

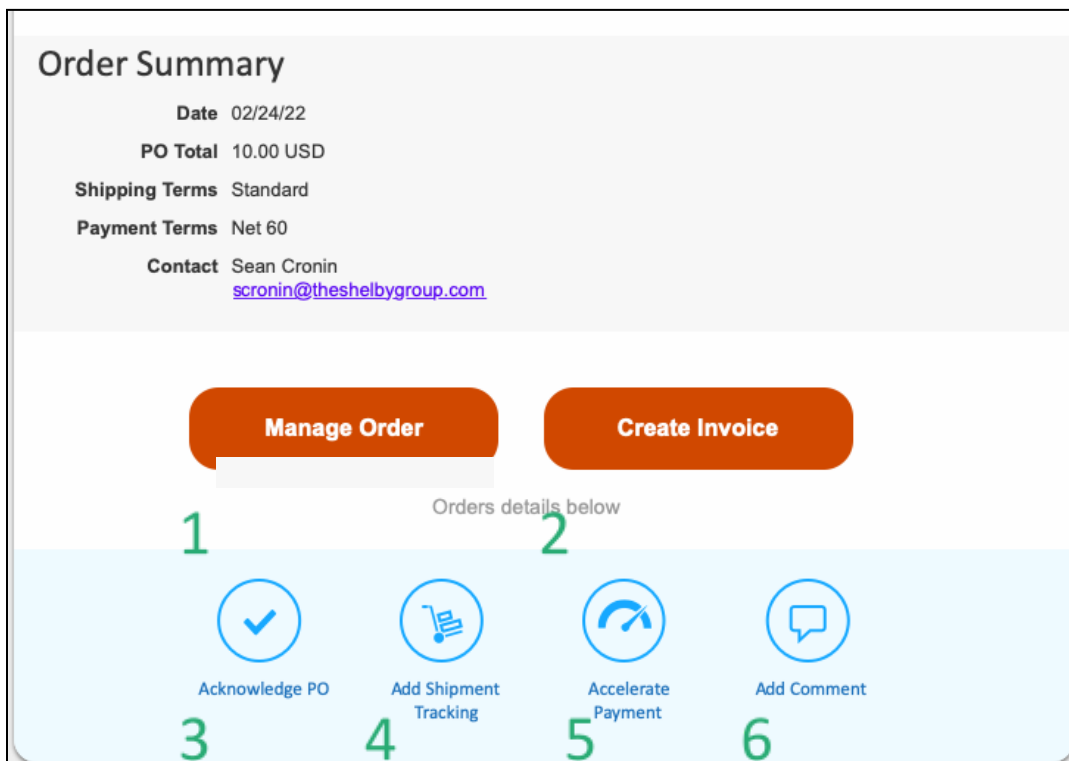
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Supplier Actionable Notifications (SAN) Guide

Quick Reference Guide for Suppliers

Compass Management Holdings is using an 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



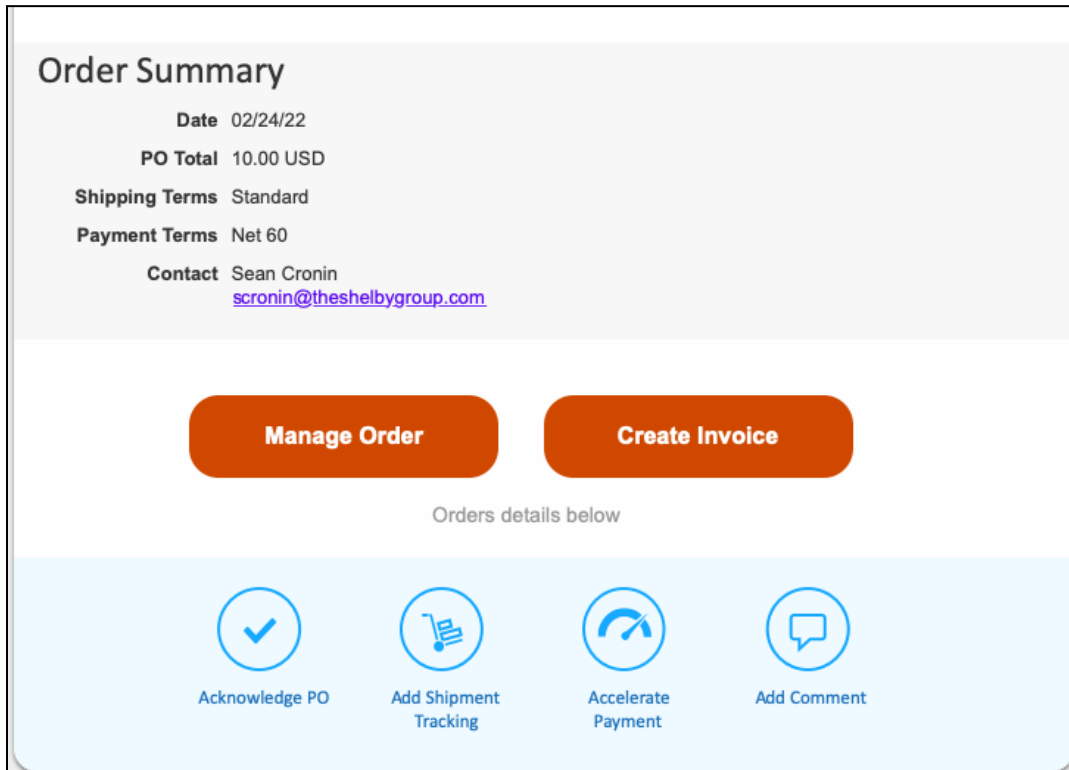
The **Order Summary** email has six buttons for use:

1. **Manage Order** button, takes you directly to the Purchase Order in Coupa where you can view the Purchase Order.
2. 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. **Compass Management Holdings** will go through their internal validation process before making payments to a newly submitted Remit-To address
 - ii. At the bottom right of the invoice, you can check Email me status updates for invoices I create this way to receive email notifications when the invoice is successfully received, approved, and paid. Click Calculate to calculate the total amount, review the invoice details, and click Submit to submit the invoice to **Compass Management Holdings**.

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Note: You will be able to change the Price and Quantity on the invoice, but this may trigger approval notifications when submitted to **Compass Management Holdings**. These may delay payment processing should the changes be outside expectations

How It Works (Cont.)



3. **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 **Compass Management Holdings** know you have received their order
4. **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.

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Create Shipment Tracker ✕

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


* Tracking Number


* Carrier


Note

5. **Accelerate Payment** button, this button will also take you to the Purchase Order in Coupa.
6. **Add Comment** button, this is another communication tool available for you to add a time stamped comment directly to the PO.
7. **Create Account** button, lets you create a Coupa Supplier Portal (CSP) account directly from the PO by taking you to the registration/login page.

Manage your orders and more with Coupa

 Insight

 Opportunity

 Collaboration

[Create Your Account](#)

[Learn more about Coupa](#)

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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 **Compass Management Holdings** - 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
Shipping	<input type="text" value="3.95"/>	
Handling	<input type="text" value="0.05"/>	
Misc	<input type="text" value="0.00"/>	
Tax	<input type="text" value="7.00%"/>	<input type="text" value="0.35"/>
Total Tax		0.35
Net Total		9.00
Total		9.35

Email me status updates for invoices I create this way