



Chubb Coupa Supplier Actionable Notification (SAN)

Vendor Guide

Table of Contents

- SAN Overview 3
- Introduction 4
- Complete Chubb’s Supplier Information Request Form 5
- Handling Purchase Orders (POs) and Invoices via Supplier Actionable Notifications (SAN) 23
- Support 34



SAN Overview

What is SAN?

- SAN stands for *Supplier Actionable Notifications* and serves as an 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 a one-time registration on the CSP. Once set up, suppliers have the ability to create invoices against Purchase Orders from their inbox.

Why is SAN used?

- The CSP is **best practice** to use when interacting with Chubb, with benefits including faster processing and real-time status tracking.
- SAN may be used when the CSP is not an option for the supplier

SAN Notifications

- Once the supplier submits the invoice, they will receive notifications letting them know when Chubb 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.

Introduction

Chubb transitioned to a full Procure-to-Pay solution provided by Coupa as part of our ongoing efforts to enhance our procurement capabilities in January 2025.

If you plan on doing business with Chubb, the expectation is to use one of Coupa's e-procurement options.

If you have any questions, reach out to globalvendormanagement@chubb.com.

What you will find in this Guide:

- How to onboard as a Chubb supplier for Supplier Actionable Notifications (SAN)
- How to handle Purchase Orders (POs) & Invoices via Supplier Actionable Notifications (SAN)



Complete Chubb's Supplier Information Request Form

CHUBB

SAN
Overview

Introduction

Information
Request Form


Purchase Orders
(POs) and Invoices

Support

Complete Supplier Information Request Form

To become an approved Chubb Coupa Supplier, you must enter your business's information into the Chubb Supplier Information form. Suppliers will then receive an email requesting additional profile information.

- Click 'Join and Respond' to continue registration for CSP
- Click 'Respond Without Joining' if joining the CSP is not an option.
- Then you will be taken to fill out the supplier information form, with all your business information.



The screenshot shows an email template for a Chubb Supplier Information Request. At the top right, it says "Powered by" followed by the Coupa logo. The main header features the "CHUBB" logo in a large, bold, sans-serif font, with "Profile Information Request" in a smaller, blue, sans-serif font below it. The body of the email contains the following text: "Hello Clementine Technology," "Chubb Insurance has chosen Coupa as their supplier management platform." "In order to prevent lost documents and ensure you are paid on time, Chubb Insurance has requested you to provide information about your company." "Within the next 48 hours, please respond below to provide this information. Welcome!" "Alexandra" "Chubb Insurance". At the bottom, there are two orange buttons with white text: "Join and Respond" and "Respond Without Joining". Below the buttons is the Coupa logo and the text "Business Spend Management".

Complete Supplier Information Request Form

This form is where basic company information will be entered. In most cases, the information in this portion of the SIM (Supplier information management) form will be auto-filled from your profile.

1. Supplier Name (legal company name)
2. Display Name (the company name to be displayed in the CSP)
3. Region
4. Country
5. Company Type (e.g. Corporation, Partnership etc)



Fields marked with an asterisk are mandatory. Fields that do not have an asterisk, are not mandatory and can be left blank.

Chubb New Supplier Request

* Supplier Name

Training Test Supplier

* Display Name

Training Test Supplier

Region

North America



Country

United States



Company Type

Corporation



Complete Supplier Primary Contact

Supplier Contact Information

The supplier primary contact is someone who has ownership and responsibility of your company's account on the Coupa Supplier Portal.

1. First Name
2. Last Name (Surname)
3. Email Address
4. Work Phone, including country code
5. Mobile Phone (optional)
6. Fax (optional)




Fields marked with an asterisk are mandatory. Fields that do not have an asterisk, are not mandatory and can be left blank.

***Supplier Primary Contact**

First Name

Last Name

Email address
 

Work Phone

US/Canada ▼

123-456-7890
650-555-1212

Mobile Phone

US/Canada ▼

109-876-5432
650-555-1212

Fax

US/Canada ▼

123-456-7890
650-555-1212

Complete Supplier Primary Address

The primary address is typically where you operate out of.

1. Address Purpose (optional)
2. Region
3. State (if applicable)
4. Address Name (e.g. *[Branch / Country name]*)
5. Street Address
6. City
7. Postal Code



Fields marked with an asterisk are mandatory. Fields that do not have an asterisk, are not mandatory and can be left blank.

Primary Address

Address Purpose

HQ

* Region

Country/Region

United States

State Region

PA

State ISO Code

Address Name

Test Supplier Headquarters

* Street Address

1234 Market Street

Street Address 2

Floor 5

Street Address 3

Street Address 4

* City

Philadelphia

* Postal Code

19103

Complete Purchase Order Receiving

In this section, you will fill in communication information on how you would like to receive purchase orders (POs).

1. PO Email:
 - Email address for appropriate recipient of POs.
2. PO Method:
 - Communication preference for purchase orders. The default is E-mail. For SAN set up choose E-mail.
3. PO Change Method:
 - The method in which you receive PO changes. The pre-selected PO change method is Prompt. SAN users should select E-mail.
4. Shipping Terms:
 - Specifies the conditions in which goods are transported to the buyer (defined on next 2 pages).
5. VAT Registration (if applicable):
 - Check this box if you have a Value Added Tax registration number.



