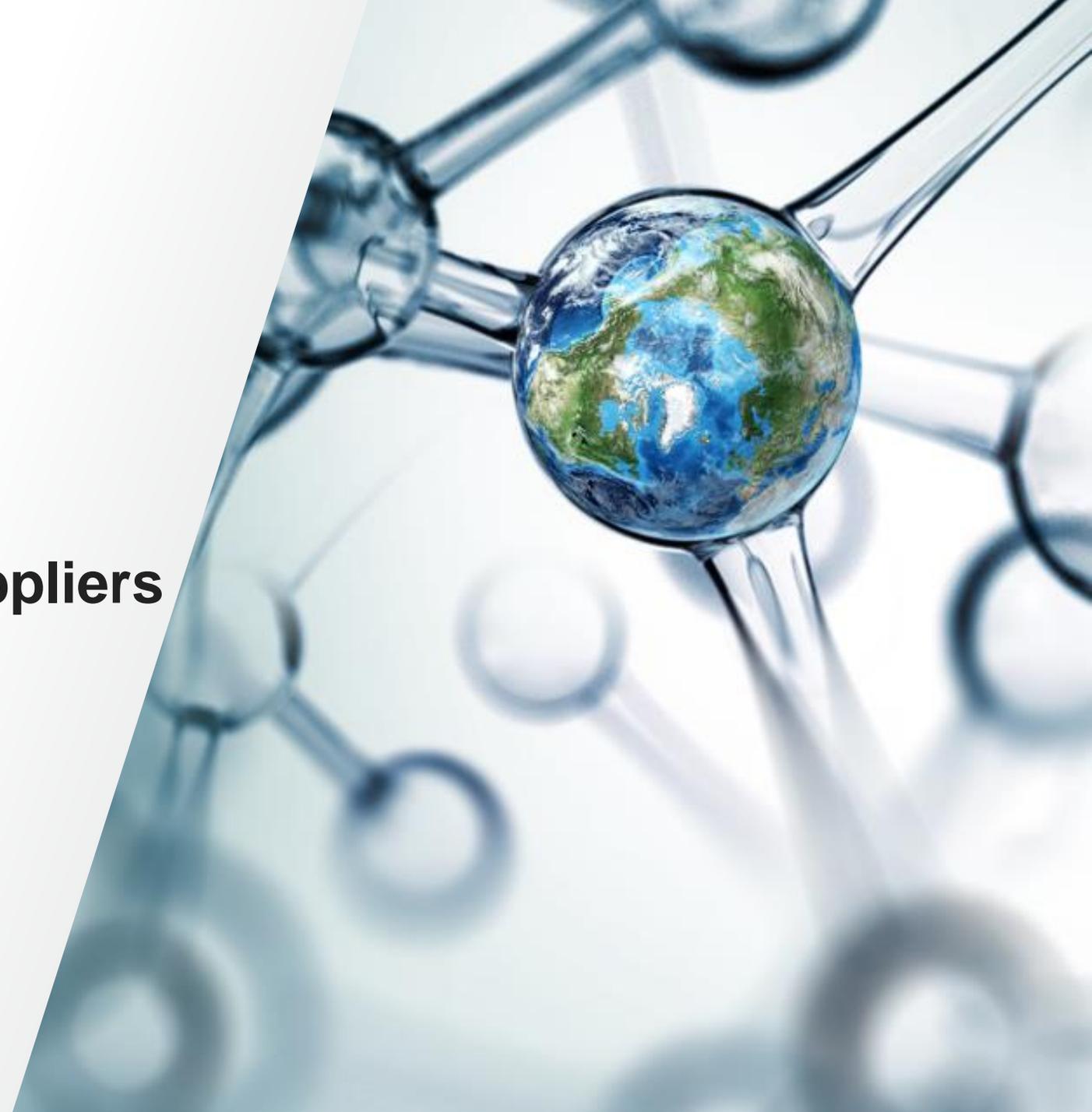


Coupa Supplier Portal (CSP) User Guide for Third-Party Suppliers

 The world leader in serving science



CONTENTS *click title to move to section*

[Introduction](#)

