

Coupa Supplier Training Guide for POs & Invoices



Pact's Journey

Pact is streamlining how its buyers find, buy, approve and pay for the goods and services it purchases from its suppliers. This is happening through an implementation of a new digital procurement solution known as Coupa. Coupa will integrate with Pact's existing systems to create a simplified purchasing process, enabling simple, fast and effective communication with suppliers.

What's happening?

As a supplier to Pact there have been changes made in how you do business with Pact. These changes include how you receive Purchase Orders (POs) and how you submit invoices.

When is this happening?

From April 2022, the new way of working will come into effect. Pact will continue working with all of our strategic materials suppliers to transition onto the new system.

What do I need to do?

Read through this Training Guide to plan how this will work for you in relation to the goods and services you provide Pact. It's important you read this today and take the action required in preparation for the launch date.

>> Take the actions on the "Supplier Checklist" page in this document.

What is Coupa?

Coupa is an IT purchasing system that is designed to give its users (Pact's Buyers) a streamlined and 'online shopping' type experience when raising purchase requisitions and orders.

Coupa is a global purchasing system with over \$3 trillion and 7 million suppliers currently under management.

What does Coupa offer?

Coupa has a very strong supplier offering to give suppliers an easier process for receiving quote requests, POs, sending invoices, etc. Coupa also offers the **Coupa Supplier Portal** which gives suppliers a single place to access reports, approve orders, flip invoices and more. Whilst you can continue to interact with Pact without using this Portal, via the Coupa desktop browser, it does have many benefits and is free of charge.

The more you integrate with Coupa, the easier it will be for more Pact Buyers to purchase from you as a supplier.

Learn more about Coupa here: <https://www.coupa.com/>

Coupa also offers strong support for suppliers: [Coupa Suppliers](#)

How can Coupa be accessed?

Coupa can be accessed through the links in the PO emails that Pact send (Supplier Actionable Notification) as well as the Coupa Supplier Portal (CSP).

Supplier Checklist

Guidance to navigating the new changes

What do I need to do?

- 1 Read this training guide. It will give you an explanation of upcoming changes on how you receive and process Pact POs, how you submit and track invoices with Pact.
- 2 Visit the [Coupa Suppliers website](#) for more supporting information
- 3 Any questions? Please contact our team via suppliersupport@pactgroup.com

Key Areas of Change For Suppliers

The rest of this guide is dedicated to providing some high level guidance on [what this change looks like and what you need to do differently](#).

➤ Purchase Orders

Previously you may have received PDF POs from Pact from numerous sources (e.g. *personal Pact emails, faxed, printed*) and may also have come to various locations in your organisation (e.g. *your accounts email, sales email, personal emails*).

>> Purchase orders will now follow a consistent format and be transacted within a centralised location. You will receive POs in your nominated email address from a single source within Coupa. The Coupa Supplier Portal also enables access to view all current and historical POs.

➤ Invoices

Previously you may have submitted invoices to Pact via email, or even through other means.

>> You are no longer able to submit invoices via email. Pact will only accept invoices submitted through the Coupa Supplier Portal or via the link in the PO email Pact sends you.

Purchase Order Overview

Changes to how you will receive POs from Pact.

Current Process

Currently you receive Pact POs via email in PDF format.

The POs are generated and sent by Pact's manufacturing system, SAP.

An example of a current Pact PO is below.

Item No	Material	Material Description	Supplier Material No.	Delivery Date	Quantity	Unit Price	Total	
1		POLYLINER 400 LINT. BLUE		Apr-17, 2019	100 kg	\$2.20/kg	\$ 0.00	
							Total AUD:	\$ 0.00
							Plus Tax if Applicable:	\$ 0.00

PLEASE NOTE
All materials/services supplied must be accompanied by a delivery docket clearly quoting this purchase order number. Goods purchased and services provided (including freight and transport) under this Purchase Order shall be strictly subject to the applicable VIP Packaging terms and conditions. A copy of these terms and conditions can be viewed here... <https://pactgroup.com.au/terms-conditions-of-procurement/>

Coupa Process

Pact will still maintain SAP as it's manufacturing system. Now Coupa will transmit orders to you as a supplier. Order management and invoices will also then be managed within Coupa.