Supplier Actionable Notification emails can be sent to multiple individuals within your organisation. Just add each email address separated by a comma to the PO Email field.

* PO Email

hannah.chaput@accenture.com

i

* PO Method

E-mail

▼

Please select a preference for receiving the purchase orders via email

PO Change Method

Prompt

▼

Please select a preference for receiving the purchase order changes via email

* Shipping Terms

DAT

▼

VAT Registration

☐

Please select this checkbox if you have a valid VAT registration number

Chubb Shipping Terms (1/2)

Code	Description	Definitions
FOB	Free on board	The seller pays for transportation of goods to a specified location. Ownership and risk transfer to the buyer once goods are loaded onto the shipping vessel.
DDP	Delivered duty paid	The seller assumes all costs and risks, including duties and taxes, delivering goods to the buyer's specified location, ready for unloading.
FCA	Free Carrier	The seller delivers goods to a designated carrier at a specified location. Risk transfers to the buyer once the carrier takes possession of the goods.
DAP	Delivered at Place	The seller delivers goods to a specified location, bearing all risks and costs until the goods are ready for unloading at the buyer's destination.
CFR	Costs and Freight	The seller pays for transportation costs to deliver goods to the destination port, while the risk transfers to the buyer once the goods are on board the vessel.
CIF	Costs, insurance and freight	The seller covers costs, insurance, and freight to deliver goods to the destination port, assuming risk until the goods are loaded onto the shipping vessel.
CIP	Carriage and Insurance Paid to	The seller pays for transport and insurance to a specified destination, transferring risk to the buyer once the goods are handed over to the carrier.
CPT	Carriage paid to	The seller pays for transport to a specified location, transferring risk to the buyer once the goods are handed over to the carrier at the origin.

Chubb Shipping Terms (2/2)

Code	Description	Definitions
DAF	Delivered at frontier	The seller delivers goods to a specified border point, assuming all risks and costs until reaching that point. The buyer handles import duties and transport beyond the frontier.
DAT	Delivered at terminal	The seller delivers goods to a terminal, bearing all risks and costs until the goods are unloaded at the agreed terminal location, ready for the buyer.
DDU	Delivered duty unpaid	The seller delivers goods to a specified location but does not pay import duties or taxes. The buyer is responsible for any customs fees upon arrival.
DEQ	Delivered ex quay (duty paid)	The seller delivers goods to the quay at the destination port, covering all costs and duties. The buyer is responsible for unloading the goods from the quay.
DES	Delivered ex ship	The seller delivers goods to a specified location on the vessel at the destination port, bearing all costs and risks until the goods are unloaded by the buyer.
EXW	Ex works	The seller makes goods available at their premises. The buyer assumes all costs and risks from that point onward, including transport and export duties.
FAS	Free alongside ship	The seller delivers goods alongside the vessel at the port of shipment, covering all costs and risks until that point. The buyer assumes risk once alongside the ship.
FOB Loaded Trucks	Free on board loaded trucks	The seller pays for transportation and risks until the goods are loaded onto trucks. Ownership transfers to the buyer once the goods are loaded.
DAF	Delivered at frontier	The seller delivers goods to a specified border point, assuming all risks and costs until reaching that point. The buyer handles import duties and transport beyond the frontier.

Complete Tax Registration

In this section, add all your applicable tax registrations including any tax withholding information. You may ignore the “local” checkbox.

1. Country:
 - Tax registration country.
2. Tax ID:
 - Tax registration number for corresponding country you put above.
 - If you work for an organization with multiple tax registrations, you will need a separate CSP account for each.
3. Withholding Tax?:
 - If your company withholds tax, check this box.
4. Withholding Combination:
 - Select the combination in which you withhold tax under.



Please do not use punctuation or extra spaces in these fields

* Tax Registrations

Use this section to add all your applicable tax registrations.

[Add Tax Registration](#)

* Tax Registration

Country

United States

Tax ID

112233445566

Local

☐

Provide a valid Tax ID number. Invalid details may result into onboarding delays. You may ignore the 'Local' checkbox'

Withholding Tax?

☒

Withholding Combination

Internal Revenue Service 3-10
99 Withholding-Federal (IRS3-
1099-FED)

Please select the withholding combination if withholding tax is applicable.
Note: Withholding combination is a concatenation of Withholding Entity, Withholding Type and Withholding Jurisdiction

Complete Remit-to Address for Chubb (1/2)

A remit-to address is the address where invoice payments should be sent. This can be the same address or a different address than the 'Primary' address.

