

**06 – Supplier
Actionable
Notification (SAN)
Emails**



**Bank of
Ireland
Group**



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06.a. Supplier Actionable Notification (SAN) Emails - Overview



What is SAN?

- ❑ SAN stands for *Supplier Actionable Notifications* and serves as a **more limitative** alternative to Coupa Supply Portal (CSP)
- ❑ SAN allows suppliers to act on purchase orders and other notifications directly via email.
- ❑ Note that suppliers still need to complete an OTP verification of their email the first time they use SAN. Once set up, suppliers have the ability to create invoices against Purchase Orders and to update their supplier information from their inbox.
- ❑ Note that in terms of supplier information form completion, SAN cannot be used to handle corrections of rejected forms. Instead, a CSP account will need to be created to correct the erroneous information in the form.

Why is SAN used?

- ❑ The **CSP** is **best practice for e-invoicing** when interacting with Bank of Ireland Group as a **PO supplier**, with benefits including faster processing and real-time status tracking.
- ❑ SAN may be used
 - by PO suppliers for e-invoicing and supplier information management when the CSP is not an option for the supplier
 - by non-PO suppliers for supplier information management (non-PO invoices are out of scope for Coupa)
- ❑ Once the supplier submits the invoice via SAN, they will receive notifications letting them know when BOI performs an action on the invoice.
- ❑ This improves transparency and further reduces the need for suppliers to track down the status of their invoices through phone calls or emails


What you will find in this Guide


- ❑ How to onboard as a Bank of Ireland Group supplier for Supplier Actionable Notifications (SAN).
- ❑ How to handle Purchase Orders (POs) & Invoices via Supplier Actionable Notifications (SAN).

06.b. SAN for Supplier Information Management (1/9)



When you receive the invitation with the subject line '**New CSP Supplier SIM Invitation**' in your mailbox, click on the "**Respond Without Joining**" button, and you will be redirected to the page with the supplier information form.

Powered by  Coupa



New CSP Supplier SIM Invitation

Hello Supplier,



Bank of Ireland has chosen Coupa as their supplier management platform.

In order to prevent lost documents and ensure you are paid on time, Bank of Ireland has requested you to provide information about your company.

Within the next 48 hours, please respond below to provide this information.

Bank of Ireland

[Join and Respond](#) [Respond Without Joining](#)

1 [Respond Without Joining](#)

NOTE: The invitation will be sent from the **email address do_not_reply@bankofireland.coupahost.com** to the **primary contact email** (existing in BOI records). Please note below is the standard Coupa text for the invitation, you might be receiving a customised version.

06.b. SAN for Supplier Information Management (2/9)



Fill in at least the mandatory information highlighted below:

Bank of Ireland

Select Customer

[View All Responses](#)

Supplier Onboarding External Form MC

Supplier Information

GreenTech Innovations Ltd

Fill in your details to get onboarded to Bank of Ireland

General Details

Message from Bank of Ireland

None

* Company Name (Legal Entity Name)

Secondary Name (Trading Name)

* Company Registration Number

* Country of Incorporation

← Mandatory (*)

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Primary Contact (Account Manager)

Contact Purpose

* First name

* Last name

* Email address

* Phone Number

Do you wish to add other contacts?

Yes

No

E.g., Sourcing Contacts

* Remittance Advice Email Address

(company/department e-mail address is recommended rather than individual)

* Purchase Orders Email Address

(e-mail address for receiving Purchase Orders)

* Have any of the Directors/Board members of the company ever been employed by Bank of Ireland?
 Yes
 No

06.b. SAN for Supplier Information Management (3/9)



The box **Local** should be left unticked.

• Tax Registrations

Use this section to add all your applicable tax registrations.

[Add Tax Registration](#)

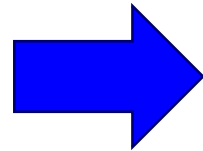
• Tax Registration

Country/Region
Ireland

VAT ID
IE1234567X

Local

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For suppliers whose country of incorporation is Ireland, the **Tax Registrations** section will have two additional mandatory fields that are absent for other countries:

*** Tax Reference Number**

IE1234567X

An Irish Tax Reference Number (TRN) is 8 or 9 characters in the format NNNNNXAA.
For businesses this is your VAT number. For sole traders this is your PPSN.