[What is Changing](#)

[Benefits for Suppliers](#)

[Introduction to Coupa Supplier Portal](#)

[Registering your CSP Account](#)

[Managing your CSP Account](#)

[Key CSP Features](#)

[Viewing your Purchase Orders](#)

[Creating an Invoice](#)

[Invoice Requirements](#)

[Why Invoice via CSP](#)

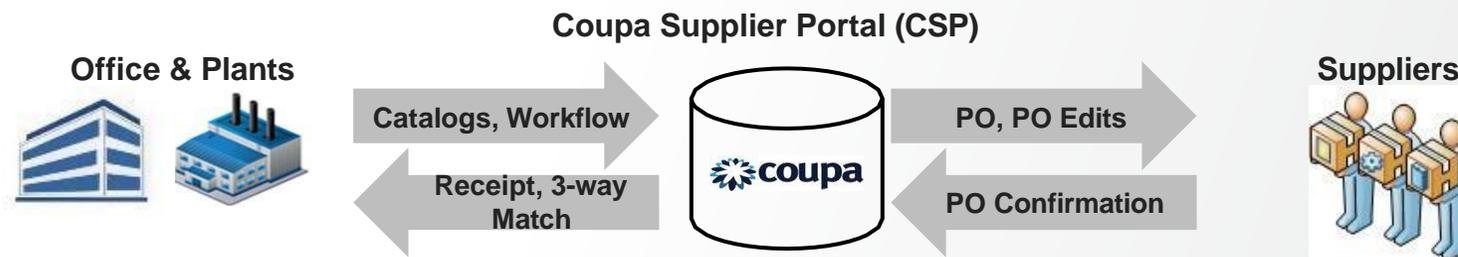
[Thermo Fisher Entities in Scope](#)

[Support](#)

Coupa Supplier Portal (CSP)

Introduction to Coupa

- Coupa is a cloud-based, user-friendly e-Procurement and supplier collaboration software
- Coupa provides Thermo Fisher with ONE platform, ONE environment that integrates our Sourcing, Procurement, and Invoice workflows
- Coupa is a leading **E-Procurement platform**, connecting buyers with their suppliers
- Coupa is an **internet-based** solution capable of accommodating a variety of different systems
- The **Coupa Supplier Portal (CSP)** is to communicate purchase orders, provide you with ability to create & send invoices, resolve disputes & provide visibility of status ('CP' prefixed PO only)
- The **Coupa Supplier Portal (CSP)** is **FREE**, there is no cost for suppliers



Coupa Supplier Portal (CSP)

What is changing?

PO Transmission

PO Emails
Phone/email for non-PO orders

Email transmission with link to supplier portal

PO Confirmations

PO confirmed via phone /email
Possible lack of acknowledgement

PO confirmation via interface
status command within the tool

Transaction Status

Transaction status not tracked
No communication with supplier

Status tracked via interface
communication with supplier

PO Flips / Invoicing

Supplier submits paper /PDF invoice
Prior to AP for 3-way match
(PO/goods receipt/invoice)

Supplier flips PO (interface)
Automatic 2-way match (PO & invoice) /
payment

Benefits for Suppliers

Coupa is focused on customer success:

- **No charge** to utilize the user-friendly Coupa Supplier Portal (CSP)
- **View your Purchase Orders** ('CP' prefixed PO) and get a summary of POs from Thermo Fisher
- **Create an invoice directly from the PO in the CSP**, by easily completing required fields Invoice # and date on the Create Invoice screen. You can attach a copy of your invoice
- **Resolve disputed invoices** via notifications received, with the reason for dispute and the option to cancel or adjust the invoice. You will be able to track the new status, from dispute to pending

POs

Network
cXML
Email/HTML

Invoices

Network
Supplier Actionable Notification (SAN)
cXML

Coupa Supplier Portal (CSP)

Introduction to Coupa Supplier Portal (CSP)

- The Coupa Supplier Portal (CSP) is an online tool that serves as the interface between the suppliers and Thermo Fisher. This will include:
- Exchanging PO and Invoice documents between Thermo Fisher and suppliers
- Provide increased visibility throughout the ordering and invoicing processes

The image shows two side-by-side forms for the Coupa Supplier Portal. The left form is titled 'Register' and includes fields for 'First Name', 'Last Name', 'Company', and 'Email', with a 'Register' button below. The right form is titled 'Log In' and includes fields for 'Email Address' and 'Password', with a 'Log In' button and a 'Forgot Your Password?' link below. A dark blue box with the text 'Login Page' is overlaid on the bottom right of the login form.