1. Active:
 - Indicate whether the remit to address is active or not. Remit-to addresses cannot be deleted but can be marked as inactive.
2. Street Address:
 - Remit-to address street number and name.
3. City
4. Country/Region
5. State Region
6. State ISO Code (if applicable)



Please do not use punctuation or extra spaces in these fields

*** Remit-To Address**

*** Active**
Active

*** Street Address**
1234 South Broad Street

Street Address 2
Floor 20

Street Address 3

Street Address 4

*** City**
Philadelphia

*** Region**
Country/Region
United States

State Region
Pennsylvania - PA

State ISO Code
US-PA

Complete Remit-to Address for Chubb (2/2)

7. Postal Code
8. Remit to Contact Email:
 - Email for point of contact to receive payment advice notifications.
10. Bank Name
11. Payment Type:
 - Way in which the bank receives/transfers money
 - See the Payment method guide included on the next 3 pages to review some unique requirements for what Payment Type selection is appropriate when doing business with Chubb.
12. Bank Street Address
13. Bank City Address
14. Bank State or Region (if applicable)
15. Bank Postal Code



Please do not use punctuation or extra spaces in these fields

* Postal Code

19146

Please provide postal code as per the country standards. If there are no standards, please provide the postal code.

Remit To Contact Email

john.doe@supplier.com

Please provide a contact email to receive payment advice notifications.

Bank Details

* Bank Name

Supplier Bank

* Payment Type

ACH (ACH) x v

* Bank Street Address

500 Bank Street

* Bank City

Philadelphia

Bank State or Region

Pennsylvania

Please provide the state name

* Bank Country

United States v

Chubb Payment Method

- The preferred payment type for suppliers conducting business with Chubb in **EMEA** countries is primarily Electronic Funds Transfer (EFT) or International Electronic Funds Transfer Cross-Border (EFT_I)
- Preferred payment methods for suppliers conducting business in **North America** countries include Automated Clearing House (ACH), Check and International Funds Transfer (IFT), although other methods may also be accepted.
- The following slides detail remit-to requirements for Chubb Business Units in EMEA and North America

Chubb Payment Method Guide – EMEA Listing

Chubb / Supplier Relationship		Remit To Fields						
Suppliers Bank Country	Supplier Scenario - Providing Goods or Services to:-	Payment Type	Bank Account	Bank Code	IBAN	Swift	DFI Qualifier	Bank Name
GBR - United Kingdom	Chubb company in Europe or UK (Except Italy, Turkey or Greece) and billing in the local currency GBP	EFT	8 Digit Required	6 digits	n/a	n/a	n/a	Required
GBR - United Kingdom	Chubb in Italy, Turkey or Greece and Billing in the local currency GBP	EFT	Required	n/a	Required	Required	02	Required
SEPA - Europe Country	Chubb company in Europe or UK and billing in the local currency EUR	EFT_I	Required	n/a	Required	Required	02	Required
NOR - Norway	Chubb company in Europe or UK (except Chubb Services UK) and billing in the local currency NOK	EFT	7 digit	4 digit	n/a	n/a	n/a	Required
SWE - Sweden	Chubb company in Europe or UK (except Chubb Services UK) and billing in the local currency SEK	EFT	Required	n/a	n/a	n/a	n/a	Required
DNK - Denmark	Chubb company in Europe or UK (except Chubb Services UK) and billing in the local currency DKK	EFT	10 digit	4 digit	n/a	n/a	n/a	Required
CZE - Czech Republic	Chubb company in Europe or UK (except Chubb Services UK) and billing in the local currency CZK	EFT	Required	4 digits	n/a	n/a	n/a	Required
HUN - Hungary	Chubb company in Europe or UK (except Chubb Services UK) and billing in the local currency HUF	EFT	16 Digit Required	8 digits	n/a	n/a	n/a	Required
POL - Poland	Chubb company in Europe or UK (except Chubb Services UK) and billing in the local currency PLN	EFT	26 digit Required	8 digits	n/a	n/a	n/a	Required
ZAF - South Africa	Chubb South Africa and billing in the local currency ZAR	EFT	Required	6 digits	n/a	n/a	n/a	Required
ZAF - South Africa	Chubb company in Europe or UK and billing in the local currency ZAR	EFT_I	Required	n/a	Required	Required	02	Required
CHE - Switzerland	Chubb Switzerland and billing in the local currency CHF	er it	n/a	5 digits	Required	n/a	n/a	Required
CHE - Switzerland	Chubb company in Europe or UK and billing in the local currency CHF	EFT_I	Required	n/a	Required	Required	02	Required
TUR - Turkey	Chubb Turkey and billing in the local currency TRY	EFT	n/a	4 digits followed by 90001999, totalling a 12 digit bank code	Required	n/a	n/a	Required
TUR - Turkey	Chubb company in Europe or UK and billing in the local currency TRY	EFT_I	Required	n/a	Required	Required	02	Required
USA - United States	Chubb company in Europe or UK and billing in USD	EFT_I	Required	n/a	n/a	Required	n/a	Required
Europe or UK	Chubb company in Europe or UK and billing in USD	EFT_I	Required	n/a	Required	Required	02	Required
Europe or UK	Chubb company in Europe or UK and billing in currency other than the local currency	EFT_I	Required	n/a	Required	Required	02	Required
Outwith Europe	Chubb company in Europe or UK and billing in USD	EFT_I	Required	n/a	n/a	Required	n/a	Required
Outwith Europe	Chubb company in Europe or UK and billing in currency other than the local currency	EFT_I	Required	n/a	Required	Required	02	Required

