coupa

Supplier Portal (CSP) guide

September 2023

ALBERTA
BLUE CROSS®

Contents

Registering as a supplier with Alberta Blue Cross

Introduction

Alberta Blue Cross utilizes Coupa to create and manage contracts, assess risk and manage supplier information management.

When you register as a supplier at Alberta Blue Cross, you can expect an easy process for

- Negotiating future contracts with Alberta Blue Cross,
- Assessing risk and controlling information, and
- Keeping your banking details up to date to ensure fast payment, through the CSP.

Supplier onboarding process

New request

Your Alberta Blue Cross contact will submit an internal request to register you as a new supplier.

Approvals

Once approved internally, you will be set up in the Alberta Blue Cross procurement system, Coupa.

Communication

You will receive an automatic notification via email, inviting you to complete the supplier onboarding form.

Onboarded

Once you have submitted the supplier onboarding form and it has been approved, you are ready to do business with Alberta Blue Cross.

Go back home

Getting started with the CSP

What is the CSP?

The Coupa Supplier Portal (CSP) is a free web-based platform for suppliers to easily do business with Alberta Blue Cross. It makes managing transactions easy and consolidates all relevant information in 1 simple-to-use location.

By joining the CSP you can

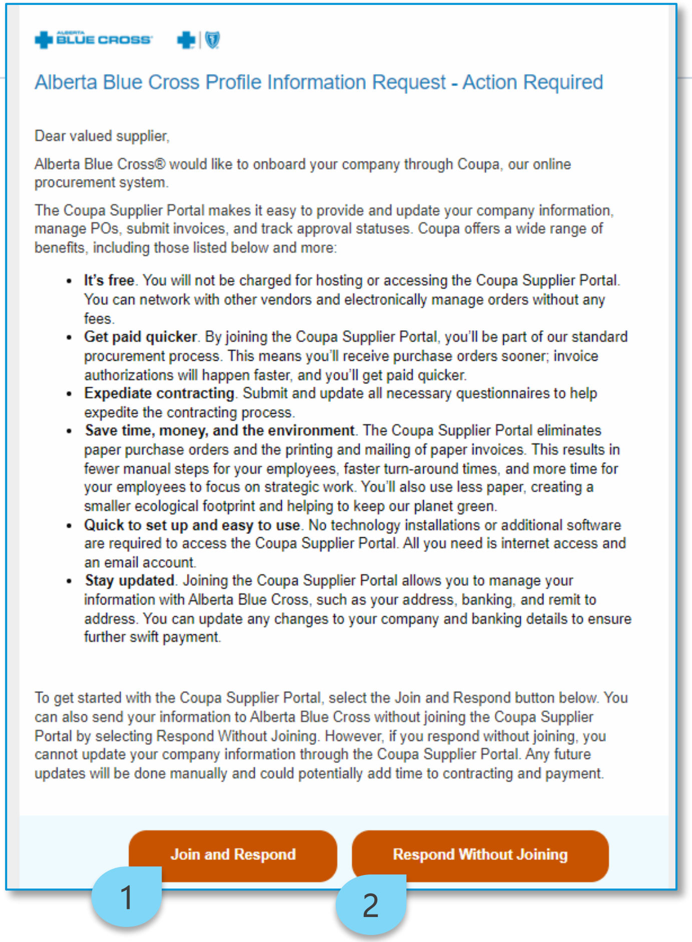
- Manage your company information and remittance information ensuring it is always up to date.
- View and manage POs received from Alberta Blue Cross.
- Invoice Alberta Blue Cross and view the status in real time.

Creating a CSP account

If your client has the correct email address, they will send you an invitation to your email to register on the CSP. From the email you receive, you will have 2 options.

1. **Join and Respond,** proceed to slide 9.
2. **Respond Without Joining,** proceed to slide 68.

Alberta Blue Cross strongly recommends joining the CSP in order to create a reusable profile and better track your interactions.


Alberta Blue Cross Profile Information Request - Action Required

Dear valued supplier,

Alberta Blue Cross® would like to onboard your company through Coupa, our online procurement system.

The Coupa Supplier Portal makes it easy to provide and update your company information, manage POs, submit invoices, and track approval statuses. Coupa offers a wide range of benefits, including those listed below and more:

- **It's free**. You will not be charged for hosting or accessing the Coupa Supplier Portal. You can network with other vendors and electronically manage orders without any fees.
- **Get paid quicker**. By joining the Coupa Supplier Portal, you'll be part of our standard procurement process. This means you'll receive purchase orders sooner; invoice authorizations will happen faster, and you'll get paid quicker.
- **Expediate contracting**. Submit and update all necessary questionnaires to help expedite the contracting process.
- **Save time, money, and the environment**. The Coupa Supplier Portal eliminates paper purchase orders and the printing and mailing of paper invoices. This results in fewer manual steps for your employees, faster turn-around times, and more time for your employees to focus on strategic work. You'll also use less paper, creating a smaller ecological footprint and helping to keep our planet green.
- **Quick to set up and easy to use**. No technology installations or additional software are required to access the Coupa Supplier Portal. All you need is internet access and an email account.
- **Stay updated**. Joining the Coupa Supplier Portal allows you to manage your information with Alberta Blue Cross, such as your address, banking, and remit to address. You can update any changes to your company and banking details to ensure further swift payment.

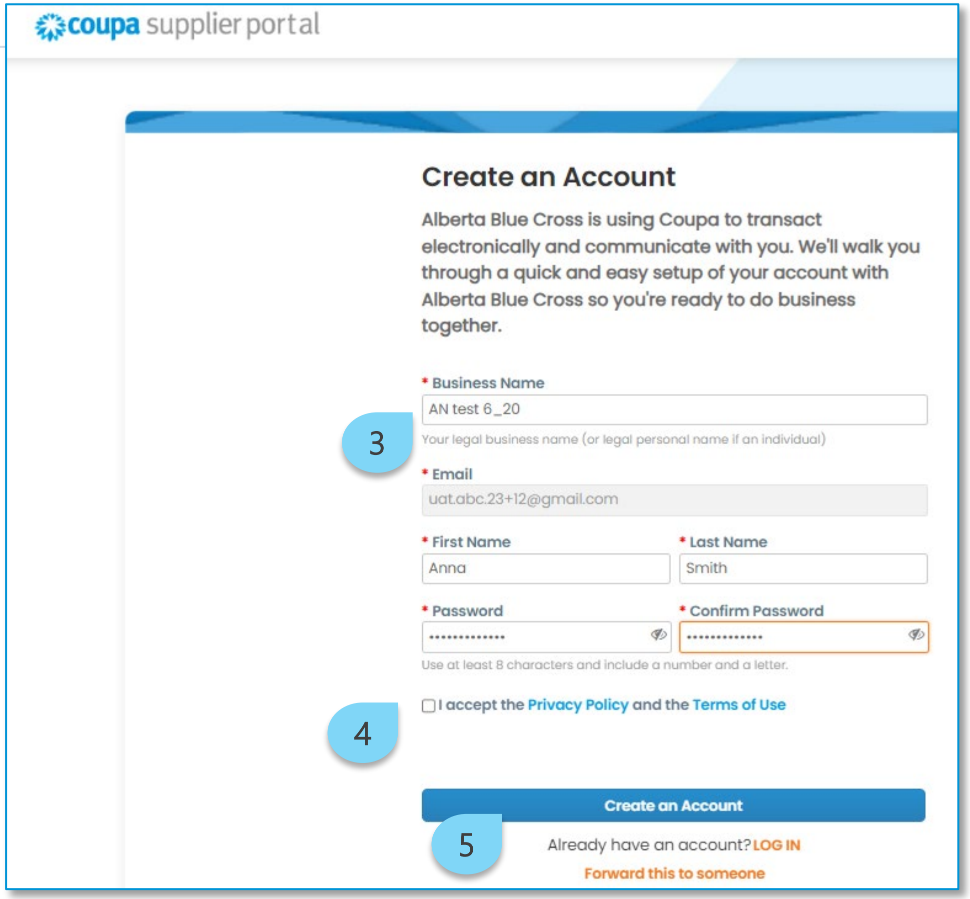
To get started with the Coupa Supplier Portal, select the Join and Respond button below. You can also send your information to Alberta Blue Cross without joining the Coupa Supplier Portal by selecting Respond Without Joining. However, if you respond without joining, you cannot update your company information through the Coupa Supplier Portal. Any future updates will be done manually and could potentially add time to contracting and payment.

Creating a CSP account

When you click on the **Join and Respond** button, you will be redirected to the activation page of your CSP account.

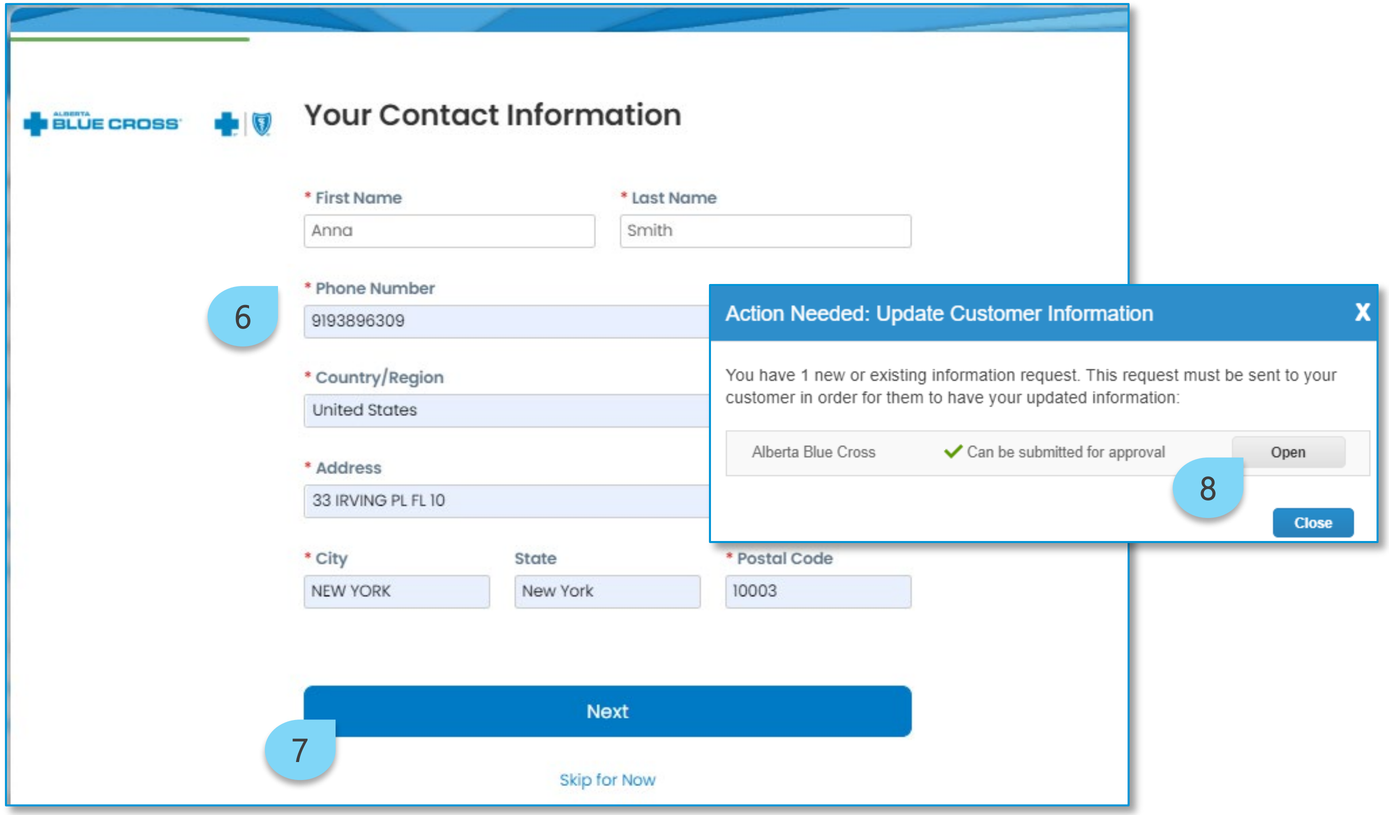
3. Complete the required fields.
4. Review the Coupa Privacy Policy and Terms of Use documents. Once reviewed, select the **check box.**
5. Click **Create an Account.**

It is recommended that you use Google Chrome or Microsoft Edge when using the CSP.



Creating a CSP account

6. Complete the required fields. Some fields may have been pre-populated by Alberta Blue Cross—you can make changes to the fields as required.
7. Click **Next.**
8. In the *Action Needed: Update Customer Information* window, click **Open.** Proceed to slide 13.

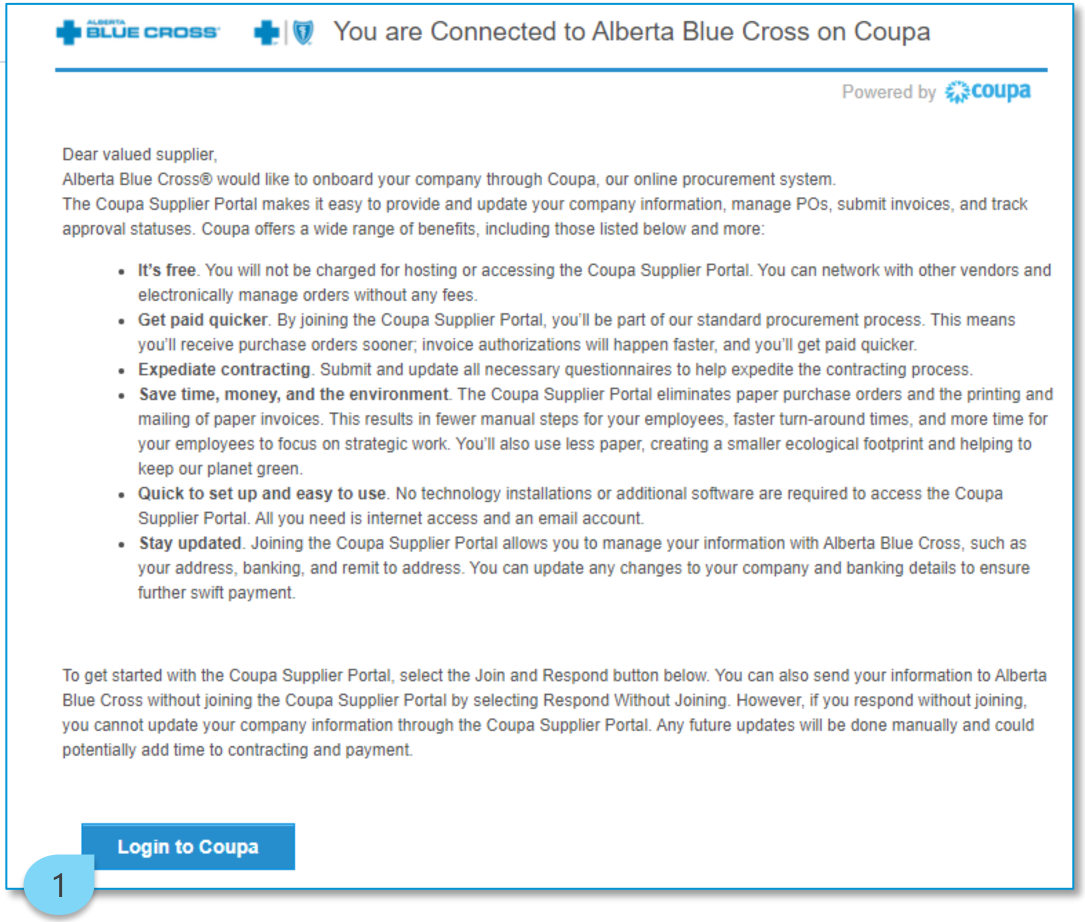


Getting started with the CSP

Existing CSP account

If you already have an account on the CSP, the primary contact will receive the following email to register:

1. Click **Login to Coupa**. Proceed to slide 12.



BLUE CROSS You are Connected to Alberta Blue Cross on Coupa

Powered by coupa

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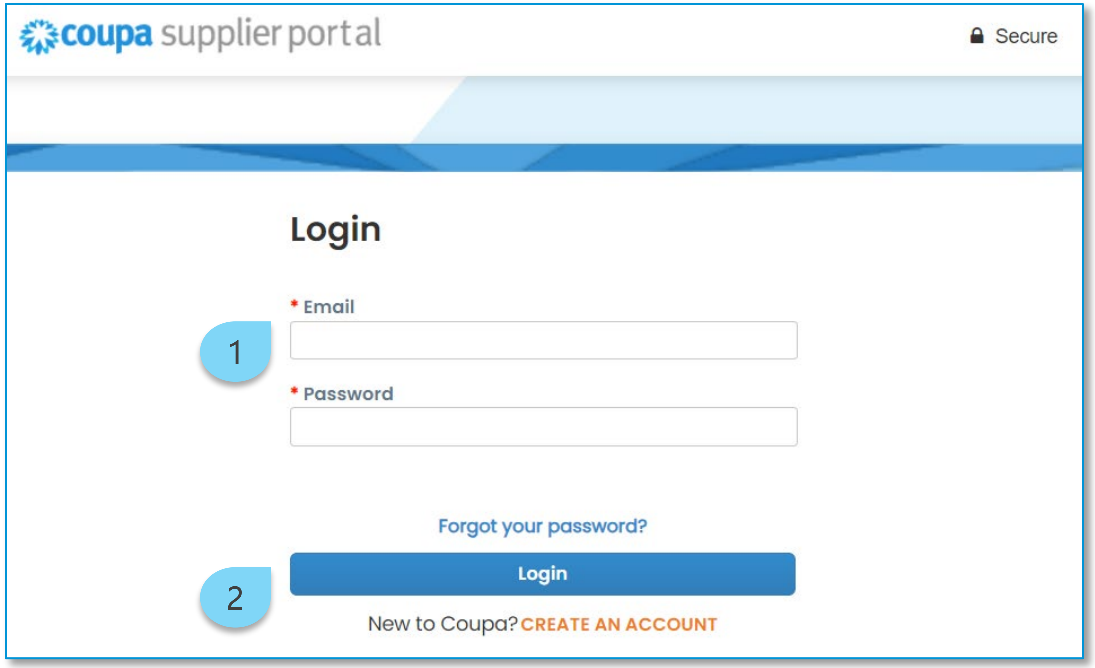
Login to Coupa

1

Logging in to your CSP account

1. Go to supplier.coupahost.com.
2. Enter your credentials and click **Login**.



Go back home

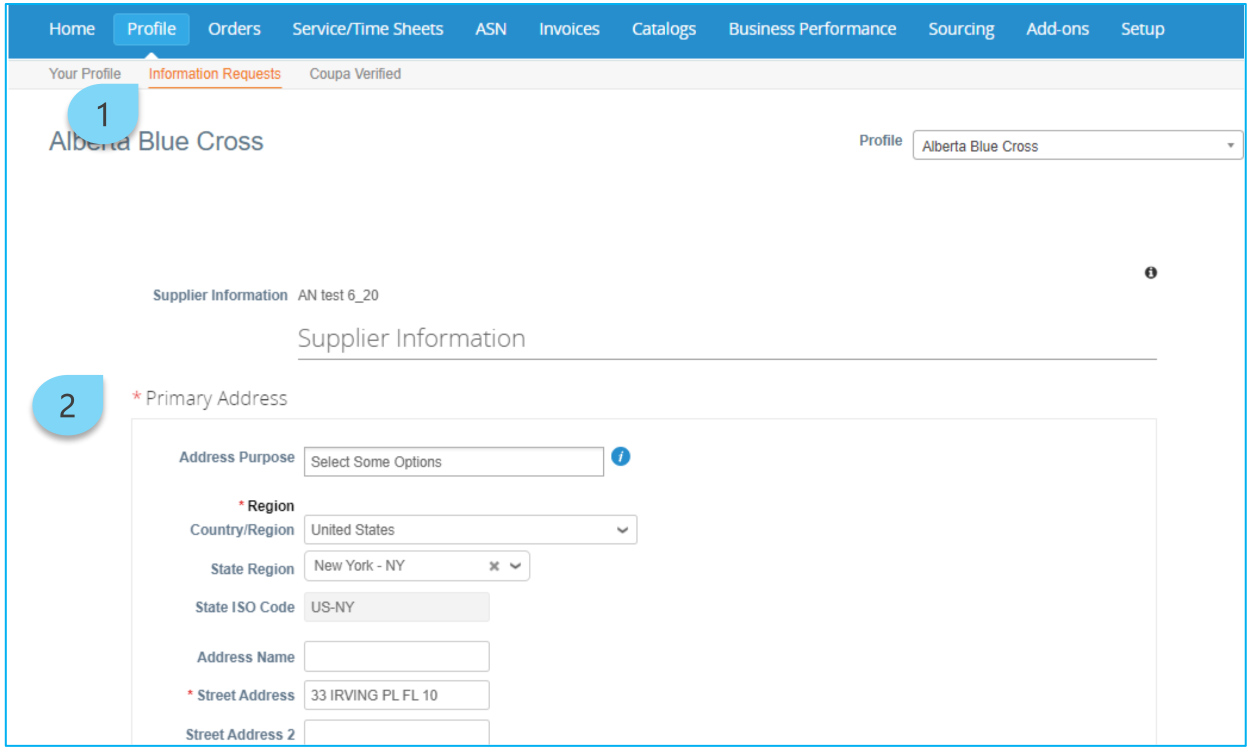
Completing the registration form

Filling out the supplier registration form

Once you have completed the CSP requirements, it is possible to access your profile to complete the Alberta Blue Cross form.

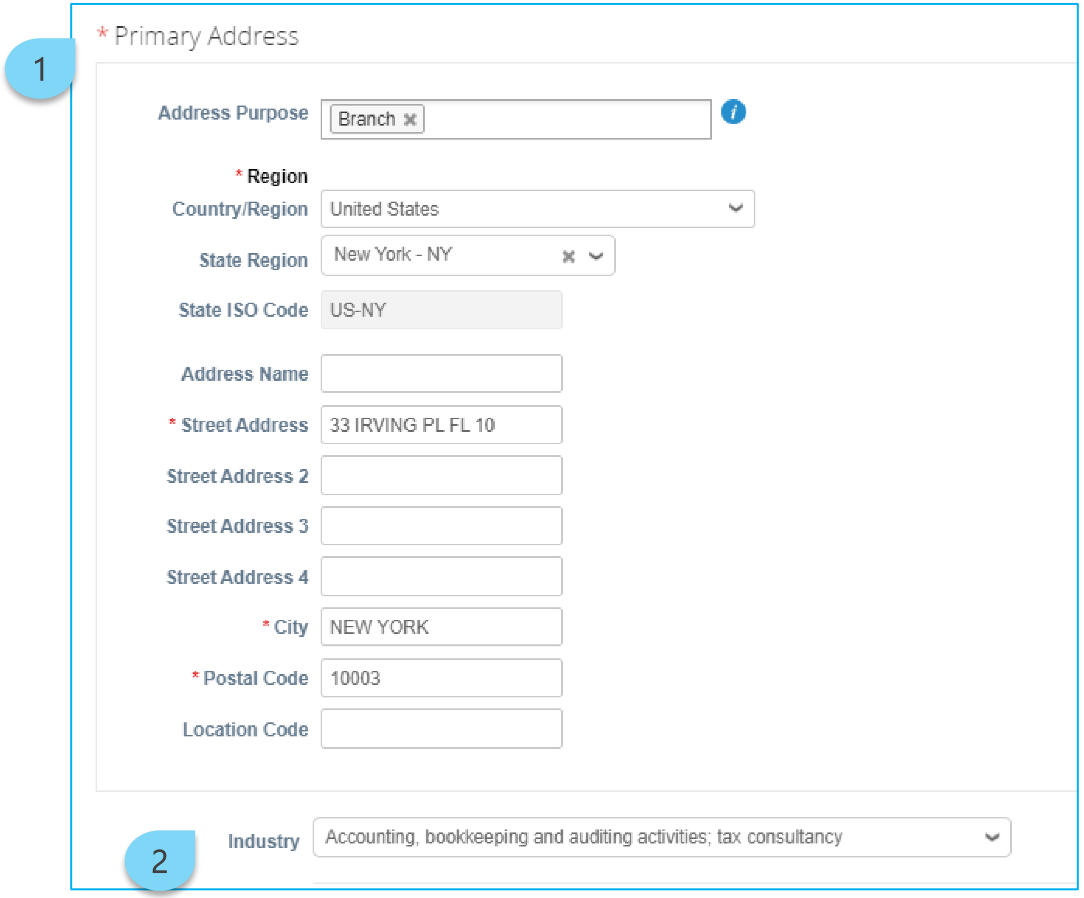
1. **Find the form on the CSP,** click **Profile** and then on **Information Request**. The form will be displayed.
2. **Complete the required fields,** the mandatory fields marked with a red asterisk (*).