The image shows the home page of the Coupa Supplier Portal. At the top, there is a navigation bar with links for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below the navigation bar, there is a 'Recommended' section with a message: 'Complete your profile to get paid faster and get discovered'. A 'Profile Progress' section shows 'Last Updated' as 'about 1 hour ago' and an 'Improve Your Profile' button. The 'Profile Summary' section displays three metrics: '38 Legal Entities', '1 Registered User', and '42 Connected Customers'. Below this, there are several status indicators: 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. The main content area features a 'Karina Dummy Supplier' profile with a globe icon and various details like 'Website', 'Industry', 'About', 'Established', 'Top Commodities', 'Currencies', 'Diversity', and 'Corporate Social Responsibility Rating'. On the right side, there are sections for 'Announcements', 'One-Click Savings', 'Merge Accounts', and 'Latest Customers'. A dark blue box with the text 'Home Page' is overlaid on the bottom right of the page.

Home Page

Coupa Supplier Portal (CSP)

Registering your Coupa Supplier Portal (CSP) Account

- You may receive an email invitation from Thermo Fisher inviting you to join the Coupa Supplier Portal
- To register, use one of the following methods:
 - Follow the instructions within the email invitation
 - Register directly at <https://supplier.coupahost.com>
 - Log-in with your existing Coupa access:
Setup > Connectivity Links > Select 'Thermo Fisher Scientific' in search field > Provide Thermo Fisher contract name/e-mail you work with > Submit
- For queries, please contact: RTPManila.Indirectprocurement@thermofisher.com

The screenshot shows the 'coupa suppliers' interface. On the left, the 'Get Started' section includes a 'Request an Invite' button, which is pointed to by a red arrow from a blue box labeled 'Register Here'. On the right, the 'Log In' section features a 'Log In' button and a 'Forgot your password?' link, both pointed to by red arrows from blue boxes labeled 'Login Here' and 'Forgot password?' respectively. The registration form fields are: * First Name, * Last Name, * Company, and * Email. The login form fields are: * Email (Email Address) and * Password.

Coupa Supplier Portal (CSP)

Managing your Coupa Supplier Portal (CSP) Account

STEP 1: Setup Company / Legal Entity profile (8 sub-steps)

- 1 From the Main Menu, click the **Setup** Tab
- 2 Click **Legal Entity Setup** option
- 3 Click **Add Legal Entity**

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup' (highlighted with a red box and a '1' in a circle). Below the navigation bar, the 'Admin' section is visible, with 'Legal Entity Setup' highlighted in the left sidebar (marked with a '2' in a circle). In the main content area, the 'Add Legal Entity' button is highlighted with a red box and a '3' in a circle. The 'Legal Entity' table lists several entities, including 'Karina Dummy Supplier', 'AIRGAS DRY ICE LLC', 'Karina Dummy Supplier', 'abbott laboratories', and 'Sonoco_US_0000064122', each with an 'Actions' button.

Legal Entity	
▼ Karina Dummy Supplier	Actions ▼
▼ AIRGAS DRY ICE LLC	Actions ▼
▼ Karina Dummy Supplier	Actions ▼
▼ abbot laboratories	Actions ▼
▼ Sonoco_US_0000064122	Actions ▼