Chubb Payment Method Guide – North America Listing

Chubb / Supplier Relationship		Remit To Fields								
Suppliers Bank Country	Supplier Scenario - Providing Goods or Services to:-	Payment Type	Bank Account	Bank Code	IBAN	Swift	DFI Qualifier	Bank Name	Intermediary banking	Transit and Institution Number
US	Chubb company in the US and billing in currency USD	Check (CHK) VCB BofA Virtual Credit Card, (BIP) Amex Buyer Initiated Payments	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
US	Chubb company in the US and billing in currency USD	(ACH) Preferred method, (EFT) Wire	Required	9 Digits	n/a	n/a	01 for (ACH) or (EFT) Wire	Required	n/a	n/a
US	Chubb company in Bermuda or Canada and billing in currency USD	(IFT)	Required	n/a	n/a	Required	02	Required	When necessary	n/a
Bermuda	Chubb company in Bermuda and billing in currency of BMD or USD	(ACH)	Required	n/a	n/a	n/a	01	Required, see Notes	n/a	n/a
Bermuda	Chubb company in the US and billing in currency USD	(ACH) or (EFT) Wire	Required	9 digits	n/a	n/a	01	Required	n/a	n/a
Bermuda	Chubb company <u>not</u> located in Bermuda or US and billing currency USD	(IFT)	Required	n/a	Only when European Bank account	Required	02	Required	When necessary	n/a
Canada	Combined Canada billing in currency CAD only	(EFT) Wire	Required	n/a	n/a	n/a	04	Required	n/a	Requires Transit (5digits) and Institution (4 digits) codes to total 9 digits (please add a zero before the Institution code to total 4 digits)
Canada	Combined Canada billing in currency CAD or USD	Check (CHK)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Canada	Chubb Canada (non-Combined) billing in currency CAD or USD	(ACH)	Restricted to 7 digits	n/a	n/a	n/a	04	Required	n/a	Requires Transit (5digits) and Institution (4 digits) codes to total 9 digits (please add a zero before the Institution code to total 4 digits) Bank accounts are restricted to 7 digits
Non-Canada	Chubb Canada and billing in currency of CAD or USD	(ACH)	Required	n/a	Only when European Bank account	Required	02	Required	When necessary	n/a
Canada	Chubb Canada (non-Combined) billing in currency CAD or USD	Check (CHK)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Canada	Chubb companies <u>not</u> located in Canada billing in currency of CAD or USD	(ACH)	Required	n/a	Only when European Bank account	Required	02	Required	When necessary	n/a
Non-North America (US, Canada & Bermuda)	Chubb company located in the US billing in a Non-USD currency	(IFT_2)	Required	n/a	Only when European Bank account	Required	02	Required	When necessary	n/a
Non-US & Bermuda	Chubb company located in US or Bermuda and billing in currency USD	(IFT)	Required	n/a	n/a	Required	02	Required	When necessary	n/a

Complete Bank Information (1/2)

Note that not all of these fields may be visible / applicable to your region

1. Beneficiary Branch:
 - The branch of the bank associated with the beneficiary account.
2. Bank Account Number:
 - The unique identifier number for the bank account.
3. Bank Account Type:
 - The classification of the bank account (i.e. checking, savings).
4. Account Currency:
 - The currency used for transactions within the account.
5. Bank Routing Number:
 - The number used to identify the bank in transactions.
6. IBAN Number:
 - International Bank Account Number for international transactions, if applicable.
7. SWIFT Code (BIC):
 - The code used to identify banks globally for international transfers.
8. Sort Code:
 - The code that identifies the specific branch of a bank in the UK, if applicable.

Beneficiary Branch

Logan Square

Bank Account Number

12345678

* Bank Account Type

Checking (03) x v

* Account Currency

USD v

Bank Routing Number

222333444

IBAN Number

0987654

DFI Qualifier

02-swift code (02) x v

SWIFT Code (BIC)

2345820

Sort Code

NA

Applicable for UK

Complete Bank Information (2/2)

Note that not all of these fields may be visible / applicable to your region

- 9. Bank Code:
 - Numbers or letters that identifies the bank for various transactions, if applicable.
- 10. Transit Number and Institution Number:
 - Identifiers used in Canada to specify the bank and its branch.
- 11. Intermediary Bank Details:
 - Information about a bank that facilitates transactions between the sending and receiving banks.
- 12. Intermediary Bank ID:
 - The identification number assigned to the intermediary bank.
- 13. Intermediary DFI ID:
 - The identifier for the Depository Financial Institution acting as an intermediary.
- 14. Intermediary Bank Postal:
 - The postal code for the intermediary bank's location.
- 15. Banking Supporting Document:
 - Documentation that supports the banking information provided, often for verification.

Bank Code

NA

Bank Code is required for the following countries in the described format:
Czech Republic - 4 digits
Denmark - 4 digits
Hungary - 8 digits
Poland - 8 digits
United Kingdom - 6 digits (Sort Code)
Switzerland - 5 digits

Transit Number And Institution Number

NA

Applicable for Canada only. Please enter Transit Number and then Institution Number.