If you already have a CSP profile, some information might already be filled out based on the information already added to the CSP profile.



Section 1—supplier information

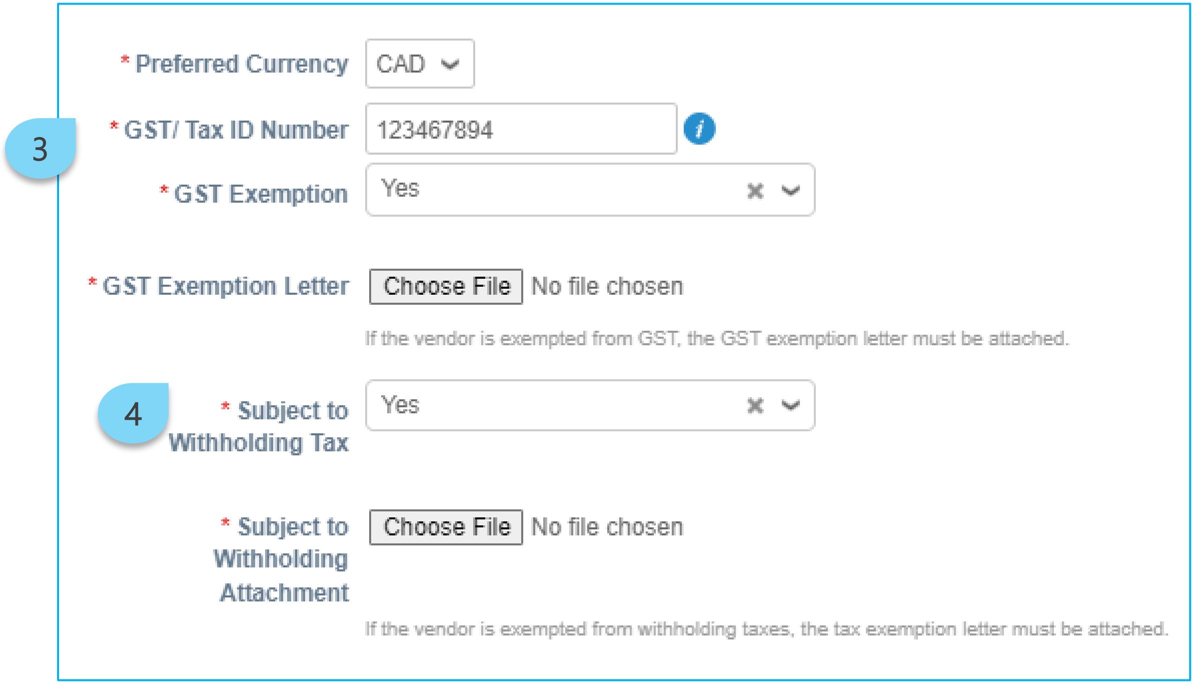
1. **Primary Address** is a mandatory field. Note this is the business address and not payment address information.
2. **Industry** is a non-mandatory field; however, select the most fitting answer from the drop-down menu.



Section 1—supplier information

Within the form some fields might have conditional functionality. Based on the answer provided, further details or attachments might be required.

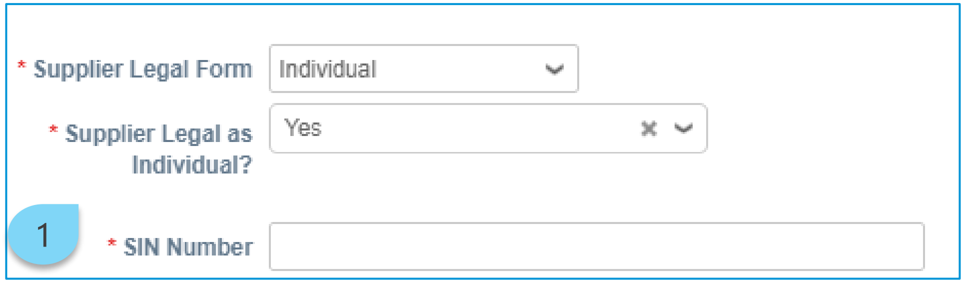
3. **GST Exception**—if the answer is **Yes,** a mandatory attachment field will be displayed.
4. **Subject to Withholding Tax**—if the answer is **Yes,** a mandatory attachment filed will be displayed.

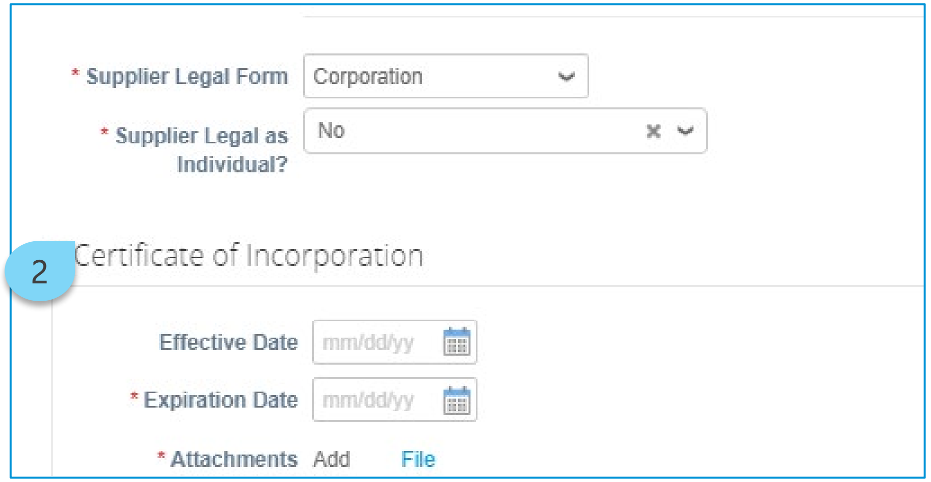


Section 2—legal form

Within the form some fields might have conditional functionality. Based on the answer provided further details or attachments might be required.

1. **Supplier legal form as individual**—if the supplier is an individual, the **SIN Number** is a required field.
2. **Supplier legal form not as individual**—if the supplier is not an individual a certificate of incorporation must be provided.



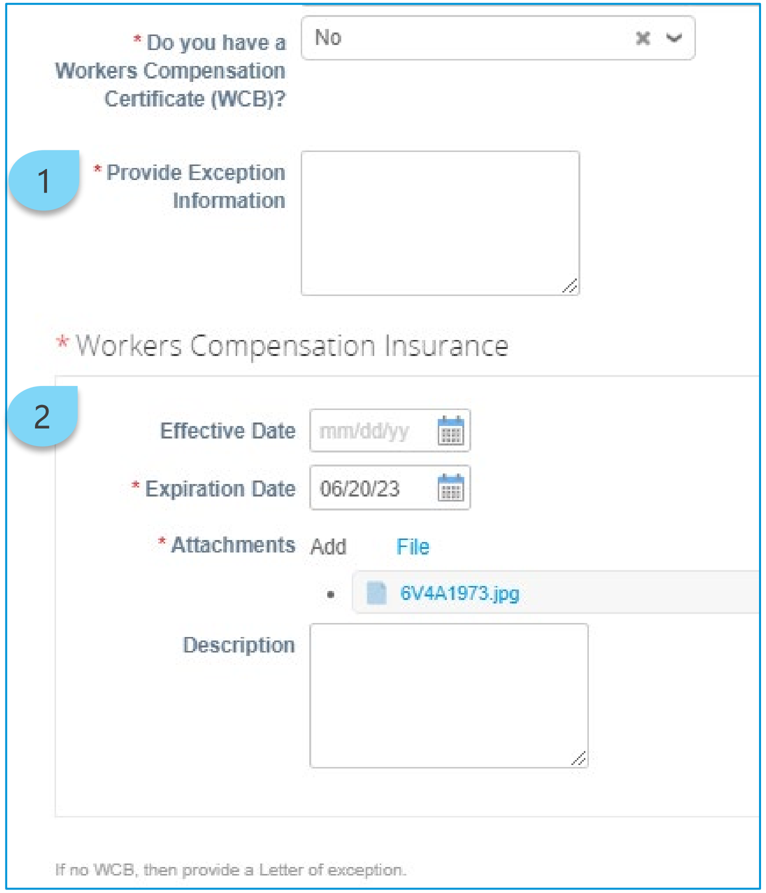


Completing the registration form

Section 2—supplier certificates

A workers' compensation certificate is required; however, if no workers' compensation certificate is present, is possible to provide an exemption letter.

1. **Workers' compensation certificate**—if the answer is **Yes**, then an attachment is mandatory.
2. **No workers' compensation certificate**—if the answer is **No**, then an exception field for further details is required. Note that an attachment is still mandatory.



Go back home

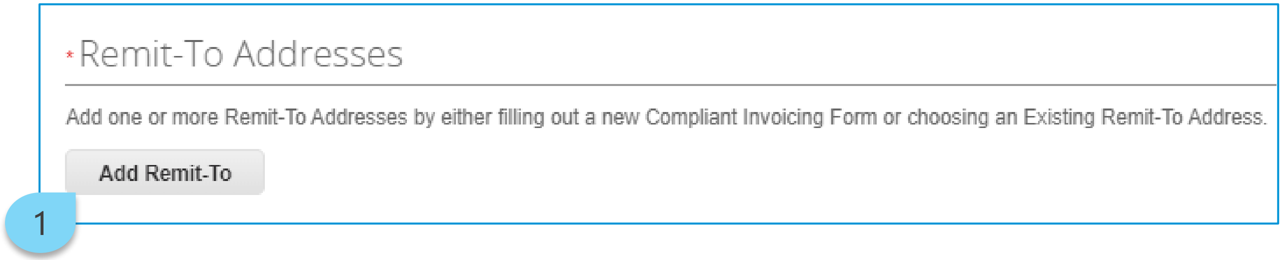
Filling out remit-to information

Adding remit-to information in the CSP

The **Remit-To Addresses** section ensures that Alberta Blue Cross has the essential banking and payment details to conduct business.

To update this information:

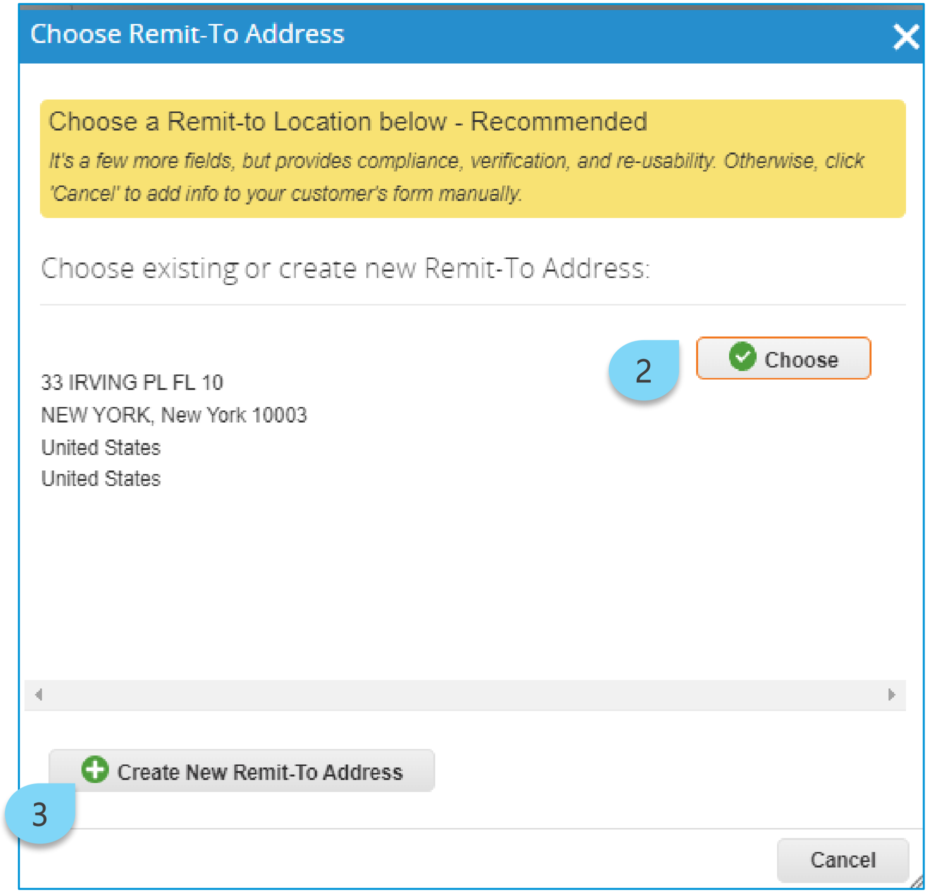
1. Within the form, click the **Add Remit-To** button.



Adding remit-to information in the CSP

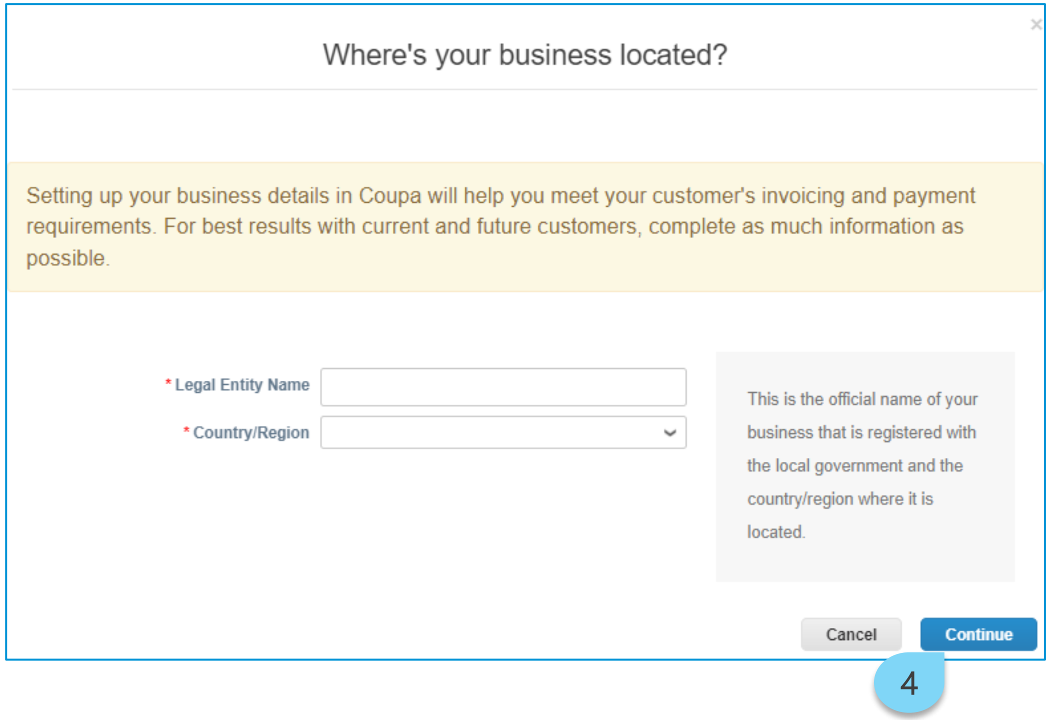
A pop-up window will open to create the remit-to address.

2. If you already have a remit-to address registered in the CSP, select the remit-to address by clicking **Choose** and then complete the information required by Alberta Blue Cross in the main form.
3. If you do not have a remit-to address registered in the CSP, click the **Create New Remit-To Address** button.



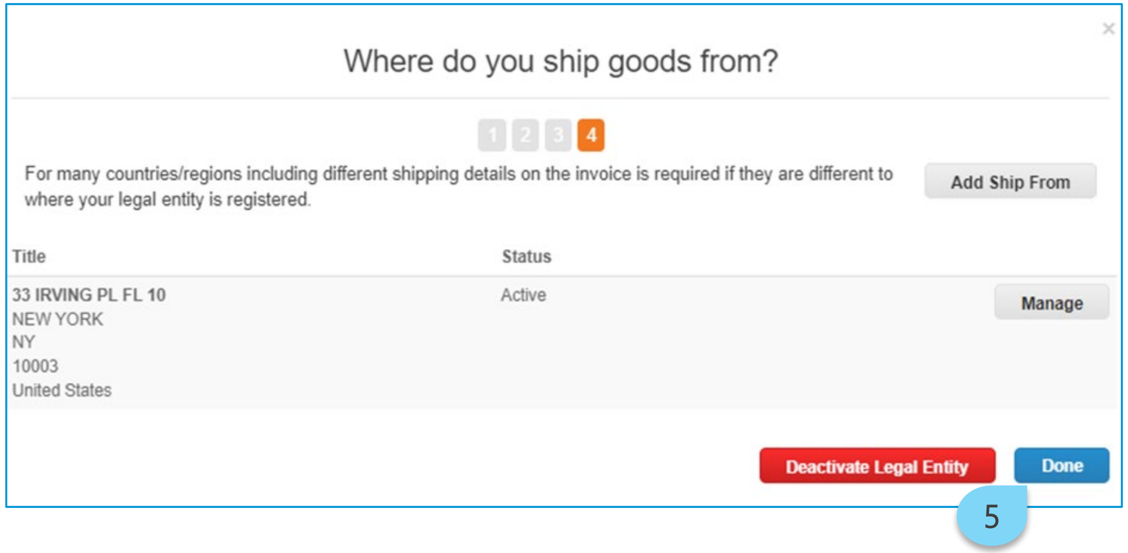
Adding remit-to information in the CSP

4. Complete the fields according to the instructions provided then click **Continue**.



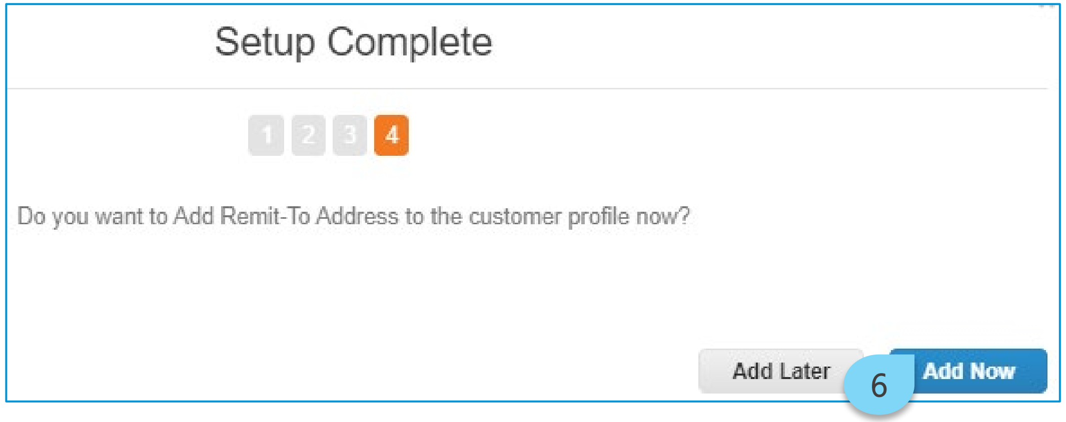
Adding remit-to information in the CSP

5. Once all the CSP required steps are completed click the **Done** button.



Adding remit-to information in the CSP

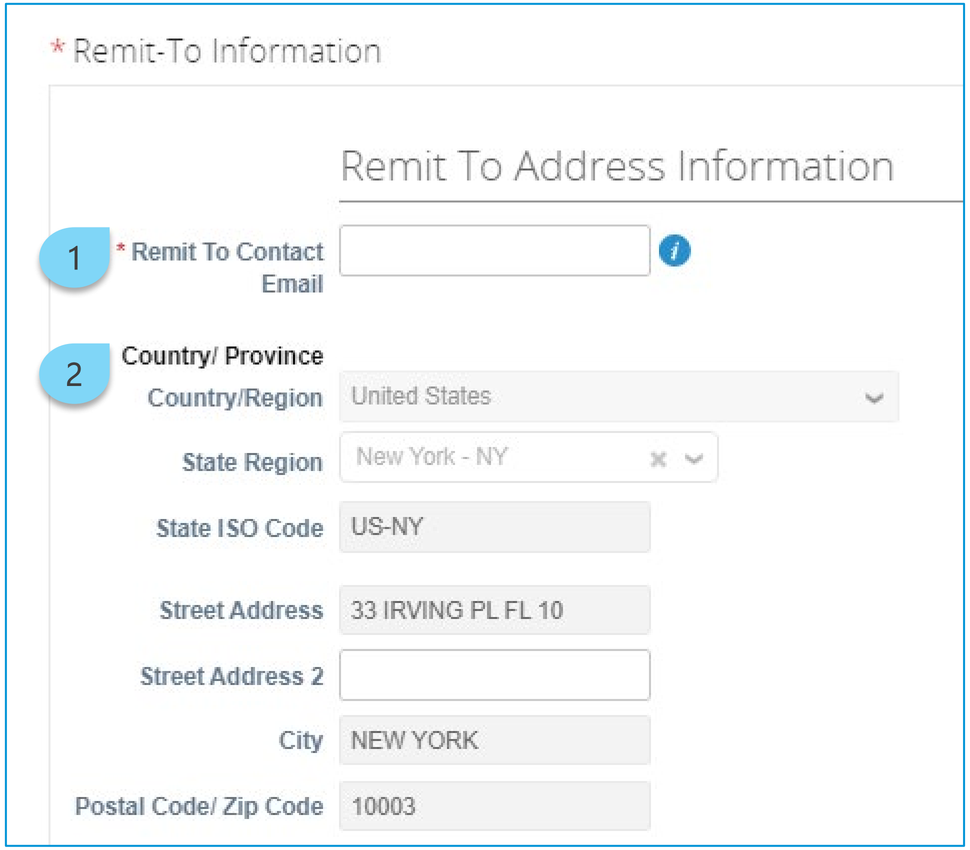
6. To add to the information completed to the Alberta Blue Cross form, click **Add Now** in the pop-up window. Once completed, you will be redirected to the Alberta Blue Cross form.



