# Coupa for Suppliers

Saga have recently implemented Coupa, a market leading Purchase to Pay platform, to not only digitise our invoice and payment process, but to also move to a model whereby we are raising Purchase Order and having them pre approved before placing orders with suppliers.

**What does this mean for you as a supplier?**

As a supplier, you will be invited to join the Coupa Supplier Portal (CSP) and link to us as your customer.

You will receive Purchase Orders via email from Saga, and all invoices raised will need to quote the relevant purchase order number.

You can raise invoices directly within the CSP or from the emails you receive (Supplier Actionable Notifications).

**What are the benefits of the Coupa Supplier Portal?**

You can view all of your Purchase Orders on one screen, and from here quickly and easily create and submit invoices for payment

You will have real time visibility of where your invoices are in the approval and payment process once submitted to Saga.

You can upload and maintain your catalogs for direct integration into the Saga platform for users to purchase from.

You can make your profile public so that you can be discovered by other Coupa users when they are running sourcing events, thereby increasing your reach.

If you would like more about using Coupa as a supplier, please visit https://www.coupa.com/suppliers/

The following guide is divided into 5 sections including information, instructions and screenshots to help you navigate moving over to Coupa with us:

Section 1) How do I sign up to the Coupa Supplier Portal if I have never used Coupa before?

Section 2) How do I connect with Saga as my customer if I am already registered on the Coupa Supplier Portal?

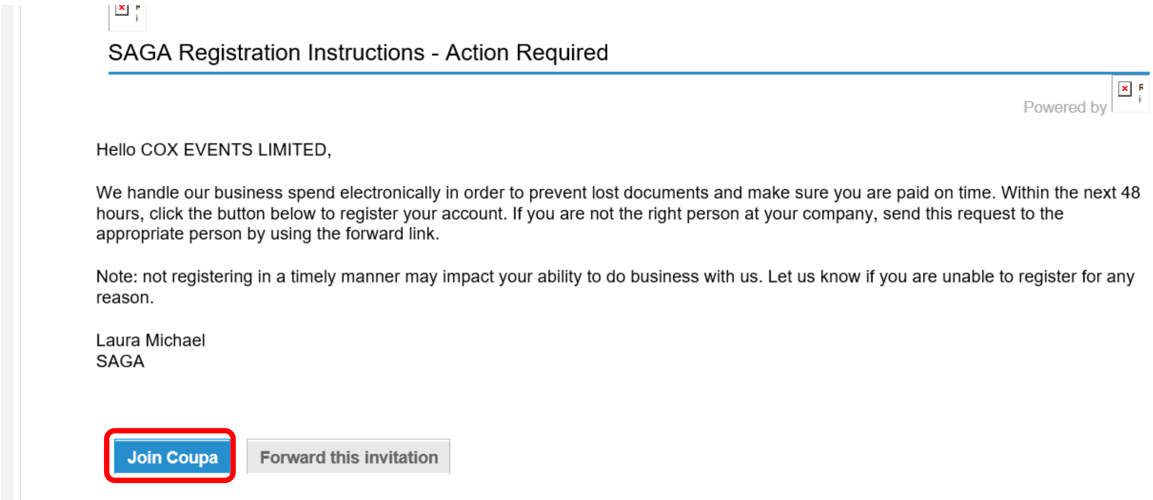
Section 3) How do I use the Coupa Supplier Portal to transact with Saga?

Section 4) What are Supplier Actionable Notifications, and how can I use them?

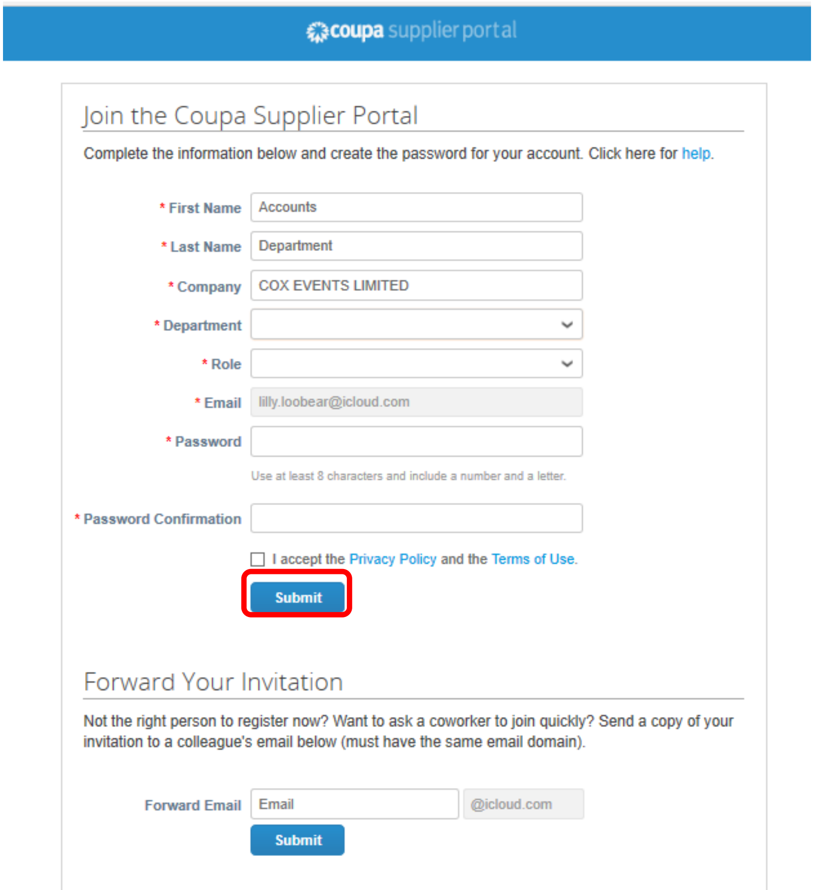
Section 5) What do I do if I do not want to make use of the Coupa Supplier Portal and Supplier Actionable Notifications? **(Non PO backed)**

## SECTION 1) How do I sign up to the Coupa Supplier Portal if I have never used Coupa before?

1. You will have received an email from Saga inviting you to join the CSP as per the below screenshot

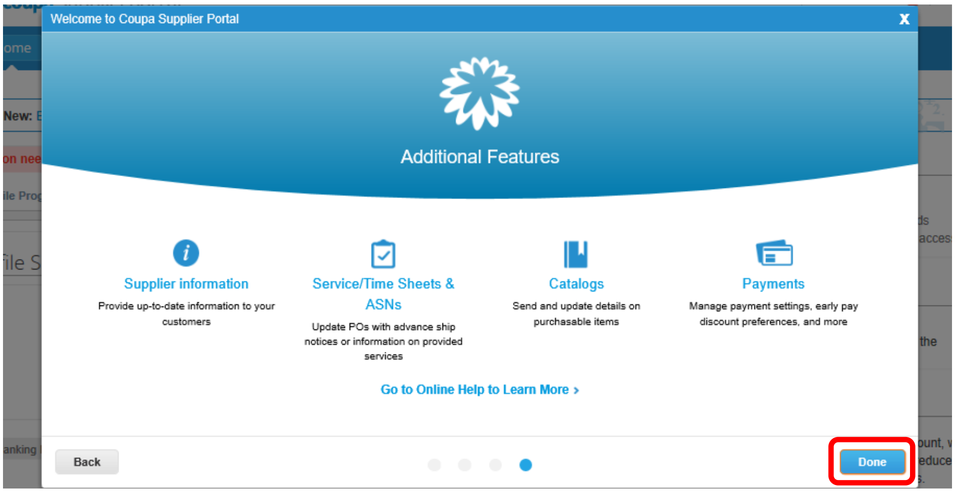



2. By clicking on the “Join Coupa” button you will be taken to the Coupa Supplier Portal website ([https://supplier.coupahost.com/](https://supplier.coupahost.com/)) to create your account *(You can also forward the invitation to someone else within your organisation if multiple people need to be able to manage the account via the CSP)*