POs will still arrive via email. The details of the order will be both in the body of the email and also attached to the email as an HTML file that is able to be printed in a similar fashion to the previous PDFs.

The email PO now includes some additional buttons/links that allow you to take actions on that PO, including accepting, responding to the Pact Buyer that raised the PO to advise on lead time, availability of that good/ service and also to "flip" the PO to an invoice ([more on this on the next page](#)).

Coupa PO Email:

PO "FLIP": click this button to "flip" the PO to an invoice ([more detail on the next page](#))

Acknowledge PO: click this button to confirm to the Pact Buyer that the PO is accepted

Communicate With Pact: click this button to open a dialogue to advise the Pact Buyer of lead times, unavailability to fulfill the PO, etc.

Billing details: site name, delivery address, billing details

Order details: description, quantity, price, PO total

Line	Description	Delivery Date	Qty	Unit	Price (excluding tax)	Total (excluding tax)
1	Clean: Deep Clean Part Num: PACTOCSAUS_0003	9/11/21	1	Each	270.00	270.00
2	Clean: FACTORY FRIDGE CLEANING Part Num: PACTOCSAUS_0008	9/11/21	1	Each	50.00	50.00
3	Toilet Paper: BW2179144: TORX JUMBO TOILET ROLL Part Num: PACTOCSAUS_0015	9/11/21	1	Carton	247.80	247.80
						567.80 AUD

PLEASE NOTE
Goods purchased and services provided (including freight and transport) under this purchase order will be strictly subject to our Terms and Conditions of Purchase <https://pactgroup.com/standard-tcs-aus/> and will apply to the exclusion of any terms and condition of sale provided. All goods/services must be accompanied by a delivery docket clearly quoting this purchase order number.

Coupa PO HTML Printable File:

Supplier :	Bill To :	Ship To :
OCS Services AU (217951) 183 GREAT EASTERN HIGHWAY BELMONT, WA 6104 Australia Email: Pact.Group.Supplier+217951@gmail.com	Astron Plastics Pty Ltd 8 Maul Street Pukekohe Hamilton, 3240 New Zealand	Astron Plastics Cheltenham 103 Bernard Street, Cheltenham, VIC 3192 Australia
Order Date: 9/11/21 Currency: AUD Contract: HC-00002	Payment Terms: ME20 Incoterms:	Contact: David (UAT) Bertazzon Email: David.Bertazzon@pactgroup.com

PLEASE NOTE
Goods purchased and services provided (including freight and transport) under this purchase order will be strictly subject to our Terms and Conditions of Purchase <https://pactgroup.com/standard-tcs-aus/> and will apply to the exclusion of any terms and condition of sale provided. All goods/services must be accompanied by a delivery docket clearly quoting this purchase order number.

Further Help:

Follow these links for further assistance.

- [Viewing and managing POs](#)
- [Requesting a change to a PO](#)
- [Training Video on POs](#)

Invoices

Changes to how you will submit invoices to Pact.

Current Process

Currently you submit invoices to Pact via email in PDF format.

Those invoices were received by Pact and then OCR scanned to get the details to attempt a match to the correct PO within Pact's SAP system.

Following up the status of your invoices, status of payment, etc. was then done by emailing our A/P team.

Coupa Process

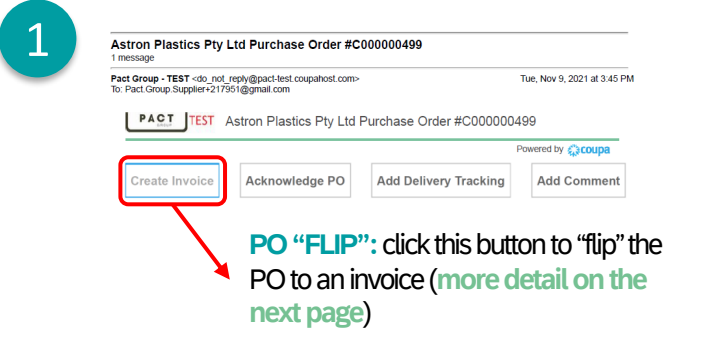
Once Coupa is live **Pact will not accept PDF invoices that are submitted via email.**

Invoices will now be tightly linked to POs. This will mean that, in the majority of circumstances, invoices will be **approved automatically or with minimal required approvals** on Pact's side. This will mean that they will reach the payment queue faster and will **improve the payment process** for you as a supplier. Tracking the status and communicating with Pact on specific invoices (have they been accepted, when will they be paid, etc.) will be much easier and available to you via the Coupa Supplier Portal. More detail on this is provided later in this guide.