*** Access Number**

1234567890

Tax Clearance Access Number (TCAN) is provided by revenue upon successful application for Tax Clearance.

06.b. SAN for Supplier Information Management (4/9)



In the **Bank Details** section, select the first option if your bank account is in ROI or UK or if you operate in a region where IBAN is mandatory (SEPA region) or the second option for all other countries, and click on **Add Remit-To** to add your bank account information.

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Bank account type



Bank Details

* What type of bank account you wish to register

- ROI & UK
- Others

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Add Remit-To Address



*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

06.b. SAN for Supplier Information Management (5/9)



Populate the Remit-To Address fields that are displayed:

| Address Details | Bank Details |
|--|---|
| <p>Address Name</p> <input type="text"/> | <p>* Beneficiary Name</p> <input type="text" value="GreenTech Innovations Ltd."/> <p><small>This should match Company Name</small></p> |
| <p>* Region</p> <p>Country/Region</p> <input type="text" value="Ireland"/> | <p>* Bank Country/Region</p> <input type="text" value="Ireland"/> |
| <p>State Region</p> <input type="text" value="None"/> | <p>Bank Name</p> <input type="text" value="Bank of Ireland"/> |
| <p>State ISO Code</p> <input type="text"/> | <p>Bank Address</p> <input type="text"/> |
| <p>Street Address</p> <input type="text" value="123 Green Avenue"/> | <p>* Bank Account Number</p> <input type="text" value="12345678"/> |
| <p>Street Address 2</p> <input type="text"/> | <p>* IBAN Number</p> <input type="text" value="IE14 BOFI 0000 1712 3456 78"/> |
| <p>* City</p> <input type="text" value="Dublin"/> | <p>* Unique Branch Identifier</p> <input type="text" value="908734 (Bank of Ireland - Wick low)"/> |
| <p>* Postal Code</p> <input type="text" value="D04 XYZ7"/> | <p><small>Please search for your unique branch identifier. This could be a Sort Code, SWIFT Code, Routing Number or Bank Code. If you cannot find your branch code, please e-mail the Vendor Maintenance Team at suppliers@boi.com</small></p> |
| | <p>* Account Currency</p> <input type="text" value="GBP"/> |

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NOTE: For the **Unique Branch Identifier** please select the appropriate value from the dropdown field. **If you cannot find your branch code there, kindly write to suppliers@boi.com**, do not select a value that does not match your branch code.

06.b. SAN for Supplier Information Management (6/9)



If you are using **more than one bank account** in your relationship with Bank of Ireland Group

You can add these additional bank accounts by clicking **again** on **Add Remit-To** and populating the fields that are displayed:

*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To



Add Remit-To



Address Details

Address Name

* Region
Country/Region
Ireland

State Region
None

State ISO Code

Street Address
123 Green Avenue

Street Address 2

* City
Dublin

* Postal Code
D04 XYZ7

Bank Details

* Beneficiary Name
GreenTech Innovations Ltd.
This should match Company Name

* Bank Country/Region
Ireland

Bank Name
Bank of Ireland

Bank Address

* Bank Account Number
12345678

* IBAN Number
IE14 BOFI 9000 1712 3456 78

* Unique Branch Identifier
908734 (Bank of Ireland - Wick
low)

Please search for your unique branch identifier. This could be a Sort Code, SWIFT Code, Routing Number or Bank Code.
If you cannot find your branch code, please e-mail the Vendor Maintenance Team at suppliers@boi.com

* Account Currency
GBP



06.b. SAN for Supplier Information Management (7/9)



Finally, if you require an **Intermediary Bank** for your payments from BOI, you have the option to fill out the details by selecting **Yes** to the question below:

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Do you require an Intermediary Bank Account?