Filling out remit-to information

Remit-to address information

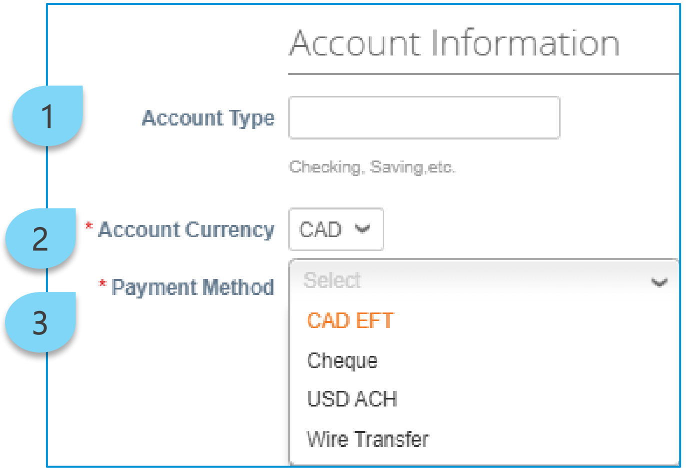
1. **Remit To Contact Email** is a required field for remit-to information to be sent out to the supplier contact.
2. **Remit To Address Information** is added from the completed CSP profile.



Remit-to account information

1. **Account type** is a non-required field to include account type information.
2. Select information from the drop-down menu for **Account Currency.**
3. Select information from the drop-down menu for **Payment Method**.

Based on the payment method selected, ensure to provide the required information to avoid rejections on your form.

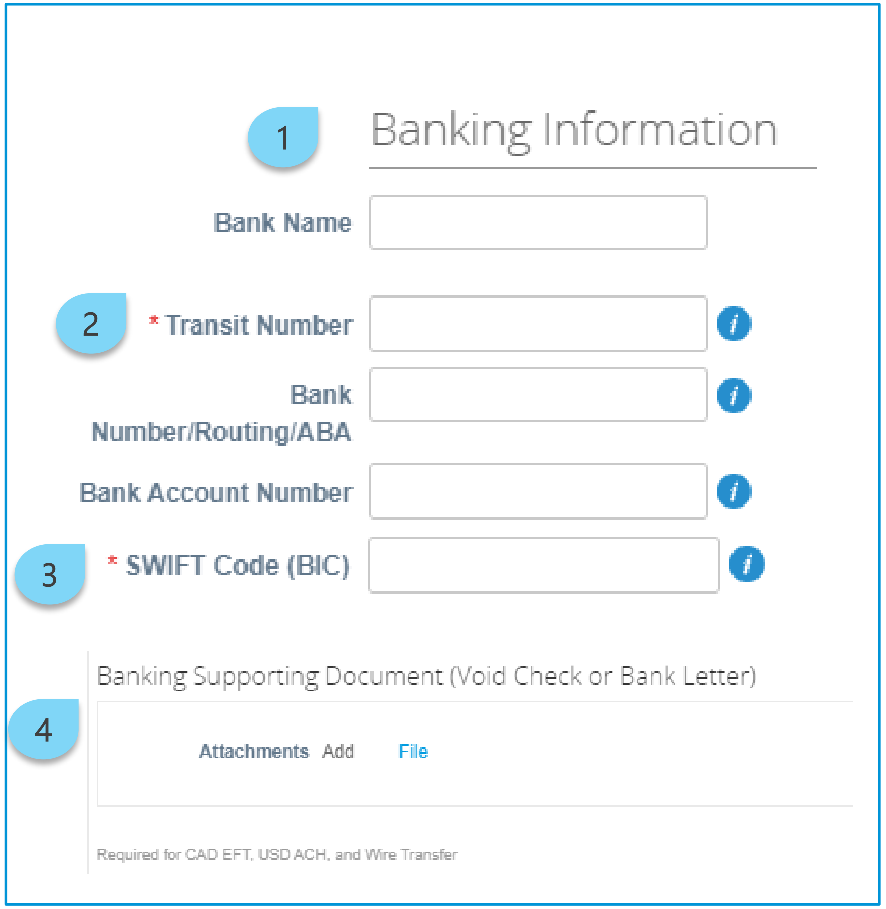


Please note for each Payment Method the following is required:

CAD EFT: Bank Name, Bank Number, Transit Number, Account Number, and Bank Letter (Attachment).
Cheque: Remit To Address Information.
USD ACH: Bank Name, Bank Address, Bank Routing/ABA Number, Account Number, and Bank Letter (attachment).
Wire: Bank Name, Bank Address, Bank Routing Number/ABA Number, Account Number, Swift Code, and Bank Letter (attachment).

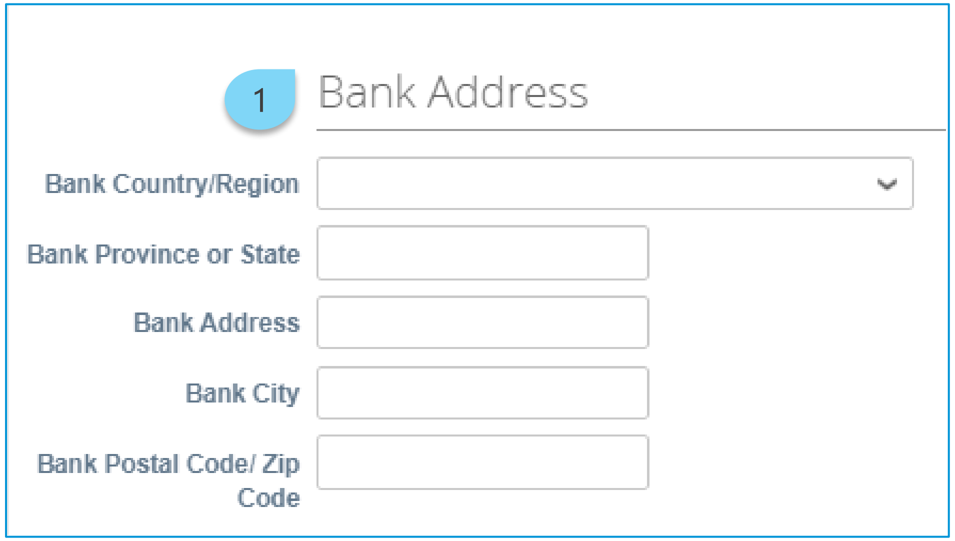
Remit-to banking information

1. Based on the payment method selected, provide banking information.
2. If **CAD EFT** is selected as the payment method, then the **Transit Number** is a mandatory field.
3. If **Wire** is selected as the payment method, then **SWIFT Code (BIC)** is a mandatory field.
4. Based on the payment method selected, supporting banking documents might be required.



Remit-to banking address

1. **Bank Address** is a non-mandatory field for banking address information. However, it is required for USD ACH and Wire payment method.

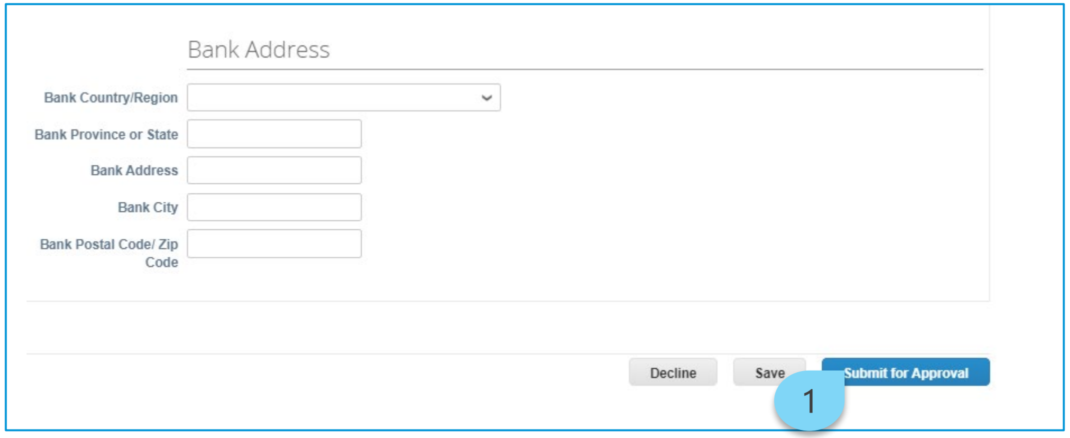


Go back home

Submitting the supplier registration form

Submit the registration form

1. Once all the supplier information and remit-to information is completed, at the end of the form, click **Submit for Approval** to send the form to Alberta Blue Cross for review and approval.



Notification of approval

After Alberta Blue Cross has verified the data provided in the form and all elements have been validated, an email notification will be received.

The same notification will be received once an update form has been approved.

ALBERTA BLUE CROSS

Profile Info submitted to Alberta Blue Cross was Approved

Hi Supplier,

The company profile information that you submitted to your customer, Alberta Blue Cross was recently approved.

This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).

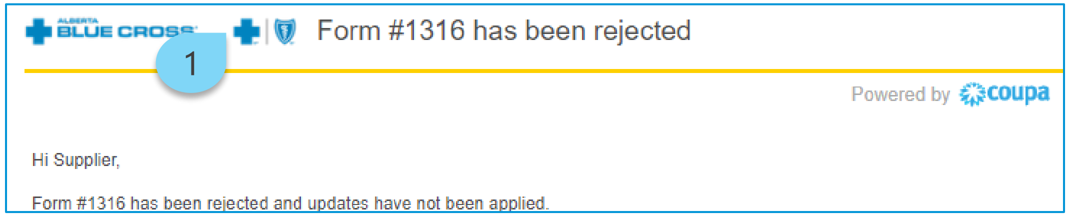
No further action is required but you can click below to view additional details.

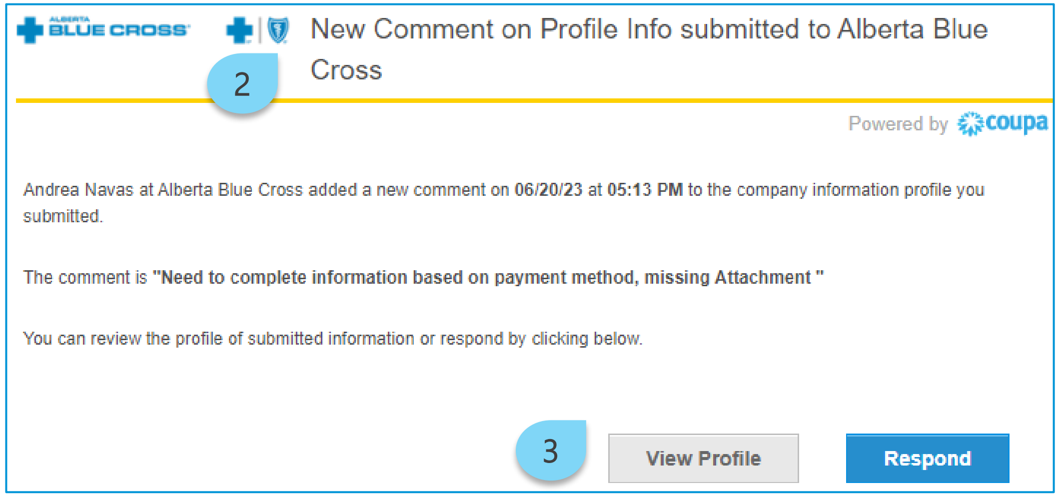
View Profile Info

Notification of refusal

1. If the form is rejected after Alberta Blue Cross has verified the data provided in the form, the supplier will receive an email notification.
2. You will receive a second notification with the comments from Alberta Blue Cross.
3. Click **Respond** or **View Profile** to review the form and resubmit.

The same notification will be received once an update form has been rejected.

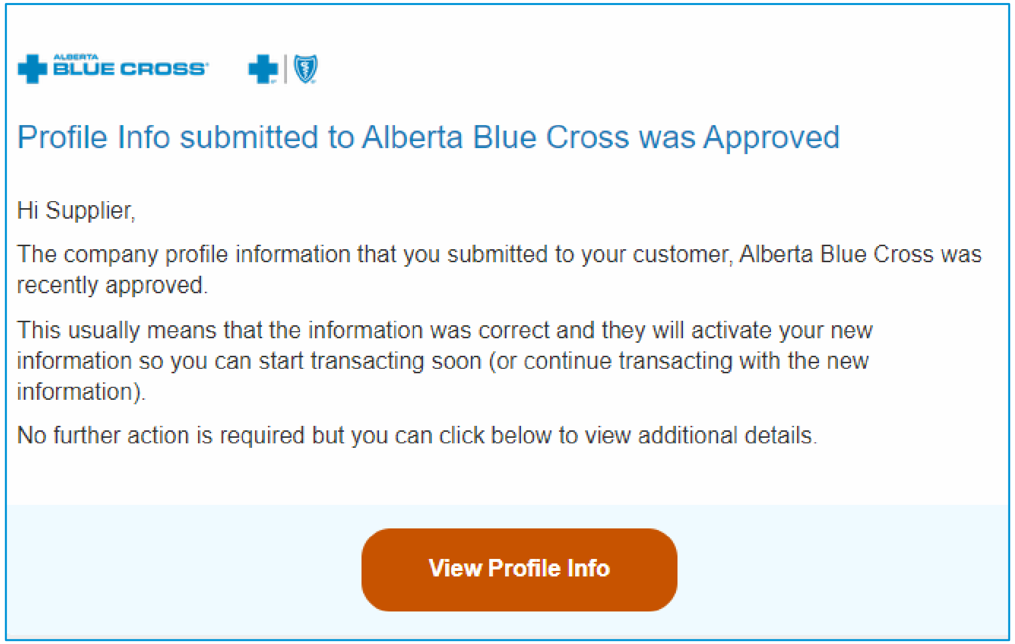




Review refusal in the CSP profile

You will receive an email notification if the form is rejected after Alberta Blue Cross has verified the data provided in the form.

The same notification will be received once an update form has been approved.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View Profile Info

Go back home

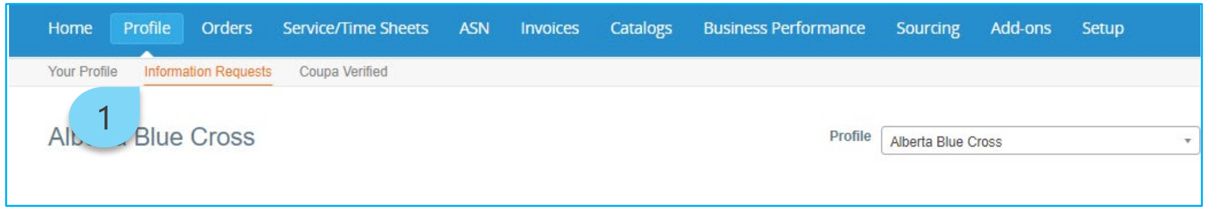
Updating your information

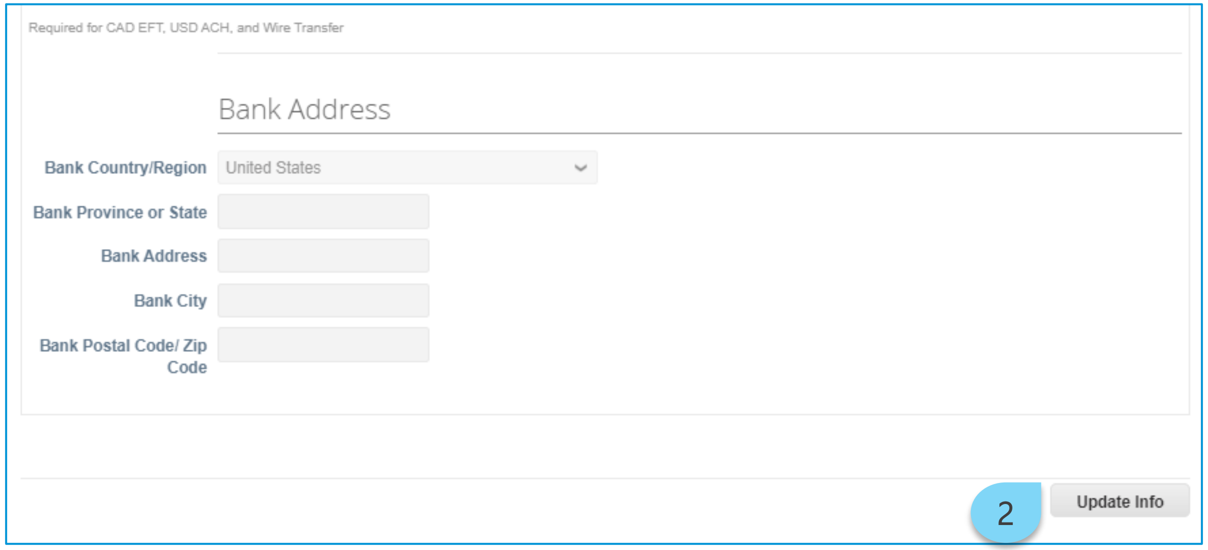
Updating your information

You can communicate changes to Alberta Blue Cross, by updating information in the CSP.

1. Click **Profile** and then on **Information Requests**.
2. Scroll to the bottom of the page and click the **Update Info** button.

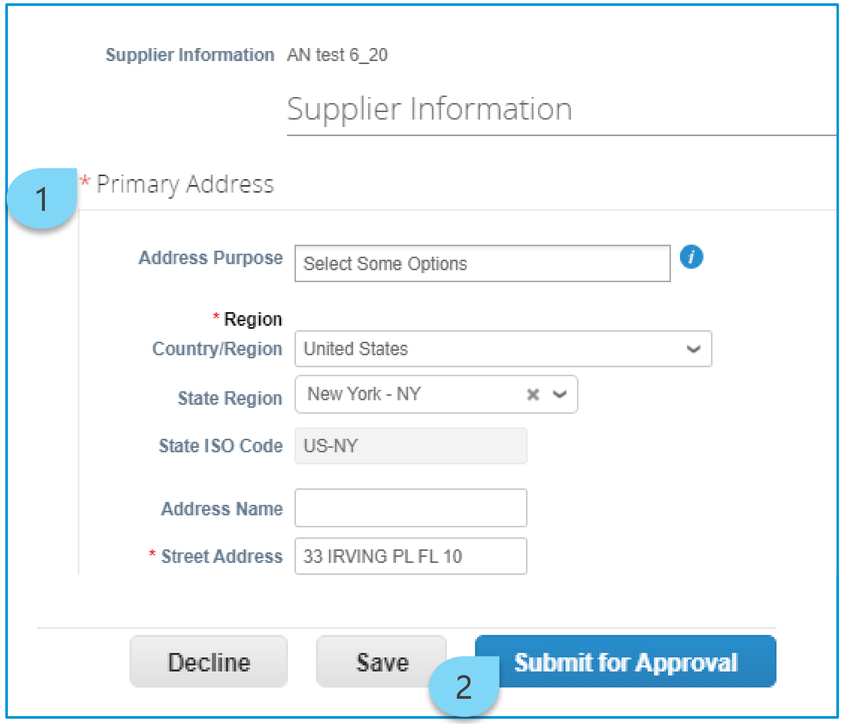
Updates are only allowed for suppliers with access to the CSP.





Updating your information

1. The form fields are now editable. Make the necessary updates.
2. Click the **Submit for Approval** button to send the update to Alberta Blue Cross.



Updating your information

Notification for update to supplier form

You will receive a notification once the update information has been sent out to Alberta Blue Cross for review.

> ALBERTA BLUE CROSS
>
> **Profile Info Recently Updated for Alberta Blue Cross on Coupa**
>
> Hi Anna,
>
> Your company's profile information was recently updated and sent to Alberta Blue Cross on Coupa. This information is important and can contain pay-to information, tax registration, compliance ceritification information, and more.
>
> Please help us ensure security by notifying your customer if this change is inaccurate or unexpected. If the change is expected you can ignore this message.
>
> Thanks!

Go back home

CSP administration

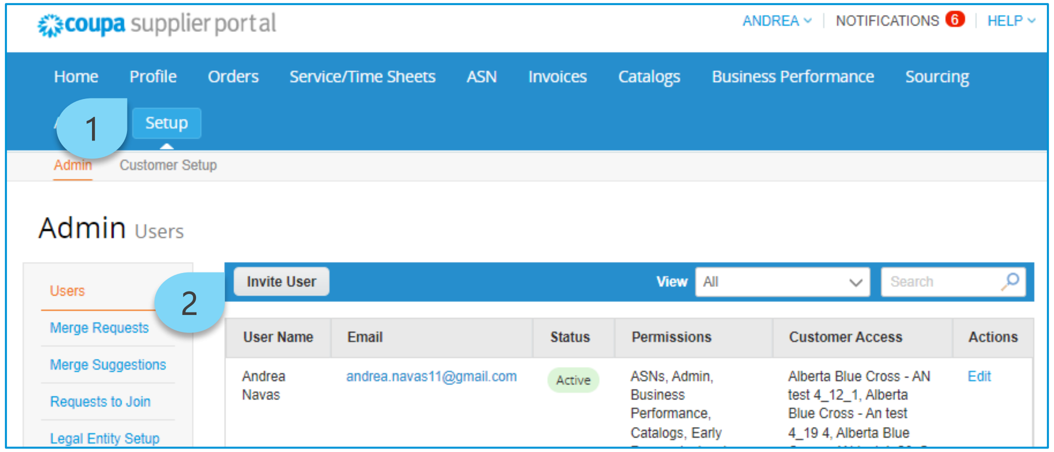
Go back home

Managing users

Inviting users to the CSP

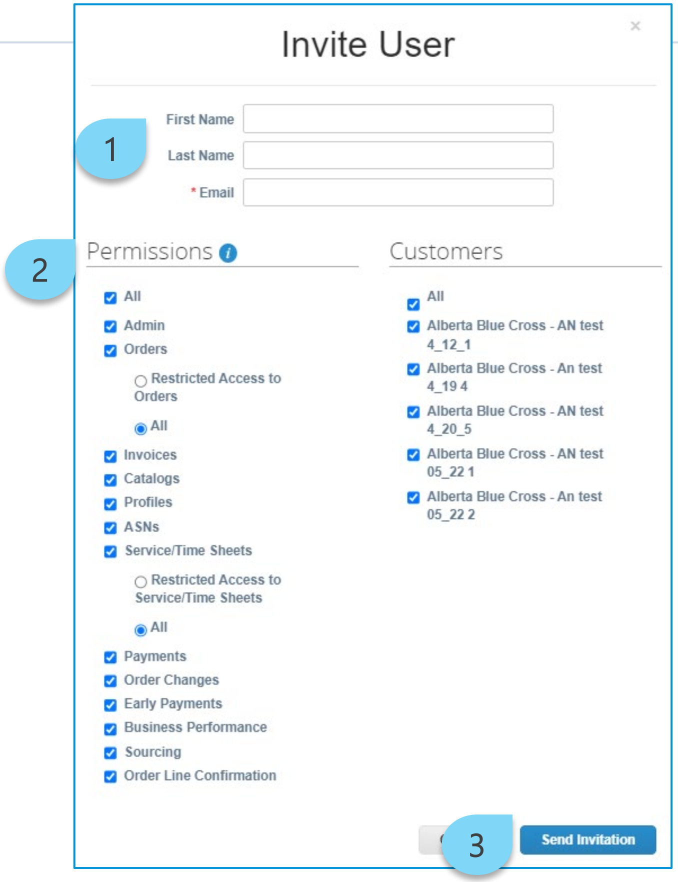
As CSP admin, you can invite users within your organization to be part of the CSP. This will help if you need other users in your organization to manage the company's CSP profile.