Intermediary Bank Details

Intermediary Bank Name

The Bank of Banking

Intermediary Bank ID

12489437

Intermediary DFI ID

917843645

Intermediary Bank Postal

19107

* Banking Supporting Document

* Attachments

Add [File](#)

Complete Additional Information

Note that not all of these fields may be visible / applicable to your region

- 1. Supplier Diversity:
 - Information that indicates the diversity status, if applicable.
- 2. W8 or W9 Attachment:
 - Tax forms (W8 for foreign entities and W9 for U.S. entities) that provide necessary tax information.
- 3. Form 1099 Attachment:
 - Documentation related to income reporting for tax purposes, typically for payments made to contractors or vendors.
- 4. Certificates Attachment:
 - Any relevant certifications that may need to accompany the banking information.
- 5. Attachments:
 - Any additional documents that need to be included with the submission.

W8 or W9 attachment

Choose File No file chosen

Form 1099 attachment

Choose File No file chosen

Certificates attachment

Choose File No file chosen

Attachments

Choose File No file chosen

Supplier Diversity

Country

United States

Diversity Category

Woman Owned Business Enterprise

Diversity Certificate

Agency

Center for Women & Enterprise

Effective Date

06/01/24

Expiration Date

03/01/26

Attachments

Add [File](#)

Description

Recognized by the Center for Women & Enterprise as a Woman Owned Business Enterprise.

Appropriate supporting documentation must be attached as evidence. Examples include Account Verification on Bank Letterhead, Voided Check, W9 (for US) or W8 (for non-US). The Supplier name and address entered in the Supplier Information Request Form must match what is on the supporting document.

Submit Supplier Information Request Form

1. There are 3 actions you can take at the bottom of the form:
 - **Submit for Approval:** If all information is filled in and accurate, click Submit for Approval.
 - **Save:** If you are not ready to submit, you can save your progress any time by clicking Save.
 - **Decline:** If a comment at the bottom of the form justfor any reason you decide not to fill out the SIM form, click Decline. Upon declining, you will need to add ifying why you are declining (see right)
2. Once submitted for approval:
 - The Chubb Procurement and AP team will review your entries and may come back to you with questions or Chubb-specific updates needed to your information (see next slide). When the form is fully approved, you will be able to submit invoices with your new/updated supplier information.

The screenshot displays the bottom portion of the Supplier Information Request Form. At the top, there are three buttons: 'Decline' (light gray), 'Save' (light gray), and 'Submit for Approval' (blue). Below these is a 'Comment' section with a header 'Comment' and a 'Mute Comments' link. It includes a text area for 'Enter Comment', a link to 'Add File | URL', and a button to 'Add Comment'. Below the comment section, it shows 'Participants: Hannah Chaput' and a message from the supplier: 'Hannah Chaput: We will provide you with supplier information in a different method.' with a timestamp of '10/17/24 at 10:23 AM'. At the bottom, a green banner states 'Form has been declined' with a close button. Below this, it says 'Chubb NSR (External)' and 'This is a form that is shared with the supplier to being the Chubb global onboarding process.' with a 'Declined' status and a help icon.



Handling Purchase Orders (POs) and Invoices via Supplier Actionable Notifications (SAN)

Doing Business with SAN

1. Purchase order notifications

- Notifies you about new POs via email.
- As a SAN supplier, you can acknowledge a PO, add a comment, or create an invoice all within the PO webpage. You will receive all necessary updates and notifications directly by email.
- Click on 'View Order' to take action.

2. Invoice status updates

- Notifies you about changes in the status of submitted invoices, such as "approved," "rejected," or "disputed."

3. Payment notifications

- Notifies you when a customer processes a payment, typically including the amount, date, and related invoice numbers.

Chubb INC

Purchase Order #70010000000000000157

Hi Hannah,

This is to inform you Purchase Order 70010000000000000157 from Chubb INC has been issued, and this same notification has been sent to your fellow team members with access to the Coupa Supplier Portal.

Submitted By	Hannah Chaput	
On Behalf Of	Hannah Chaput	
Supplier	Training Test Supplier	
Total	500.00 USD	
Items	Assessment	500.00 USD

View Order

Invoice #Credit

Test has been marked as Disputed by Chubb INC

Hi,

Your Credit Note **Credit** **Test** has been marked as disputed by your customer, Chubb INC Dev.

Dispute Reason(s)

- Goods/Service pending delivery

Date: 2024-10-17

Additional Comments: Hi, we have not received the order yet.

Creating an Invoice with SAN - Summary

- 1. Receive a PO notification email. Select the 'Create Invoice' button.
- 2. Complete the invoice by entering all applicable invoice data. All the fields with a red asterisk next to them are required to complete the invoice.
Do not use punctuation, special characters or extra spaces in the Invoice # field (max 29 characters)
- 3. Under the Invoice Header “Lines”, select the appropriate Tax Treatment from the dropdown menu.
- 4. Once all the invoice fields are complete, click 'Calculate' to update the totals.
- 5. Hit the 'Submit' button to share the invoice with Chubb.

