orders numbers.

Do I need to attach a copy of our own system generated invoice to the Coupa invoice template?

There is no requirement for suppliers to attach a copy of their internally raised invoice to the invoice created in Coupa. However, if suppliers wish to do this, these can be included by uploading a PDF document as an attachment.

Has the email address changed for when we need to send invoices via PDF?

Yes, the new email is invoices+credits@nationalgrid.coupa.com

Can we submit invoices for old PO's not in the Coupa system?

No, you will need to email PDF copies of these invoices to invoices+credits@nationalgrid.coupa.com

Will invoicing address' for National Grid all be the same within Coupa?

The main National Grid invoice address is National Grid, Shared Services, PO Box 7004, Wolverhampton, WV1 9YR which will be the same for all invoices. There are multiple ship to address' within National Grid that could be given on any given purchase order

Will we receive confirmation for the receipt of an invoice once submitted?

Yes, an automatic email will be generated by Coupa to confirm the receipt of an invoice.

Do we need a GB VAT number if we are invoicing from outside the UK?

You need to provide a GB VAT number if you are registered for VAT in the UK and charging UK VAT.

If an invoice has been paid, can a credit note still be raised?

Yes, credit notes can still be raised against invoices that have been paid. Purchase orders can also be revised and edited even after invoices have been paid to align them to invoices if necessary.

How do we handle invoicing in different currencies?

When creating an invoice there is a currency option you can edit, you will be required to have an up to date exchange rate to enter when switching between currencies.

Can you invoice against more than the corresponding PO value?

Yes, you are able to invoice for more than the PO value when creating an invoice against a PO.

Will you be allowed to backdate an invoice in the system?

Yes, there is functionality to do this if agreed with the relevant National Grid customer.

How can we get pdf copies of the invoices or credit notes we generate on the portal?

If you click into the relevant invoice via the invoices tab, there will be an option there to download the legally compliant invoice that has been created as well as view & download credit notes against it.

Will there be a time limit on invoicing against a PO?

Not that is dictated by the Coupa system.

When will be able to submit invoices via email up until?

We are looking to for all invoices to be sent via Coupa by the middle of 2019 but will this is to be confirmed.

Where should backing sheets be sent going forward?

Backing sheets can be attached to an invoice during invoice creation. If you send an invoice via email to Invoices+credits@nationalgrid.coupa.com then you can attach backing sheets with this.

Who do I contact if an invoice isn't approved or paid in a timely manner?

First point of call would be to check the invoice status in Coupa & then email the relevant National Grid requisitioner for the purchase order in question. If you feel you need to escalate further please email box.frontdesk.BusinessServices@nationalgrid.com

If any invoices are sent by post to NG after 19th November, will they be paid?

They will continue to be paid for a small period of time but if suppliers continue to do this for a long period of time they will be rejected as we close off the paper invoicing process.

Can you see payment dates against invoices?

Yes, in the Coupa Supplier Portal, you can see both the predicted payment date and the actual payment date

What if the VAT is incorrect on an invoice? Can we amend it on the Coupa system?

It is the supplier's responsibility to charge the correct amount of VAT. Errors can be corrected via credit notes.

Is it possible to change the "invoiced from" address on the invoicing page?

Yes this can be edited by amending the legal entity you have created under the e-invoicing setup within the admin section of the portal.

Catalogues



How will the existing catalogues work with the CSP?

Catalogues will be uploaded and maintained by suppliers through the CSP.

Can we add images for our catalogue items?

Suppliers can include URL links to images within their catalogue files. The Coupa system is unable to host jpeg or pdf images.

How can we capture the additional P&P/Shipping costs on our catalogue?

Any additional shipping charges must be added by the National Grid requisitioner as a free-form line on the purchase order. If shipping has agreed to be charged and it is not present as a line on the purchase order, suppliers are required to contact the National Grid requisitioner in order for them to issue an amended purchase order with shipping charges included.

Under our current contract we provide products that we believe could be purchased by a catalogue. How do we put a catalogue in place?

If you believe your product offering is suitable for a hosted catalogue, you should first contact either your National Grid Contract Manager or Buyer to discuss further. A catalogue template can then be created and uploaded into Coupa.

How do we update and add to the catalogue?

We have put up an external training video on our supplier website [here](#) that outlines this process.

Legal Tracker

Will Legal Tracker still be used once Coupa is in place?

Legal Tracker will still be used by Legal to instruct our panel firms, for budget quotes, for panel firms to raise invoices and for tracker to check invoices for expense and fee earner violations

I use Legal Tracker today. Do we still need to register on the Coupa Supplier Portal?

Yes. You will still be able to use the CSP to manage purchase orders issued by National Grid and view the status of your invoices.