1. To access the admin page, click **Setup**.
2. Click **Invite User**.



Send invitation

1. A pop-up window is displayed. Fill out the contact information.
2. Select the permissions and customers you would like the new user to have access to.
3. Click **Send Invitation**.



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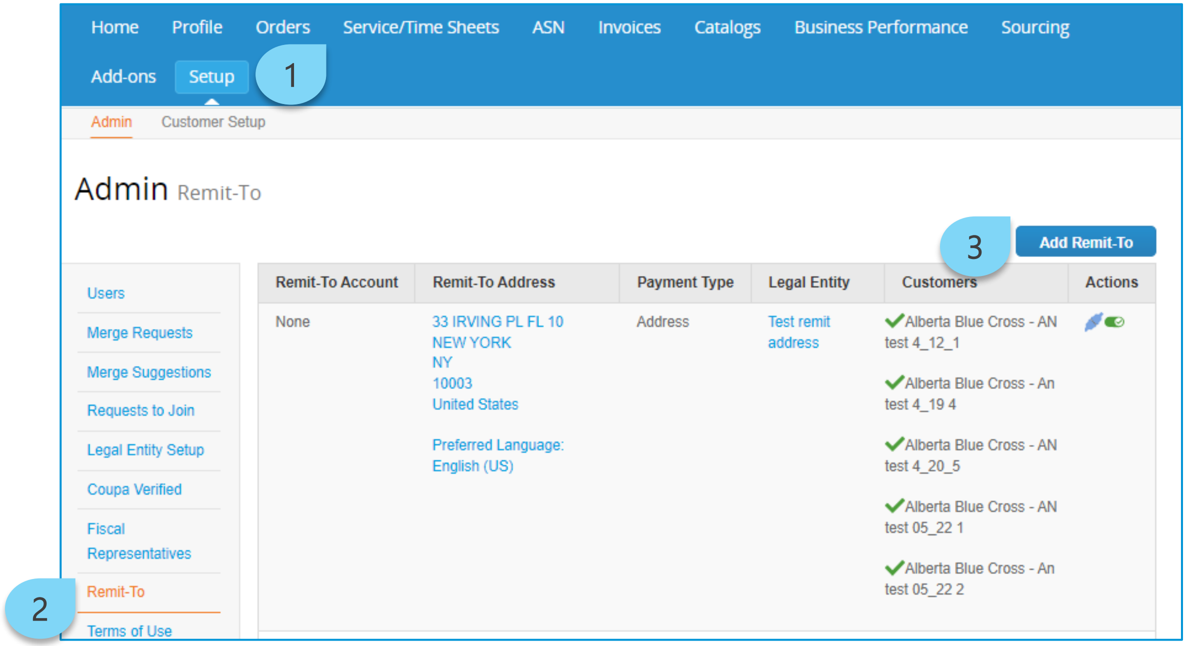
Updating a remit-to record

Adding a remit-to record

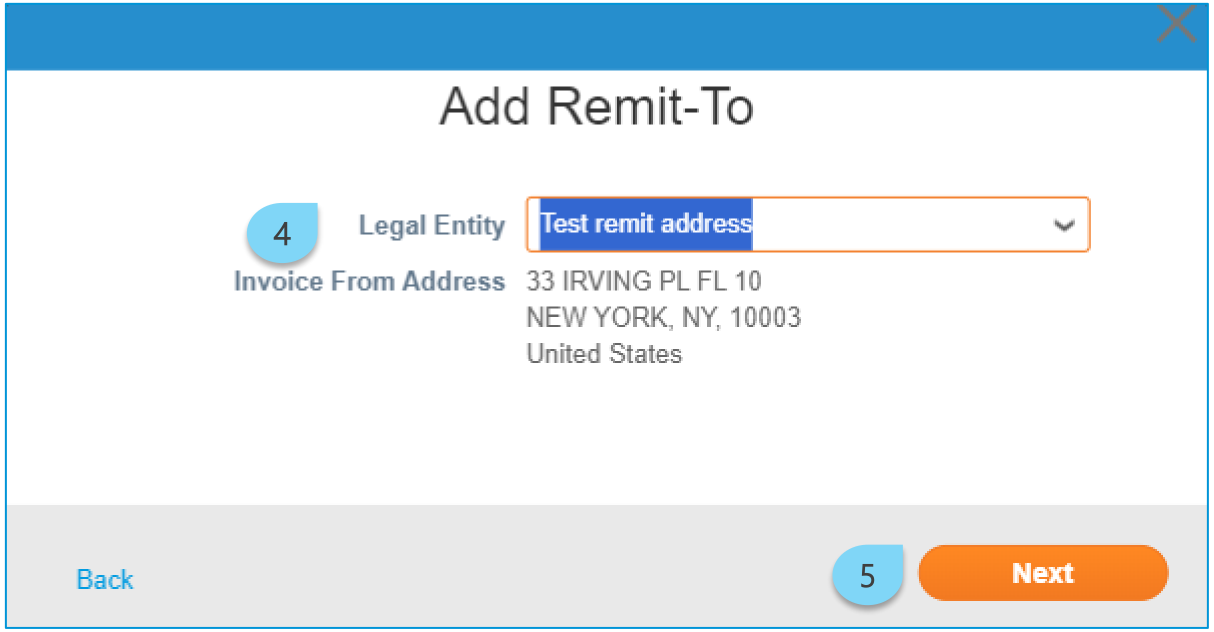
To add a remit-to record through the *Admin* tab:

1. Click **Setup**.
2. Click **Remit-To**.
3. Click **Add Remit-To**.



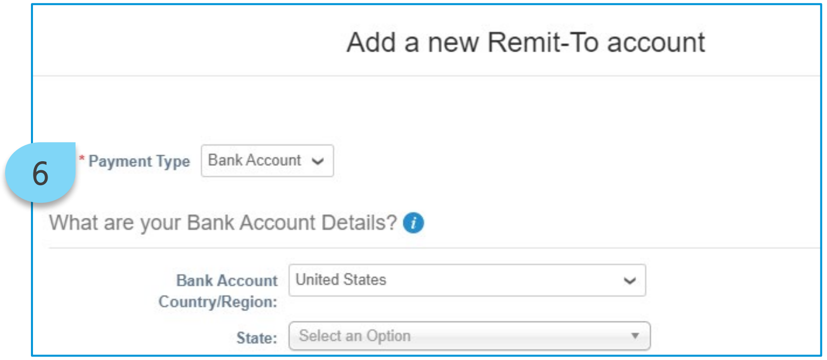
Adding a remit-to record

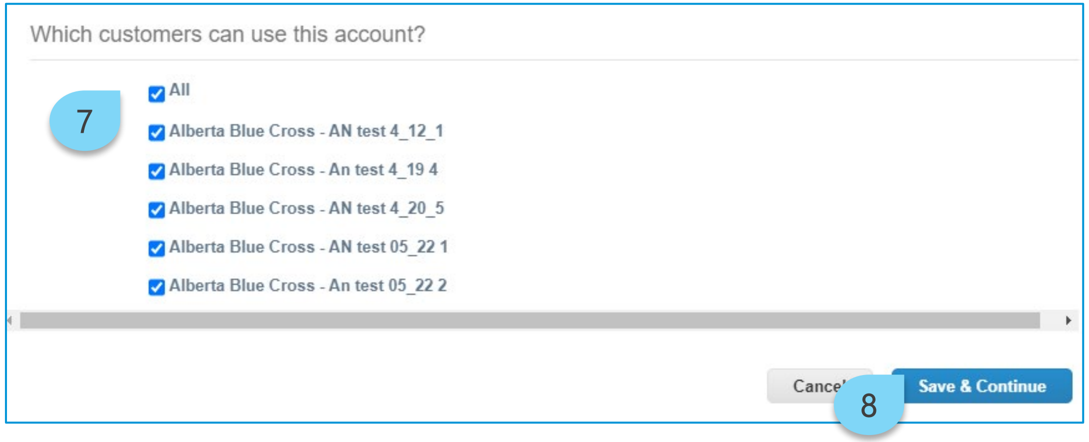
4. A pop-up window is displayed.
   Select **Legal Entity** to apply the remit-to record. This record is previously created.
5. Click **Next**.



Adding a remit-to record

6. Fill in the fields.
7. Select the customer that the account can be used by.
8. Click **Save & Continue**.





Adding a remit-to record

9. The new remit-to address is added to the list of remit-to records.

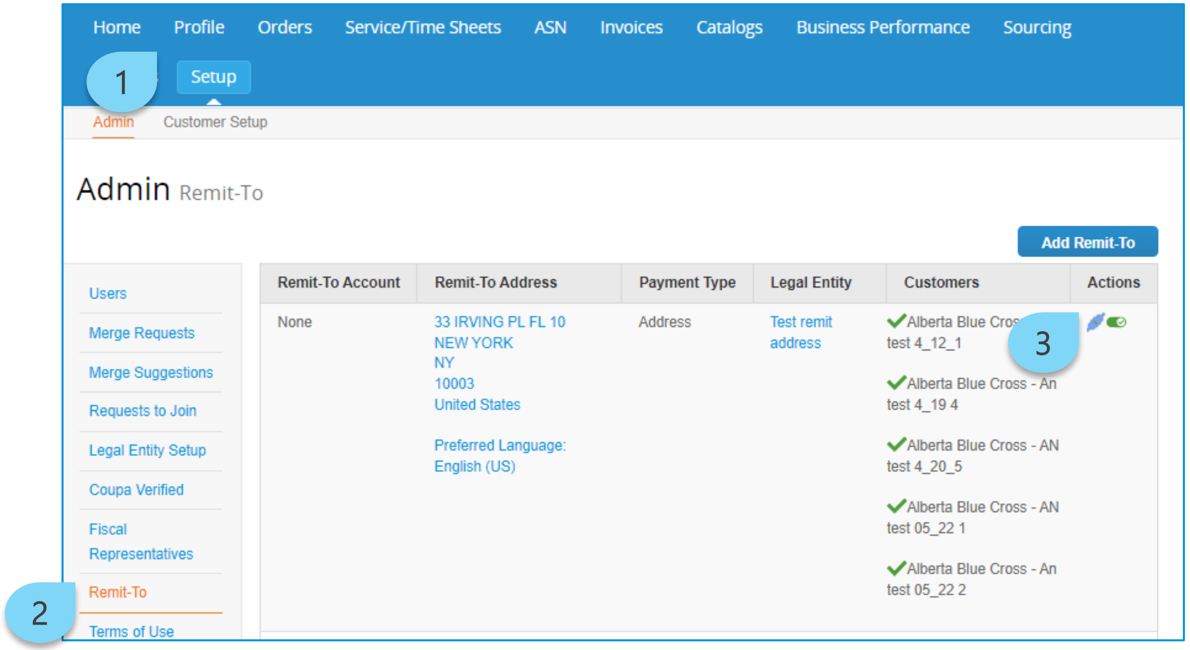
Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	33 IRVING PL FL 10 NEW YORK NY 10003 United States Preferred Language: English (US)	Address	Test remit address	✓Alberta Blue Cross - AN test 4_12_1 ✓Alberta Blue Cross - An test 4_19 4 ✓Alberta Blue Cross - AN test 4_20_5 ✓Alberta Blue Cross - AN test 05_22 1 ✓Alberta Blue Cross - An test 05_22 2	

To include a new remit-to record to the Alberta Blue Cross profile, ensure to follow the update profile steps.

Adding customers to a remit-to record

It is possible to add customers to an already created remit-to record through the *Admin* tab.

1. Click **Setup**.
2. Click **Remit-To**.
3. Click on the **Leave** icon under **Actions**.



Adding customers to a remit-to record

4. A pop-up window is displayed. Under **Add Additional Customers,** click the drop-down menu and select the customer.
5. Click **Add Selected**.
6. Click **Next**.

Adding customers to a remit-to record

7. The new added customer is displayed in the remit-to record.

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	33 IRVING PL FL 10 NEW YORK NY 10003 United States Preferred Language: English (US)	Address	Test remit address	✔Alberta Blue Cross - AN test 4_12_1 ✔Alberta Blue Cross - An test 4_19 4 ✔Alberta Blue Cross - AN test 4_20_5 ✔Alberta Blue Cross - AN test 05_22 1 7 ✔Alberta Blue Cross - An test 05_22 2	

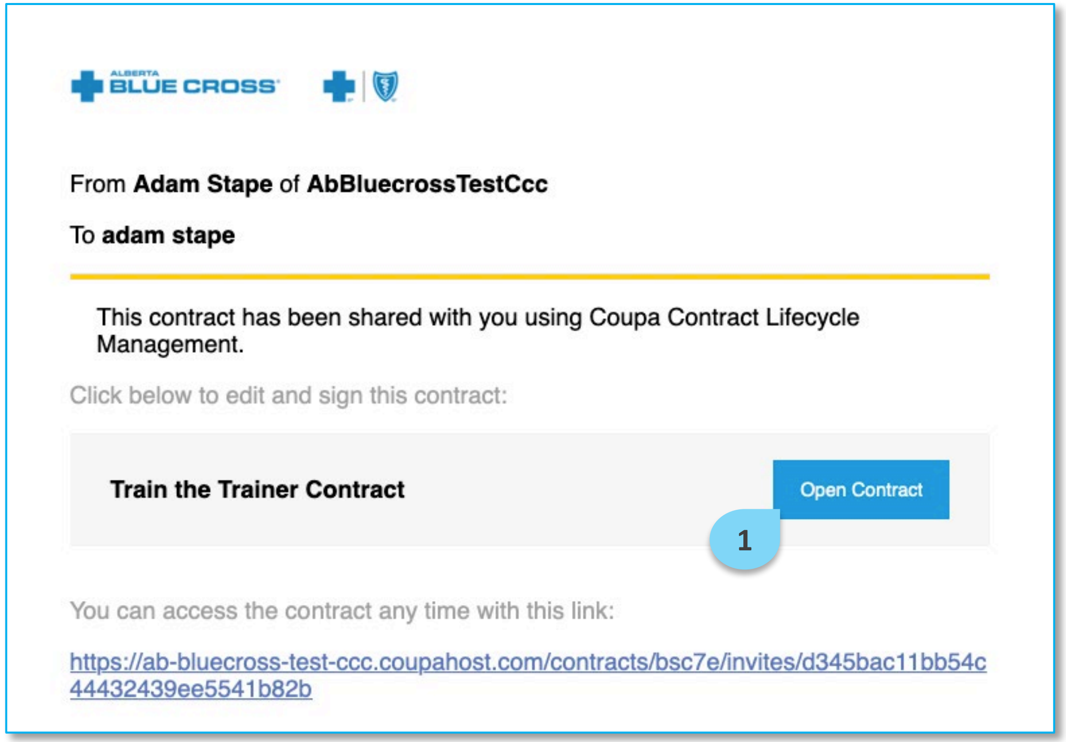
Go back home

Negotiating contracts through the CSP

Notification to negotiate

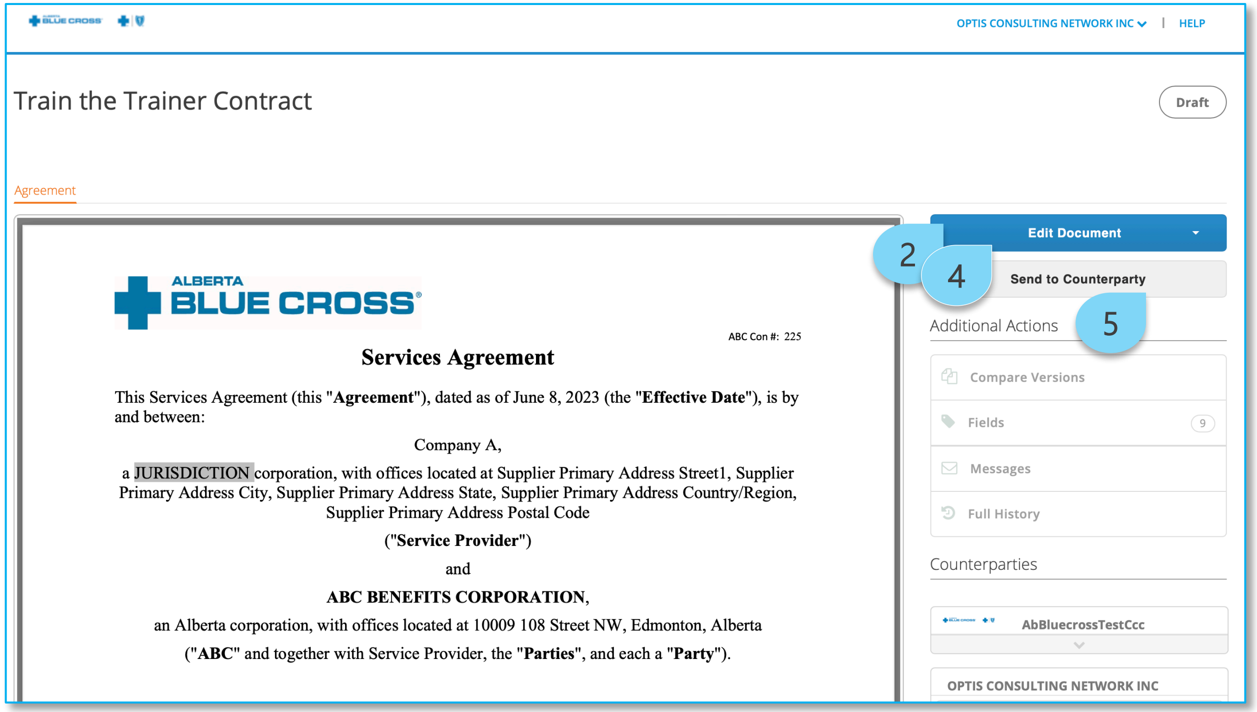
You will receive an email from Coupa when it is time to negotiate terms and conditions of a contract.

1. Access the email from do_not_reply@ab-bluecross-ccc.coupahost.com and click **Open Contract**.



Download or upload the contract

2. Click **Edit Document** and select **Download for Edit**.
3. Review the document and provide any redlines or comments in Microsoft Word.
4. Upload the reviewed document by clicking **Upload**.
5. When you are ready to send the contract back to Alberta Blue Cross, click **Send to Counterparty**.



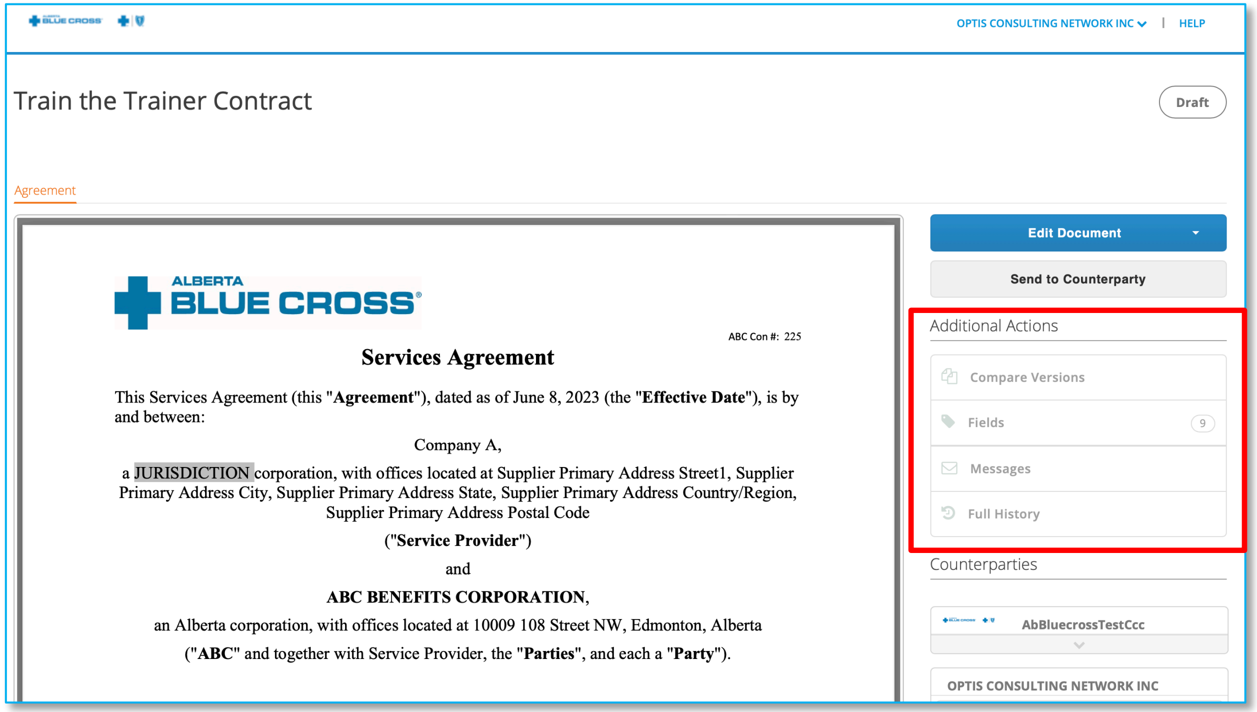
Coupa will provide a quick 4-step tour guide to support contract negotiation for first time collaborators.

Negotiating contracts through the CSP

Additional actions

The *Additional Actions* section houses the following options:

- Compare Versions—see who checked in a particular version and at what time. Deleted text is shown in red, and additions are shown in green.
- Fields—list all fields built into the contract that can be changed (e.g., Effective Date, Supplier Name, etc.). Fields can be populated here to quickly update the contract.
- Messages—use the message board to communicate and track messages internally and externally.
- Full History—a log of all actions taken on the agreement including the name of the user who took the action and the date and time it was taken. Actions that are logged include changes to and comments on the agreement, invitation of reviewers and their acceptance to review.



