



National Grid -Supplier Enablement

Frequently Asked Questions for Suppliers

National Grid
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Frequently Asked Questions

As part of our continuous engagement with our suppliers, National Grid has put together various frequently asked questions suppliers would like answered about Coupa. We have grouped these questions and provided responses.

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Coupa

What is Coupa?

The Coupa system is cloud-based purchase-to-pay tool which will allow National Grid to connect directly with our suppliers. Through Coupa, we will be able to raise and issue purchase orders to our suppliers and offer our users visibility of the products and services being supplied by you.

Through joining the Coupa Supplier Portal (CSP) as a National Grid supplier, you will be able to view and acknowledge your purchase orders, submit invoices and view your invoice status' in real time.

There is no cost for registering and using the CSP and no additional software is required.

What are the benefits of using Coupa?

The major benefits of the introduction of Coupa are:

- To improve the purchase to pay process, making us an easier organisation to transact with
- Reduce costs of transactional processes for both ourselves and our suppliers
- Eliminate the use of paper when issuing purchase orders and receiving invoices
- Improved operating efficiency and business relationships

The benefits to your business:

- Immediate receipt of electronic purchase orders
- Acknowledge and comment on a purchase order electronically through the CSP
- Visibility of all purchase orders through the CSP
- Flip a purchase order to create an invoice, which provides a guaranteed invoice match to the purchase order
- Real time visibility of invoice status – improved transparency which removes the requirement for you to track down the status of your invoice.

Coupa Supplier Portal

How do I sign up to the Coupa Supplier Portal (CSP)?

To sign up to use the National Grid Coupa Supplier Portal, you have to complete the registration process you would have received by email. Please ensure that you complete the survey in STEP 4 which will ensure that your supplier account is linked with National Grid's. Please refer to the [Quick Reference Guide](#) which will help you complete the registration.

We are already signed up to Coupa for a different customer. How do we link National Grid to it?

Once you have completed Step 4 of the quick reference guide by confirming your existing Coupa sign-up credentials which is your name and the email address used to sign-up to Coupa. This will then link your account once National Grid is live with Coupa in Autumn.

How do I know that I have successfully registered on the Coupa Portal?

You can use your newly created log-in credentials to access the Coupa Supplier Portal. If you can enter the CSP then your registration has been successful

Will National Grid still use Achilles Utilities Vendor Database (UVDB)

National Grid will still use Achilles to identify suppliers for sourcing activities. The Coupa system is replacing our existing purchase to pay platform which covers raising of requisitions, issuing of purchase orders and invoice submission.

Will Coupa be replacing Ariba & Egress systems?

The Coupa system will not be replacing Ariba or Egress. National Grid will still use Ariba to undertake sourcing activities and Egress to issue commercially sensitive documentation externally.

Is there going to be a test environment prior to go live?

A test site will be available for testing catalogue uploads and for cXML testing for internal purposes only.

As Quotations are submitted to the Coupa Portal, will there subsequently be visibility of status of the Quote?

Coupa will only be used for Spot Buys which are cut down versions of a RFQ, RFI or RFP process. Coupa will not impact existing RFX processes.

Purchase Orders

How will I receive my purchase order once National Grid has gone live with Coupa?

Suppliers will receive purchase orders by logging into the CSP and retrieving orders from the portal. You will receive an email notification that a new purchase order has been submitted by National Grid.

If we are asked to perform extra work during an existing contract which has started do we have to have a new purchase order number for the extra work or is it to be added to the original purchase order?

We will either issue a new purchase order or amend the existing PO. This process can be agreed between yourselves and the relevant National Grid requisitioner or Buyer.

We currently have a lump sum of PO number to cover under the contract. Will each individual job covered need a separate PO?

National Grid will be able to release an amount based order and you will be able to part deliver/ invoice against these.

Can a supplier acknowledge a Purchase Order through Coupa?

Yes, a Purchase Order can be acknowledged through Coupa, by accessing the order and clicking the 'Acknowledge Order' button. This will send a notification to the National Grid requisitioner informing them that the order has been acknowledged by the supplier

When you acknowledge the order is that acknowledging receipt of the order or everything on the whole order?

When you acknowledge an order in the CSP you will acknowledge everything on the order.

Will we still receive purchase orders via email?

Yes, all purchase orders generated through Coupa will be issued via email. If you have registered to the Coupa Supplier Portal, you can also retrieve your purchase order through the portal, along with viewing all orders received from National Grid in one central location.

We have bespoke questions and information on the National Grid purchase order that end users must answer, will these appear on this system?

Please send any bespoke questions/ information that you require to be captured on your PO to the following email address: box.nationalgrid.sup@nationalgrid.com

Invoices

How do I submit my invoice to National Grid?

Invoices can be submitted to National Grid in a number of ways:

- Through utilising the PO flip functionality within the CSP. This action will flip the purchase order into an invoice which can be submitted through the CSP
- Submitting invoices in PDF format via email to a designated National Grid email address
- Through cXML (if system to system integration has been established)

Can I still submit paper invoices to National Grid?