You will now submit invoices via Coupa using the process below. The invoice details will be pre-populated using the PO details which makes this a very quick process.

How to submit an invoice via Coupa:

1

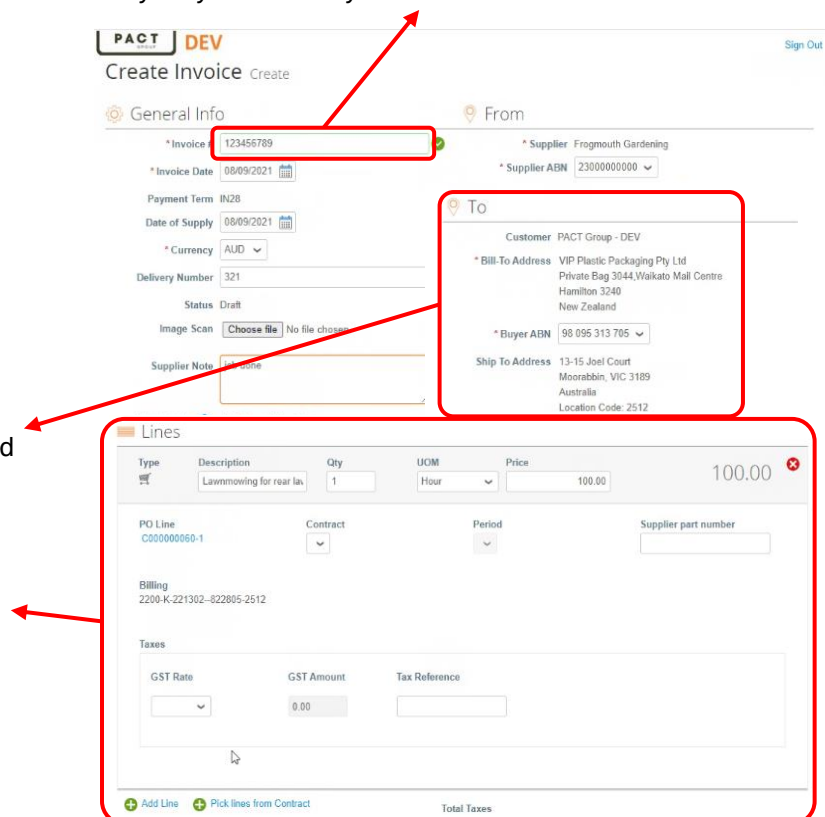


Astron Plastics Pty Ltd Purchase Order #C000000499
1 message
Pact Group - TEST <do_not_reply@pact-test.coupa-host.com>
To: Pact.Group.Supplier+217951@gmail.com Tue, Nov 9, 2021 at 3:45 PM

PO "FLIP": click this button to "flip" the PO to an invoice ([more detail on the next page](#))

2

Supplier Invoice Number: You continue to create an invoice in your system. Take the number for this invoice and enter it here to ensure that the invoice number on your system can always be linked to the Pact Invoice # and Pact PO #



Supplier Invoice Number: You continue to create an invoice in your system. Take the number for this invoice and enter it here to ensure that the invoice number on your system can always be linked to the Pact Invoice # and Pact PO #

Billing Details: This section confirms the Pact site to which the goods / services are being supplied

Item details: description, quantity, price. These details are prepopulated to exactly match the PO.

- If you are submitting an invoice which partially fulfills a PO, then amend the qty on each PO item accordingly and submit the invoice. The PO will remain open until all items have been fulfilled.
- You can amend the invoice if what you are providing has changed from the original PO. As the invoice will not match the PO it may trigger an alert for the Pact Buyer. They will review your invoice and either approve or contact you to discuss.
- Similarly if you need you can add lines if what you are delivering has changed from what was ordered.