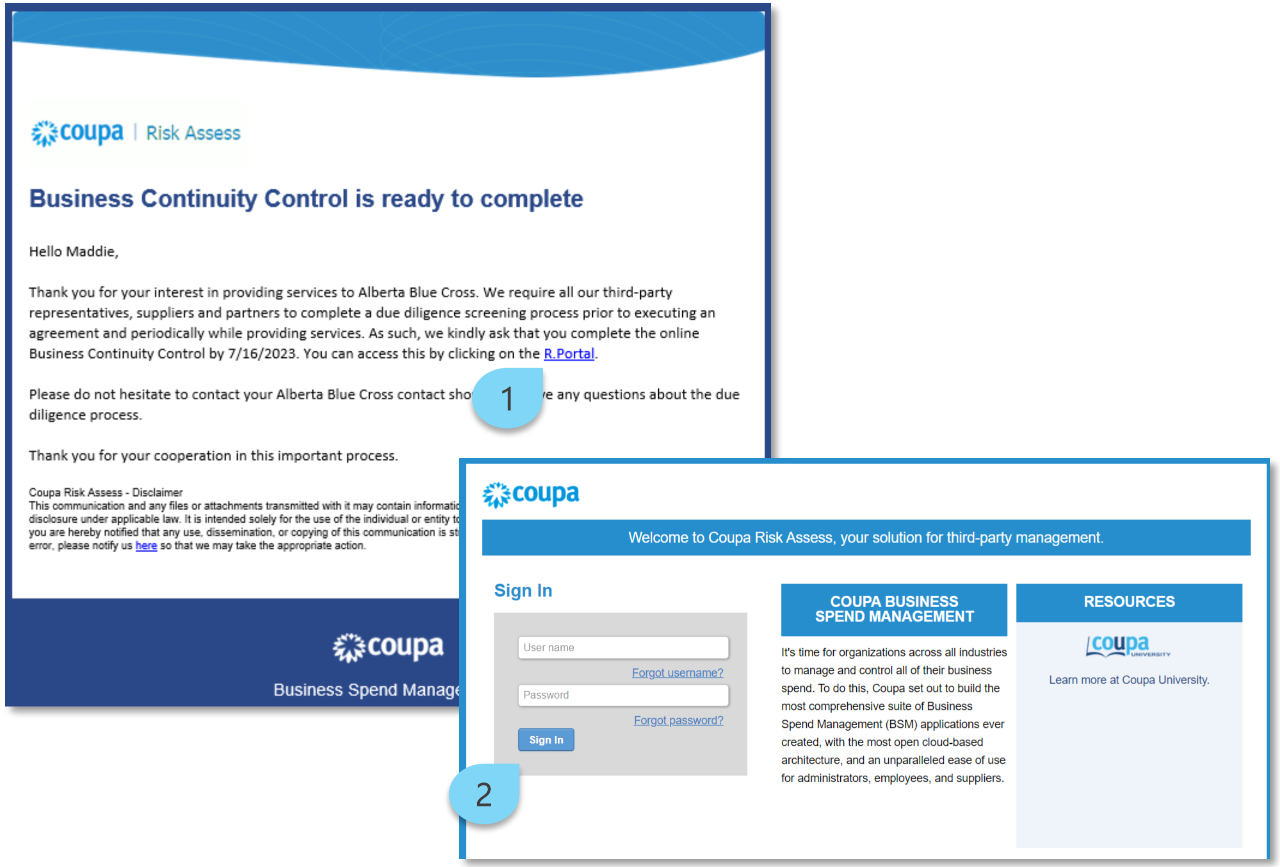
Go back home

Completing risk questionnaires

Access the risk questionnaire

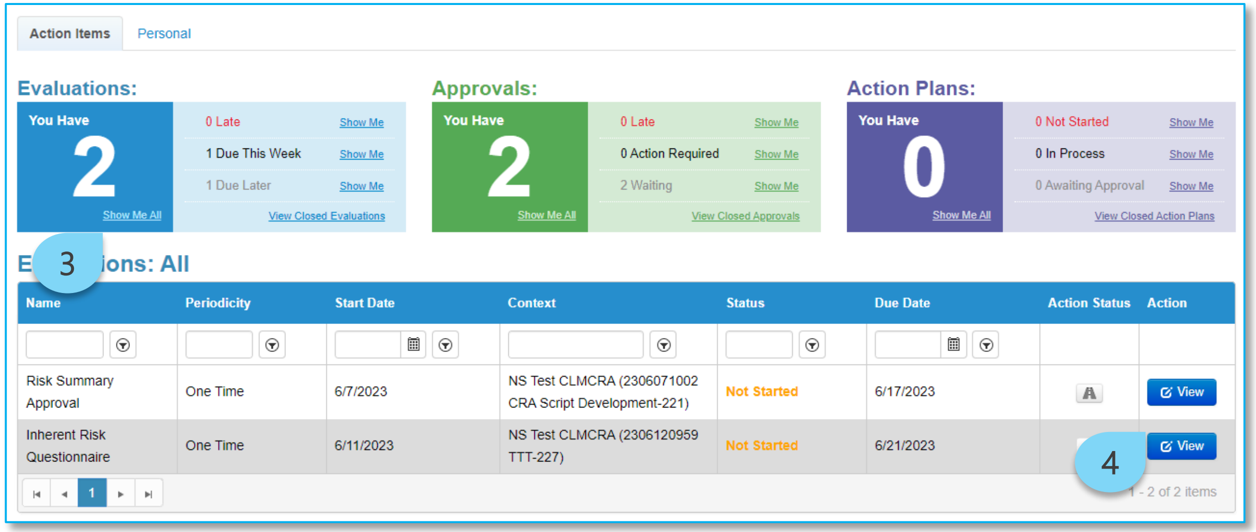
Depending on the nature of the goods and/or services, you may be required to complete 1 or more risk assessments prior to receiving a signed contract or approved purchase order.

1. Access the email from noreply@ab-bluecross.risk-mail.coupahost.com and click the **R.Portal** link.
2. Enter your CSP credentials and click **Sign In**.



Access the risk questionnaire

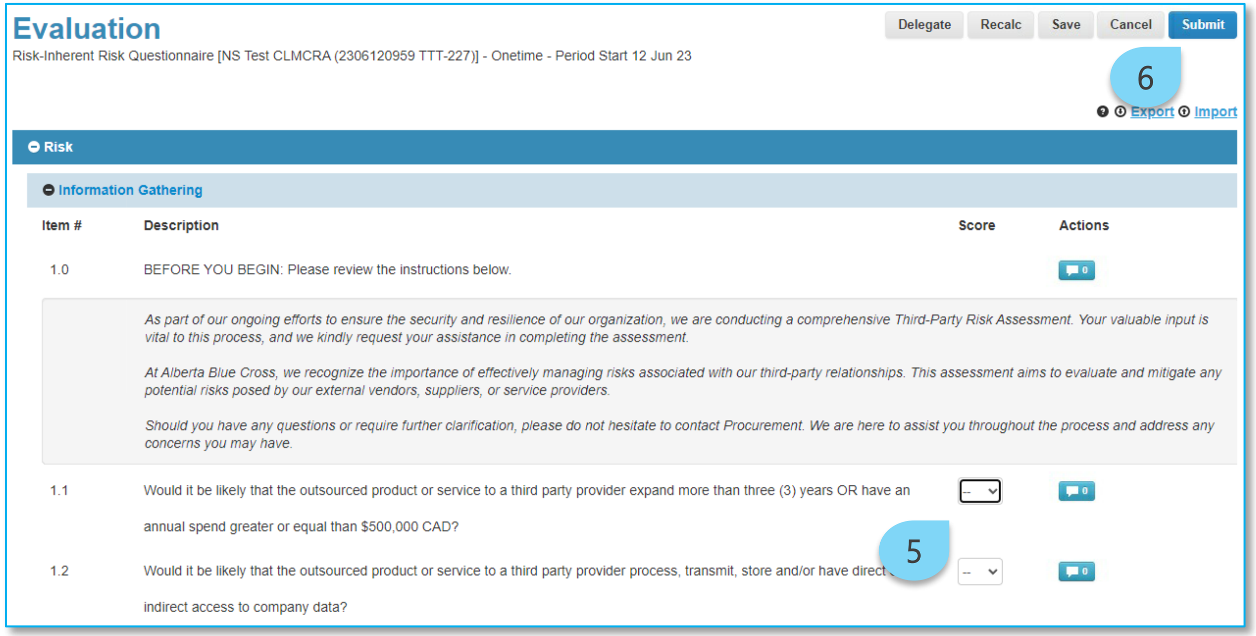
3. Access risk assess and open the evaluations by clicking **Show Me All**.
4. Search for the applicable questionnaire and click **View**.



Respond to a risk questionnaire

5. Respond to the questions.
6. Click **Submit**.

Alberta Blue Cross will review your submission and contact you if any next steps are required.



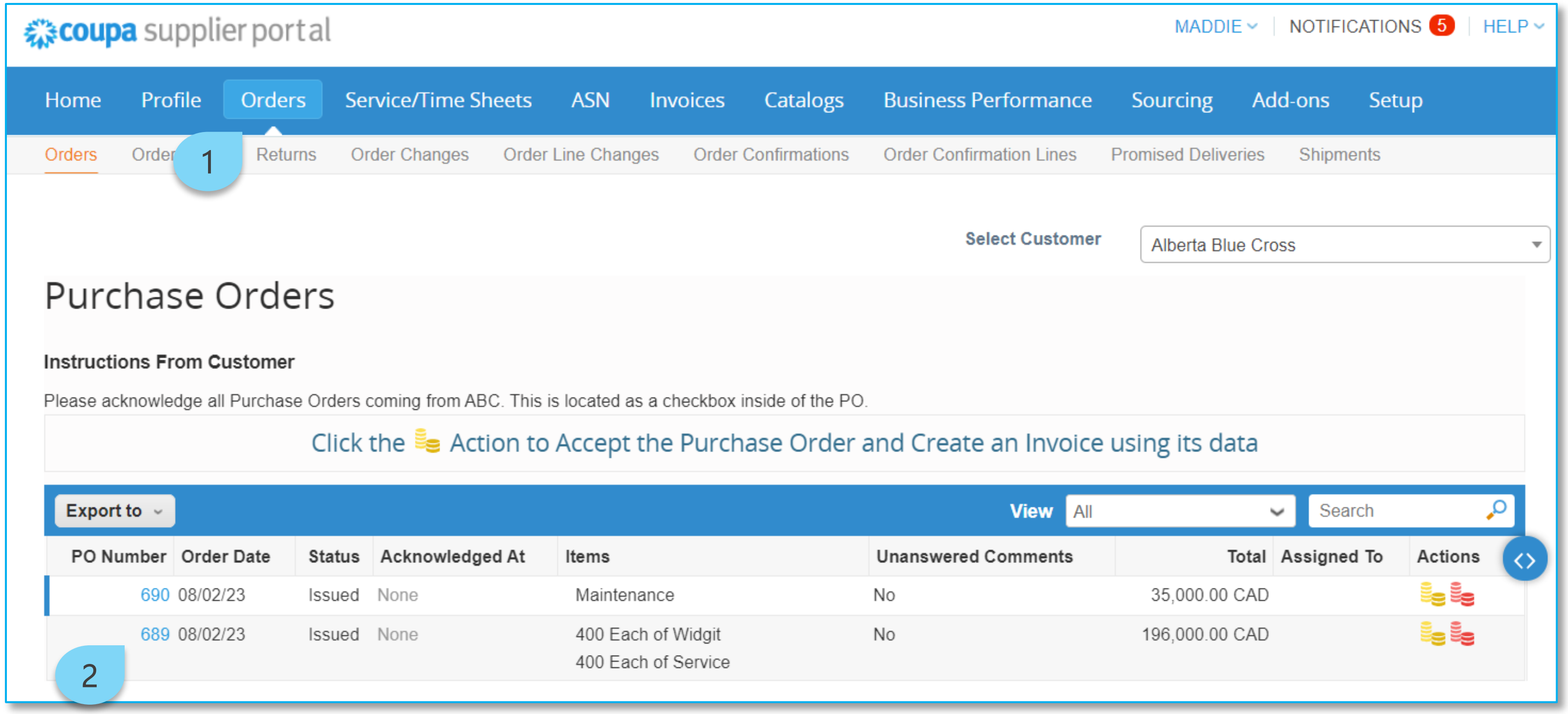
Go back home

Managing purchase orders (POs) and invoices

View and manage POs

To view your POs from Alberta Blue Cross

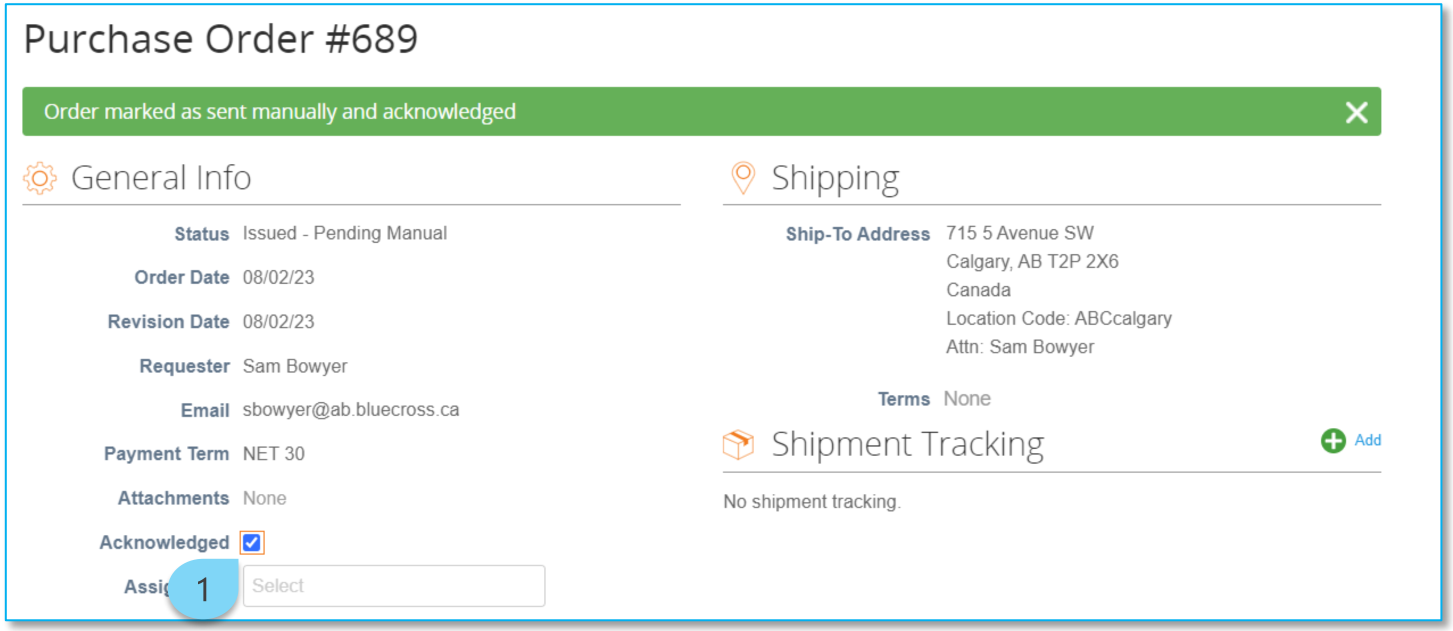
1. Click the **Orders** tab.
2. Orders will be visible in the table. Click the **PO Number** to see more details.



Acknowledge POs

Alberta Blue Cross requires you to acknowledge receipt of the purchase order.

1. Within the purchase order, click the **Acknowledged** checkbox.

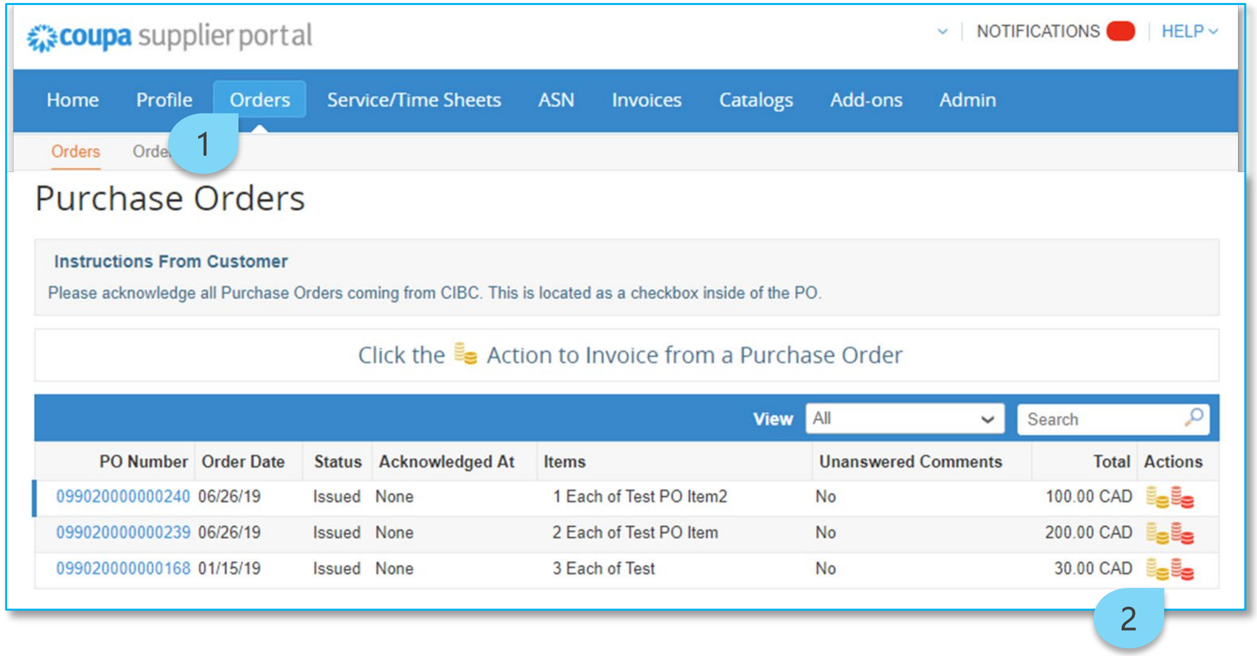


The purchase order table in the *Orders* tab identifies which purchase orders have been acknowledged in the *Acknowledged At* column.

Create an invoice/credit note from a PO

1. Click the **Orders** tab.
2. Click on the **Create Invoice** icon ( ) or **Credit Note** icon ( ) for the PO in the *Purchase Orders* table to flip the PO into an invoice.
   - Alternatively, to create an invoice, click the **PO Number** link to open the purchase order and click **Create Invoice**.

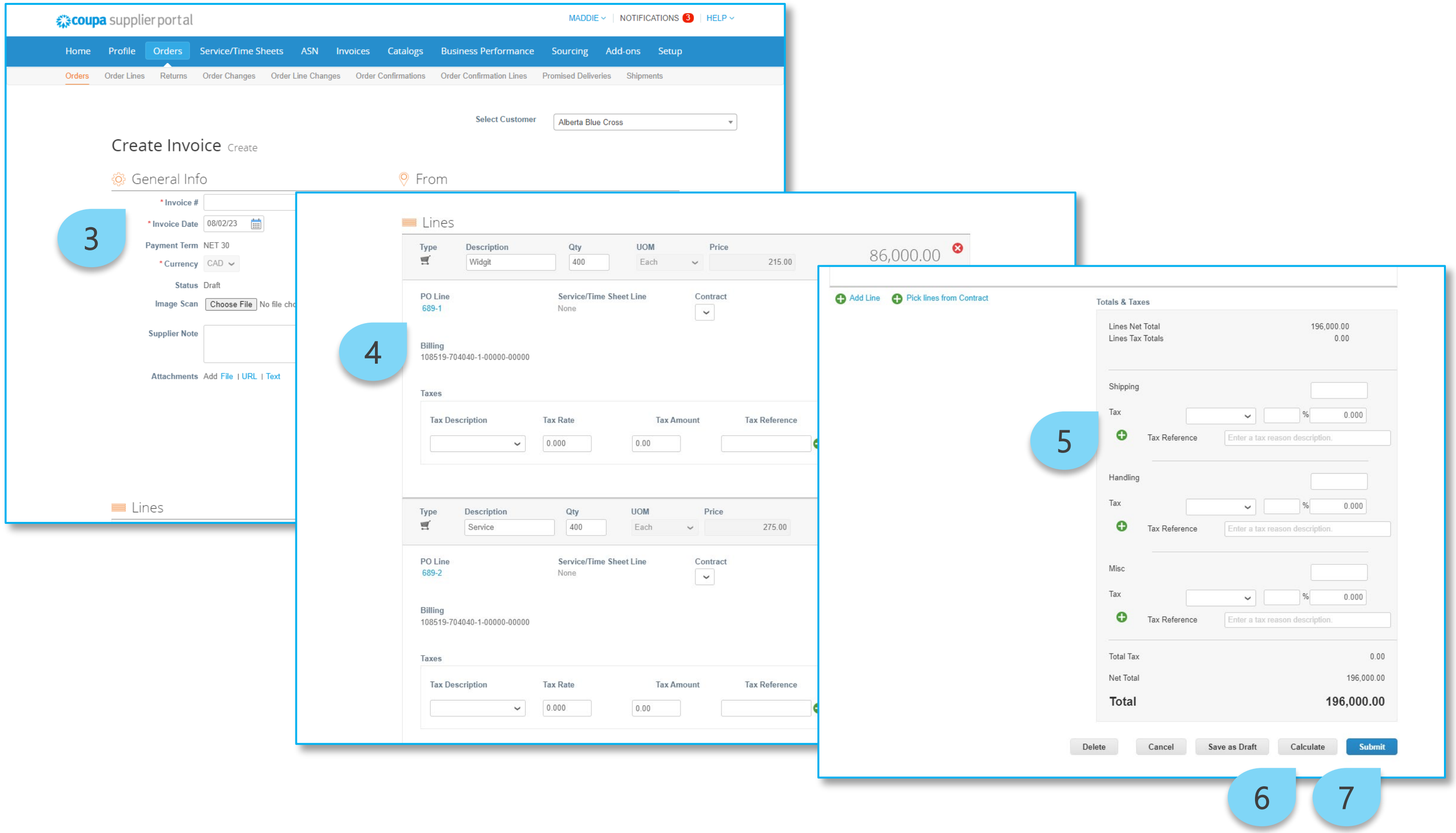
By 'flipping' the PO to an invoice or credit note directly, the CSP will pre-populate most of the fields, making it easy and accurate.



Create an invoice/credit note from a PO

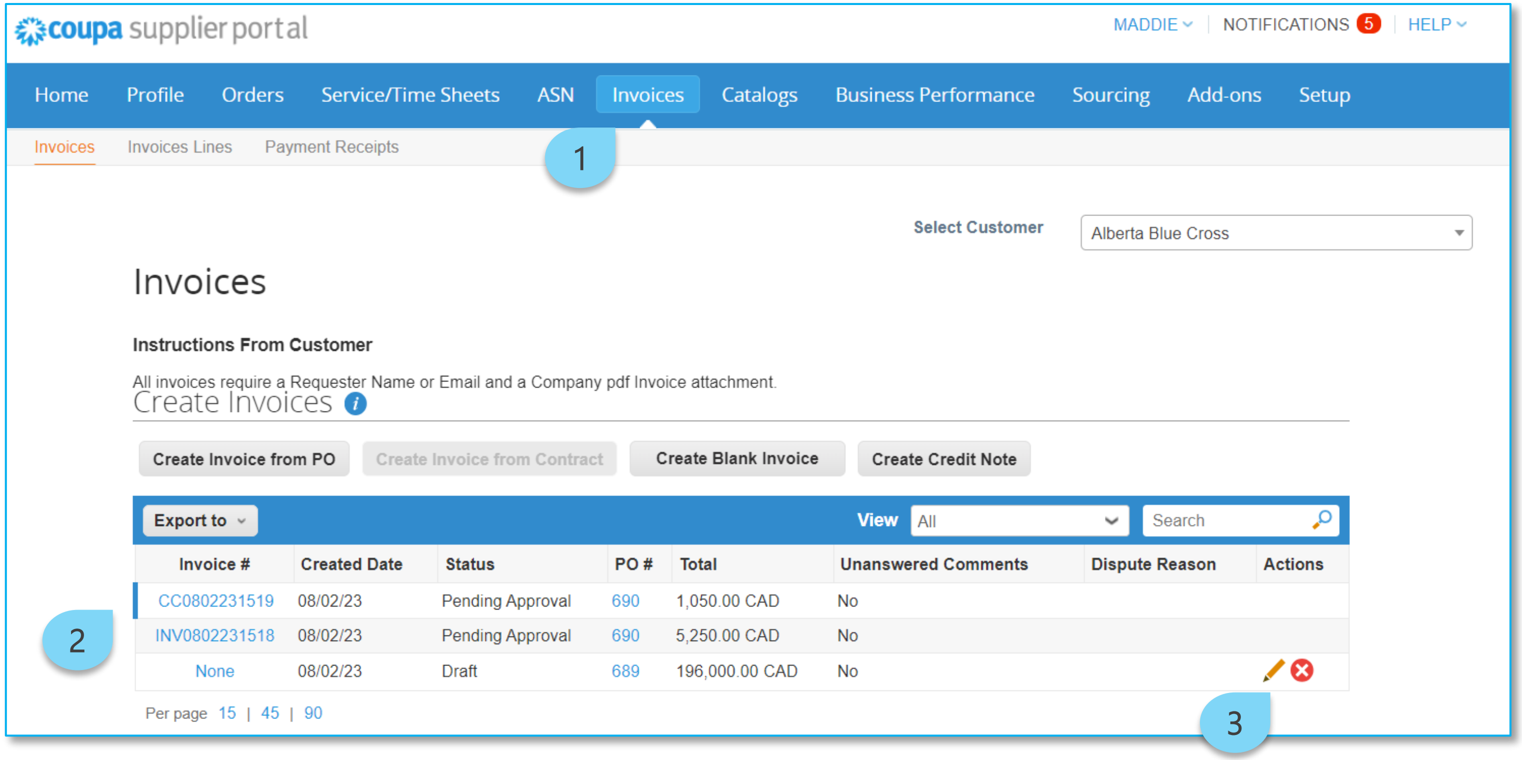
3. Populate the *General Info* section.
4. Update the Quantity *(Qty)* or *Price*.
5. Update the *Taxes* field.
6. Click **Calculate** to update the invoice or credit note total.
7. Click **Submit**.