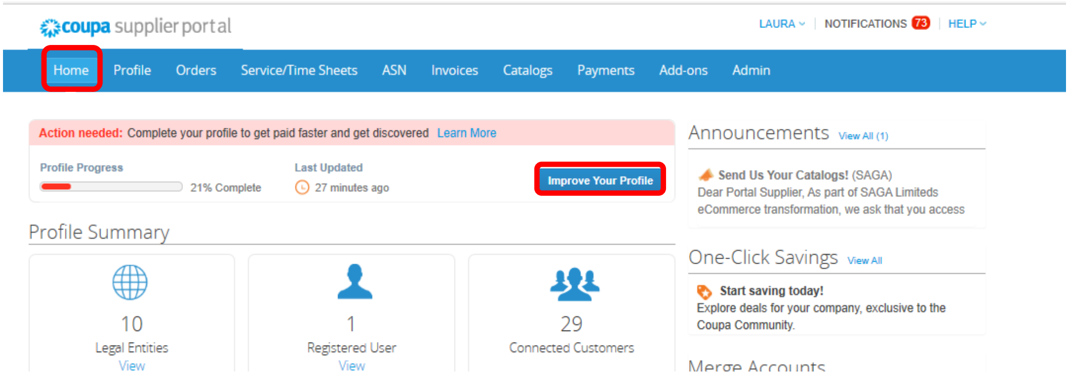


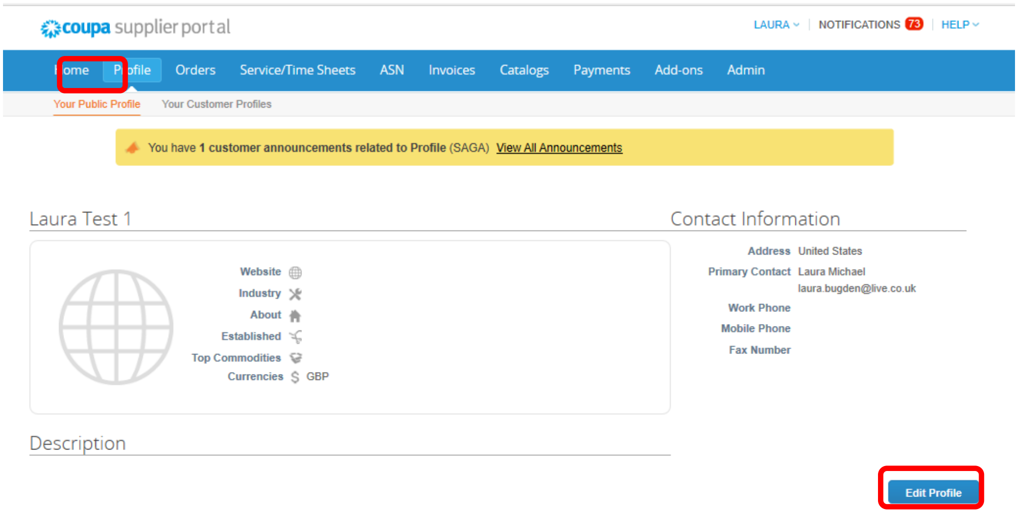

3. Some of the fields will be pre populated based on the information already held on record by Saga, and you will need to complete the missing fields before clicking on “Submit”.

4. You will now be taken into your account with the Coupa Supplier Portal, and be presented with some high level information about the portal to review, before clicking on "Done" to view the available options

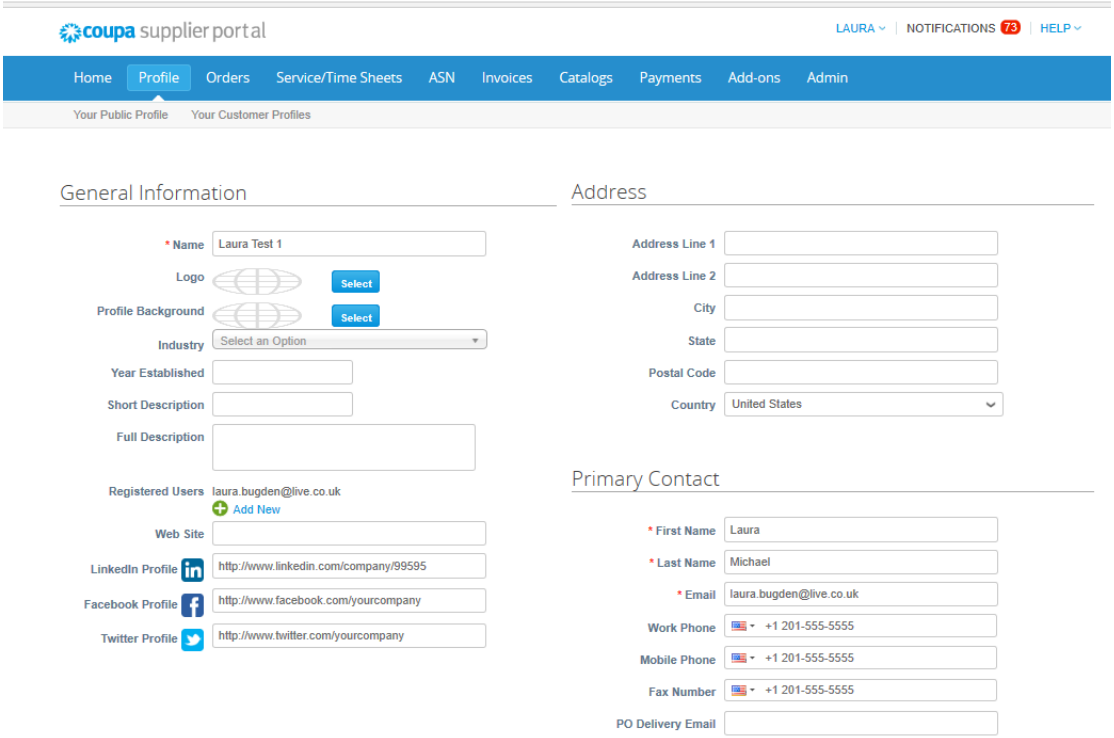



5. At this point you should update your profile information, including all address and contact details, banking details and Remit To Address details. This can be done either by clicking on "Improve Your Profile" on the Home tab, or by clicking on "Edit Profile" on the Profile tab.

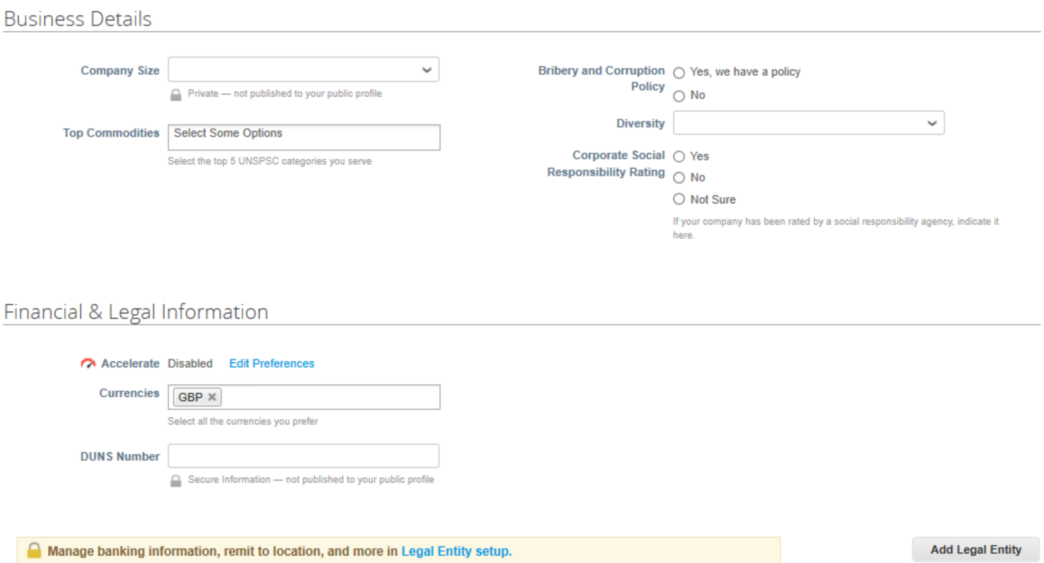


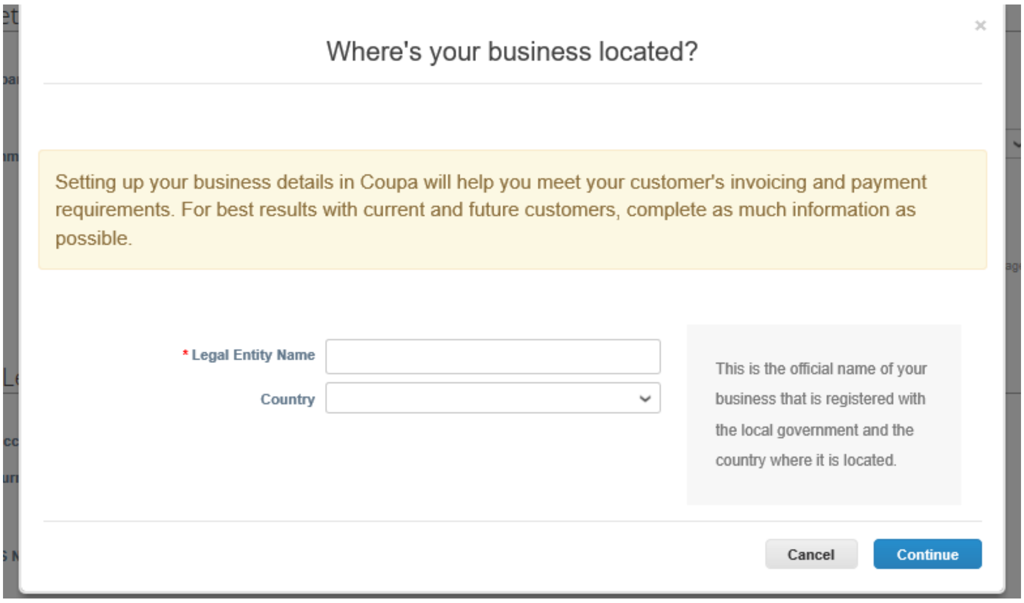
6. This will open up a screen where you can update General Information (, Business Address, Primary Contact details, Business Details and Financial & Legal Information.
   a. *Under Primary Contact details please ensure that you enter a PO Delivery Email address if this should be different to the primary contact*



