



Supplier Actionable Notifications (SAN) Guide

Quick Reference Guide for Suppliers

Portland General Electric has moved 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 button options 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

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

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

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. See below for optional actions you can take with SAN.



- 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 coupa

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

#5 Create Account

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CONTRACT
Buyer Name
CONTACT: **John Doe**
John.doe.test.email.12345@gmail.com

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

The image shows a software window titled "Create Shipment Tracker" with a blue header and a close button (X) in the top right corner. Below the header is a decorative banner with a white truck icon and a star. The main content area contains the following text and form elements:

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

* Tracking Number

* Carrier

Note

At the bottom right of the window are two buttons: "Cancel" (grey) and "Save" (blue).

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](#).

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

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="7.001"/> %	<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