

Supplier Actionable Notification (SAN) Training Jabil P2P Implementation

December 2017

Detailed Agenda

- Supplier Actionable Notification - Email Flip
 - Receiving and viewing an Order
 - Acknowledging an Order
 - Create Invoice via email

Supplier Actionable Notification (Email Flip)

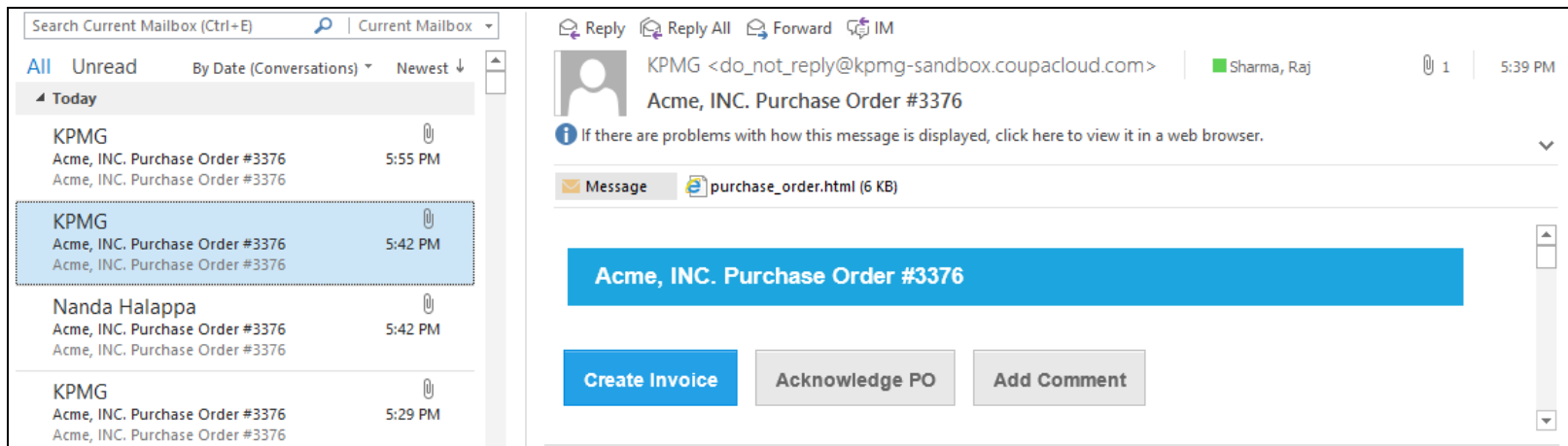
Transactions in Coupa Via Email

- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs, and invoice against those orders via Email
- As the Supplier you will have the ability to act directly from your inbox when you receive a Purchase Order (PO) notification email
- The notification email will include action buttons so depending on what you click you will be able to Create Invoice, Acknowledge PO or Add Comment to the PO
- There is no need for suppliers to sign into another website or portal
- Suppliers who are already registered on the Coupa Supplier Portal can also take advantage of these actionable notifications



Receive a Purchase Order via Email


- If the Supplier email address is added in the Jabil systems, the PO will be automatically emailed directly to you
- Purchase Orders will show up as **Coupa Notifications** in your mailbox
 - POs will be issued to a PO email address confirmed by the supplier and not to the primary contact email address (unless they are identical).



Acknowledge a Purchase Order via Email

View the PO information and click on the **Acknowledge PO** to notify Jabil that you have received the purchase order.

[Create Invoice](#) [Acknowledge PO](#) [Add Comment](#)

 **Acme, INC.
PURCHASE ORDER**

Amazon.com
1516 2nd Ave
Seattle, WA 98101
Attn: Allison Livingston
rks.me2+amazon@gmail.com

PO NUMBER 3387
DATE 04/17/17
PAYMENT TERMS Net 30
SHIPPING TERMS Standard
CURRENCY USD
CONTRACT
CONTACT **Nanda Halappa**
nandahalappa@kpmg.com

Ship To
Acme, INC.
Jilotepec 10110-34
Ciudad Juarez, Chihuahua
32698
Attn: Nanda Halappa

Bill To
Acme, INC.
28 Nevada Blvd
Laughlin, NV 94301
Attn: Jill Harker

Line	Description	Qty	Unit	Price	Total
1	Swingline Speedpoint Staples B000CD0YW4-1	1	Each	3.60	3.60
				1 Unit	3.60 USD

Please ensure the PO number is included on all invoices.
Standard Terms and Conditions apply per our agreed policy.