Powered by

CHUBB®

Chubb Insurance Purchase Order #1000800000000000383

Order Summary

Date05/12/25

PO Total5,000.00 USD

Payment Terms30

Contact

Manage Order

Create Invoice

Orders details below

CHUBB®

Create Invoice Create

Sign Out

General Info

From

* Invoice #93840329-932-0923-02

* Invoice Date05/12/25

Payment Term30

* CurrencyUSD

Delivery Number

StatusDraft

Image ScanChoose FileNo file chosen

Supplier Note

* SupplierClementine Consulting

Supplier Tax ID

* Invoice From AddressClementine Consulting500 W Madison StChicago, IL 60661United States

* Remit-To AddressClementine Consulting500 W Madison StChicago, IL 60661United States

* Ship From AddressClementine Consulting500 W Madison StChicago, IL 60661United States

AttachmentsAdd File | URL | Text

Lines

Line Level Taxation

Type	Description	Price	
	Consulting	5,000.00	5,000.00

PO Line10008000000000000383-1

Credit LineNone

Billing Note

Service Sheet LineNone

Supplier Part Number

BillingALL08-6061410090-10000-21000-350000

ContractSOW CC (Published)

Tax TreatmentSelect

Period

ResourceNone

Total Tax0.00

Net Total5,000.00

Total5,000.00

Delete

Cancel

Save as Draft

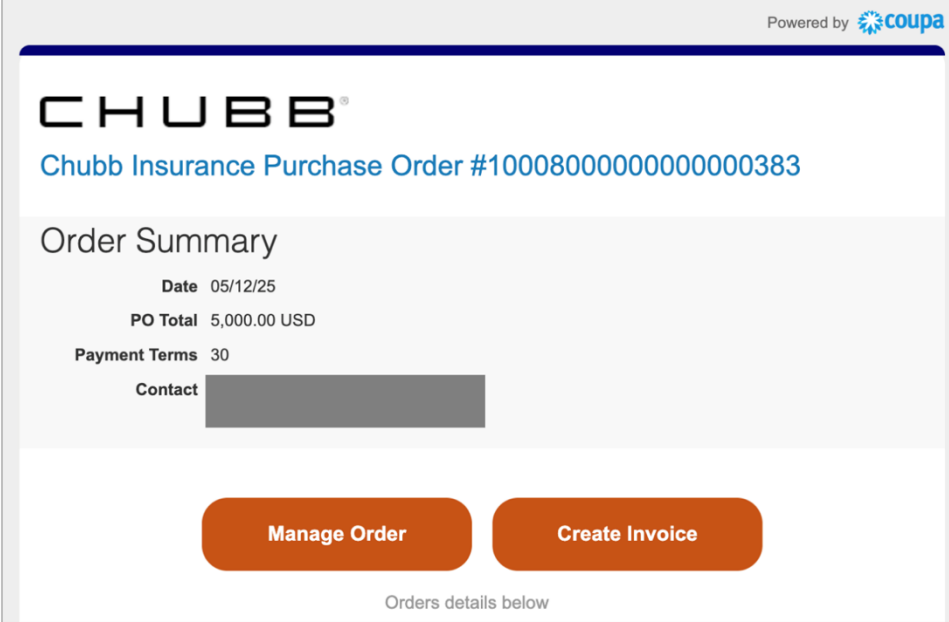
Calculate

Submit

Creating an Invoice with SAN (1/8)

Once the goods have been shipped or services have been completed, you will issue an invoice to indicate order fulfillment.

1. Receive a PO notification email.
2. Select the 'Create Invoice' button.
 - A unique invoice number will automatically be generated when creating an invoice.

