

Supplier Actionable Notifications (SAN) Guide

Quick Reference Guide for Suppliers

Portland General Electric is moving to a new eProcurement system - Coupa - for their P2P needs. In using Coupa via the Supplier Actionable Notifications (SAN) process, you will now have the ability to act directly from your inbox when you receive a PO notification email without the need to sign in or create an account.

How It Works

The **Order Summary** email has five buttons for use:

PGE Purchase Order #0000000620

Powered by Coupa

#1 Create Invoice #2 Acknowledge PO #3 Add Shipment Tracking #4 Add Comment

#5 Create Account

PGE
PURCHASE ORDER

PO NUMBER 0000000620
DATE 08/24/21
PAYMENT TERMS NET 60 DAYS
SHIPPING TERMS STANDARD
CURRENCY USD
CONTRACT
Buyer Name
CONTACT **John Doe**
john.doe.test_email.12345@gmail.com

Coffee Beans and Blue Jeans
123 Main Street
Anywhere, US 45678

Ship To
PGE
121 SW Salmon St., Ste. 230
Portland, OR 97204
United States
SWS02
Attn: John Doe

Bill To
PGE
121 SW Salmon St
Portland, OR 97204
United States
Attn:
Accounts.Payable@pge.com

Line	Description	Need By Date	Qty	Unit	Purchasing Business Unit	One Time Ship To	Freight Terms	Delivery Instructions	PGE Part Number	Price	Total
1	Coffee Beans, French	08/27/21	1	EACH						20.00	20.00

1. The **Create Invoice** button will pull all the relevant information from the PO onto the invoice. You will only need to enter the Invoice # and Shipping/Tax/Misc. charges, as well as any other necessary data not on the PO.
 - i. You will be prompted to enter a Remit-To Address the first time you create an invoice using this method. This information will not be used for payment but will be stored for future invoices created through this method. **Portland General Electric** will go through their internal validation process before making payments to a newly submitted Remit-To address
 - ii. Once you have entered all invoice details, click Calculate to calculate the total amount, review the invoice details, and then click Submit to submit the invoice to **Portland General Electric**.

Note: You will be able to change the Price and Quantity on the invoice, but this may trigger approval notifications when submitted to **Portland General Electric**. These may delay payment processing should the changes be outside expectations

- Acknowledge PO** button, eliminates time-consuming calls and emails by quickly acknowledging receipt of the PO. This will mark the PO as acknowledged and let **Portland General Electric** know you have received their order.

PGE Purchase Order #0000000620
Powered by

#1

Create Invoice

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**PGE
PURCHASE ORDER**

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- Add Shipment Tracking** button, clients can get real-time tracking status updates for the items they've ordered. In-product shipping details provide greater visibility into the incoming shipments. You would do this by clicking on the add shipment tracker and it will take you to a window where you will be able to input your tracking information. Once the tracking details are added, make sure to save. Example listed below.

Create Shipment Tracker

Enter tracking number for entire PO. To ship PO partially, create ASN.

* Tracking Number

* Carrier

Note

Cancel Save

4. **Add Comment** button, this is another communication tool available for you to add a time stamped comment directly to the PO.
5. **Create Account** button, lets you create a Coupa Supplier Portal (CSP) account directly from the PO by taking you to the registration/login page.

Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

* First Name

* Last Name

* Company

* Email

* Password

Use at least 8 characters and include a number and a letter.

* Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

Submit

Forward your invitation


Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to colleague's email below (must have same email domain).

Forward email

Submit

One additional feature, after you have created your Invoice – and prior to submitting to **Portland General Electric** - you will be able to choose to receive notifications about the status of the invoice. You will be able to track the progress towards payment when clicking this box **“Email me status updates for Invoices I create this way”**.

Totals & Taxes			
Lines Net Total			5.00
<hr/>			
Shipping		<input type="text" value="3.95"/>	
<hr/>			
Handling		<input type="text" value="0.05"/>	
<hr/>			
Misc		<input type="text" value="0.00"/>	
<hr/>			
Tax	<input type="text" value=""/>	<input type="text" value="7.00%"/>	<input type="text" value="0.35"/>
<hr/>			
Total Tax			0.35
Net Total			9.00
Total			9.35

 Email me status updates for invoices I create this way