[Create Invoice](#) [Acknowledge PO](#) [Add Comment](#)

Notice that you also have the ability to add a comment or create an invoice directly from your email

Acknowledge a Purchase Order via Email

Coupa will open in a new browser tab or window. You will see the message 'Order Acknowledged' at the top of the screen.

Purchase Order #3387

Order acknowledged



Status Issued - Sent via Email

Order Date 04/17/17

Revision Date 04/17/17

Requester Nanda Halappa

Email nandahalappa@kpmg.com

Payment Term Net 30

* **Contract file**

* **Custom Field 1** None

Attachments None

Acknowledged

Shipping


Ship-To Address Jilotepec 10110-34
32698 Ciudad Juarez Chihuahua
Mexico
Attn: Nanda Halappa

Terms Standard

Create Invoices via Email

To flip this PO into an invoice, click **Create Invoice**.

Create InvoiceAcknowledge POAdd Comment



Amazon.com
1516 2nd Ave
Seattle, WA 98101
Attn: Allison Livingston
rks.me2+amazon@gmail.com

Acme, INC.
PURCHASE ORDER

PO NUMBER	3387
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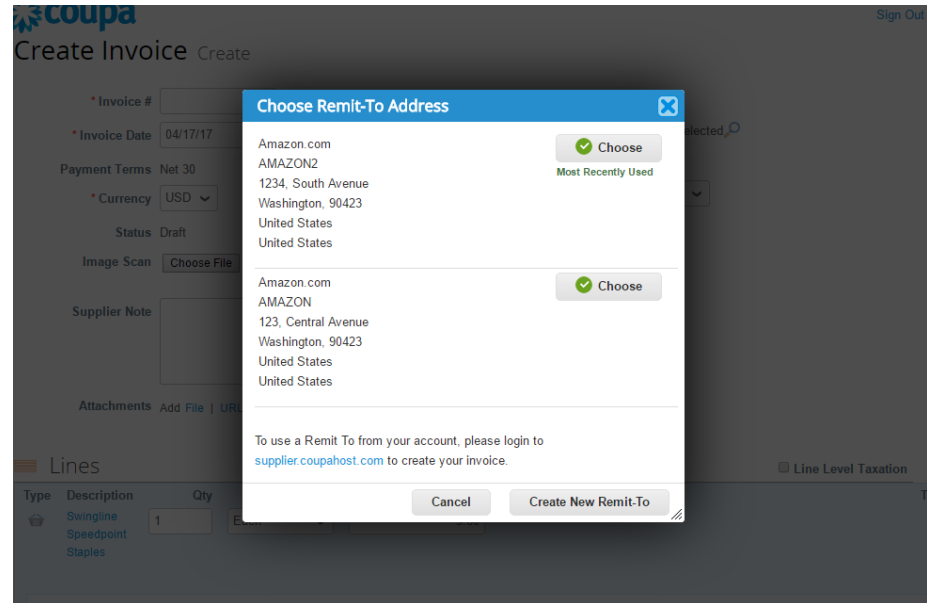
Create InvoiceAcknowledge POAdd Comment

Create Invoices via Email

The **Choose Remit-To Address** pop-up will display. Select the address you would like to remit-to by clicking **Choose**.

Note: If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. Or if there is no Remit-To address stored, Coupa will ask you to create one.

- If the correct remit-to address does not appear, click **Create New Remit-To**.



Note that if you create a new address, the invoice will be put “on hold” as the new remit-to address will need to be approved by the Jabil AP team.

Create Invoices via Email

On the **Create Invoice** screen, input the invoice number into the **Invoice #** field.

Note that all other required fields are indicated by an asterisk.

coupa Sign Out

Create Invoice Create

*** Invoice #**

*** Invoice Date**

Payment Terms

*** Currency**

Delivery Number

Status

Image Scan No file chosen

Supplier Note

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

*** Supplier** Amazon.com

*** Remit-To Address** Amazon.com
AMAZON
123, Central Avenue
Washington, 90423
United States

Supplier Tax ID None

Customer KPMG

*** Bill To Address** 28 Nevada Blvd
Laughlin, NV 94301
United States

Ship To Address Jilotepec 10110-34
32698 Ciudad Juarez Chihuahua
Mexico

Buyer Tax ID None

Lines Line Level Taxation

Type	Description	Qty	UOM	Price	Total
	Swingline Speedpoint Staples	<input type="text" value="1"/>	<input type="text" value="Each"/>	<input type="text" value="3.60"/>	3.60