- Yes
 No

* Intermediary SWIFT/Routing Number

* Intermediary Bank Name

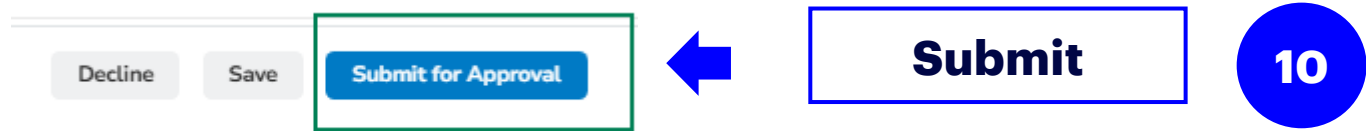
* Intermediary Bank City

* Intermediary Bank Account Number

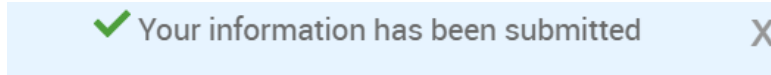
06.b. SAN for Supplier Information Management (8/9)



Once you have completed all the details, click on **Submit for Approval** to send the form to BOI team for validation.



If there are no errors in your form, you will receive confirmation (both in the form page and by email) that it has been successfully submitted.

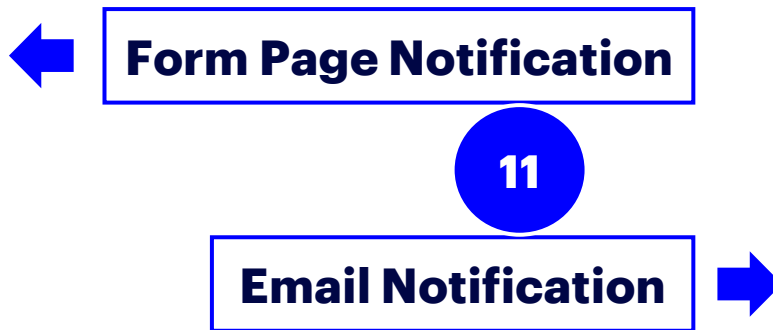


Manage your profile and more with Coupa.



Learn more about Coupa

Create Your Account



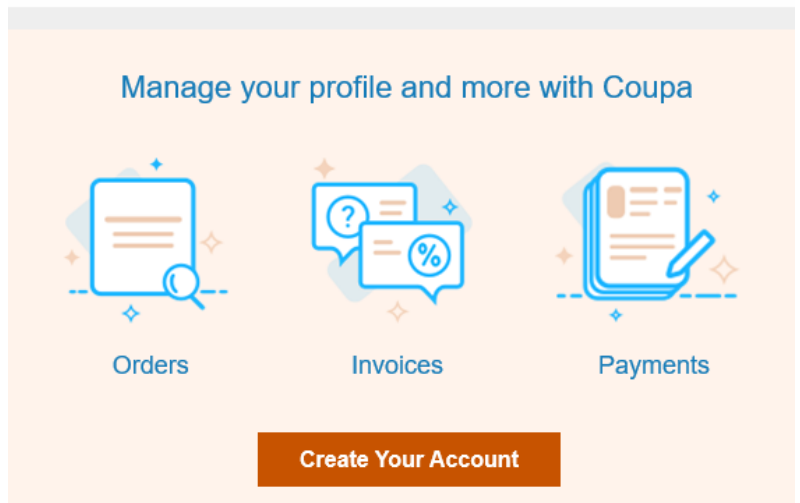
Profile Info Recently Updated for Bank of Ireland on Coupa

Hi Supplier,

Your company's profile information was recently updated and sent to Bank of Ireland on Coupa. This information is important and can contain pay-to information, tax registration, compliance certification 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!