Managing your Coupa Supplier Portal (CSP) Account

STEP 1: Setup Company / Legal Entity profile

4 Enter Legal Entity name and select the Country, and Continue

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

5 Enter your company Invoice address and Tax ID number

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country/Region

Use this address for Remit-To *i*

Use this for Ship From address *i*

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. *i*

What is your Tax ID? *i*

Country/Region

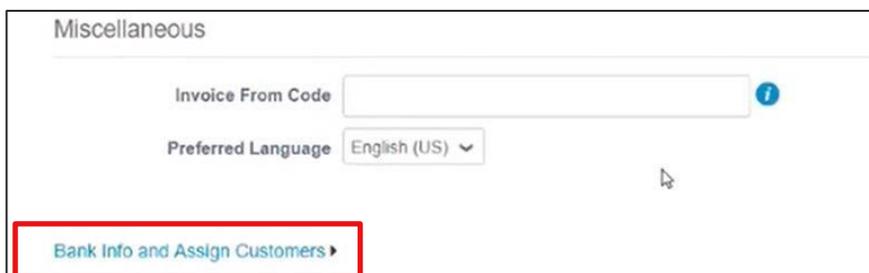
Tax ID

I don't have Tax ID Number

Managing your Coupa Supplier Portal (CSP) Account

STEP 1: Setup Company / Legal Entity profile

- 6 At the base of the screen, click: Bank Info and Assign Customers



Miscellaneous

Invoice From Code

Preferred Language

[Bank Info and Assign Customers >](#)

- 7 Select the customers to be included and click Done



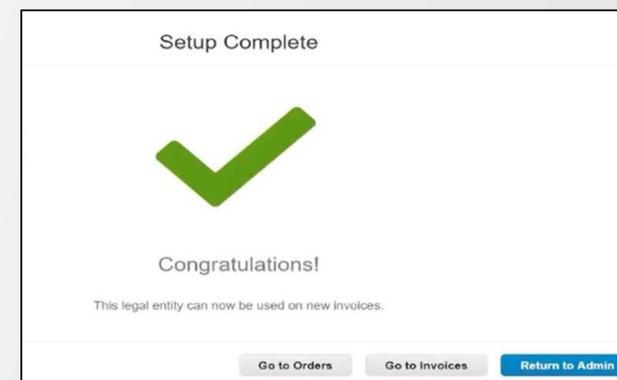
Assign Customers

Who do you want to see this?

NJ

Thermo Fisher Scientific

- 8 Coupa Will confirm the setup is complete



Setup Complete



Congratulations!

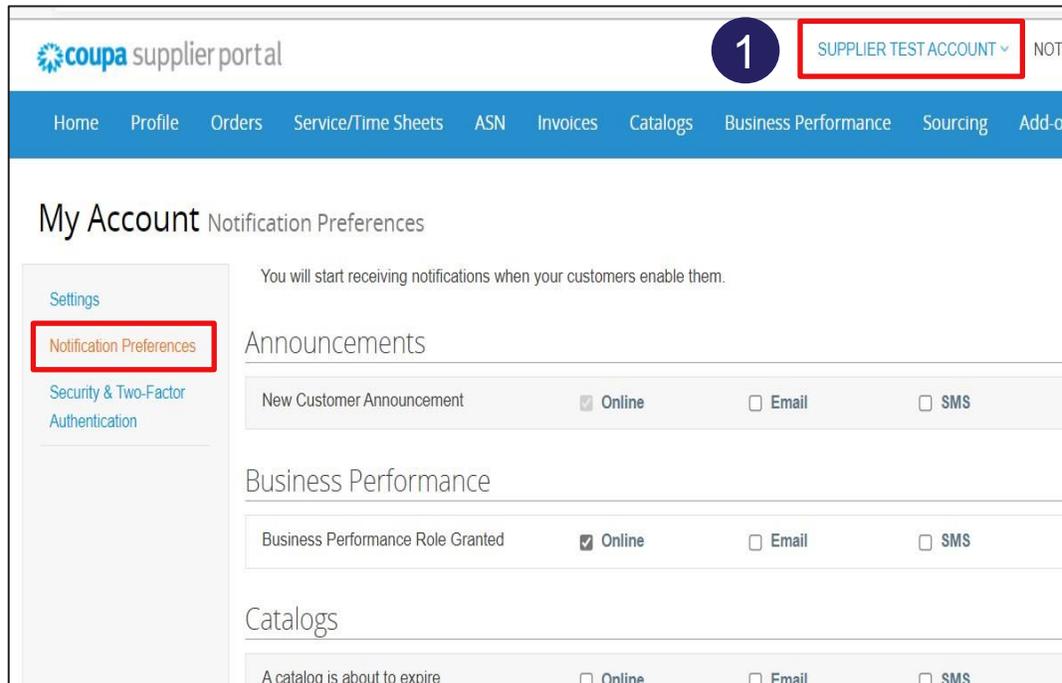
This legal entity can now be used on new invoices.