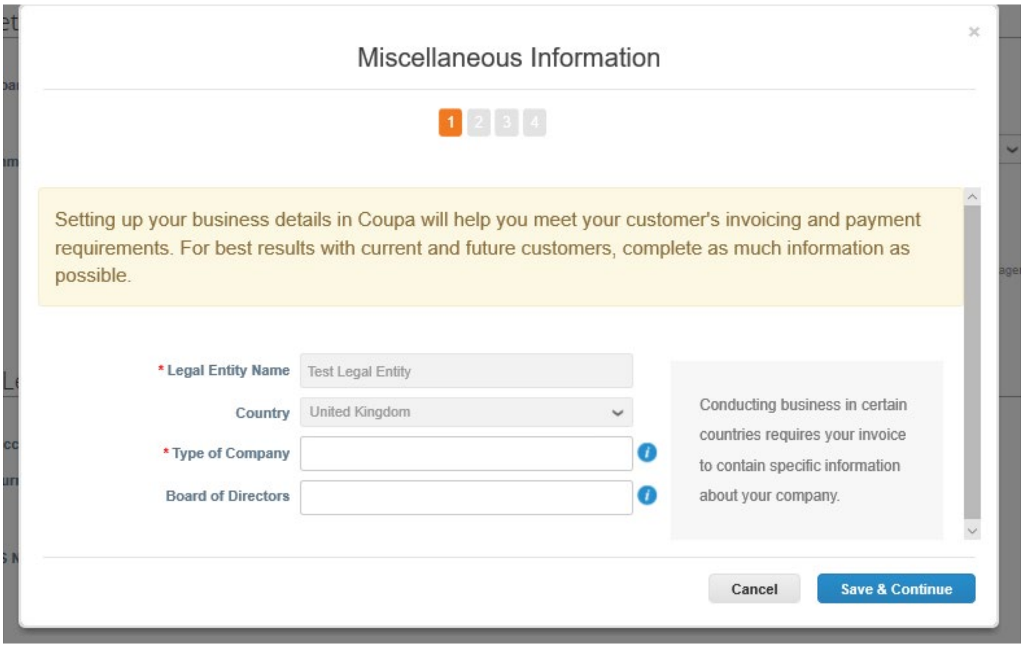

   b. *Under Financial & Legal Information please leave "Accelerate" as Disabled as we do not currently use this functionality*



7. Finally you will need to set up your banking and Remit To Address information. This is done by clicking on “Add Legal Entity” which will bring up a pop up window where you can create your Remit to Address
    a. Both fields on the first screen are mandatory, before you can click on “Continue”



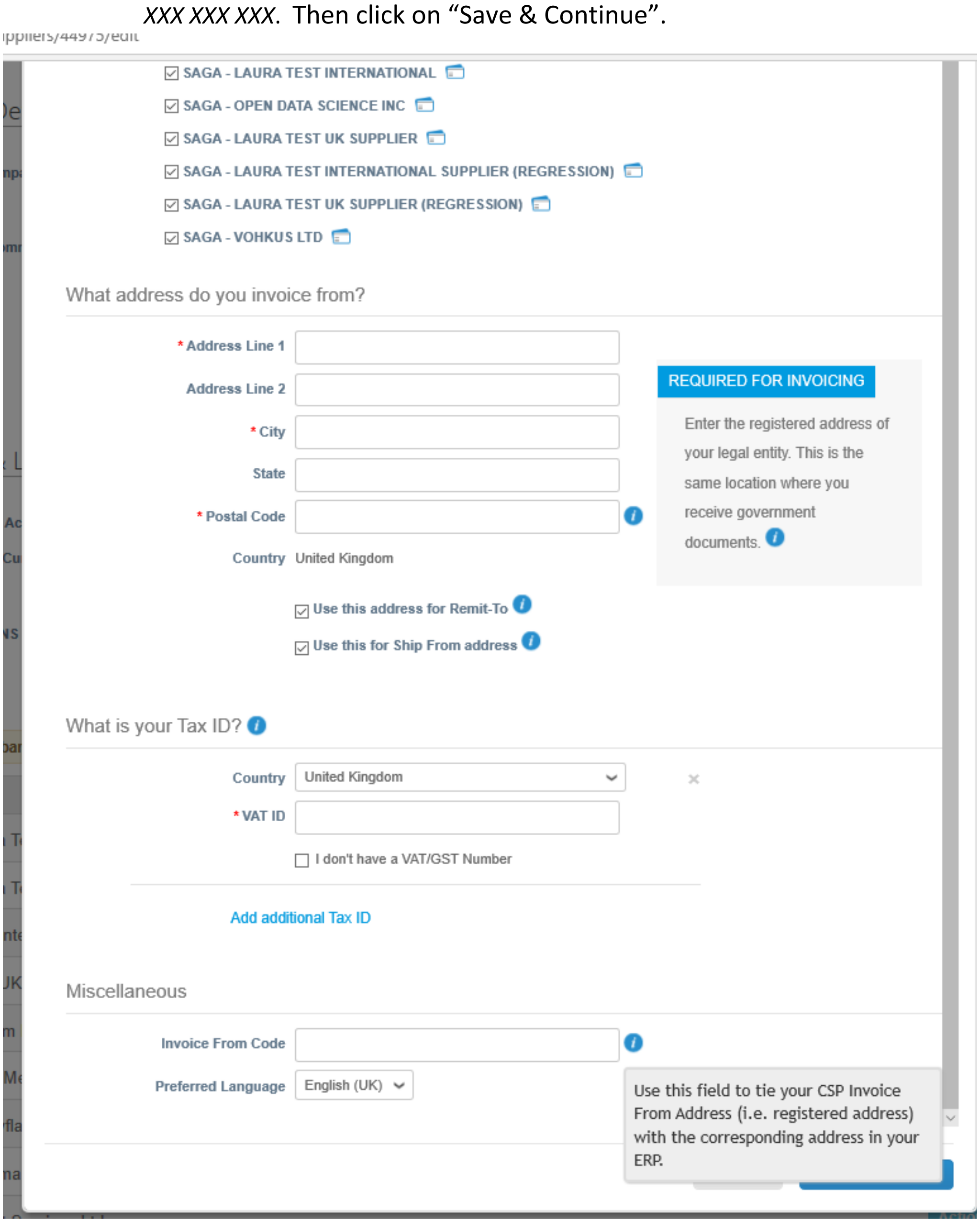

    b. In Type of Company you will need to enter a description of the type of business that you are (this is free text), and the Board of Directors field is not mandatory but is free text if you do want to complete this. Then click on “Save & Continue”



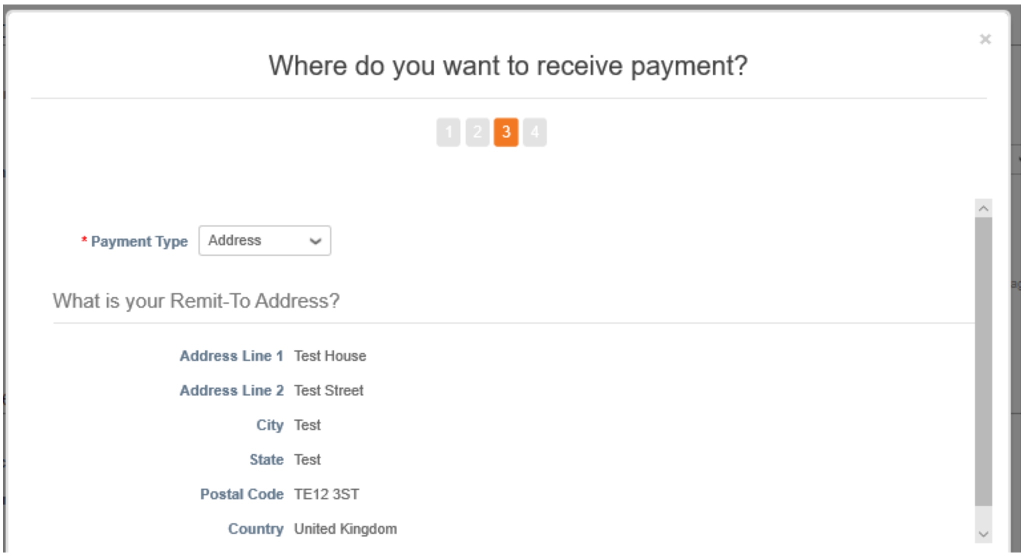
c. On the next screen you can chose to apply this Remit to Address to "All" customers or only selected customers by ticking the boxes next to just those customers. Then scrolling down to enter the required information, and clicking on "Save & Continue" once completed.