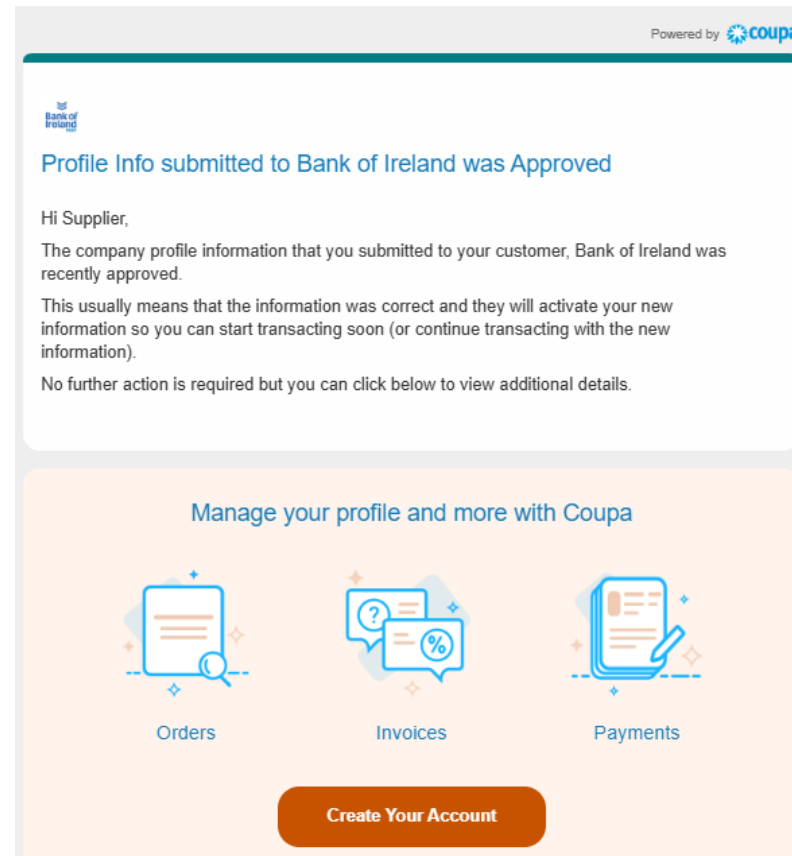


06.b. SAN for Supplier Information Management (9/9)



Once the form has been approved by Bank of Ireland Group, you will receive email confirmation regarding the approval:

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NOTE: When completing Supplier Information forms via SAN, without joining the Coupa Supplier Portal, you **won't be able to access any old forms**, once they have been submitted. Should any of your supplier information change, you will need to reach out to your Bank of Ireland Group contact and ask them to submit a new form request via SAN.

NOTE: If the form you submit is rejected by BOI due to errors in the information, you cannot handle rejections via SAN. Instead, you will need to create a CSP account to correct your form.

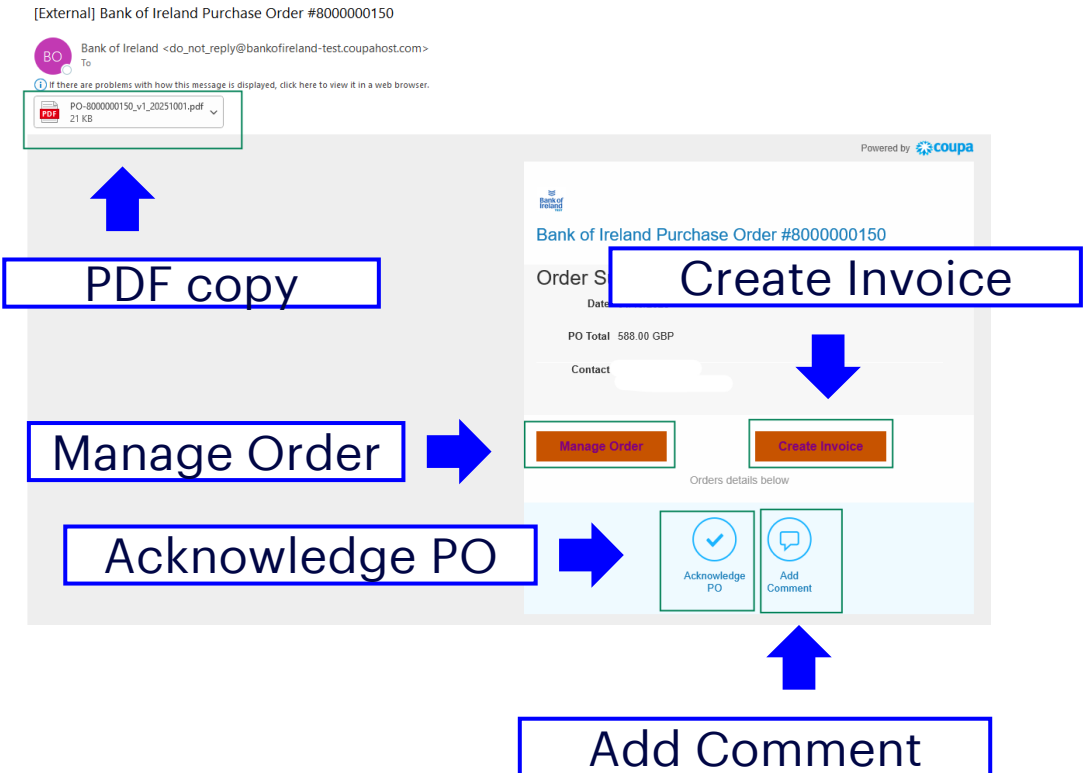
06.c. SAN for PO Management



When BOI issues a PO

You will be notified via a Supplier Actionable Notification (SAN) email. This contains a PDF copy of the order, as well as several buttons allowing you to take actions without logging into your CSP account:

- ❑ **Manage Order:** Clicking this takes you to the Coupa Supplier Portal (CSP), where you can view and manage all order details. You'll need to log in to make changes, but you can access everything related to the PO here.
- ❑ **Create Invoice:** This button allows you to directly create an invoice for the PO without logging into CSP. Clicking it will take you to the invoice creation page, pre-populated with the PO details (see *detailed steps in next slides*)
- ❑ **Acknowledge PO:** By clicking this, you can quickly confirm that you've received and are accepting the PO, without needing to log in. This action updates the PO status to "Acknowledged" in the system.
- ❑ **Add Comment:** This option lets you add comments to the PO directly from the SAN email. If you have any notes or need to clarify something, you can submit them right away without logging into your account.



06.d. SAN for Invoice Creation (1/7)



Bank of Ireland Purchase Order #8000000150

Order Summary

Date 01/10/2025

PO Total 588.00 GBP

Contact [Redacted]

Manage Order

Create Invoice

Orders details below

'Create Invoice' button in SAN email

1

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Verify email address by generating OTP

Verify Your Access for Purchase Order #8000000150

Your access to this page has expired. Please click on the button below. You will receive an email with the One-Time Password (OTP), using which you can access this page.

Generate One-Time Password


Already have an account? [Log in](#)

06.d. SAN for Invoice Creation (2/7)




When the invoice page opens:


In the **From** section click on the Search icon to add the **Remit-To Address**, which is empty:


 From

* **Supplier** Northbridge Professional Ltd (Test)

* **Supplier VAT ID** GB123456789


* **Invoice-From Address** Northbridge Professional Ltd (Test) 
3 Midland House
45 Chesterfield Avenue
Manchester
Manchester
M20 5QF
United Kingdom
LTD

* **Remit-To Address** No address selected 

* **Ship-From Address** Northbridge Professional Ltd (Test) 
3 Midland House
45 Chesterfield Avenue
Manchester
Manchester
M20 5QF
United Kingdom

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Search Icon

Choose Invoice From Address 

No Invoice From Addresses to choose from.

To add a new address click Create New Remit-To.

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NOTE: Creating the Remit-To Address is only required the 1st time when submitting an invoice via SAN without a CSP account.

06.d. SAN for Invoice Creation (3/7)



Complete the **mandatory fields** marked with *, which may vary based on the country-specific Coupa requirements:

Enter a new address ✕

Create a Remit-To address to make it available on invoices to specify the details of how you would want to be paid. The Remit-To name helps when creating invoices online.

Company Information

Supplier Northbridge Professional Ltd (Test)

* Country/Region United Kingdom

* Registered company legal name Northbridge Professional Ltd

* Type of Company Ltd

⚠ Must be present on United Kingdom compliant invoice

Board of Directors

Address

Remit-To name

* Line 1 3 Midland House

Line 2

Line 3

Line 4

* City Manchester

State None

* Postal Code M1 2AB

Preferred Language English (United Kingdom)

Tax Registration

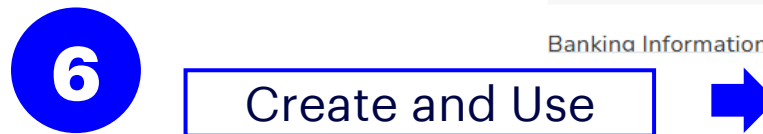
Tax Country/Region United Kingdom - GB

* VAT ID GB123456789

Not For Cross-Border Invoices

Banking Information

Cancel Create and Use



06.d. SAN for Invoice Creation (4/7)



Fill in the remaining mandatory fields:

- Invoice #
- Invoice Date

The rest of the fields are optional. You may add attachments such as a delivery note or other supporting documents, but **we do not require you to add your internal invoice**. Coupa uses **compliant invoicing**, ensuring that the system automatically checks and processes the invoice data for accuracy according to Ireland or UK requirements (depending on country of incorporation) and **automatically generates a legal invoice PDF**.

