



Introducing Coupa and how it can help you

Coupa is a free, cloud-based purchase to pay system that will enable you, as an RBC Brewin Dolphin supplier, to conduct commercial transactions more efficiently. It will help to reduce costs and provide better value for money to both you and RBC Brewin Dolphin.

The part of Coupa you will use is called the Coupa Supplier Portal (CSP). This cloud-based, collaborative procurement system will allow you to receive and acknowledge purchase orders (POs), submit invoices and view payments electronically.

Why use the CSP?

Coupa will innovate and simplify some of our processes, making it easier for you to work with us. The main benefits the system brings are:

- **Free to use** – there is no fee for registering with or using the system.
- **More efficient payments** – simply flip your POs to invoices to start the payment process.
- **Improved visibility** – you can view all your POs and invoices, as well as the date when your invoices are due for payment.
- **Effective communication** – Coupa and the CSP allows you to communicate efficiently with RBC Brewin Dolphin requisitioners by adding your comments directly on POs and invoices. If you are not registered on the CSP you can also use this feature directly on the Supplier Actionable Notification (SAN) email you will receive each time we release a new PO.
- **Easy to access** – the CSP is a cloud-based platform so you can access it from any device, anywhere in the world.

CSP registration – it is free!

It is quick and easy to sign up to the CSP. Below you can find the steps you need to follow if you are new to Coupa or if you have previously registered on the CSP with another customer.

Our quick guide to signing up with Coupa

Follow the four steps below to register:

1. Navigate to the [Coupa supplier portal](#).
2. Complete the fields in the Registration box and click 'Register'.
3. You will receive an email to verify your email address. Click on the link in the email and create a password for your CSP account.
4. Email your CSP account details to your business contact or our Accounts Payable team (address will be in the previous email) – this will allow us to link your account.

Please ensure that you include your:

- Company name (used for CSP registration).
- Primary contact name (used for CSP registration).
- Email address (used for CSP registration).

Please make sure you complete all steps, otherwise we will not be able to link your account.

Complete CSP registration guide

Visit the <https://supplier.coupa.com> to register.

The following CSP registration guide shows the steps above in more detail.

Before you register, please note the following:

1. If you already have a CSP account with another customer, other than RBC Brewin Dolphin, please simply email us your account details. You do not need another CSP account, so you do not need to register again.

2. We can link only one supplier account to the CSP. For example, if different parts of your business supply goods/services to RBC Brewin Dolphin and they each have separate supplier accounts with us, we need to work with you to make sure we setup your accounts correctly. CSP accounts can be set up to be shared accounts where everyone can see everything or locked accounts, so the CSP account is shared, but you do not see each other's transactions. If multiple people within your organisation need to register on the CSP, please get in touch with us by emailing your business contact or our Accounts Payable team.

How will you receive POs?

Registered Suppliers

- You will receive Coupa-released POs by email – here you can click on the view order button, which will direct you to the Coupa Supplier Portal.
- You can then log in to view the PO, flip (pre-populate) it into an invoice and submit it for payment.

Unregistered Suppliers

- You will receive Coupa released POs by email – these are called Supplier Actionable Notifications (SAN). Please note that if we do not have a valid email address for you, we will issue the PO via post.
- In the email, you will find the following buttons, which allow you to:
 - **Create an invoice** – click this button to open a new screen where you can invoice RBC Brewin Dolphin directly for the stated PO.
 - **Acknowledge a PO** – click this button to notify RBC Brewin Dolphin that you received the order.
 - **Add a comment** – send comments about this PO to the RBC Brewin Dolphin requisitioner.

Please note that while SAN is possible, you will lose some of the benefits of the CSP such as complete visibility of your PO and invoice status.

How should you invoice us?

All new POs are produced in Coupa and you will be notified of the details.

If you are **registered** on the CSP, you can simply flip POs into invoices and submit for payment directly on the portal.

If you are **not registered** to the CSP, please refer to the **unregistered suppliers** section above to create an invoice from the PO email you receive from us, using the **create invoice** button, and submit it to RBC Brewin Dolphin directly.

Brewin Dolphin will still accept valid PDF invoices submitted via email for a short period after our Coupa go-live. Please note that the email address to submit your invoices to is PurchaseLedger@brewin.co.uk.

What to do if your records need to be updated

The name of a supplier's CSP account will need to match the name we have for you in our main records.

If you believe your main records need to be updated, please contact your business contact or the Accounts Payable team referencing your vendor number and the required changes.

We will then get in touch to validate and advise of any next steps.

If you have any questions, please contact your business contact or the Accounts Payable team.