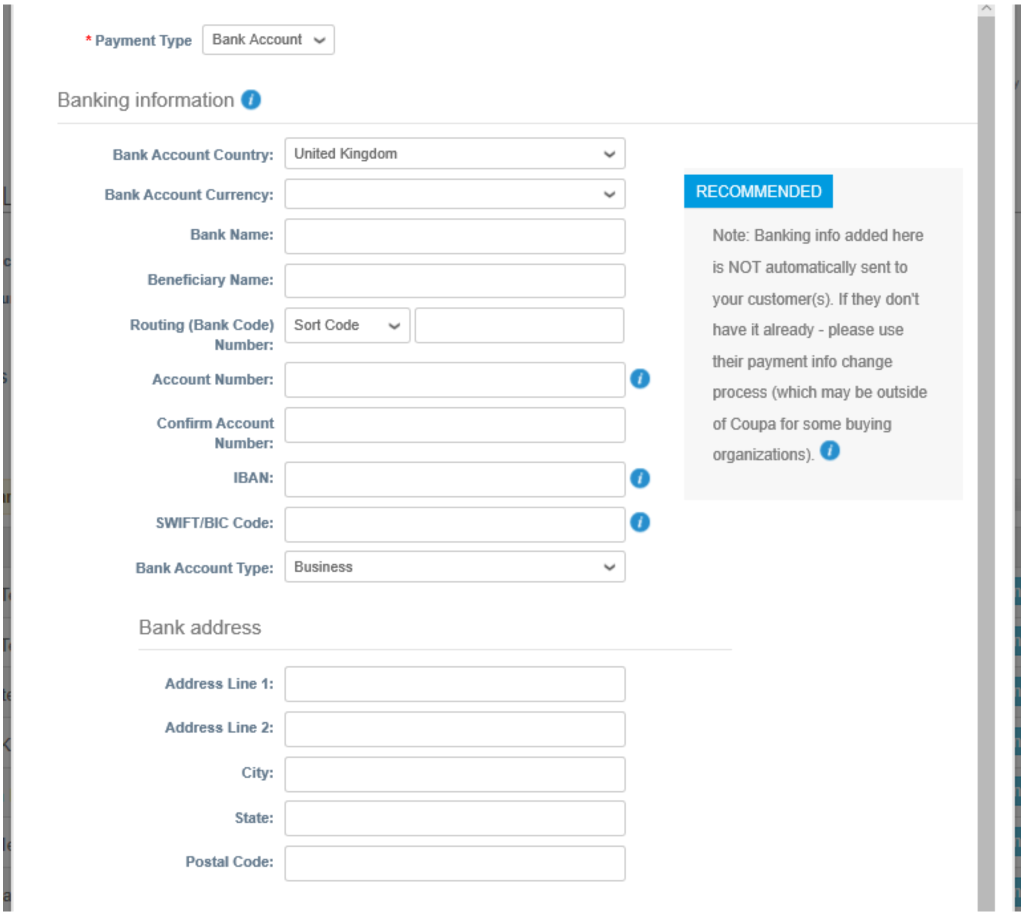
   i. *By default the address you are entering will be selected to be used for Remit-To and Ship From address, if you want to amend this please pay attention to the boxes highlighted below in Blue*

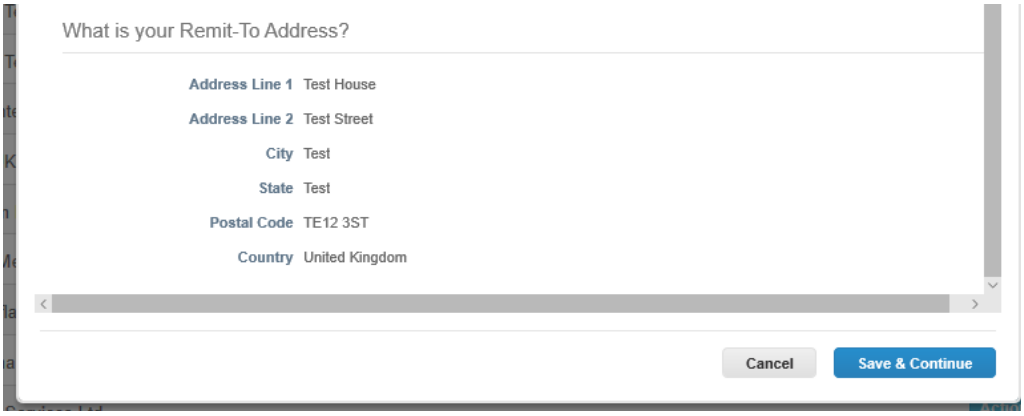
   ii. *Please ensure that you enter your full VAT ID, including country code – for instance GB XXX XXX XXX*. Then click on "Save & Continue".



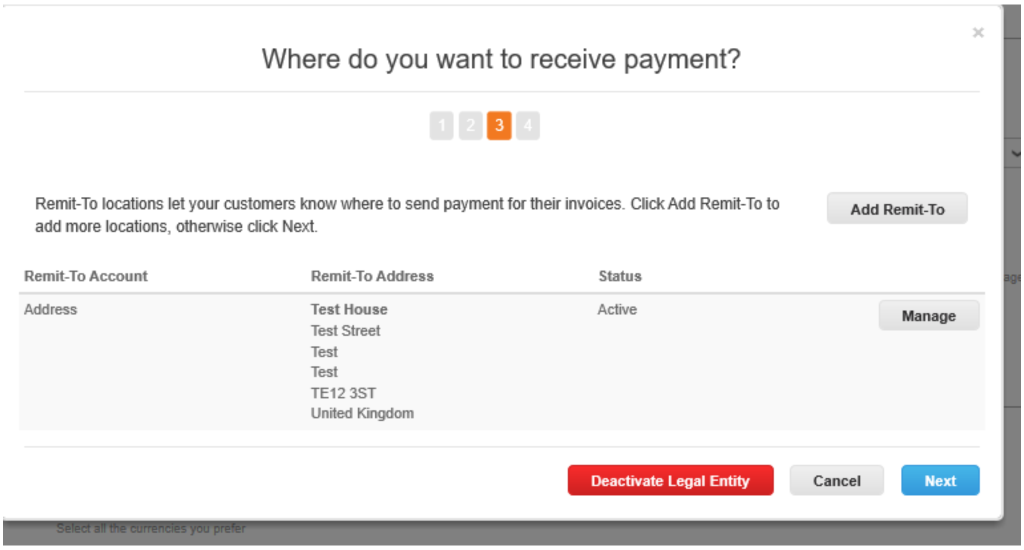
*d.* The next screen will present the Remit-To Address details that you have created for review. By changing the drop down by “Payment Type” to Bank Account you will then have the next screen displayed where you can enter your banking information (including the address details for your bank) before clicking on “Save & Continue”