Invoice #

Invoice Date

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Create Invoice

General Info

- * Invoice # 21012026
- * Invoice Date 21/01/2026
- * Payment Term 2030_30 days net no discount
- Date of Supply 21/01/2026
- * Currency GBP
- Delivery Number
- Status Draft
- Image Scan [Choose File](#) No file chosen
- Supplier Note
- Attachments [Add File](#) | [URL](#) | [Text](#)
- Cash Accounting Scheme
- Margin Scheme

From

- * Supplier Northbridge Professional Ltd (Test)
- * Supplier VAT ID GB123456789
- * Invoice-From Address Northbridge Professional Ltd (Test)
3 Midland House
45 Chesterfield Avenue
Manchester
Manchester
M20 5QF
United Kingdom
LTD
- * Remit-To Address Northbridge Professional Ltd (Test)
3 Midland House
45 Chesterfield Avenue
Manchester
Manchester
M20 5QF
United Kingdom
- * Ship-From Address Northbridge Professional Ltd (Test)
3 Midland House
45 Chesterfield Avenue
Manchester
Manchester
M20 5QF
United Kingdom

To

- Customer Bank of Ireland
- * Bill-To Address Temple Quay
1 Temple Back East
Bristol
BS1 6DX
United Kingdom
- * Buyer VAT IDVAT GB168196135000

NOTE: You cannot backdate your invoice by more than 1 day, otherwise your submission will be blocked, as payment terms are calculated from the invoice date.

06.d. SAN for Invoice Creation (5/7)



At the line level of the invoice

The **Description** and **Price** are taken directly from the PO upon flipping, so you only need to select the **VAT rate** for each line from the dropdown menu, if you are invoicing the full price of the PO line.

For **partial invoices**, the **Price** can be edited to reflect only the price you need to invoice.

Unnecessary invoice lines may also be completely removed from the current invoice (e.g. for PO month lines not yet due for invoicing) by clicking the 'x' next to the unnecessary invoice line.

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VAT Rate

May be edited – for partial invoicing

Unnecessary invoice lines may be removed

Lines

| Type | Description | Price | |
|---------------------------|--|----------------------|-----------------------------------|
| | January | 1,250.00 | 1,250.00 |
| PO Line 8000000687-1 | Contract UAT_Supplier_3 - Standard St | Supplier Part Number | Services Start Date dd/mm/yyyy |
| Services End Date None | Billing K-CC5011-4410020 | | |
| Taxes | | | |
| VAT Rate 20.0% | VAT Amount 250.00 | Tax Reference | |
| | February | 1000 | 1,250.00 |
| PO Line 8000000687-2 | Contract UAT_Supplier_3 - Standard St | Supplier Part Number | Services Start Date dd/mm/yyyy |
| Services End Date None | Billing K-CC5011-4410020 | | |
| Taxes | | | |
| VAT Rate 20.0% | VAT Amount 250.00 | Tax Reference | |

06.d. SAN for Invoice Creation (6/7)



After selecting the VAT rate and making sure all the other information on the invoice is correct:

Scroll down and click on **Calculate** for the VAT Rate to be added to your total and then click on **Submit**:

You will be prompted to confirm that you are ready to send the invoice:

Total Taxes

| | |
|--------------------|---------------|
| Lines Net Total | 588.00 |
| Lines VAT Totals | 117.60 |
| <hr/> | |
| Total VAT | 117.60 |
| Net Total | 588.00 |
| Gross Total | 705.60 |

Delete

Cancel

Save as draft

Calculate

Submit

9

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Are You Ready to Send?

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

Continue Editing

Send Invoice

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06.d. SAN for Invoice Creation (7/7)



After clicking on Send Invoice

If all details are correct, you will receive confirmation that the invoice has been submitted:

Northbridge Professional Ltd (Test) invoice #21012026 is processing



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NOTE: While you may flip a PO into an invoice using the relevant button in the SAN email, you can only create **credit notes** in relation to a PO by **setting up a Coupa Supplier Portal (CSP) account**.