Create Invoices via Email

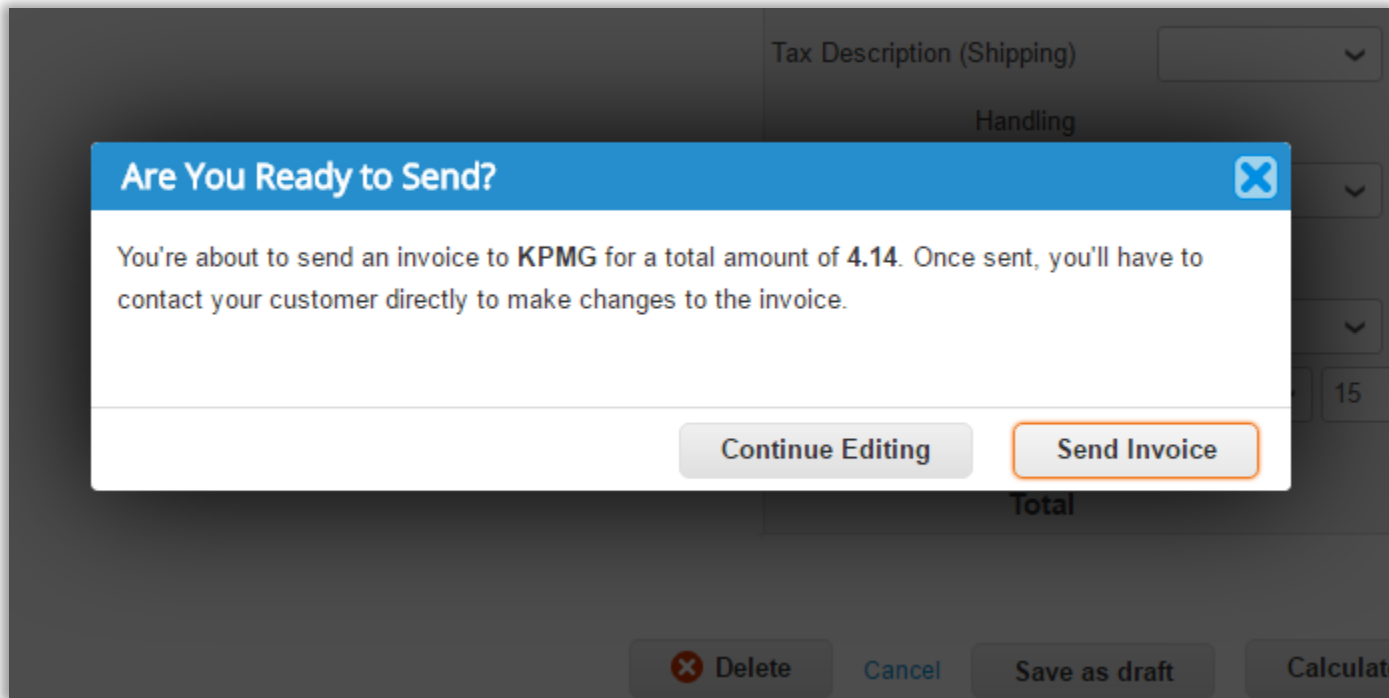
Scroll down to the **Lines** section and ensure all details are accurate, specifically the Price and the Quantity.

- Enter any shipping and handling information.
- If applicable, add any tax in the proper section by one of the following methods:
 - Select a tax code from the **Tax Code** dropdown and click **Calculate**
 - Manually enter a **tax percentage**
 - Manually enter a **tax amount (\$)**
- Enter any comments for Jabil and then click **Add Comment**.

The screenshot displays the 'Lines' section of an invoice creation tool. At the top, a table lists line items with columns for Type, Description, Qty, UOM, Price, and Total. The first line item is 'Swingline Speedpoint Staples' with a quantity of 1, UOM of 'Each', and a price of 3.60. Below this, there are fields for PO Line (3387-1), Contract (SF-Marketing-Indirect), and Billing Period (Q4 FY2015). The main area shows a summary of the line item: Subtotal 3.60, Shipping 0.00, Handling 0.00, and Misc 0.00. A 'Tax Description' dropdown menu is highlighted with a red box, showing a selection of '0'. At the bottom, there are buttons for 'Delete', 'Cancel', 'Save as draft', 'Calculate', and 'Submit', with 'Calculate' and 'Submit' also highlighted with a red box. A 'Comments' section is visible at the bottom, with an 'Add Comment' button.

Create Invoices via Email

After you click Submit, a pop up appears to confirm if you are ready to send the invoice. Click **Send Invoice** to complete the process. Note that once submitted, the invoice cannot be changed.



Thank you!