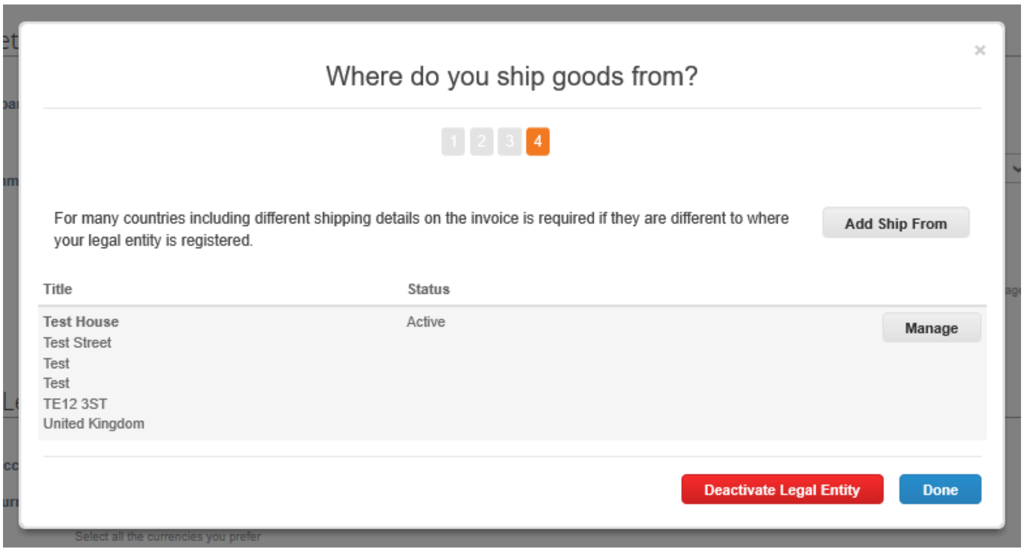





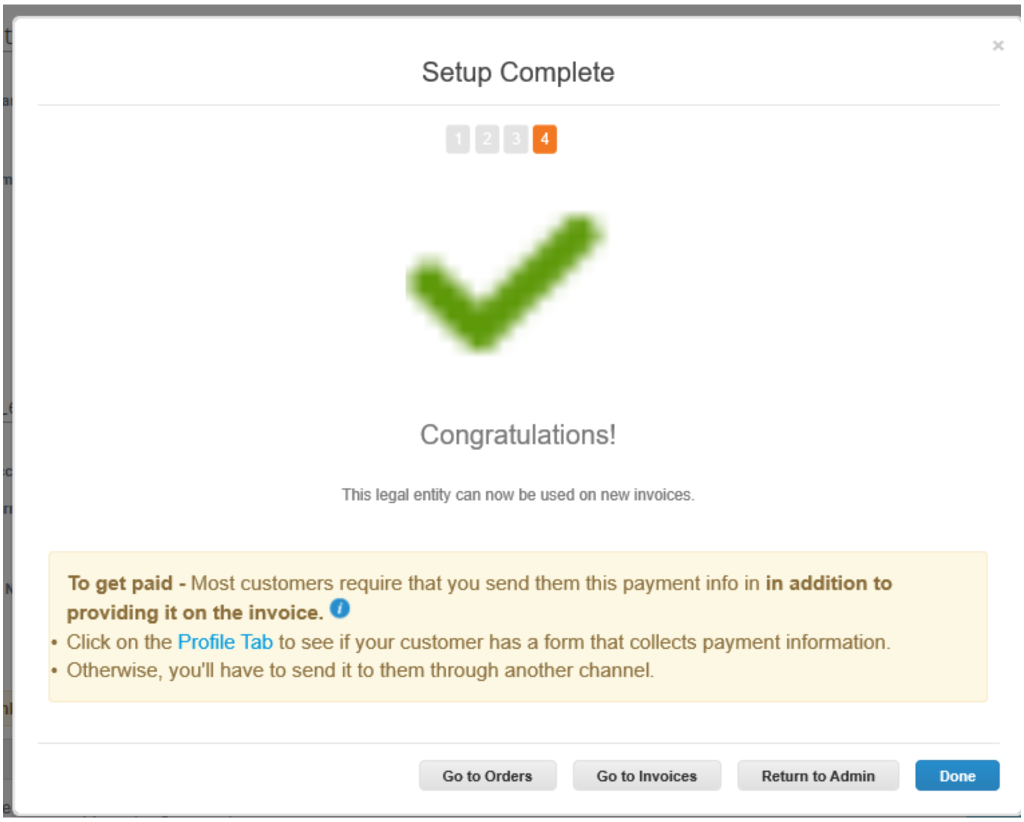

*e.* On the next screen you will be able to review the Remit-To Address you have created, make any amendments by clicking on "Manage", or add a secondary address if required by clicking on "Add Remit-To". When you are happy clicking on "Next" will take you through to the final screen.




*f.* On this screen you will have the option of adding a different Ship-To Address by clicking on "Add Ship From". Once completed you can click on "Done" and you will be presented with the final confirmation screen.



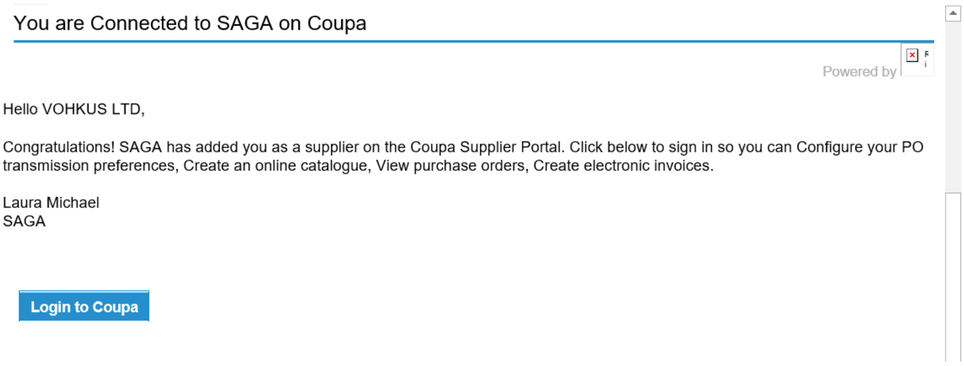
*g.* On this final screen, click on "Done" to be taken back into the main Edit Profile screen.



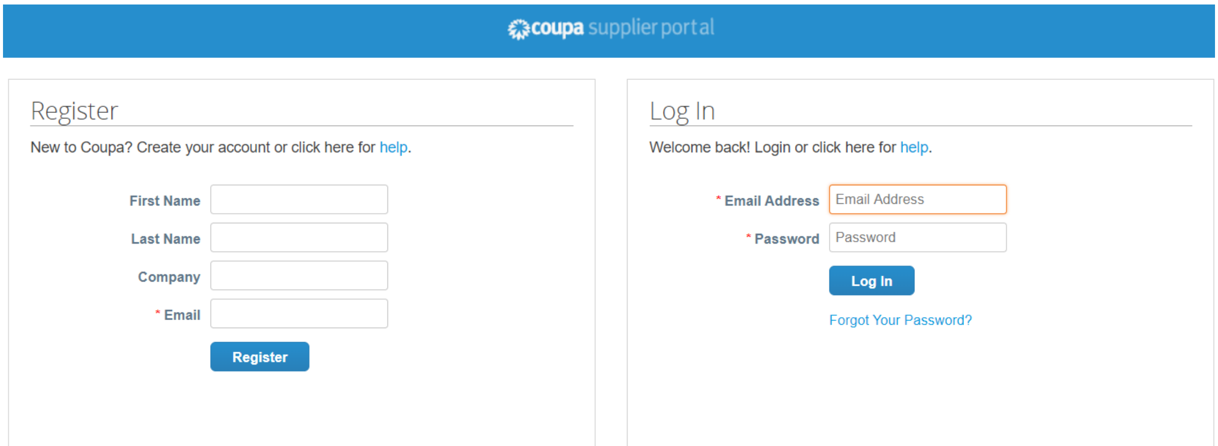

8. After clicking "Done" you will be returned to the Edit Profile screen, where you can review that all details are now present and then click on "Save" to complete the setup of your account

**SECTION 2) How do I connect with Saga as my customer if I am already registered on the Coupa Supplier Portal?**

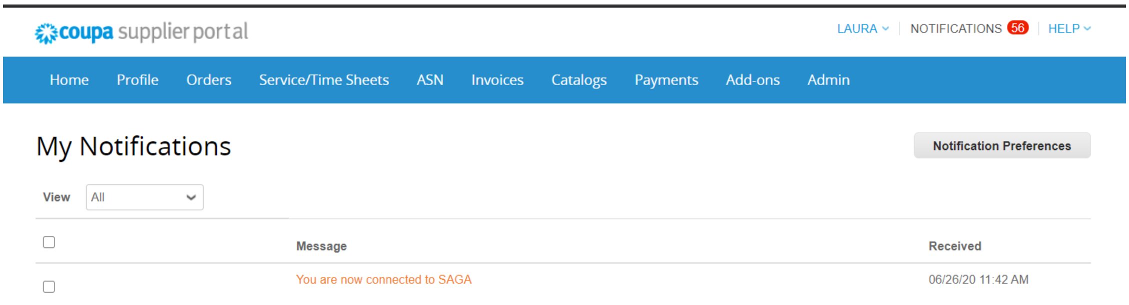
If you already use the Coupa Supplier Portal for other customers, then the invite that you receive from Saga will look slightly different (please see below)



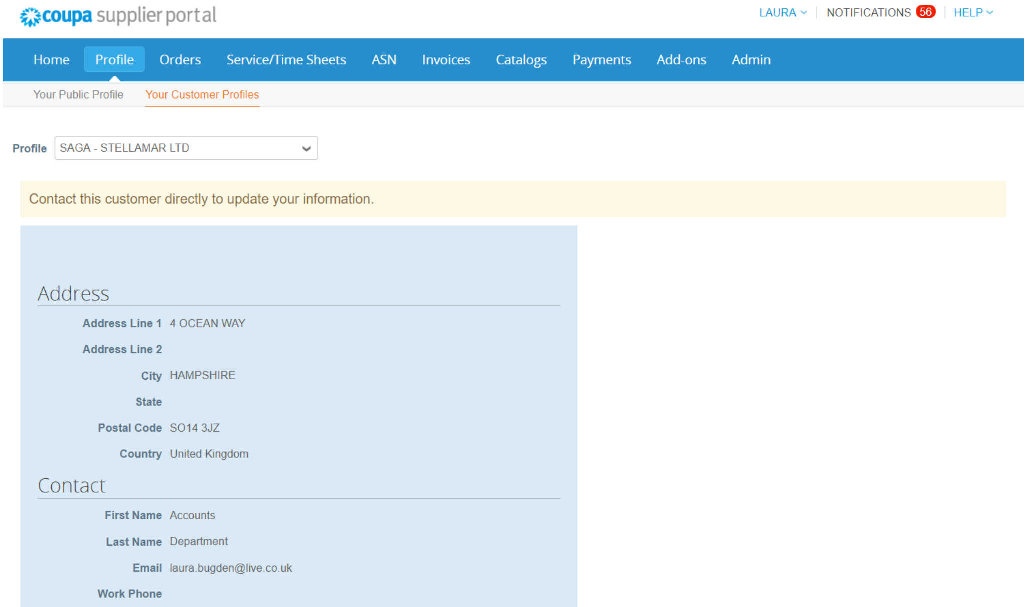

1) From the email received, click on "Login to Coupa" to be taken to the Coupa Supplier Portal, where you can login with your username & password.



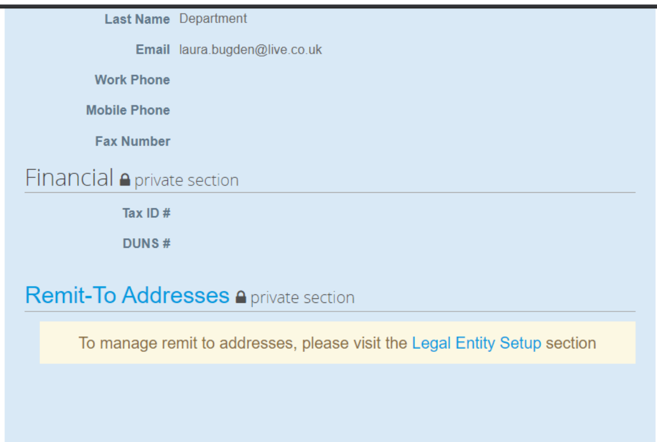

2) Upon logging in, you will have a new notification to advise that you have been connected with another customer.




