
COUPA SUPPLIER ACTIONABLE NOTIFICATION (SAN)

Quick Reference Guide for PGE Suppliers



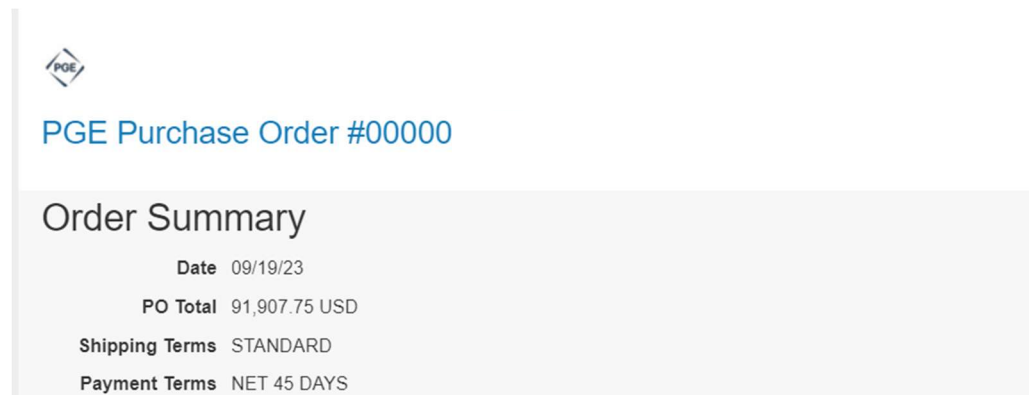
Portland General Electric (PGE) uses Coupa as its procurement system and that system interacts with Oracle – PGE's ERP system – to process Purchase Orders (POs) for payment. For quickest turnaround for payment to suppliers, PGE prefers suppliers to use one of two methods to invoice PGE POs: the Coupa Supplier Portal (CSP) or Supplier Actionable Notification (SAN) PO emails.

Supplier Actionable Notification (SAN) POs that come from Coupa can be used in lieu of using a Coupa Supplier Portal for invoicing and other basic communication with receiving a PO. This guide will show how to use each feature of the SAN POs instead of the portal for invoicing and basic functions.

Invoicing


When a PO is issued by PGE, an email will be sent to the email you gave us to be used for Purchase Order confirmation and fulfillment. If you also want your accounts receivable to use it for invoicing, their email will need to be on that same field as well in our Coupa instance. Contact SupplierEngagement@pgn.com to verify where POs should go for your company.


Purchase orders sent from the PGE Coupa instance are titled: "PGE Purchase Order #0000034776" or whatever 10-digit number the purchase order is.



If you also have a Coupa Supplier Portal and the email address for the PO dispatch is the same as the Coupa Supplier Portal login you have, you will have two emails for each purchase order – one that comes from your Coupa Supplier Portal and one that comes from the PGE instance of Coupa. They are NOT the same type of PO. One is not interactive (the supplier portal one) and one that is interactive (the PGE one).

A Supplier Portal PO email is subject titled "New PO" and looks like the following and is NOT interactive apart from the CSP portal:

 PGE Purchase Order #00000

Powered by 

Hi Suzanne,

You have received a new purchase order #00000 from PGE Company.

Submitted By

On Behalf Of


Supplier

Total 102.39

Items CUTOUT, FUSED/TD, 1.0 EACH X 102.39
DROPOUT, 15 KV, 100 A,
POLYMERIC BODY, TEST
FOR CHANGE ORDER
WORKFLOW 102.39 USD

View Order

An Interactive SAN PO from the PGE Coupa instance is subject titled ""PGE Purchase Order #####" and looks like the following:

 PGE Purchase Order #00000

Order Summary

Date 09/19/23

PO Total 91,907.75 USD

Shipping Terms STANDARD

Payment Terms NET 45 DAYS


Contact Amy


Please send us an updated contact name, email and phone number to


Manage Order

Create Invoice

Orders details below

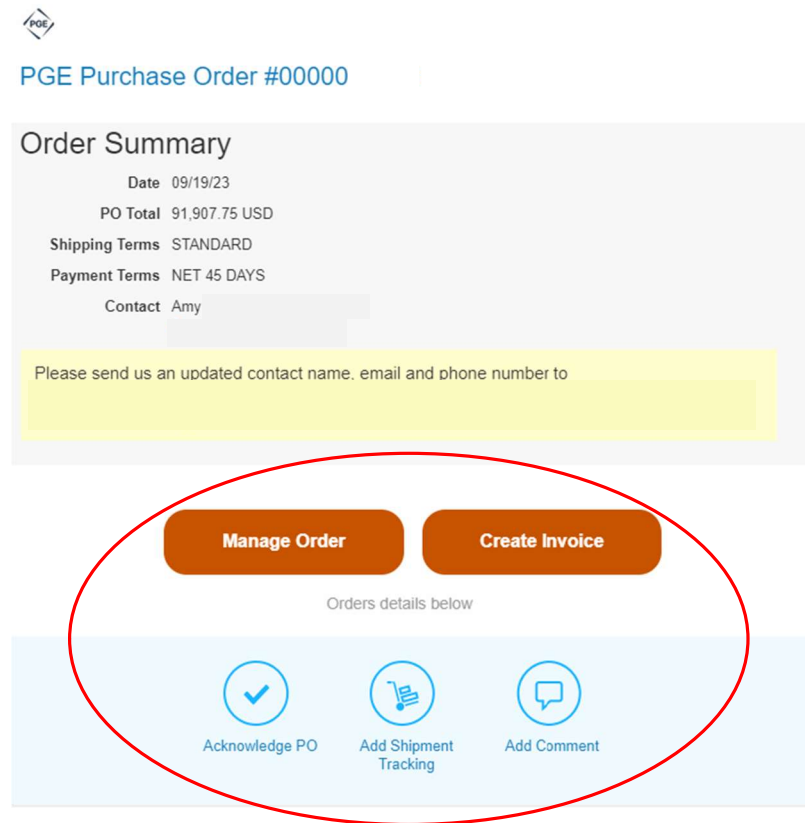
 Acknowledge PO

 Add Shipment Tracking

 Add Comment

Please pay attention to anything in yellow at the top of your SAN PO as these are individual instructions for your specific PO or supplier record from the buyer or Supply Chain. They will not be on every PO unless necessary.

Items that are interactive on this PO are circled in red:



PGE Purchase Order #00000

Order Summary

Date 09/19/23
PO Total 91,907.75 USD
Shipping Terms STANDARD
Payment Terms NET 45 DAYS
Contact Amy

Please send us an updated contact name, email and phone number to

[Manage Order](#) [Create Invoice](#)

Orders details below

[Acknowledge PO](#) [Add Shipment Tracking](#) [Add Comment](#)

Scrolling down below this interactive section you will see the full content of the PO and all its text including Supplemental Terms and Conditions.

Please note important items in the above header:

- Shipping Terms
- Payment Terms
- Contact – This is the requester of the PO and their email address. **If you have issues with the content of the PO, it's total, line items or any other issue, please contact this person for corrections to be made.** Do not contact Accounts Payable or Supply Chain. Each department manages the content of the purchase orders.

To use this PO to invoice, simply click “Create Invoice” – it will take you to a guest login that is linked to the PO in question you need to invoice:

Manage your PGE orders and more with Coupa [Create Your Account](#)

Sign Out

Create Invoice

General Info

* Invoice #

* Invoice Date 12/20/23

* Payment Term NET 45 DAYS

* Currency USD

Status Draft

Image Scan [Choose File](#) No file chosen

Supplier Note

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

From

* Supplier CUSTOM

Supplier Tax ID

* Invoice From Address CUSTOM

* Remit-To Address CUSTOM

* Ship From Address CUSTOM

Notice these crucial elements:

- **The URL should start “pge.coupahost.com”** as the starting domain.
- **Any REQUIRED field is asterisked in orange.** A field that doesn’t have an asterisk you do not need to fill out to submit your invoice.