No. With immediate effect we will no longer be accepting paper invoices. National Grid will still accept PDF invoices emailed to ngrid.invoices@edmgrou.com. However our long term approach is to receive invoices through the Coupa Supplier Portal.

How should a supplier be submitting consolidated invoices once Coupa has gone live?

Consolidated invoices will still be issued to National Grid via email submission, including the necessary backing data to accompany your invoice.

Can we attach documents to the CSP invoice?

It is possible to attach invoice backing data to a CSP invoice, however the National Grid Coupa system does not require any PDF invoice attachments created from supplier systems to be attached.

How do we query delayed payments?

Invoice queries can still be raised via our off shore team within National Grid Business Services. The Coupa Supplier Portal will also provide additional functionality that will assist in the queries in relation to payment of invoices.

If an invoice is saved as draft in the CSP, will it allow you to modify before submitting?

Yes, you will be able to modify draft invoices before submitting.

Will the CSP provide us a consolidated view of all invoices with status for a date range and for how much period will we be able to download the data for?

The CSP can be used to view the status of all invoices submitted to National Grid.

If any invoice is rejected in the Coupa Supplier Portal will it provide a reason for rejection?

If National Grid rejects an invoice, commentary will be added within the CSP as to the reason for the rejection.

Can we apply different payment terms to different invoices?

No, the payment terms are determined by the vendor record and the commercial agreement that you have negotiated with National Grid.

Can I still part invoice against a purchase order in the CSP?

Yes, Coupa provides the functionality to part invoice. Purchase orders can be raised either via a quantity based PO or an amount based PO. It is suggested you discuss with your Procurement contact to ensure the PO is structured correctly to enable you to part invoice against.

What happens when an invoice is generated against a purchase order that doesn't display any value?

If the price on the purchase order is hidden, you will still be able to flip the PO into an invoice and manually enter the invoice value before submitting through the portal.

All products we supply to National Grid use Standard VAT @ 20%, can the lines on the invoice be defaulted to hold this information to save time?

In order to ensure a compliant invoice is received through CSP, currently you will need to add the VAT amount onto each line of the PO manually. This may change when future updates are released to the Coupa system.

Can multiple deliveries/invoices be assigned against a purchase order?

The CSP allows a supplier to raise multiple deliveries/invoices against a purchase order.

Can one invoice cover multiple purchase order lines?

One invoice can only cover one Purchase Order across multiple lines. One invoice cannot cover multiple purchase orders.

Can part quantities be invoiced against a purchase order?

Yes. You will be able to amend the quantity supplied on your invoice if the relating order has been part shipped.

How are invoice queries going to be dealt with in the CSP

Coupa is a self-service system as such there will be requestor / on behalf of information on the initial Purchase order so that you are able to chase or follow up. There is also a new Comment facility which enables you to comment against a PO or Invoice directly back to National Grid. This is an auditable track of communication which can be used to resolve any PO or Invoice questions.

How do we include retention within our invoicing?

There will be no change to how retentions are managed once we have migrated to Coupa. If you submit a payment application currently you will continue to do this through Conject and submit invoices through the Coupa Supplier Portal once your payment application has been approved.

My invoices show quite a detailed breakdown re-rates charged per person, how can I show that on this system?

The Supporting documentation relating to Time and Materials can be attached to your invoice within the Coupa Portal.

If you currently provide National Grid a consolidated invoice (one invoice with multi line backing data on a separate document), please continue to issue these via email until further notice.

Our computer system automatically emails invoices. Will this still be ok or will that have to change?

National Grid will still accept invoices sent in PDF format to our designated email address. However, we will be fully migrating our invoice receipt process into Coupa during the course of 2019.

When you flip a PO to create an invoice is there a facility to invoice for additional items or do you have to obtain a PO for all additional items.

There is **no** option to add additional invoice lines, including shipping. All items must be included on the purchase order issued by National Grid.

If there is no shipping charged advised on the purchase order and shipping is to be paid by National Grid in accordance with any contractual arrangement, suppliers will be required to contact the requisitioner and inform them that an additional line for shipping be added to the purchase order.

The purchase order will need to be amended by National Grid, approved and re-issued to suppliers in order for shipping to be invoiced.

Will invoices from National Grid's current system be migrated across to new system?

Not immediately. There will be a transition period where both systems will be operating in parallel.

In the short term, all existing purchase orders will remain in our current system and invoiced as per National Grid's invoice channels. It is our intention to operate two systems until February 2019. Any open purchase orders live in our existing system come February will be migrated in Coupa. Suppliers will be advised of this action in advance, along with being provided new purchase order numbers.

Do I need to attach a copy of our own system generated invoice to the Coupa invoice template?

There is no requirement for suppliers to attach a copy of their internally raised invoice to the invoice created in Coupa. However, if suppliers wish to do this, these can be included by uploading a PDF document as an attachment.