3) From the "Profile" menu, under "Your Customer Profiles" you will now see Saga listed in the drop down of options, once selected the core information already held by Saga will be presented on screen. If any of this information is incorrect, then you can contact our Accounts Payable team who can send you a form that you can complete and submitin order to update the information held about you.



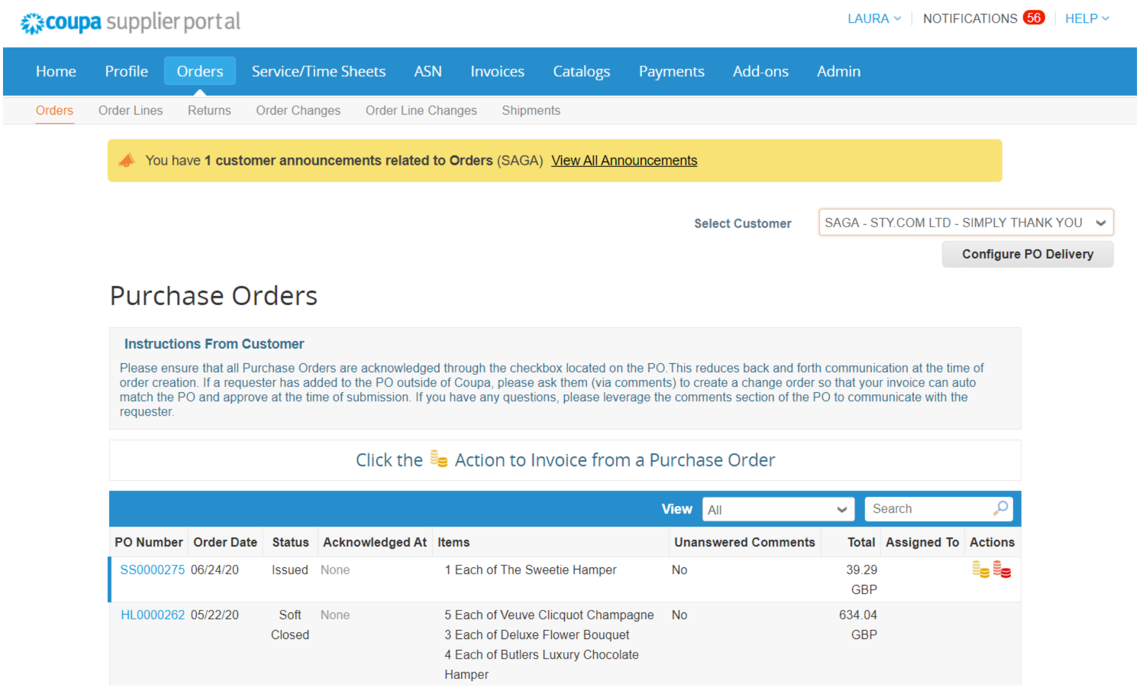

4) From this menu you can also manage the Remit to Address and Bank Account information via the "Legal Entity Setup" (please refer to step 7 a) to g) in the first section of this guide for instructions on this)



## SECTION 3) How do I use the Coupa Supplier Portal to transact with Saga?

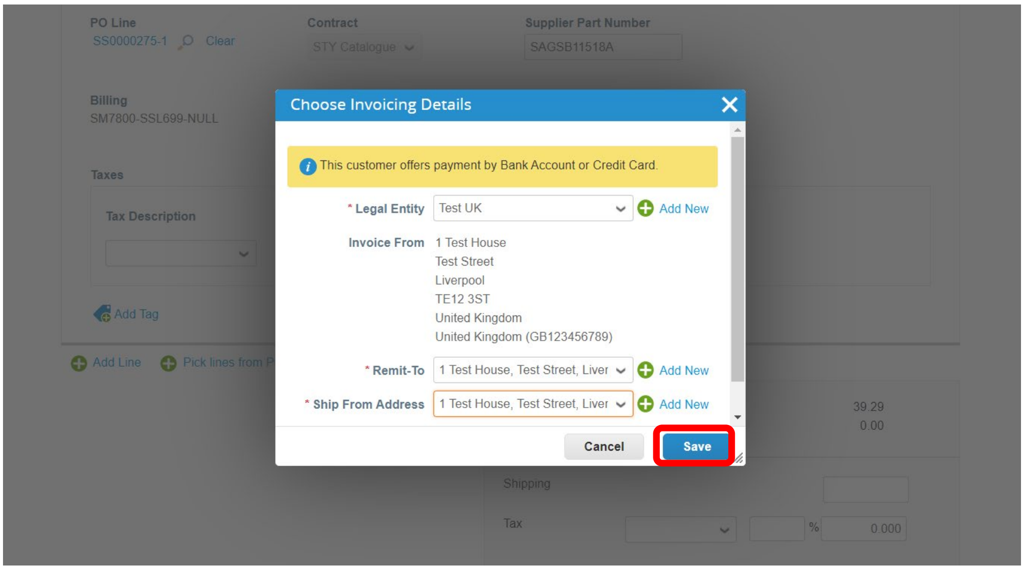
### a) Purchase Orders

- In the “Orders” section of the site, you have the option to select the customer from a drop down (this will show all customers you are connected with, and will filter the information presented)
- On this view, you can see all the details of the purchase orders, including the status - *Issued or Soft Closed (if fully invoiced by supplier and invoice approved by Saga)*
- If you can click on the PO Number (in blue text), you will be into the full PO

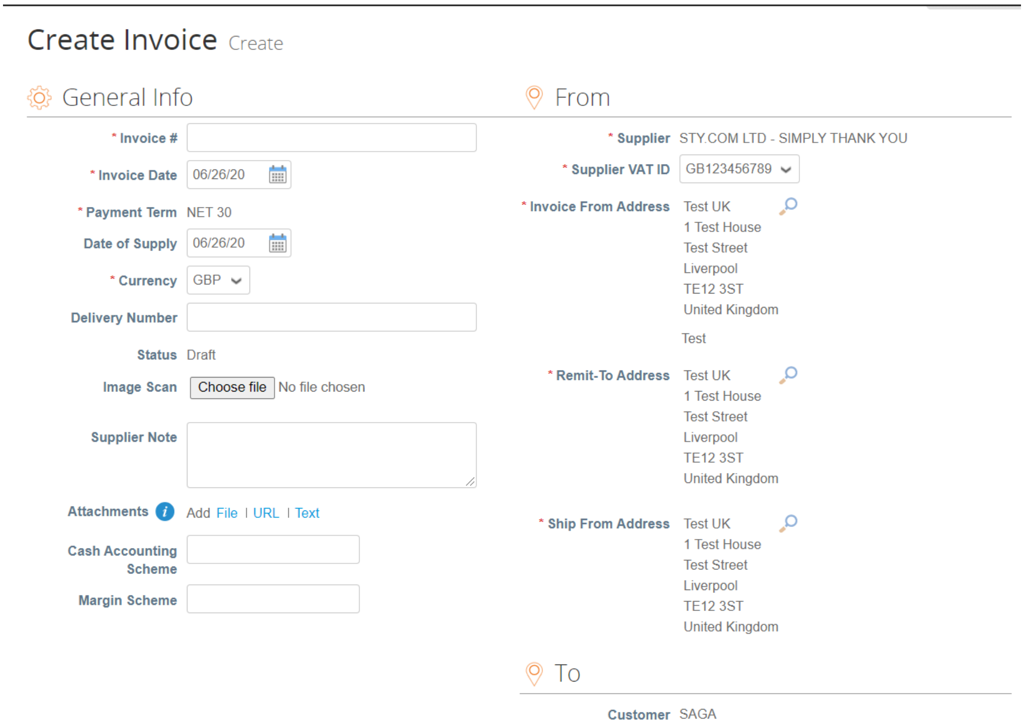



From this screen, you can create an invoice or credit note against a Purchase Order, by simply clicking on the stack of coins icon (Yellow coins for Invoice and Red coins for Credit Note)