[Go to Orders](#) [Go to Invoices](#) [Return to Admin](#)

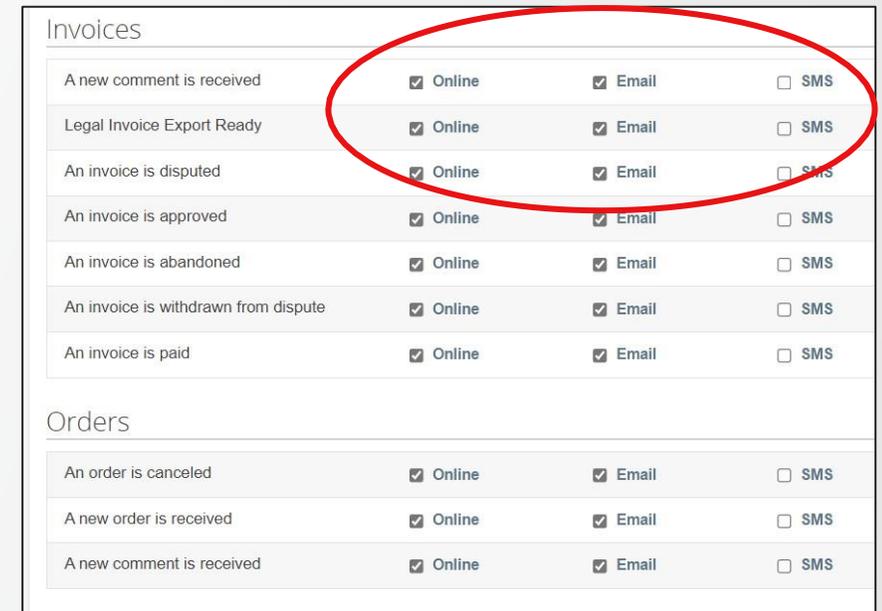
Managing your Coupa Supplier Portal (CSP) Account

STEP 2: Notification Preferences (3 sub-steps)

- 1 From the **Main Menu**, click the **Supplier Test Account Tab**
- 2 Click the **Notification preferences** button



- 3 Select preferences. Coupa will confirm the setup is complete



Coupa Supplier Portal (CSP)

Managing your Coupa Supplier Portal (CSP) Account

STEP 3: Add a New User (5 sub-steps)

- 1 From the **Main Menu**, click the **Setup** Tab
- 2 Click the **Invite User** button

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the logo, account type (SUPPLIER TEST ACCOUNT), notifications (99+), and a help menu. A main navigation bar contains various tabs, with the 'Setup' tab highlighted and circled with a '1'. Below this, a sub-menu shows 'Admin', 'Customer Setup', and 'Connection Requests'. The 'Admin' section is active, displaying 'Admin Users' with an 'Invite User' button circled with a '2'. A table lists user details for 'Eva Bizek', including email, status, permissions, and customer access.

Users	Permissions	Customer Access
Eva Bizek eva.bizek@thermofisher.com Status: Inactive Activate User	ASNs Admin Business Performance Catalogs Community Invoices Order Changes Order Line Confirmation Orders - Restricted Access to Orders	None selected

Managing your Coupa Supplier Portal (CSP) Account

STEP 3: Add a New User (5 sub-steps)

- 3 Enter the user's information
- 4 Select which permissions the user should have access to

Invite User

First Name

Last Name

* Email

Permissions ⓘ

Customers

- All
- Admin
- Orders
 - Restricted Access to Orders
 - All
- Invoices
- Catalogs
- Profiles
- ASNs
- Service/Time Sheets
 - Restricted Access to Service/Time Sheets
 - All
- Payments
- Order Changes
- Pay Me Now
- Business Performance
- Sourcing
- Order Line Confirmation