Please make sure the Invoice number you enter in the “Invoice #” field matches exactly the invoice you will attach in pdf or docx format from your system in the Attachments area (not the Image Scan) by clicking the blue “File” text and attach your invoice:

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

[Browse](#)

Drop files here

Also make sure the invoice date matches the invoice date on your attached invoice:

General Info

* Invoice # 26993868

* Invoice Date 12/20/23

Next adjust any line items as necessary to match your invoice:

Lines

Line Level Taxation

Type	Description	Price	2,511.00	✖
	PGE-IOC-			

PO Line

9-1

Service/Time Sheet Line

None

Contract

Period

Credit Line

None

Supplier Part Number

Manufacturer Name

None

Manufacturer Part Number

None

PGE Part Number

None

Freight Terms

None

Billing

Add Line

Pick lines from Contract

Totals & Taxes

Lines Net Total	2,511.00
Shipping	
Tax	0.000 % 0.000
Total Tax	0.00
Net Total	2,511.00
Total	2,511.00

Delete

Cancel

Save as Draft

Calculate

Submit

Adjustments can be made to the invoice by removing line items or changing the contents of any boxed field on the invoice submission form:

- Description (if you want to be more specific about what you are supplying for the specified line item – blanket POs can be written very generically sometimes).
- Price – can be quantity written or overall price – adjust quantities or price, as necessary to match your invoice.
- Subtotal area including Shipping and Tax (note: there is no sales tax in Oregon).
- Remove line items you are not currently invoicing by clicking the red circled “x” next to that line:
 - This does NOT remove it from the purchase order, only from your invoice form.
 - Suppliers cannot amend a purchase order of any kind including removing line items. If you need lines added, please contact the requester on the PO. Their email is at the top in the header section (see earlier image).

Once you have made your adjustments, click the “Calculate” button to reset the total of the invoice to match your attachment and accept the changes you made:

The screenshot shows the 'Lines' section of an invoice system. The 'Price' field is circled in red. Below the form is a 'Totals & Taxes' section showing a net total of 500.00. At the bottom, the 'Calculate' button is circled in red.

Type	Description	Price	
	PGE-IOC	500.00	500.00

PO Line	Service/Time Sheet Line	Contract	Period
9-1	None		

Credit Line	Supplier Part Number	Manufacturer Name	Manufacturer Part Number
None		None	None

PGE Part Number	Freight Terms	Billing
None	None	

Add Line Pick lines from Contract

Totals & Taxes	
Lines Net Total	500.00
Shipping	
Tax	0.000 % 0.00
Total Tax	0.00
Net Total	500.00
Total	500.00

Delete Cancel Save as Draft **Calculate** Submit

Once your changes are made and the total amount matches the total on your invoice, click the “Submit” button. It will produce a pop-up window asking if you are certain:

The screenshot shows a pop-up window titled "Are You Ready to Send?". It contains a warning message and two buttons: "Continue Editing" and "Send Invoice".

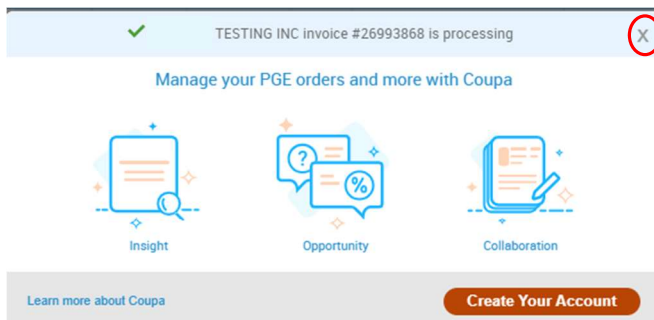
Are You Ready to Send?

You're about to send an invoice to PGE for a total amount of 500.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.