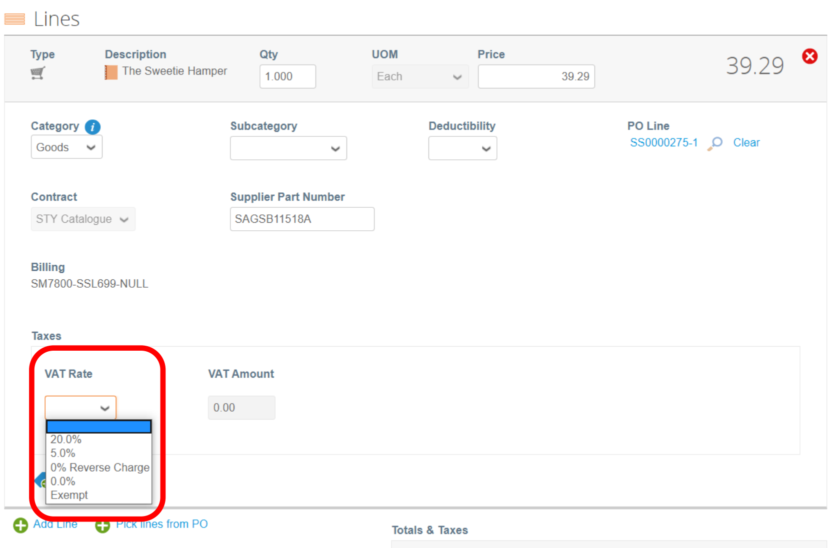
1. On the first screen, you will need to select the Legal Entity, Remit to Address and Ship From Address to be displayed on the invoice from the drop downs, and then click on “Save”



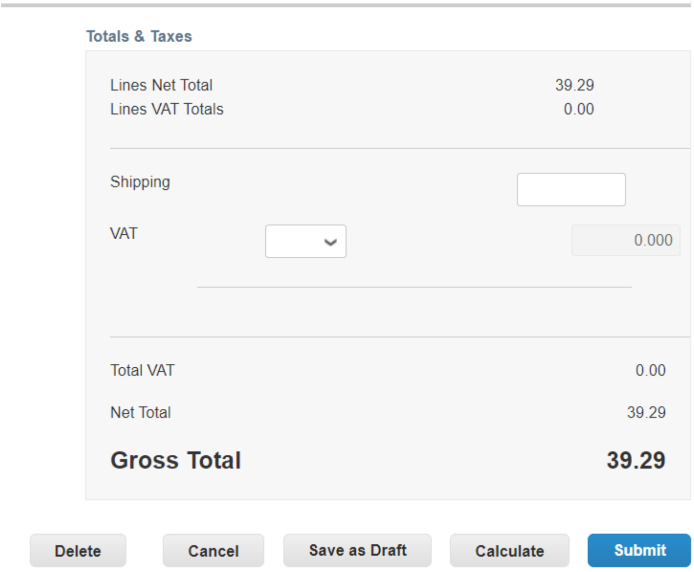
2. The details on the invoice will be populated with the information directly from the Purchase Order, and there are a number of fields that you will need to complete.
    - Invoice Number must be entered
    - Invoice Data will default to the current date but can be amended if required, simply by overtyping or selecting from the calendar popup
    - Currency will be defaulted based on your default and that selected on the PO
    - You have the option to attach images or files if you would like to (Image Scan or Attachments)



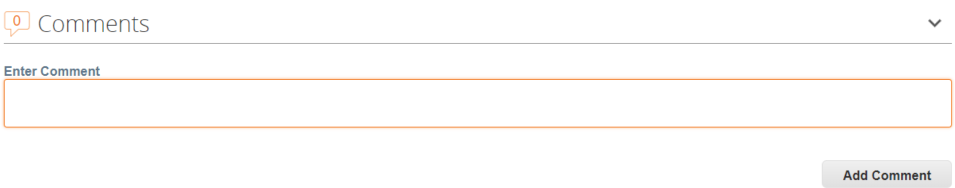

3. In the lines section, you will see the line items transferred from the Purchase Order on to the invoice with all the information populated for you. The only field that is required to be updated is the VAT Rate, which will need to be selected from the drop down available for each line item.



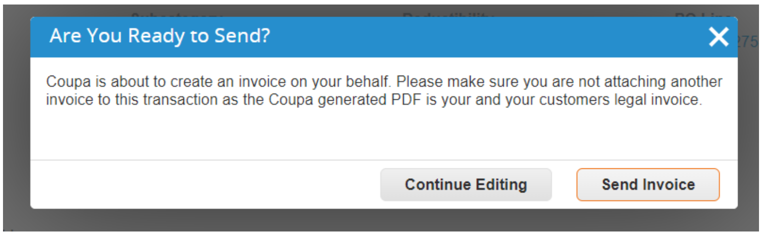
4. At the bottom of the invoice is the "Total & Taxes" section, and 5 available options
    - Delete – which will delete the draft invoice from the Coupa Supplier Portal (at this point Saga will not have any sight of this invoice either)
    - Cancel – which will cancel the creation of the invoice
    - Save as Draft – which will save this to the CSP in draft status so only you can see it and then you will be able to edit and submit it at a later date
    - Calculate – which will recalculate the totals taken into account the VAT rates selected on the invoice line items
    - Submit – which will submit the invoice into Saga's Coupa system for approval and payment




5. You also have the ability to add comments that will be held on the invoice record, and will be viewable by Saga once the invoice has been submitted. Under the Totals & Taxes section, you will see a box headed "Enter Comment" where you can type your comment, and then click on "Add Comment" to include it on the invoice record.




6. When you click on "Submit", you will see the following pop up. If you select "Continue Editing", it will cancel the submission and allow you to make changes to the invoice before taking any further action. If you select "Send Invoice" this will be submitted to Saga for processing and you will be returned into the Invoices screen, where you will see a banner advising that the invoice is being processed, and the invoice will appear in the table shown.



**b)** **Tracking Invoices**

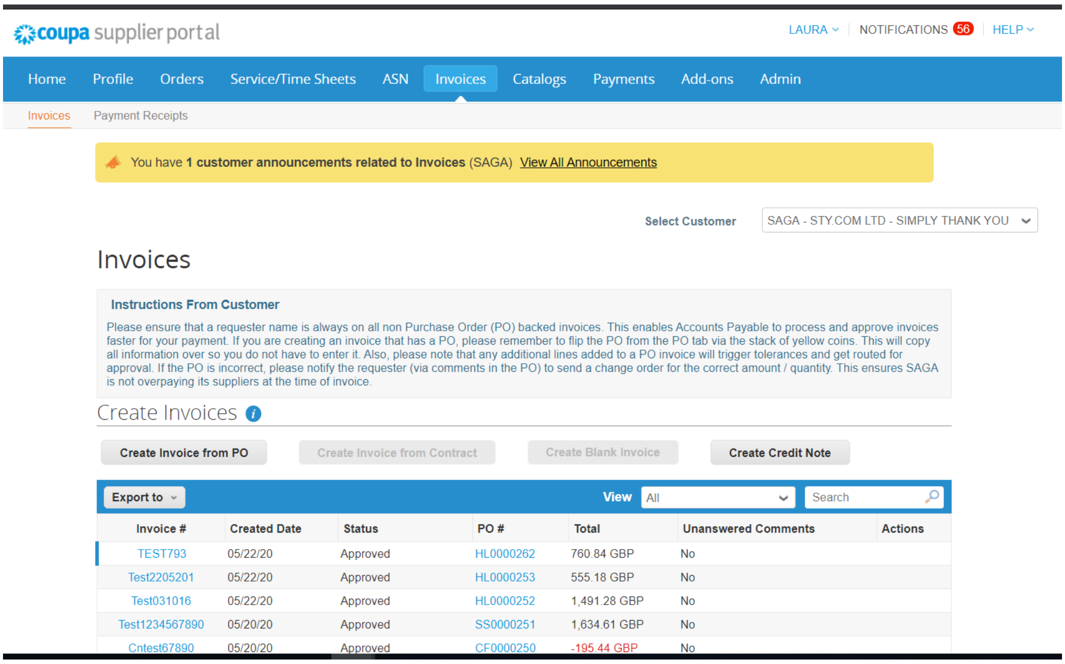
Under the "Invoices" tab, you will see a table presented displaying all invoices that have been submitted by you to Saga and the status that these are in.

***Processing*** – this is when you have submitted an invoice but it has not yet been registered in Saga's system (this is only a temporary status whilst the invoice transmits)

***Pending Approval*** – this means that the invoice has been received by Saga and is either awaiting a user to receipt the goods to allow the3 way match to be completed successfully, or a tolerance has been breached and the invoice has gone for over-riding approval

***Approved*** – once the invoice is fully approved and ready for payment

***Paid*** – once the invoice has been paid in full by Saga

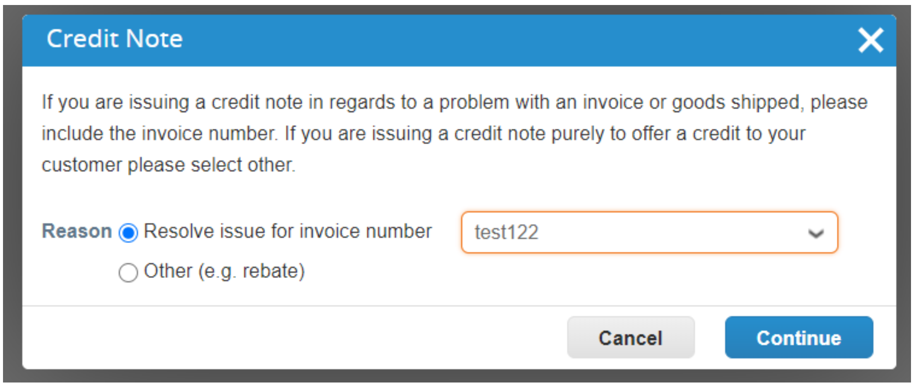



From this screen you can also

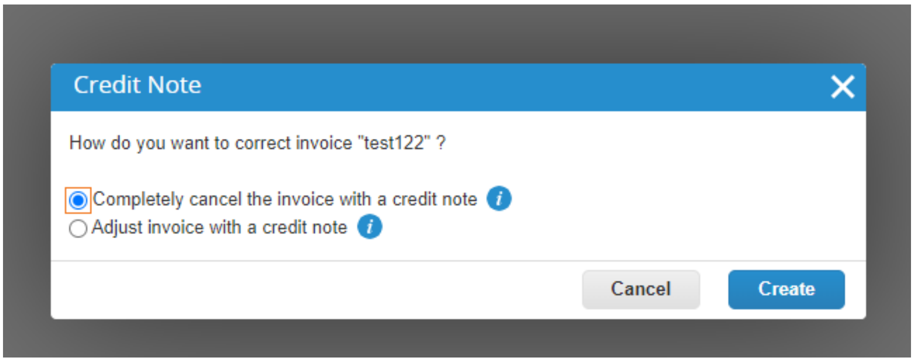
"Create Invoice from PO", which will take you back into the Orders screen to locate the order and then click on the icon to create the invoice.