Are invoices raised in Legal Tracker going to be transferred into Coupa so we can view the status of them?

Yes they will be pushed into Coupa once created in Legal Tracker so you can view and track their status.

Will the new matters opened by a firm be added to Coupa by National Grid or will the firm have the accessibility to add new matters themselves?

There will be no change to this process. Panel firms will follow the same process as now, they will need to ensure that National Grid matter leads create matters in Legal Tracker and invoices should still be uploaded to Legal Tracker in the usual way.

Will Purchase Order numbers be added by National Grid before the work requested by the firm is carried out or will the firm be able to add Purchase Order numbers?

Matter leads will raise a purchase order in Coupa to confirm the work to be undertaken. The processes in Coupa are simple and the purchase order generation processes should be shorter.

What if the work requested to be carried out by the firm exceeds the amount of the PO?

If the Purchase Order does not have sufficient funds, additional funds will be added to the PO, which will then be subjected to DOA approval. Once approved the PO/Invoice will be matched and approved for payments.

How should we submit invoices if we use Legal Tracker?

Invoices must be submitted via Legal Tracker. If you are a legal firm and use Legal Tracker, invoices issued directly through the Coupa Supplier Portal will be rejected.

Will the firm still have to add the allowable codes to their time narratives for invoices?

Yes, details required for invoicing remain unchanged and firms should continue to use Legal Tracker as they do today

How will the time spent by the firm be shown on Coupa as a breakdown of the amount of the invoice of time spent by the firm?

As you will be invoicing through Legal Tracker there will be no change in your invoicing details. LEDES format should still be used to break down the work carried out by the firms.

Other Questions:

What is the support email address for any technical queries related to the CSP going forward?

Please send any queries to Box.frontdesk.businessservices@nationalgrid.com specifying the nature of the issues you are experiencing and any relevant supporting information, screenshots etc.

Where can I find recordings of webinars that have been missed?

Webinar recordings and video tutorials on how to use the Coupa Supplier Portal can be found on our supplier webpage [here](#).

Why do we have 2 National Grid customers listed under the orders filter?

Purchase orders for different vendor numbers that have been consolidated will need to be viewed as different drop down options under the orders tab.

Do I need to add my bank details to the Coupa Supplier Portal?

No not for the purposes of invoicing National Grid. Instead supplier bank details will remain stored outside of Coupa.

What does the invoice from code represent on the e-invoicing set-up?

This will be a code specific to your ERP system if you are integrating it with Coupa. It is not mandatory & may not apply to your business.

Will vendor legal entities show in the system on log-in?

No, these will need to be entered manually by going to the admin tab of the portal, 'e-invoicing' on the left hand side and the option 'add legal entity'.

Can we store multiple legal entities for different company entities under the same CSP?

You are able to add multiple legal entities under the e-invoicing setup & activate and deactivate legal entities as you wish. You are only able to have one legal entity active at a time though.

What happens if our contracts have different payment terms – do we need more than one account?

No, purchase orders and invoices are linked to contracts and will follow their payment terms. There is no requirement to have multiple accounts.

How will the NG requestor ask for a quotation or technical questions/information about products and services?

Whilst Coupa does have the functionality to support spot buy quotations, requests for quotations and technical questions will normally be handled outside of the system via email.

How will retentions be managed within the new system?

NG will still accrue and withhold retention payments, for the agreed duration, until invoiced by the supplier at the end of the retention period. The process from a supplier perspective does not change.

I notice that the Coupa portal has a tab for timesheet function that NG will be using?

National Grid will not be using the timesheet tab at this present time.

Is there any integration to accounting S/W? QuickBooks?

No, Coupa can output cXML PO's and accept cXML invoices, please check with your vendor if this is supported

In terms of processing orders received via the portal, beyond ticking the 'acknowledge' box is there anything else that needs to be done in the portal regarding confirming the order has been processed or confirming expected delivery dates?

No, you are able to use the comments section under the purchase order to communicate with the requisitioner if required though.

Will our existing vendor number change after we go live?

No, vendor numbers will remain the same. Contract numbers will change & you will be notified on your new contract number(s) via email.

Acronyms

Acronyms and terms explained:

- NG- National Grid
- PO – Purchase Order
- CSP – Coupa Supplier Portal
- SAN – Supplier Actionable Notifications
- Requisitioner – Person who raises the Purchase Order
- Flipped – Turns the Purchase Order into an invoice template to complete
- CSP- Coupa Supplier Portal
- UVDB- Utilities Vendor Database
- RFI – Request for Information
- RFQ – Request for Quotation
- RFT – Request for Tender
- RFP – Request for Proposal

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