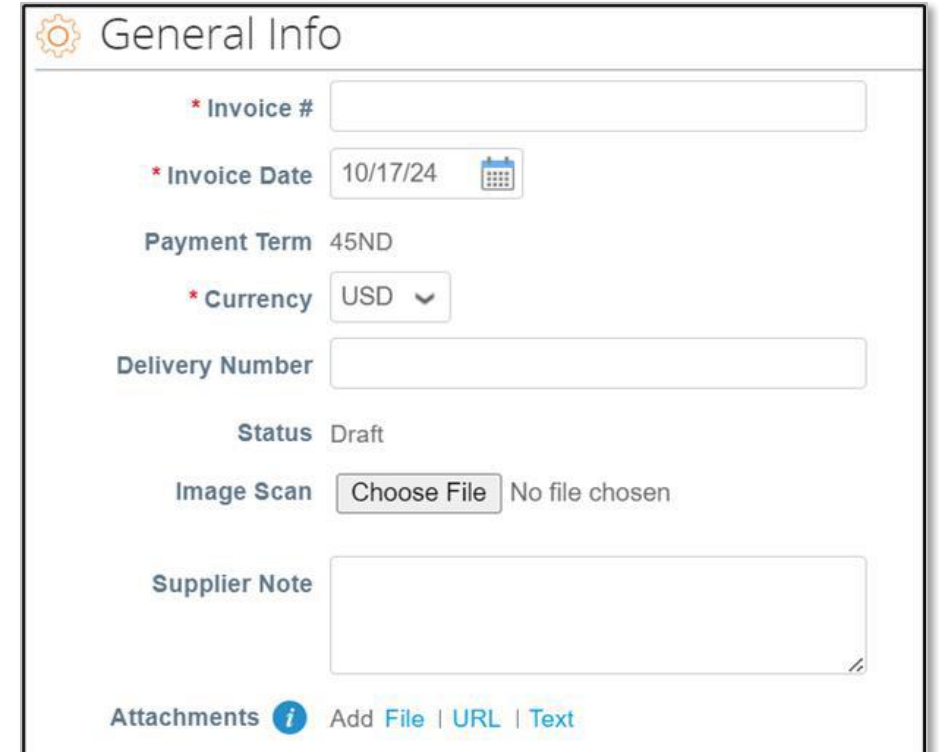


The screenshot displays a web interface for a Chubb Insurance Purchase Order. At the top right, it says 'Powered by coupa'. The main header shows the 'CHUBB' logo and the text 'Chubb Insurance Purchase Order #10008000000000000383'. Below this is an 'Order Summary' section with the following details: Date 05/12/25, PO Total 5,000.00 USD, Payment Terms 30, and a redacted Contact field. At the bottom of the summary section are two orange buttons: 'Manage Order' and 'Create Invoice'. Below the buttons, it says 'Orders details below'.

Creating an Invoice with SAN (2/8)

3. Enter the Invoice details:

- **Invoice #:** Enter the invoice number you want to correspond with the PO.
- **Invoice Date:** The date you are issuing the invoice.
- **Currency:** The currency in which the payment is requested.
- **Delivery Number:** A delivery or shipping number associated with the items billed on the invoice (optional).
- **Status:** Indicates the current state of the invoice in the workflow- in this view, it will always be Draft.
- **Image Scan:** Place to upload a scanned copy of the physical invoice or any relevant document (optional).




The screenshot shows a web form titled "General Info" with a gear icon. The form contains the following fields and options:

- * Invoice #**: A text input field.
- * Invoice Date**: A date picker showing "10/17/24" with a calendar icon.
- Payment Term**: A dropdown menu showing "45ND".
- * Currency**: A dropdown menu showing "USD" with a downward arrow.
- Delivery Number**: A text input field.
- Status**: A dropdown menu showing "Draft".
- Image Scan**: A button labeled "Choose File" and the text "No file chosen".
- Supplier Note**: A large text area with a small icon in the bottom right corner.
- Attachments**: A section with an information icon and the text "Add File | URL | Text".

Creating an Invoice with SAN (3/8)


4. Complete the 'From' section of the Chubb Invoice.
- Supplier VAT ID:** Value Added Tax identification number. Unique identifier assigned to your business for VAT purposes. *Only applicable to the EMEA region.*
 - Supplier Tax ID:** Tax identification number. Unique identifier assigned to your business for tax purposes. *Only applicable to the LATAM region.*
 - Invoice From Address:** The business address of the supplier (you) issuing the invoice. Identifies where the invoice originates from. It reflects your business's registered location or main office.
 - Remit-To Address:** The address where payments should be sent. Guides the customer on where to send checks or correspondence related to payment. This can differ from your business address if you use a payment processor, PO Box, or a different billing department.
 - Ship From Address:** The physical location from which goods are shipped. Important for logistics, customs, and tax purposes—especially for goods crossing state or international borders. If you're not shipping physical goods (e.g., you're providing services), this may just match your main office address.

 From


* **Supplier**

Clementine Consulting


* **Supplier VAT ID**

GB998854239 


* **Invoice From Address**

UK 
9 Conduit Street
London
London
W1S 2XG
United Kingdom
UK Office

* **Remit-To Address**

UK 
9 Conduit Street
London
London
W1S 2XG
United Kingdom

* **Ship From Address**

UK 
9 Conduit Street
London
London
W1S 2XG
United Kingdom

CHUBB®

SAN
Overview

Introduction

Information
Request Form

Purchase Orders
(POs) and Invoices

Support



28

Creating an Invoice with SAN (4/8)

- 5. The 'To' section of the invoice will have already been completed by Chubb. You do not need to enter any information in this section (*apart from Clarity invoices where the start and end date should be added; if you do not know what a Clarity invoice is, please leave blank*)
- 6. Review Invoice Line information:
 - **Type:** Specifies the type of line item. In this case, the dollar icon indicates it is an amount line item, rather than a quantity line item. You will not be able to change this field on an invoice.
 - **Description:** Short description or name of the item/service being invoiced.
 - **Price:** The cost associated with the specific line item.
 - **PO Line:** Refers to the purchase order (PO) line number that corresponds to this invoice line. This links the line item to a specific line item in the original PO.