Catalogue

How will the existing catalogues work with the CSP?

Catalogues will be uploaded and maintained by suppliers through CSP.

Can we add imagines for our catalogue items?

Suppliers can include URL links to images within their catalogue files. The Coupa system is unable to host jpeg or pdf images.

How can we capture the additional P&P/Shipping costs on our catalogue?

Any additional shipping charges must be added by the National Grid requisitioner as a free-form line on the purchase order. If shipping has agreed to be charged and it is not present as a line on the purchase order, suppliers are required to contact the National Grid requisitioner in order for them to issue an amended purchase order with shipping charges included.

Under our current contract we provide products that we believe could be purchased by a catalogue. How do we put a catalogue in place?

If you believe your product offering is suitable for a hosted catalogue, you should first contact either your National Grid Contract Manager or Buyer to discuss further. A catalogue template can then be created and uploaded into Coupa.

Legal Tracker

Will Legal Tracker still be used once Coupa is in place?

Legal Tracker will still be used by Legal to instruct our panel firms, for budget quotes, for panel firms to raise invoices and for tracker to check invoices for expense and fee earner violations

I use Legal Tracker today. Do we still need to register on the Coupa Supplier Portal?

Yes. You will still be able to use the CSP to manage purchase orders issued by National Grid and view the status of your invoices.

Will the new matters opened by a firm be added to Coupa by National Grid or will the firm have the accessibility to add new matters themselves?

There will be no change to this process. Panel firms will follow the same process as now, they will need to ensure that National Grid Matter Leads create matters in Legal Tracker and invoices should still be uploaded to Legal Tracker in the usual way.

Will Purchase Order numbers be added by National Grid before the work requested by the firm is carried out or will the firm be able to add Purchase Order numbers?

Matter leads will raise a purchase order in Coupa to confirm the work to be undertaken. The processes in Coupa are simple and the purchase order generation processes should be shorter.

What if the work requested to be carried out by the firm exceeds the amount of the PO?

If the Purchase Order does not have sufficient funds, additional funds will be added to the PO, which will then be subjected to DOA approval. Once approved the PO/Invoice will be matched and approved for payments.

How should we submit invoices if we use Legal Tracker?

Invoices must be submitted via Legal Tracker. If you are a legal firm and use Legal Tracker, invoices issued directly through the Coupa Supplier Portal will be rejected

Will the firm still have to add the allowable codes to their time narratives for invoices?

Yes, details required for invoicing remain unchanged and firms should continue to use Legal Tracker as they do today

How will the time spent by the firm be shown on Coupa as a breakdown of the amount of the invoice of time spent by the firm?

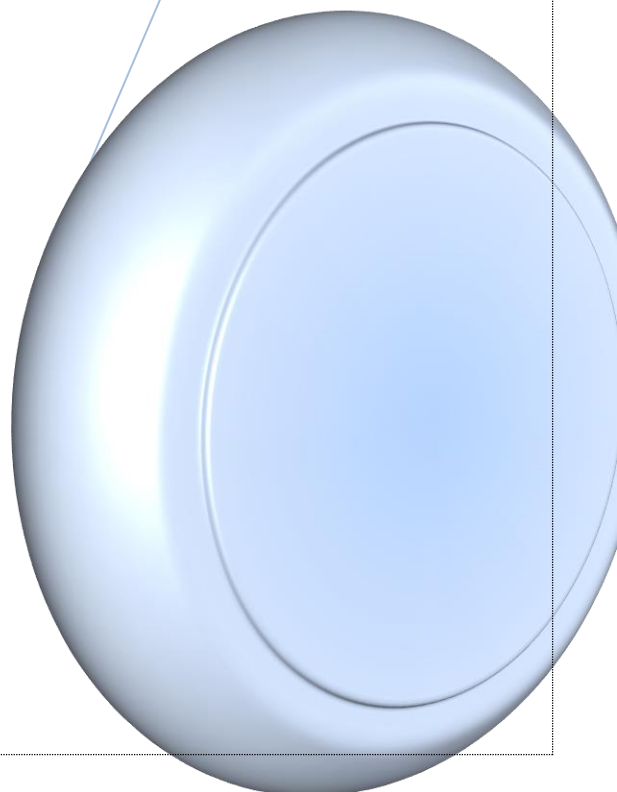
As you will be invoicing through Legal Tracker there will be no change in your invoicing details. LEDES format should still be used to breakdown the work carried out by the firms.

Acronyms

Acronyms and terms explained:

- PO – Purchase Order
- CSP – Coupa Supplier Portal
- SAN – Supplier Actionable Notifications
- Requisitioner – Person who raises the Purchase Order
- Flipped – Turns the Purchase Order into an invoice template to complete and submit
- CSP- Coupa Supplier Portal
- UVDB- Utilities Vendor Database
- RFI – Request for Information
- RFQ – Request for Quotation
- RFT – Request for Tender
- RFP – Request for Proposal

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