You will be directed to the *Invoices* screen with a message stating your invoice or credit note is in pending approval status.



Viewing and editing an invoice

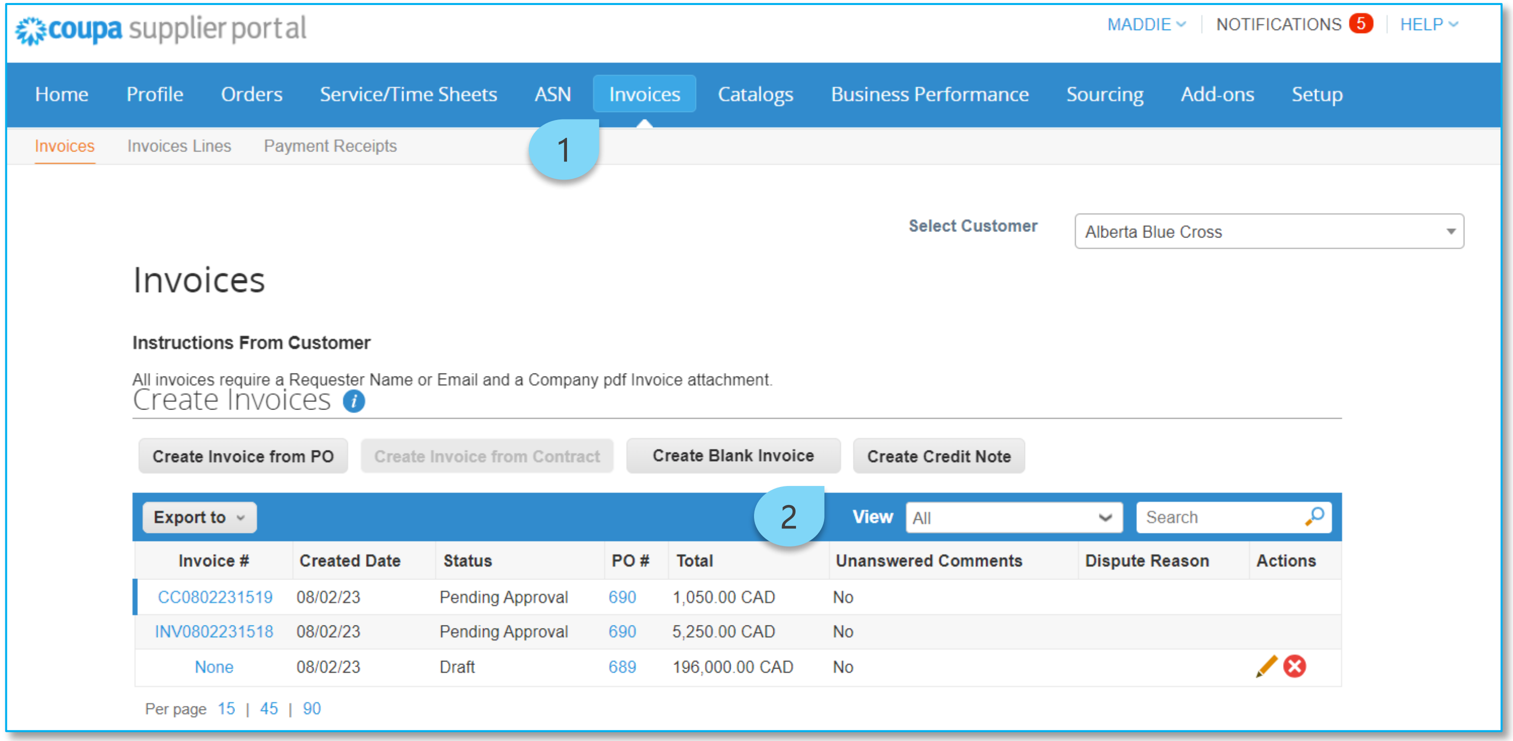
1. Click the **Invoices** tab.
2. Invoices and their status will be visible in the table. Click the **Invoice #** to see more details.
3. Click to edit or to delete a draft invoice.



Create a non-backed invoice/credit note

If Alberta Blue Cross allows you, you can create a non-backed (no PO or contract) invoice by doing the following:

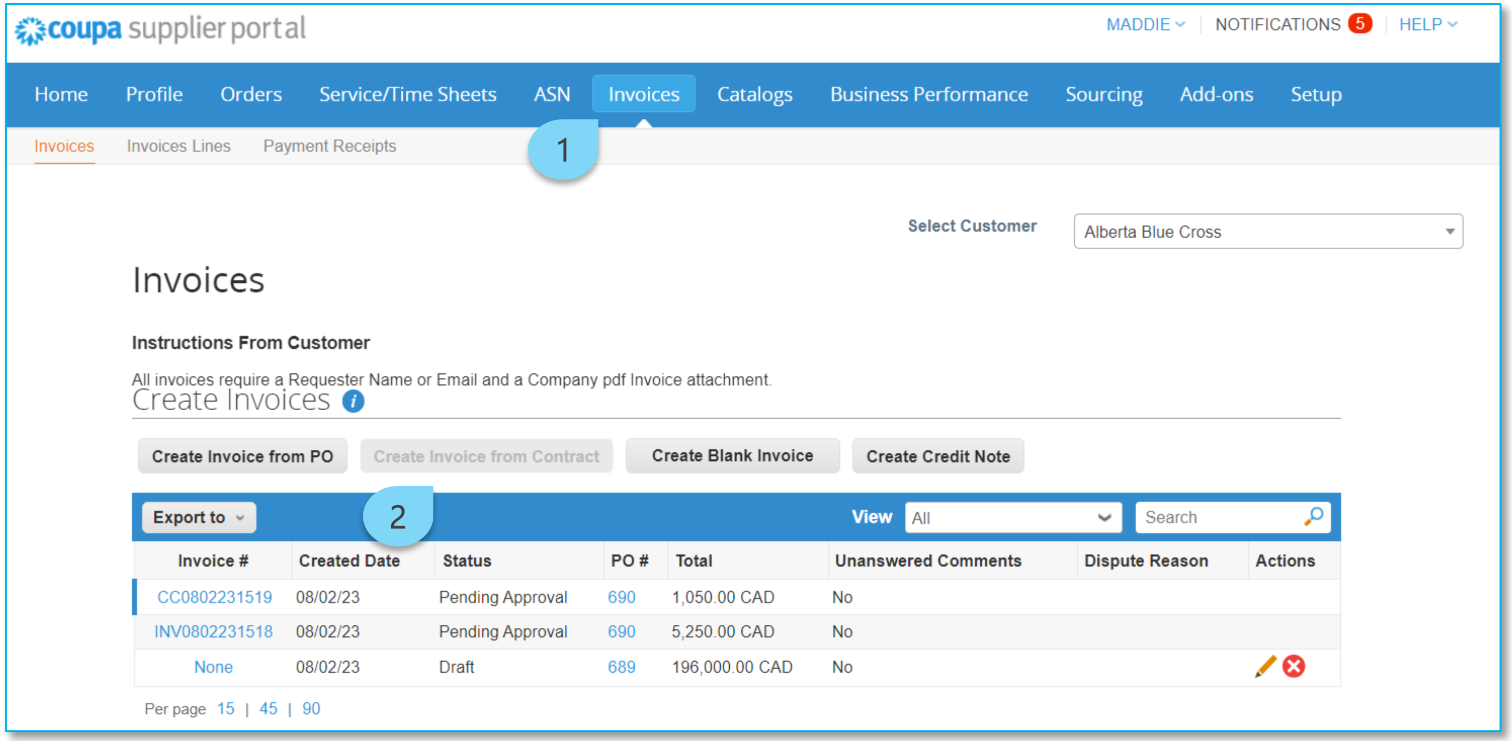
1. Click the **Invoices** tab.
2. Click **Create Blank Invoice** or **Create Credit Note**.



Creating a contract invoice

Some contracts with Alberta Blue Cross may allow you to invoice the contract directly without a PO (e.g., statements of work or mobility plans). You can invoice a contract directly by doing the following:

1. Click the **Invoices** tab.
2. Click **Create Invoice from Contract**.



PO and invoice statuses

PO statuses

Status	Description
Buyer hold	The PO is approved but requires Alberta Blue Cross to review it.
Cancelled	The PO is cancelled and does not need to be fulfilled.
Closed	The issued PO was received and then closed either manually or automatically within Coupa.
Currency hold	The PO is on hold due to a currency exchange rate issue.
Error	Something is wrong with the PO. Contact Alberta Blue Cross to get the PO back on track.
Issued	The PO was approved and sent to you.
Soft closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Supplier window hold	The PO was approved outside of the order window schedule under contract terms.

Invoice statuses

Status	Description
Abandoned	The disputed invoice has been abandoned.
Approved	The invoice has been accepted for payment by Alberta Blue Cross.
Disputed	The invoice has been disputed.
Draft	The invoice has been created, but it has not been submitted to Alberta Blue Cross yet.
Pending approval	The invoice is currently under review by Alberta Blue Cross.
Processing	The invoice is being processed by the Accounts Payable department and should be paid soon.
Voided	Something is wrong with the invoice. Contact Alberta Blue Cross to get the invoice back on track.

Conducting business without joining the CSP

Utilizing Supplier Actionable Notification

SAN stands for **S**upplier **A**ctionable **N**otification. SAN will allow you to act on items processed by Alberta Blue Cross out of Coupa directly.

SAN features the following:

- You can control everything via your email inbox by action buttons.
- The service is free but has limited functionality.
- You can register for the CSP at any point later if you wish to no longer use SAN.

With SAN you can

- Fill in onboarding forms.
- Receive POs.
- Act on received POs.

With SAN you *cannot*

- Update your company information.
- Respond to rejected forms.
- Efficiently track your POs and Invoices.

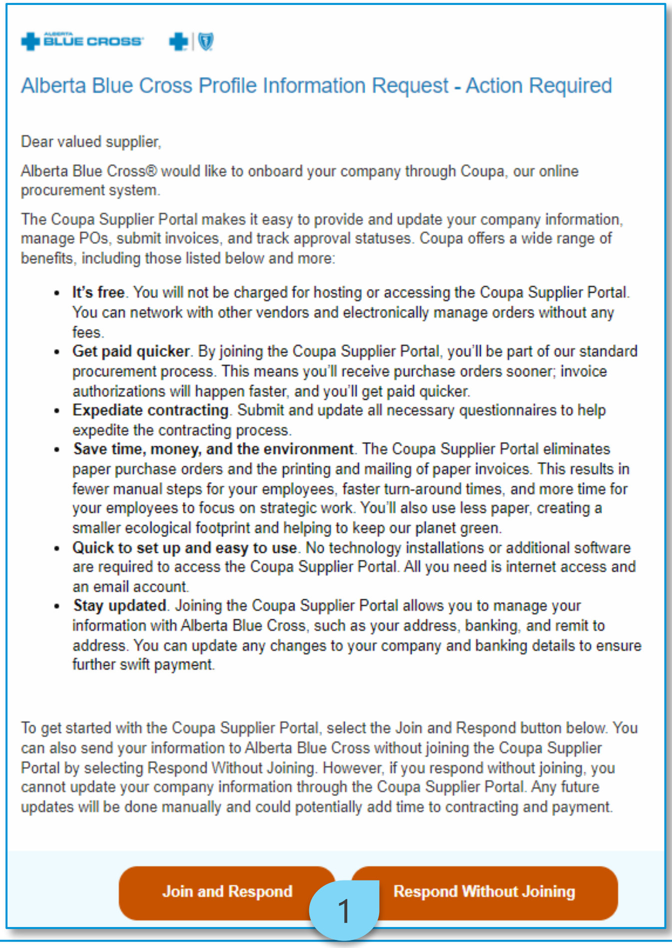
Registering as a supplier without joining the CSP

Notification of information request

If you decide not to join the CSP, it is possible to complete the form directly in your browser.

1. When you receive the email invitation, click the **Respond Without Joining** button, and you will be redirected to the form page.

Alberta Blue Cross strongly recommends creating a CSP profile in order to better track your interactions with Alberta Blue Cross. Note that without a CSP profile it is not possible to update your company information without external support from Alberta Blue Cross.



Alberta Blue Cross Profile Information Request - Action Required

Dear valued supplier,

Alberta Blue Cross® would like to onboard your company through Coupa, our online procurement system.

The Coupa Supplier Portal makes it easy to provide and update your company information, manage POs, submit invoices, and track approval statuses. Coupa offers a wide range of benefits, including those listed below and more:

- **It's free**. You will not be charged for hosting or accessing the Coupa Supplier Portal. You can network with other vendors and electronically manage orders without any fees.
- **Get paid quicker**. By joining the Coupa Supplier Portal, you'll be part of our standard procurement process. This means you'll receive purchase orders sooner; invoice authorizations will happen faster, and you'll get paid quicker.
- **Expediate contracting**. Submit and update all necessary questionnaires to help expedite the contracting process.
- **Save time, money, and the environment**. The Coupa Supplier Portal eliminates paper purchase orders and the printing and mailing of paper invoices. This results in fewer manual steps for your employees, faster turn-around times, and more time for your employees to focus on strategic work. You'll also use less paper, creating a smaller ecological footprint and helping to keep our planet green.
- **Quick to set up and easy to use**. No technology installations or additional software are required to access the Coupa Supplier Portal. All you need is internet access and an email account.
- **Stay updated**. Joining the Coupa Supplier Portal allows you to manage your information with Alberta Blue Cross, such as your address, banking, and remit to address. You can update any changes to your company and banking details to ensure further swift payment.

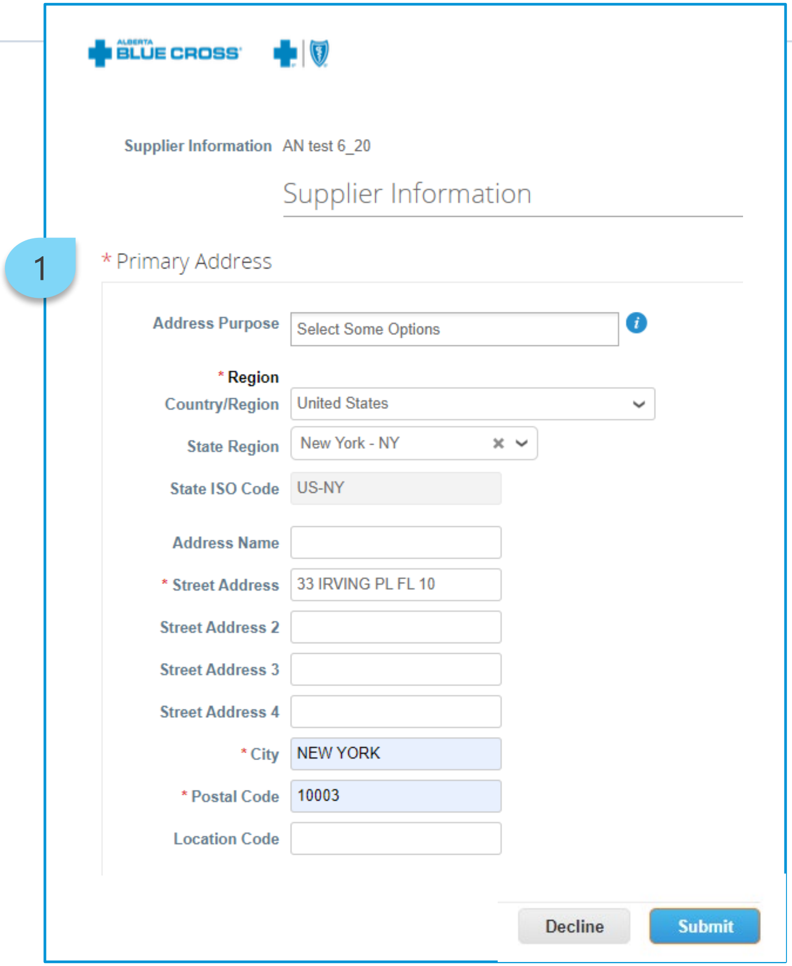
To get started with the Coupa Supplier Portal, select the Join and Respond button below. You can also send your information to Alberta Blue Cross without joining the Coupa Supplier Portal by selecting Respond Without Joining. However, if you respond without joining, you cannot update your company information through the Coupa Supplier Portal. Any future updates will be done manually and could potentially add time to contracting and payment.

Registering as a supplier without joining the CSP

Filling out the form via SAN

When you click the **Respond Without Joining** button, you will be redirected to the form page.

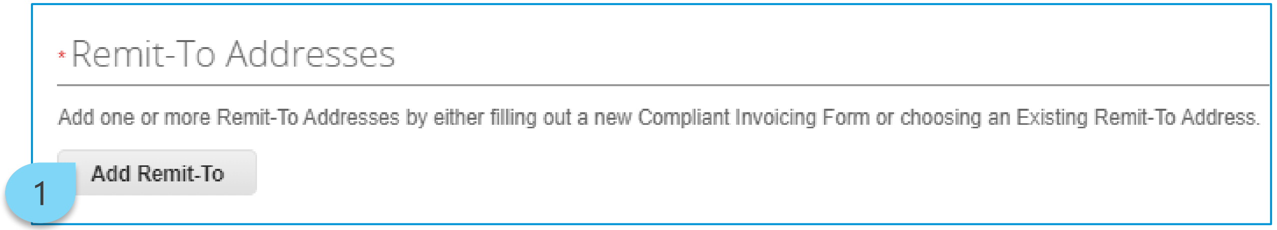
1. Complete the required fields as explained in the section [completing the registration form](#).



Remit-to from SAN

The *Remit-To Addresses* section ensures that Alberta Blue Cross has the essential banking and payment details to conduct business.

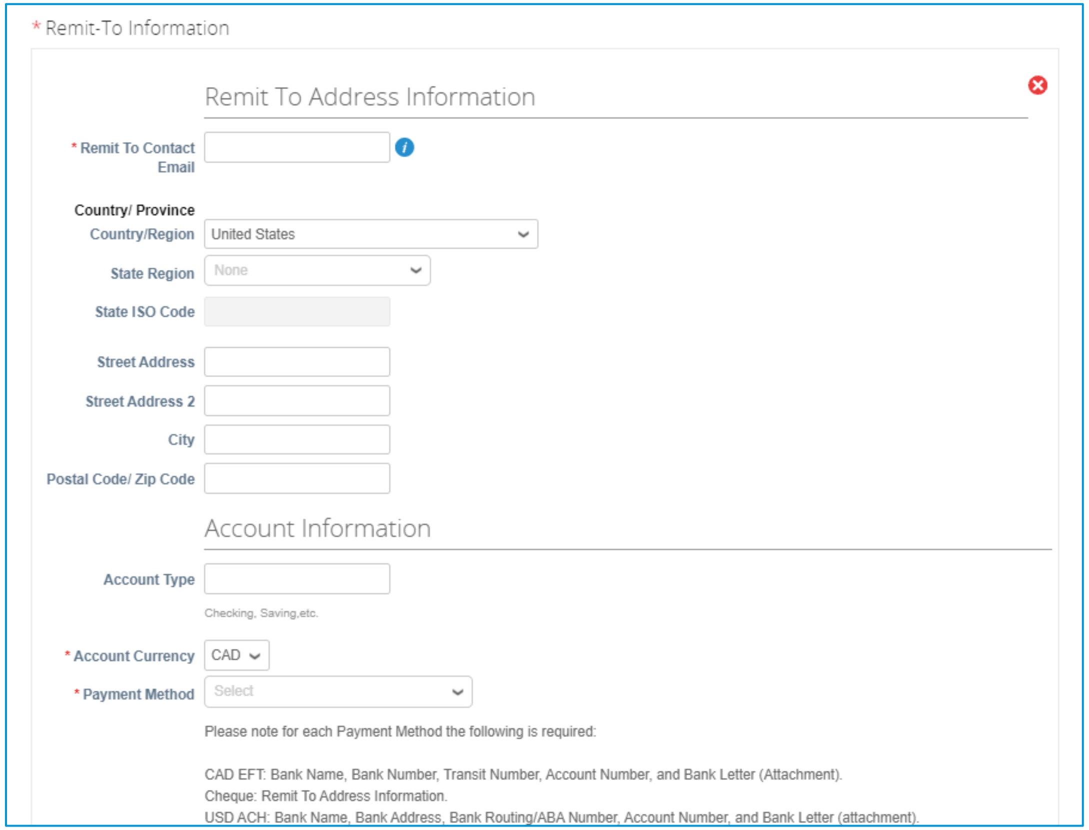
1. To add a new remit-to, click the **Add Remit-To** button.



Remit-to from SAN

A new section is displayed for the remit-to information to be added.