Lines

☐ Line Level Taxation

Type	Description	Price	500.00
	Consulting Februar	500.00	

PO Line

10008000000000000417-1

Clear

Service Sheet Line

None

Contract

SOW CC (Published)

Credit Line

None



Depending on the type of PO, you may not be able to change price and quantity

Creating an Invoice with SAN (5/8)

7. Review Invoice Line information (Continued)

- **Service/Time Sheet Line:** This field is only used for invoices related to time-based services.
- **Contract:** The contract associated with the line item.
- **Supplier Part Number:** Field to enter an internal part or product number specific to the supplier (optional).
- **Tax Treatment:** The tax classification for the item (*required for U.S. invoices only*). *If this is NOT a U.S. invoice and the field appears, select 'Exempt.'*

Lines

Line Level Taxation

Type	Description	Price	
	Consulting Februar	500.00	500.00

PO Line

1000800000000000417-1

Clear

Service Sheet Line

None

Contract

SOW CC (Published)

Credit Line

None

Supplier Part Number

Tax Treatment

Exempt (E)

Only for US invoices

Resource

None

Billing Note

Billing

ALL08-6061410090-10000-21000--350000

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
		0.00	

Creating an Invoice with SAN (6/8)

8. Review Invoice Line information. (Continued)

- **Resource (if applicable – used for Clarity Contingent Workforce invoices only):** Field used to specify a particular resource, such as a person or asset, associated with the item. Use the LAN ID for the resource that was identified on the PO. If the LAN ID needs to be updated, you will need to submit a PO Change Request.
- **Billing Note:** Field for any additional notes related to this billing line.
- **Line Level Taxation (Canada and EMEA):** If applicable select the checkbox on the top right side of the invoice line section. An accounts payable specialist will select the tax code and tax rate at the same line level. There is no header level tax for EMEA/Canada.
 - **Tax Description:** A short label or name for the type of tax being applied. Helps Chubb understand the nature of the tax. E.g., "VAT", "Sales Tax", "GST", "Zero Rated", "Reverse Charge VAT".
 - **Tax Rate:** Applicable tax rate.
 - **Tax Amount:** The monetary value of the tax being charged for that specific line.
 - **Tax Reference:** An optional field to provide supporting tax information. E.g., a VAT exemption code or reason ("EU reverse charge"), Internal tax code used in your system, Jurisdictional tax information or Regulation reference.

☒ **Line Level Taxation**

Taxes			
Tax Description	Tax Rate	Tax Amount	Tax Reference
<div>▼</div>	<div></div>	<div>0.00</div>	<div></div>

Creating an Invoice with SAN (7/8)

9. Enter invoice total and taxes. Suppliers are responsible for calculating the tax. IF TAXES ARE NOT ENTERED IN THIS SECTION, CHUBB WILL NOT KNOW TO PAY THE TAX ON THIS ITEM. Please note that for *North America and Bermuda suppliers*, the tax amount should be provided in the totals section. This tax amount should be inclusive of any tax on shipping or miscellaneous charges.
- **Lines Net Total:** The total cost of all items added on the invoice before adding any extra charges, taxes, or discounts. It's auto-calculated based on what you entered in the "Lines" section.
 - **Shipping:** If there are any shipping charges, enter them here. The amount will be added to the total.
 - **Misc:** Use this field for any other charges that don't fit under shipping or tax, like special handling fees or additional services. Enter the extra amount, and it will be added to the total.
 - **Tax:** Enter the percentage or amount of tax. Select the tax type in the dropdown, for each region the available options will look different.

Totals & Taxes

Lines Net Total	500.00
Shipping	<input type="text"/>
Misc	<input type="text"/>
Tax	<div><div></div><div>0.000 % 0.000</div></div>
Total Tax	0.00
Net Total	500.00
Total	500.00

Delete

Cancel

Save as Draft

Calculate

Submit



When line level taxation is applied to an invoice, the tax will appear on each line and not the bottom of the invoice.

Creating an Invoice with SAN (8/8)

10. Submit, Save, Cancel, or Delete.

- **Submit:** Finalizes the document and submits it to Chubb. Coupa will confirm that the invoice is ready to be sent.
- **Calculate:** Calculate the total of the invoice. Often used when submitting a partial invoice or adjusting the tax.
- **Save as Draft:** Saves the progress on the invoice without submitting it.
- **Cancel:** Halts an invoice that has already been submitted.
- **Delete:** Deletes an invoice in draft form.

11. Next Steps

- The invoice will enter Chubb's approval workflow.

Taxes

VAT Rate

VAT Amount

Tax Reference

5.0%

17.50

+ Add Line

+ Pick lines from PO

+ Pick lines from Contract

Totals & Taxes

Lines Net Total

Lines VAT Totals

Shipping

Misc

Total VAT

Net Total

Gross Total

350.00

17.50

17.50

350.00

367.50

Delete

Cancel

Save as Draft

Calculate

Submit

Delete

Cancel

Save as Draft

Calculate

Submit



Support Available

- For supplier related questions, email GlobalVendorManagement@chubb.com
- For high level guidance on creating an account on the CSP and navigating purchase orders and invoices, visit Chubb's [Coupa Supplier Portal](#) webpage.
- For Coupa resources, visit [Coupa's Supplier Resources](#).
- If you experience multi factor authentication issues or need Coupa support, please email supplier@coupa.com and CC your Chubb contact.