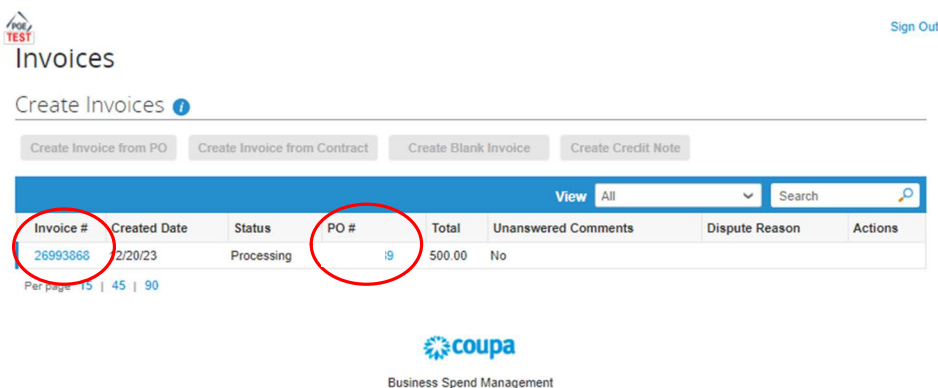
Click “Send Invoice” to complete the submission or “Continue editing” if you are not finished.

Coupa will encourage you to create a Coupa Supplier Portal if you do not already have one. A window will pop up to encourage you to create an account once you submit your invoice. While not required, creating a Coupa account and supplier portal to manage the business you receive will enable easier purchase order management, invoicing and status details as well as profile management activities to communicate business information changes to PGE as well as any other customers you have who use Coupa for procurement.

If you do not want to create a portal, click the "x" in the upper right corner to clear the window.



Once completed, it will take you to the list of invoices attached to your company's supplier record:



You are still logged into the guest account and are accessing everything attached to the supplier record. Any blue text can be clicked to go to either the completed invoice or a PO. You can also see the statuses of any invoice previously submitted.

You will not be signed out till you click "Sign Out" in the upper right corner or if you completely close your browser window or tab.

Clicking on the "Manage Order" button on the original SAN PO email will take you to the purchase order on the Coupa system where you can print it out (A), acknowledge receipt of the purchase order (B), assign the purchase order to someone (C), create an invoice (D), add shipment tracking information (E) or send comments back to the PGE requester (F).

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When adding Shipment tracking a pop-up window will come up to add the tracking information:

Create Shipment Tracker

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

* Tracking Number 1Z456987CW876

* Carrier

Note

Fedex

USPS

UPS

DHL

OnTrac

Stamps.Com

Asendia

Cancel Save

Create Shipment Tracker

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

* Tracking Number 1Z456987CW876

* Carrier UPS

Note

Ground

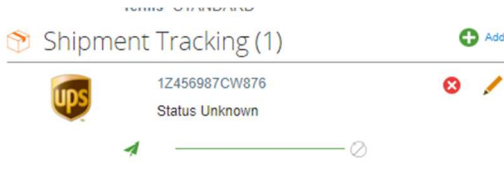
Cancel Save

Fill out the information (orange asterisk is a required field) and click "Save."

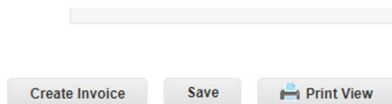
Any changes made are acknowledged at the top:



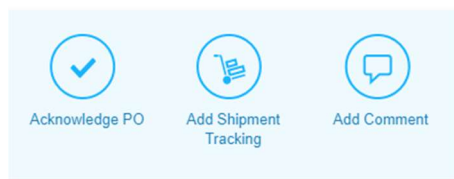
And added to the PO:



Once you make a change to the PO (such as "assigned to) you will need to click the "Save" button to complete the task:



To simply do any of the above tasks with one step, click any of the three buttons from your original email:



Questions?

That completes your quick reference for using the Supplier Actionable Notification Purchase Order emails. For more information on using Coupa or the Coupa Portal please reference the following Coupa Support page: <https://compass.coupa.com/en-us/products/product-documentation/supplier-resources/for-suppliers/coupa-supplier-portal> .

Thank you for your compliance in using the preferred methods for invoicing in the Coupa system in your business with PGE. We appreciate your collaboration and look forward to a productive and successful business partnership with your company.