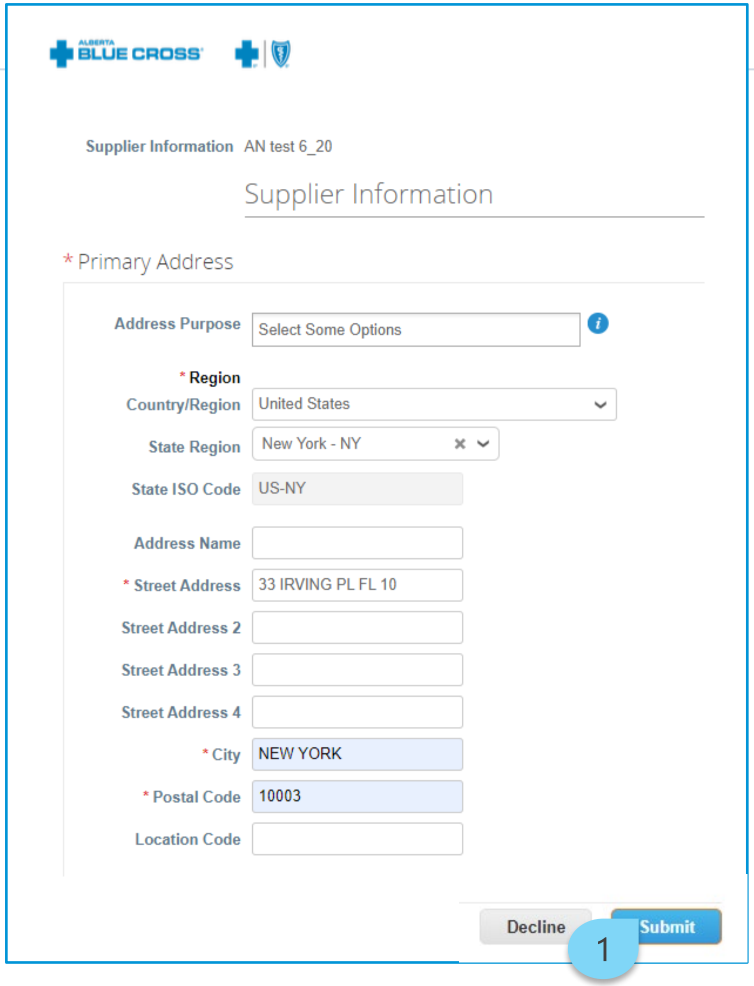
Complete the required fields as explained in the section filling out remit-to information.



Registering as a supplier without joining the CSP

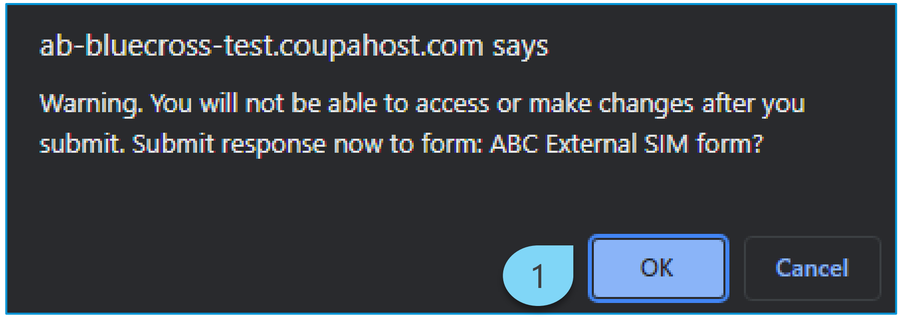
Submit the form

1. Once all information has been completed, click **Submit**.



Submit the form

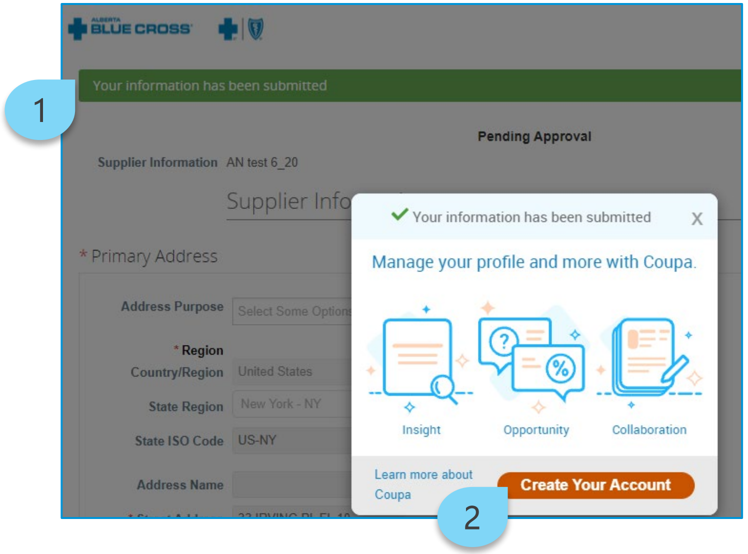
1. After clicking on **Submit**, a pop-up window will appear, informing the supplier that they will not be able to access the form or make any changes after submission. Click **OK** to submit the form.



Registering as a supplier without joining the CSP

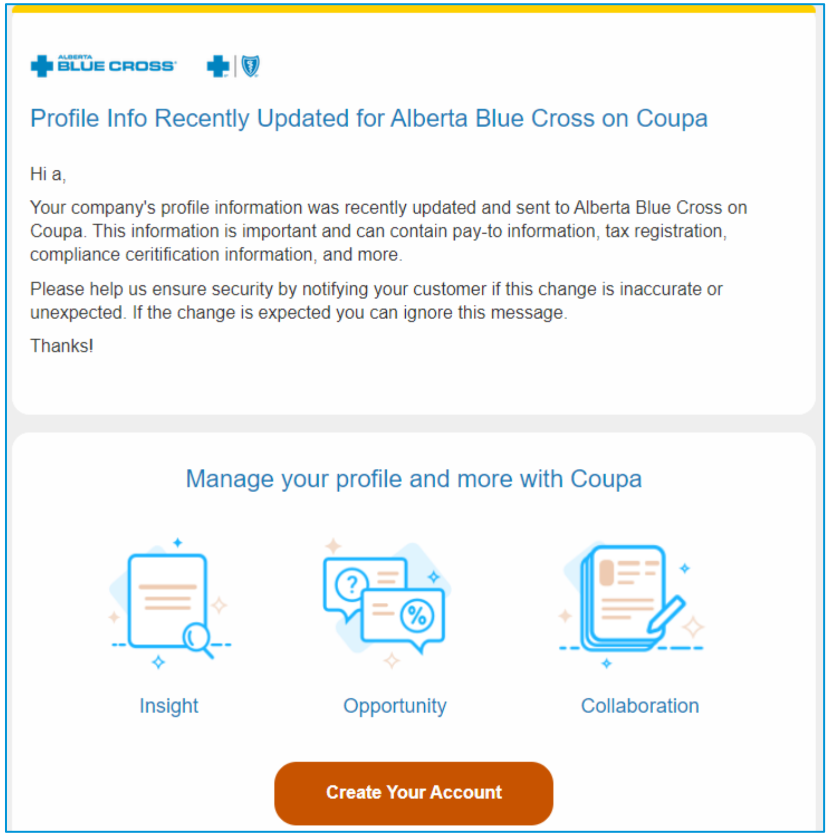
Submit the form

1. A message will be displayed confirming the submission of the form to Alberta Blue Cross.
2. A pop-up window is displayed with the possibility of creating a CSP profile. If you wish to create a profile, click **Create Your Account**. Otherwise, click the **X** on the top right of the window.



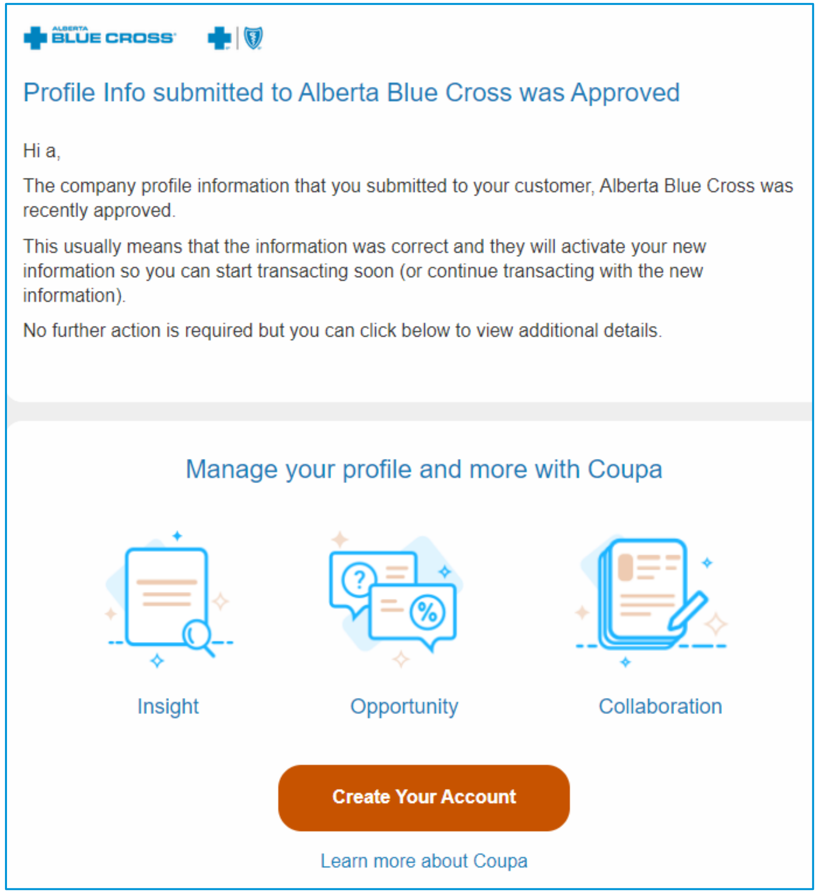
Form submission notification

Once the form is submitted to Alberta Blue Cross, you will receive an automatic email confirming that information has recently been updated.



Form approval notification

Once the form is reviewed and approved by Alberta Blue Cross, you will be notified with an automatic email.


ALBERTA BLUE CROSS

Profile Info submitted to Alberta Blue Cross was Approved

Hi a,

The company profile information that you submitted to your customer, Alberta Blue Cross was recently approved.

This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).

No further action is required but you can click below to view additional details.

Manage your profile and more with Coupa

Insight

Opportunity

Collaboration

Create Your Account

Learn more about Coupa

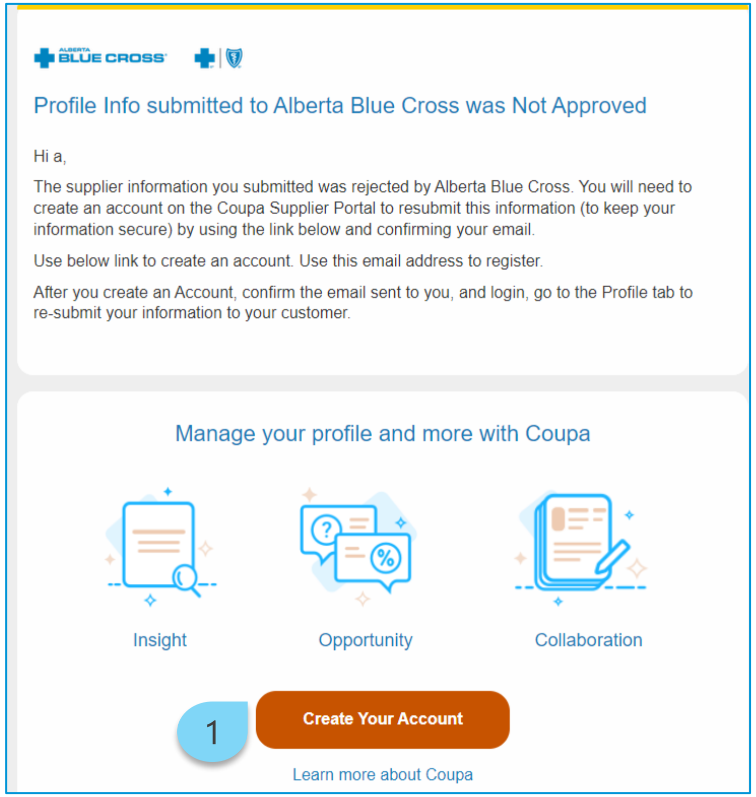
Form refusal notification

If the form is rejected, you will receive an email notification saying that the submission was not approved.

To resubmit your information

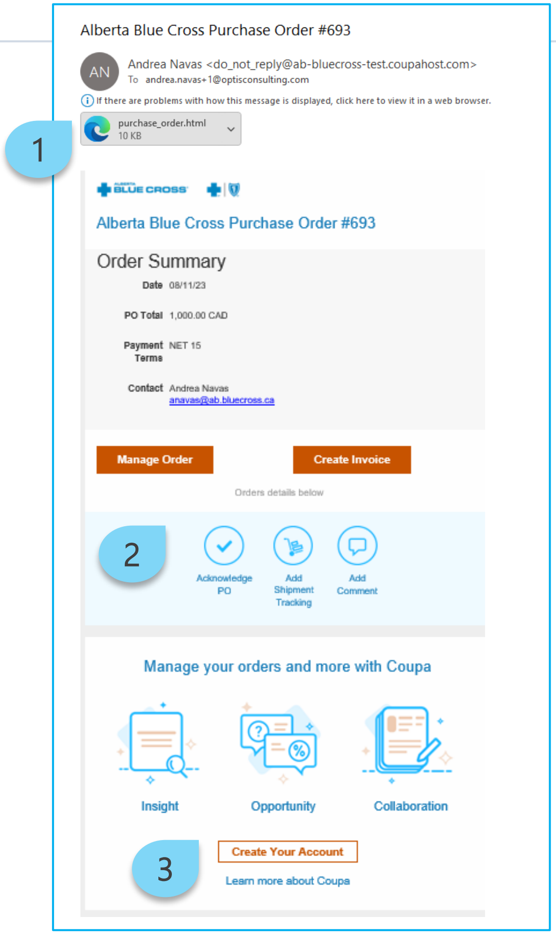
1. Click the **Create Your Account** button.

You must join the CSP first to re-submit your information.



Managing POs and invoices without joining the CSP

Receiving POs



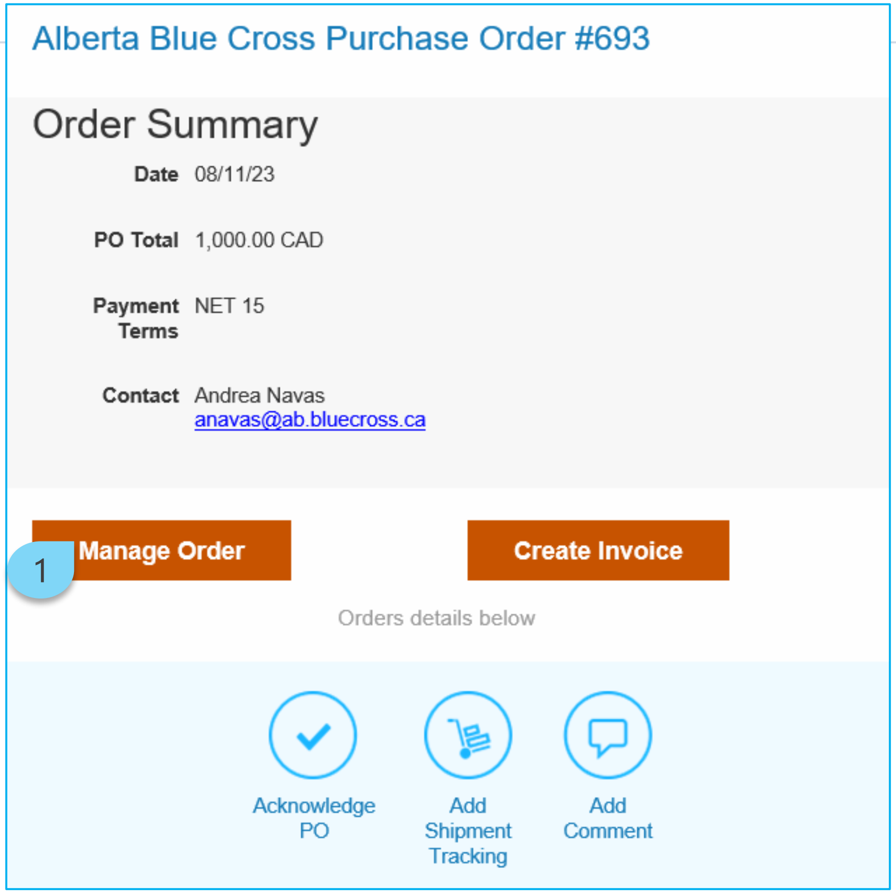
Once you open the email, a brief overview of the PO will become available.

1. PO number and attachment.
2. Actionable buttons
   - **Acknowledge PO**.
   - **Add Shipment Tracking**.
   - **Add Comment**.
3. The **Create Your Account** button is available if you want to create an account in the CSP, but it is not required for processing POs via SAN.

Manage order

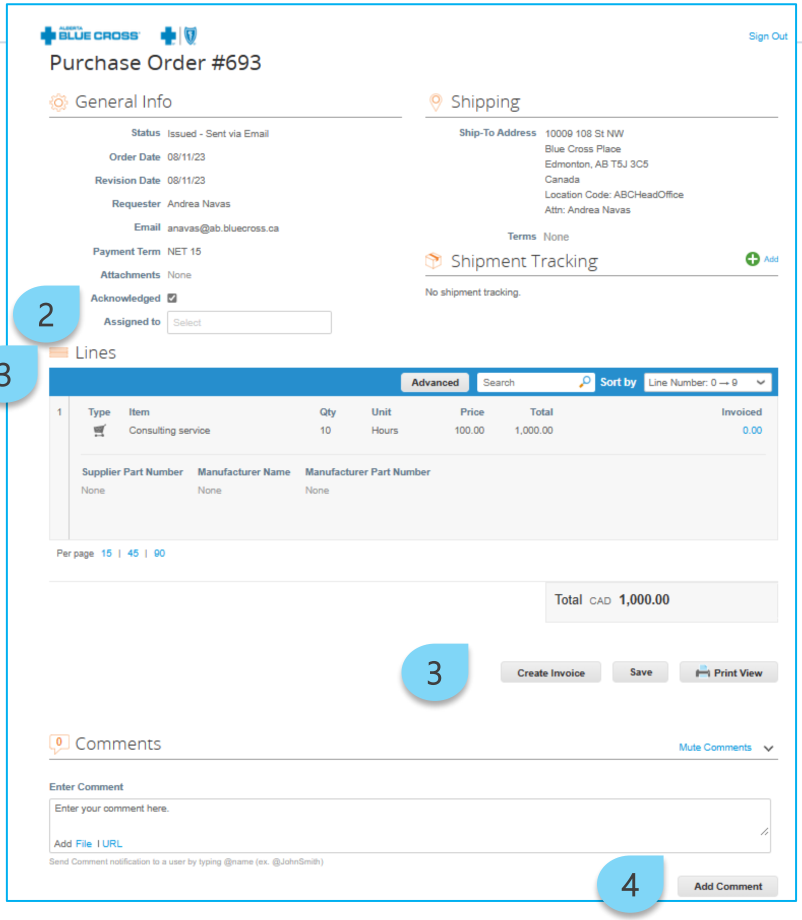
It is possible to manage and review the PO from the email notification.

1. Click **Manage Order**.



Manage order

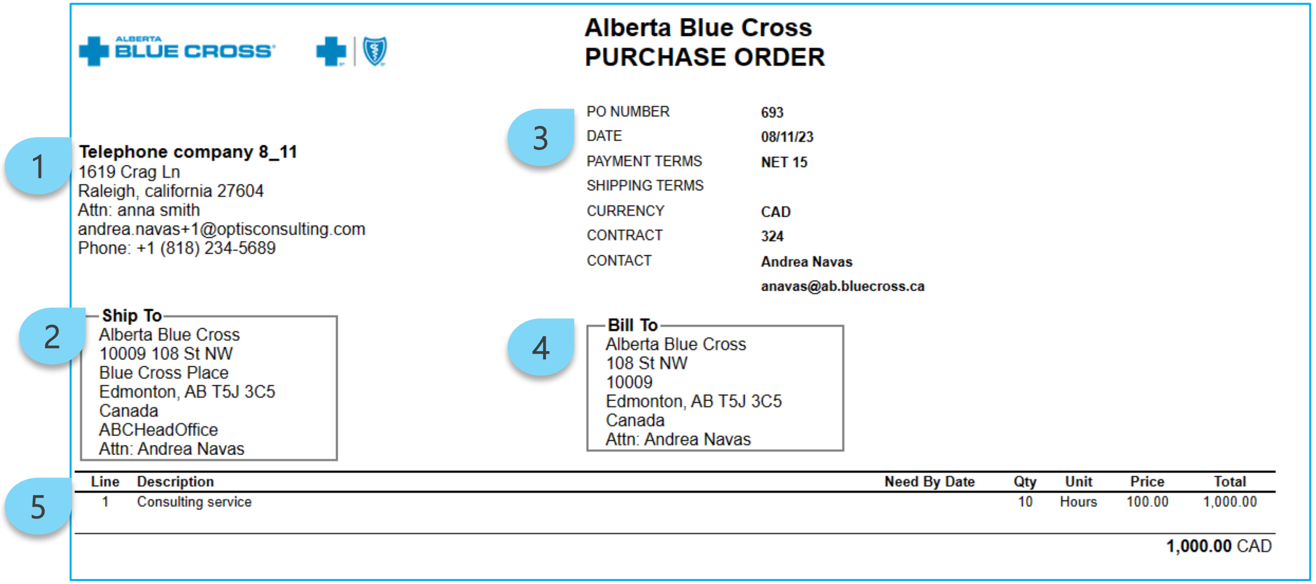
2. Click the **Acknowledged** checkbox under the *General Info* section.
3. Review line information.
4. Create invoices by clicking **Create Invoice**.
5. Add comments by clicking **Add Comment**.



Receiving POs—PO attachment

Once you receive the PO through email, the following is available attached on the email:

1. Supplier information.
2. Ship to information.
3. PO information and Alberta Blue Cross contact information.
4. Bill to information.
5. Line description.