"Create Credit Note" – which will

1. From the first screen select whether the Credit Note is against a previously raised invoice, and if so which invoice number it relates to, or for another reason (such as a rebate)




2. Selecting "Resolve issue for invoice number" will prompt you to select whether you are completely cancelling the invoice or adjusting the value, and this will pre populate the credit note for you.




a. If you select “Completely cancel the invoice with a credit note” all the information will be pre-populated and you will just need to enter the Credit Note number before submitting. If you select “Adjust invoice with a credit note”, the credit note will be populated with all the information from the original invoice and you will need to:
   i. Enter the Credit Note number
   ii. Select if the Adjustment Type is Quantity / Price / Other, and then update the relevant field(s) accordingly before reviewing and submitting

3. Selecting “Other” will open up a screen very similar to when you create an invoice, and you can enter the information directly on this screen.

## c) Managing Catalogues

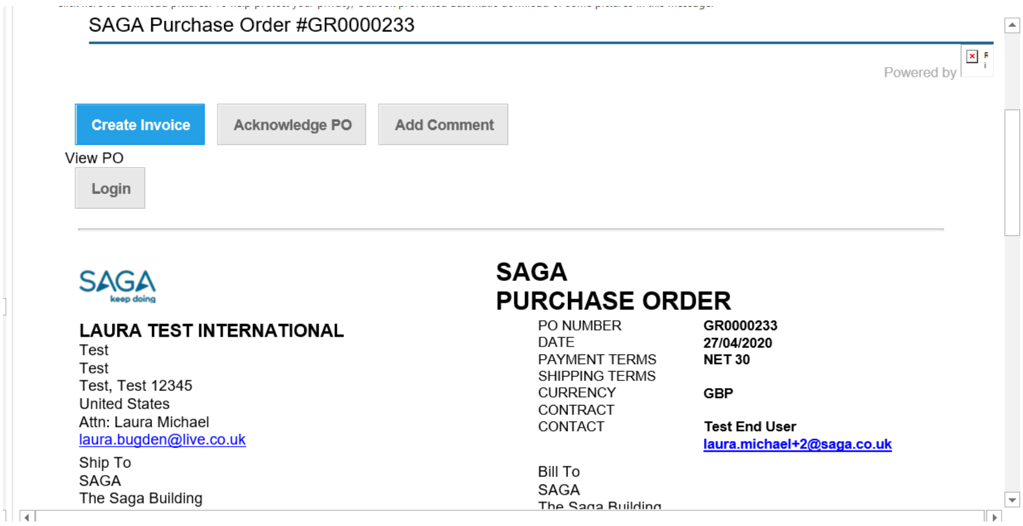
Under the “Catalogs” menu option you are able to submit and maintain catalogues of goods that you hold for Saga to purchase from.

You can view any existing catalogues on the main screen, as well as key information about when they are due to expire and any comments that have been submitted against them by Saga

You can also create new catalogues and submit them to Saga for approval, before the users of the system at Saga can purchase from them. There are detailed notes available to talk you through this process if this is something that you would be interested in developing with us.

## SECTION 4) What are Supplier Actionable Notifications, and how can I use them?

Saga hold email addresses for PO transmission against the supplier record, and upon a request being fully approved internally, this will trigger the automatic transmission of this Purchase Order to you (as the supplier) via email.  This email is called a Supplier Actionable Notification.



SAGA Purchase Order #GR0000233

Powered by

Create Invoice | Acknowledge PO | Add Comment

View PO

Login

SAGA
keep doing

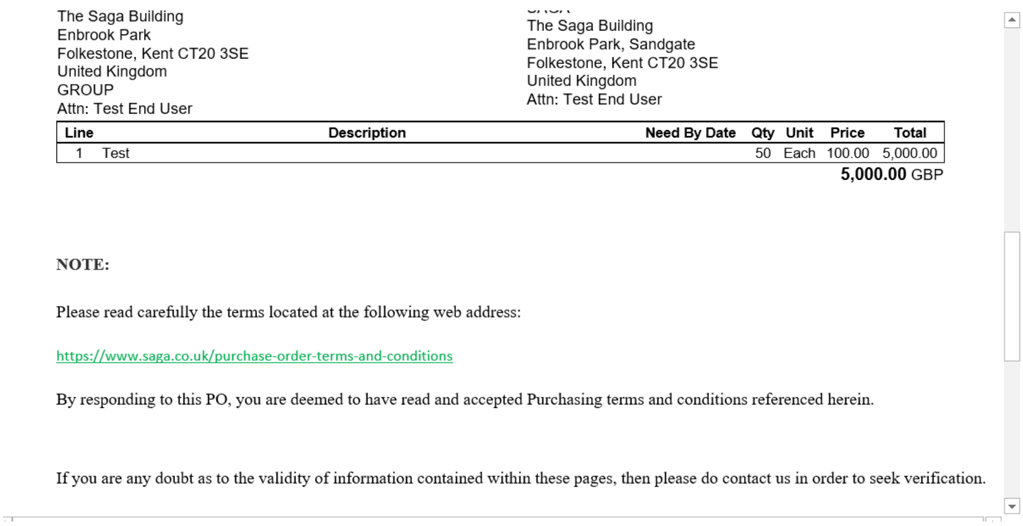
**SAGA PURCHASE ORDER**

**LAURA TEST INTERNATIONAL**
Test
Test
Test, Test 12345
United States
Attn: Laura Michael
laura.bugden@live.co.uk

| | |
|---|---|
| PO NUMBER | **GR0000233** |
| DATE | **27/04/2020** |
| PAYMENT TERMS | **NET 30** |
| SHIPPING TERMS | |
| CURRENCY | **GBP** |
| CONTRACT | |
| CONTACT | **Test End User** laura.michael+2@saga.co.uk |

Ship To
SAGA
The Saga Building

Bill To
SAGA
The Saga Building



The Saga Building
Enbrook Park
Folkestone, Kent CT20 3SE
United Kingdom
GROUP
Attn: Test End User

The Saga Building
Enbrook Park, Sandgate
Folkestone, Kent CT20 3SE
United Kingdom
Attn: Test End User

| Line | Description | Need By Date | Qty | Unit | Price | Total |
|---|---|---|---|---|---|---|
| 1 | Test | | 50 | Each | 100.00 | 5,000.00 |

**5,000.00** GBP

NOTE:

Please read carefully the terms located at the following web address:

https://www.saga.co.uk/purchase-order-terms-and-conditions

By responding to this PO, you are deemed to have read and accepted Purchasing terms and conditions referenced herein.

If you are any doubt as to the validity of information contained within these pages, then please do contact us in order to seek verification.

This email contains a view of all of the Purchase Order information, and has a number of action buttons that can be utilised to perform certain tasks

1) Create Invoice
2) Acknowledge PO
3) Add Comment
4) Login / Create Account

**SECTION 5) What do I do if I do not want to make use of the Coupa Supplier Portal and Supplier Actionable Notifications, or if I have a non PO backed invoice to submit for payment?**

We are actively encouraging all of our suppliers to register with the Coupa Supplier Portal, as this allows you real time visibility of your orders and invoices so that you can keep up to date with the status at all times, whilst also providing you with a quick and easy way to generate invoices directly from Purchase Orders once goods or services have been provided.

However, if you decide that this is not suitable for your business, then you can still submit us invoices via email as in the past. These invoices should be in machine readable pdf format, MUST include the PO reference number clearly on them, and need to be sent to a new email inbox (invoices@sagagroup.coupahost.com)

From here our software will pick up your invoice and ingest the data, matching it to the relevant PO and GRN (goods receipt note) within the system, and if all 3 documents match then the invoice will be automatically approved and move into a "Ready to Pay" status for our Accounts Payable team to include on our weekly payment run ahead of the net due date of the invoice.

If the 3 documents do not match, or the invoice is non PO backed, then our system will route these invoices to our Accounts Payable team who will submit them for electronic approval within the Coupa system. Once fully approved, the invoice will be moved into a "Ready to Pay" status for our Accounts Payable team to include on our weekly payment run ahead of the net due date of your invoice.