3 Way Match: invoices will be placed in the payment queue and paid via your payment terms once the following 3 way match has been established:

- **PO.** The invoice must match the originating PO - i.e. the item descriptions and quantities must match. Any discrepancies will be alerted to the Pact Buyer who will manually review
- **Goods Receipt.** Pact must have received the goods or confirmed completion of the service against the PO for the invoice to be auto-approved, and the receipt must match on quantity and item description
- **Pricing.** The invoice pricing must also match the PO. Again, discrepancies will occur and will trigger a manual review from the Pact Buyer prior to approval of the invoice.

Further Help:

Follow this links for further assistance - [Create or Edit an Invoice](#) & [Invoice Training Video](#)

Coupa Supplier Portal (CSP)

The CSP is an optional and free service offered by Coupa to enhance your ability as a supplier to manage Pact as a customer.

Coupa Process

The CSP enables a supplier to **track and manage their orders and invoices with Pact**. The portal is *free*, available to all Pact Coupa suppliers and is accessible via any web browser.

The CSP is best explained by [this short 5 minute video](#) which provides an overview of the **function** and **benefits** of the portal for suppliers. We strongly recommend you view this video so you can better understand the ease and benefits of using the CSP. Further, Coupa has developed a support guide which you can download [via this link](#).

Suppliers that transact with Pact through the CSP find many benefits, save time in administration and increase their compliance with orders and invoices.

The CSP is optional for suppliers and if suppliers opt not to register for the CSP they can still communicate with the Pact Buyer that raised the order via Coupa's dedicated comments function.

How the CSP looks and functions:

Invoices: via this report, suppliers can view all invoices with Pact, its approval status and can also ask questions about individual invoices.

[Invoice Training Video](#)

The screenshot shows the 'Invoices' section of the Coupa Supplier Portal. At the top, there is a green notification bar that says 'BuyntSmall invoice #154844 is processing'. Below this is a 'Create Invoices' section with buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table below displays a list of invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The table contains three rows: one with Invoice # 154844 (Processing), one with Invoice # 123456 (Pending Approval), and one with Invoice # None (Draft). A 'Per page' selector at the bottom shows options for 15, 45, and 90 items per page.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
154844	08/19/19	Processing	2818	200.00 USD	No	
123456	08/19/19	Pending Approval	2814	212.00 USD	No	
None	07/31/19	Draft	2815	200.00 USD	No	

Purchase Orders: via this report, suppliers can view all orders with Pact, its fulfilment status, convert the order to an invoice with the click of a button, and more. The report can be filtered and then exported if required.

[PO Training Video](#)

The screenshot shows the 'Purchase Orders' section of the Coupa Supplier Portal. At the top, there is a button that says 'Click the Action to Invoice from a Purchase Order'. Below this is a table with columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The table contains four rows, all with a status of 'Issued' and 'Print Services' as the item. A 'View' dropdown menu is set to 'All' and there is a search bar.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
2819	07/31/19	Issued	08/19/19	Print Services	No	200.00 USD	
2818	07/31/19	Issued	None	Print Services	No	200.00 USD	
2817	07/31/19	Issued	None	Print Services	No	200.00 USD	
2816	07/31/19	Issued	None	Print Services	No	200.00 USD	
2815	07/31/19	Issued	None	Print Services	No	200.00 USD	

Catalogs: For many of Pact's raw material suppliers pricing is managed via a separate contract or price agreement – this process will remain in place. Many other suppliers will be able to take advantage of Coupa's searchable 'catalog' environment. Developing a catalog for use within Pact's Coupa environment allows suppliers to have their goods and services be more available to Pact Buyers. Reach out to us to see if this is something that can benefit your company.

[Catalog Training Video](#)

The screenshot shows the 'Catalog 3 Edit' page in the Coupa Supplier Portal. It includes a form for editing catalog details such as Customer (Coupa), Catalog Name (Catalog 3), Status (Draft), Start Date, and Expiration Date. Below the form, there are summary statistics: '0 Items Changed (0 unchanged)', 'Price Increase: 0', 'Price Decrease: 0', 'Other Fields Updated: 0', 'New Items: 0', and 'Deactivated Items: 0'. At the bottom, there are two tables: 'Items Included in Catalog' and 'Items Offered to Coupa Inspire', both showing columns for Name, Part Number, Status Change, Price, Price Change, Currency, and Other Fields Changed. Both tables currently show 'No rows'.