Alberta Blue Cross
PURCHASE ORDER

1 **Telephone company 8_11**
1619 Crag Ln
Raleigh, california 27604
Attn: anna smith
andrea.navas+1@optisconsulting.com
Phone: +1 (818) 234-5689

3

PO NUMBER	693
DATE	08/11/23
PAYMENT TERMS	NET 15
SHIPPING TERMS	
CURRENCY	CAD
CONTRACT	324
CONTACT	Andrea Navas anavas@ab.bluecross.ca

2 **Ship To**
Alberta Blue Cross
10009 108 St NW
Blue Cross Place
Edmonton, AB T5J 3C5
Canada
ABCHeadOffice
Attn: Andrea Navas

4 **Bill To**
Alberta Blue Cross
108 St NW
10009
Edmonton, AB T5J 3C5
Canada
Attn: Andrea Navas

5

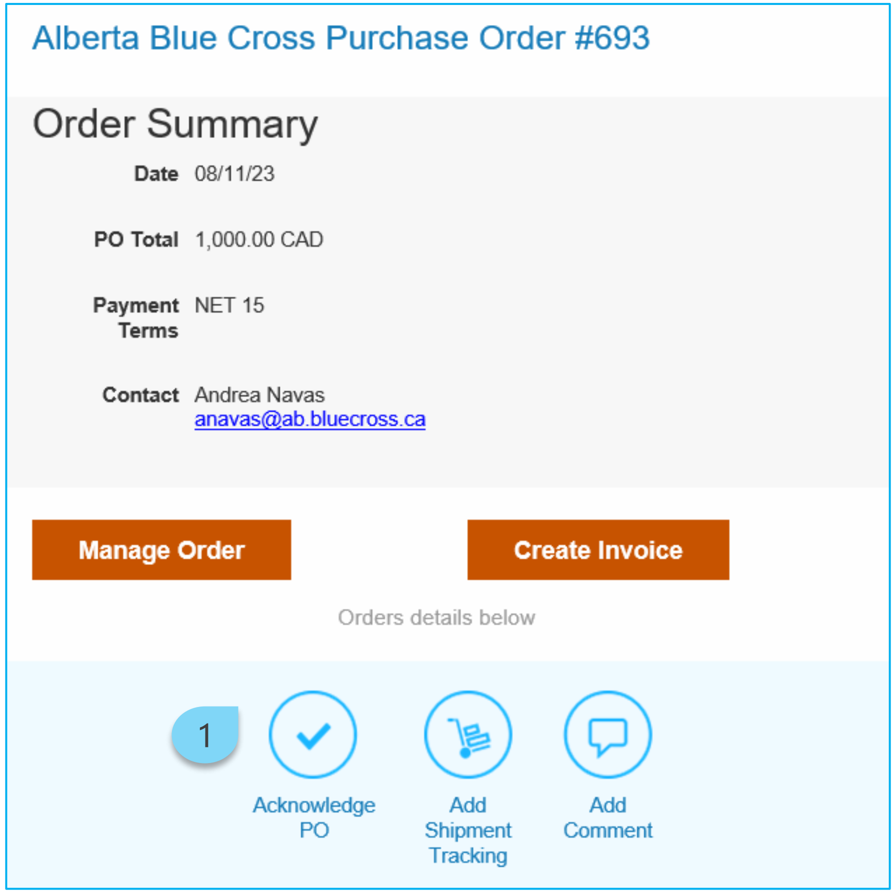
Line	Description	Need By Date	Qty	Unit	Price	Total
1	Consulting service		10	Hours	100.00	1,000.00

1,000.00 CAD

Acknowledge PO

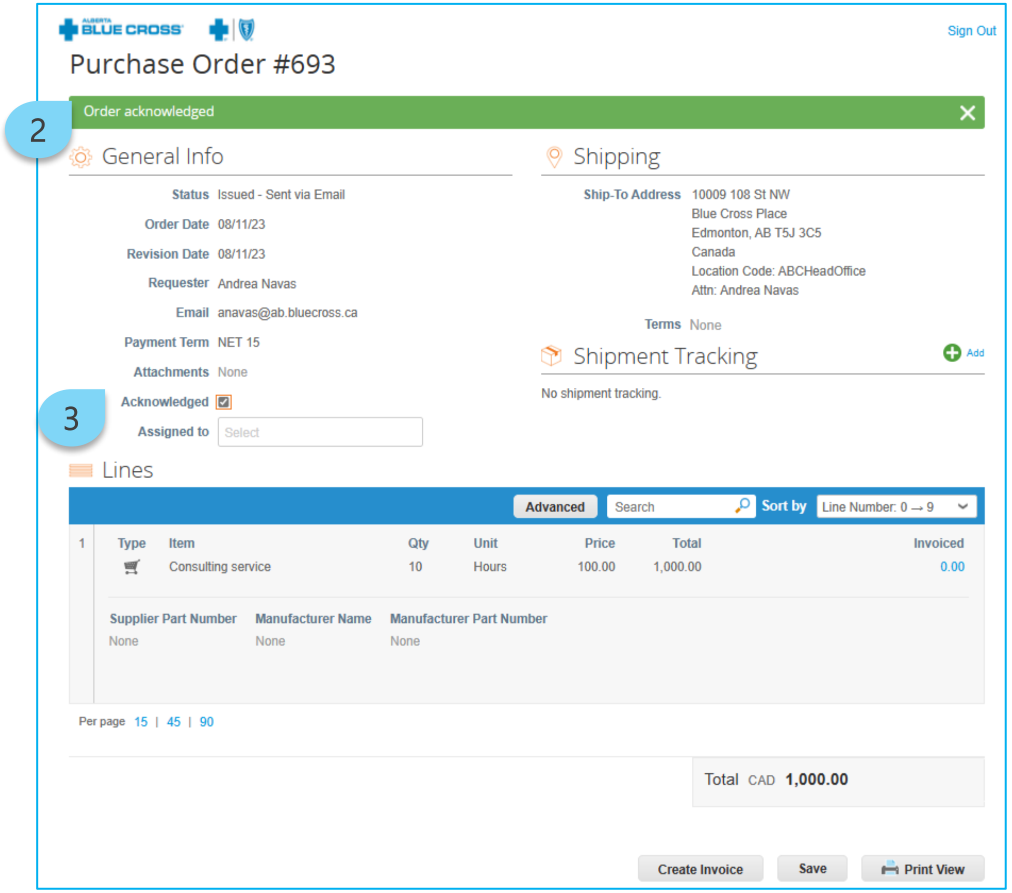
Acknowledge PO allows you to directly acknowledge the PO and send the information back to Alberta Blue Cross.

1. Within the email received, click **Acknowledge PO**.



Acknowledge PO

2. A new browser window is displayed, and the order is automatically acknowledged.
3. The **Acknowledged** checkbox is automatically checked, and the Alberta Blue Cross buyer within Coupa will be able to see the date the PO was acknowledged.

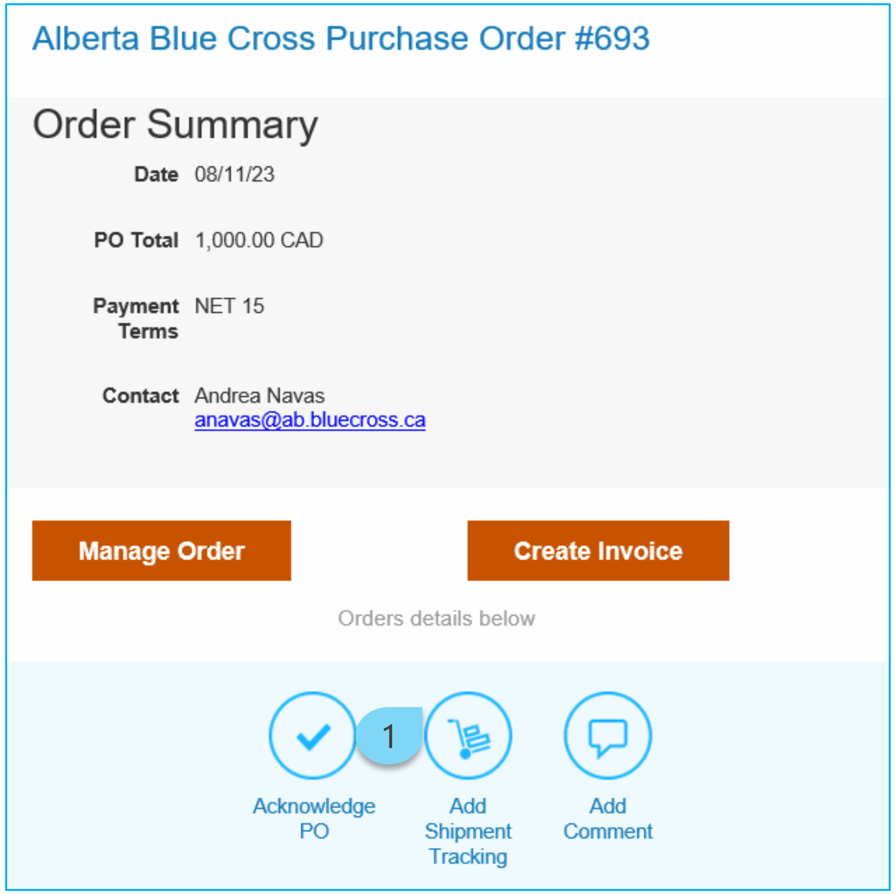


If the PO needs to be un-acknowledgeable, click the checkbox again. However, ensure to inform the Alberta Blue Cross buyer.

Add shipment tracking

Adding shipping information can be used to enter detailed information about your delivery and tracking data.

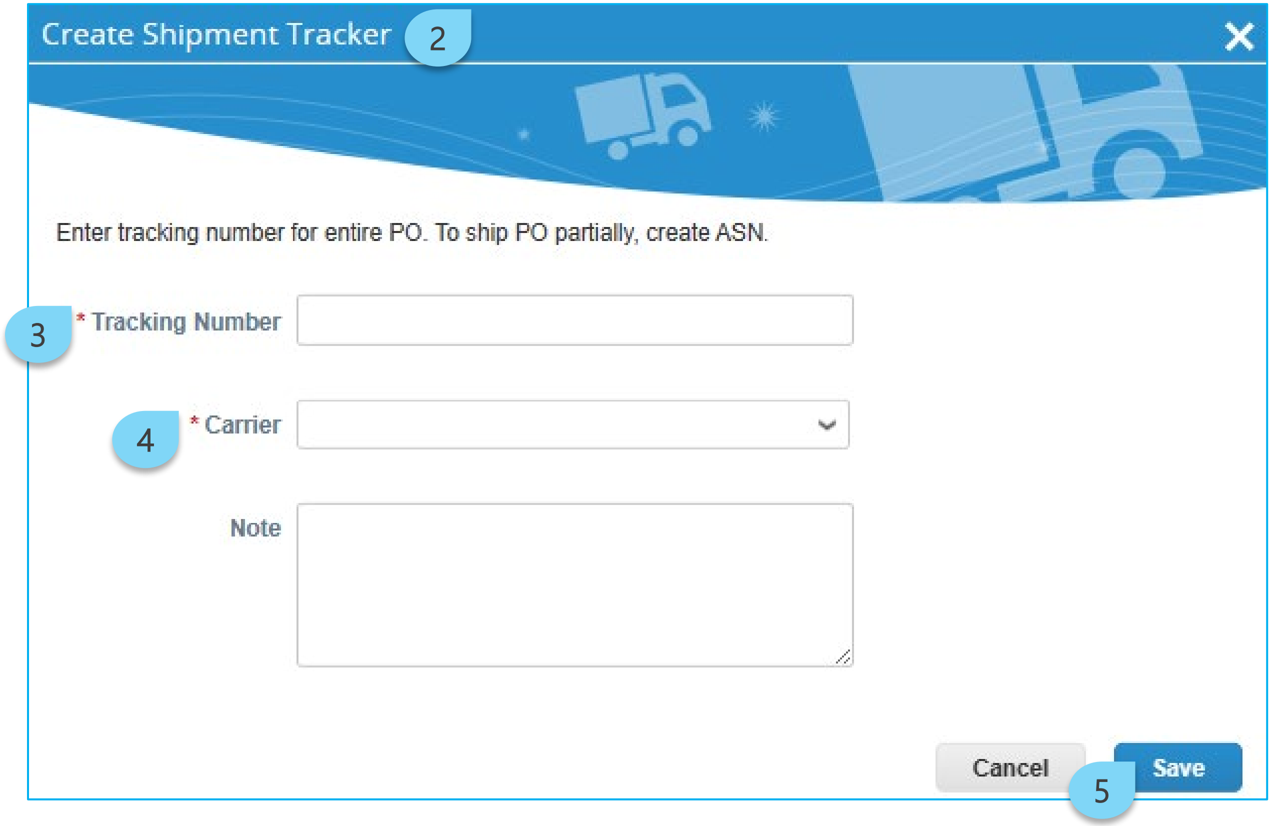
1. Within the email received, click **Add Shipment Tracking**.



Add shipment tracking

2. A new browser window is displayed.
3. Include the complete tracking number.
4. Select a carrier from the drop-down menu.
5. Click **Save**.

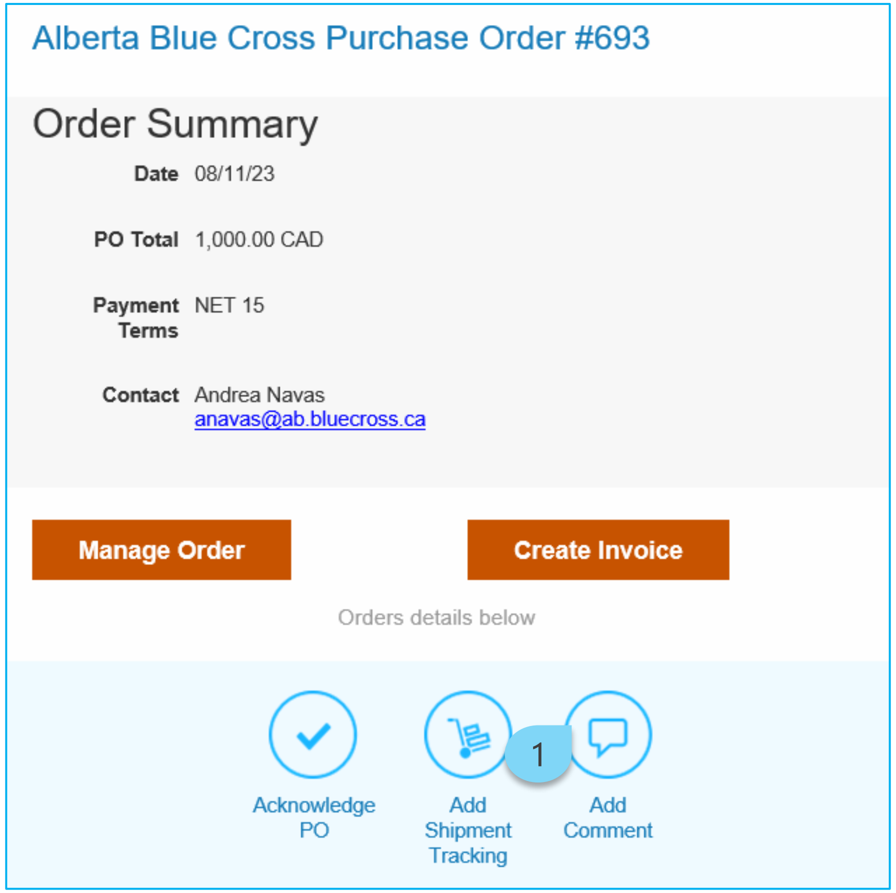
Note that only 1 tracking number can be added on a PO.



Add comments

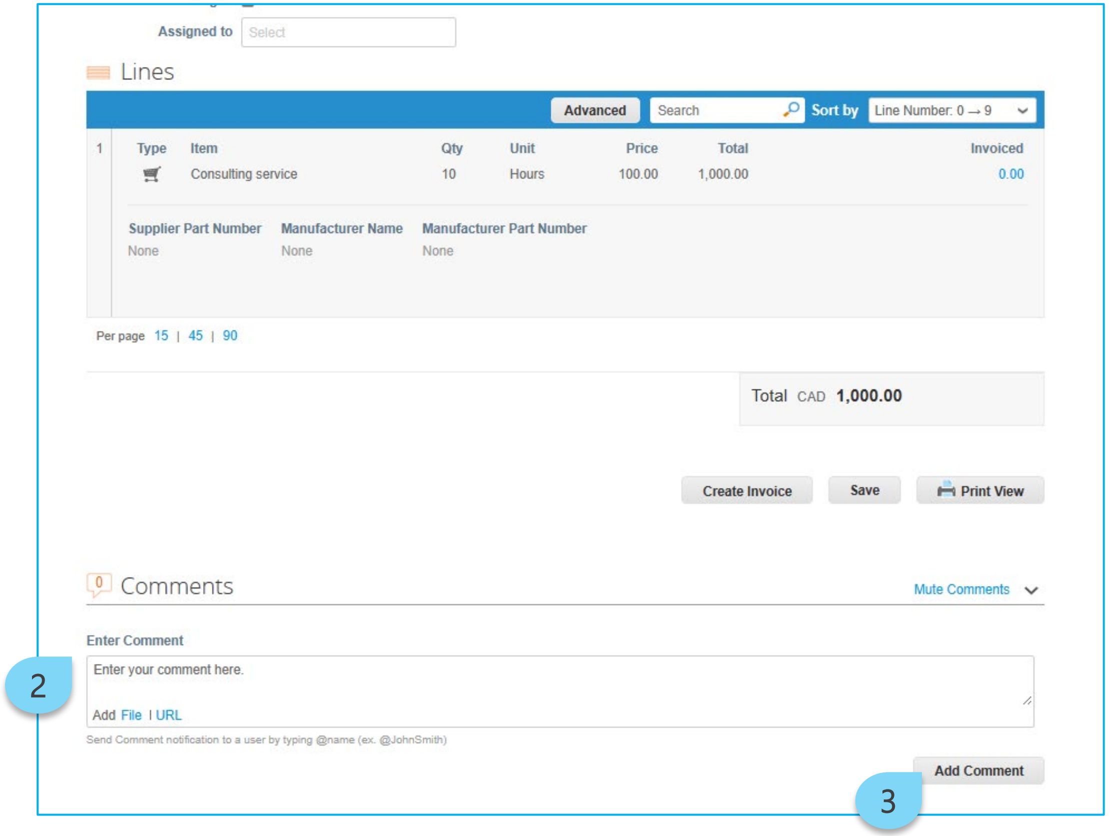
Include any comments relevant to the PO that will provide additional information to Alberta Blue Cross.

1. Within the email received, click **Add Comment**.



Acknowledge PO

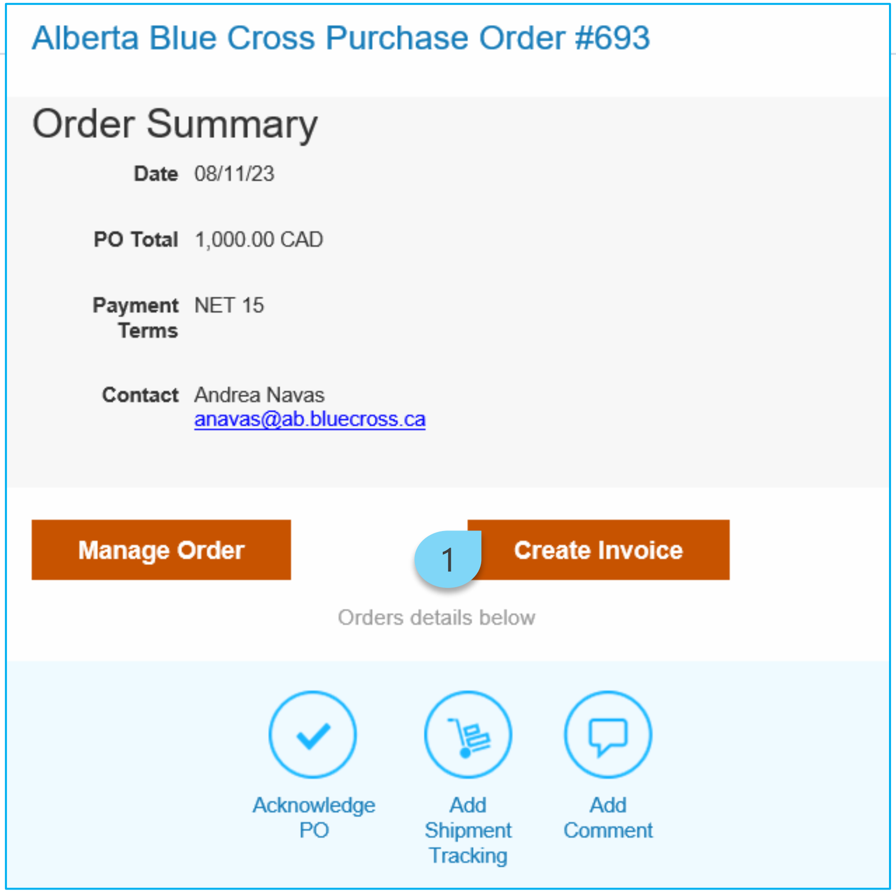
2. Include the comments that will be visible to Alberta Blue Cross. Both ends will be notified when a new comment is added or if a response to one was created.
3. Click **Add Comment**.



Create an invoice

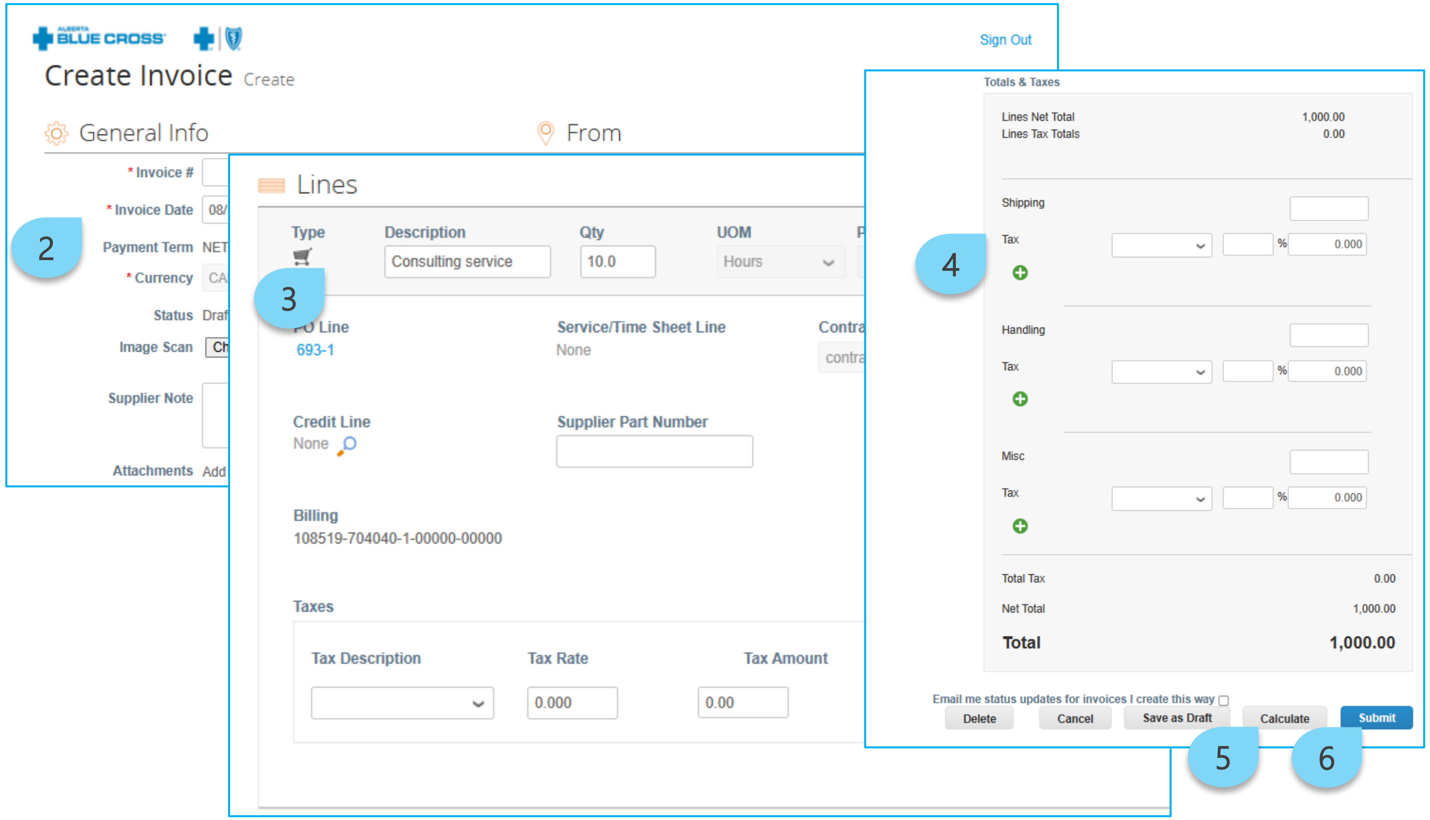
Invoicing can be created directly from the email received.

1. Click **Create Invoice**.



Create an invoice

2. Populate the *General Info* section.
3. Update the Quantity *(Qty)* or *Price*.
4. Update the *Taxes* field.
5. Click **Calculate** to update the invoice or credit note total.
6. Click **Submit**.



Questions?

For more information regarding this supplier guide, review the frequently asked questions available on the supplier website or contact the Procurement team at PRC@ab.bluecross.ca.