Customers

- All
- Thermo Fisher Scientific - TIME WARNER CABLE (BUFFALO)_US_50051004
- Thermo Fisher Scientific - AIRGAS USA LLC_US_00053226
- Thermo Fisher Scientific - MOTION INDUSTRIES INC_US_0000011866
- Thermo Fisher Scientific - TRANSPERFECT TRANSLATION INTL INC_US_0000716083
- Thermo Fisher Scientific - ABELL PEST CONTROL INC_CA_0000721849
- Thermo Fisher Scientific - STAPLES BUSINESS ADVANTAGE_US_00080039
- Thermo Fisher Scientific - TRANSPERFECT TRANSLATIONS INTERNATIONAL_US_0013635

- 5 Click **Save** to send invitation
Your colleague will receive an email notification with a link to register

Note: to deactivate a user, you must edit the user record and select “Deactivate User”

Cancel Deactivate User Save

Coupa Supplier Portal (CSP)

Key Features of CSP

The screenshot displays the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left, and 'SUPPLIER TEST ACCOUNT', 'NOTIFICATIONS 99+', and 'HELP' are on the right. A blue navigation bar contains tabs for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The 'Orders', 'Invoices', and 'Setup' tabs are highlighted with red boxes. Below the navigation bar, a 'Recommended' banner suggests completing the profile. A 'Profile Progress' section shows five progress indicators and a 'Last Updated' timestamp of '22 minutes ago' with an 'Improve Your Profile' button. The 'Profile Summary' section features three cards: '38 Legal Entities' (globe icon), '1 Registered User' (person icon), and '42 Connected Customers' (group of people icon). On the right, there are sections for 'Announcements' (with a 'Remit to information' notice), 'One-Click Savings', and 'Merge Accounts'.

Orders	Review your purchase orders and submit invoices / credit memos
Invoices	Review status of invoices and credit memos
Set Up	Administration of your CPS account

Coupa Supplier Portal (CSP)

Viewing Your Purchase Orders

You will be able to view your POs in the CSP regardless of your transmission method

- 1 Go to **Orders** tab, this will provide a summary of all PO from Thermo Fisher
- 2 Click on the **PO number hyperlink**, which will open another screen and allow users to view the entire PO
- 3 Alternatively **search** for a specific PO number

coupa supplier portal 1

SUPPLIER TEST ACCOUNT | NOTIFICATIONS 99+ | HELP

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons Setup

Orders Order Lines Returns Order Changes Order Line Changes Shipments

Select Customer Thermo Fisher Scientific - AMAZON CAPITAL S

Configure PO Delivery

Purchase Orders

Click the 📄 Action to Invoice from a Purchase Order

Export to View All Search 3

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CP-79274 2	9/15/21	Soft Closed	None	Amazon product	No	300.00 USD		

Purchase Order #CP-79274

General Info

Status: Soft Closed - Sent via xml
Order Date: 09/15/21
Revision Date: 09/15/21
Requester: NARequisitioner17 TEST
Email: ifscoupausertest+141@gmail.com
Payment Term: N60 - Net 60
Attachments: None
Acknowledged:
Assigned to: Select

Shipping

Ship-To Address: 401 Millcreek Road
Marietta, OH 45750
United States
Location Code: 101
Attn: NARequisitioner17 TEST
Default Tax Code: USEOHWA
Terms: FCA: Free Carrier

Creating an Invoice

You will be able to create an invoice directly from the PO in the CSP, commonly referred to as a 'PO Flip'

- 1 Go to **orders** tab
- 2 Identify **PO you would like to 'flip'**
- 3 Click on the **create invoice icon**



Home Profile **Orders** 1 /Time Sheets ASN Invoices Catalogs Add-ons Admin

Orders Order Lines Returns Order Changes Order Line Changes Shipments

Select Customer Thermo Fisher Scientific - AMAZON CAPITAL

Configure PO Del

Purchase Orders

Click the Action to Invoice from a Purchase Order

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CP-79261	09/15/21	Issued	None	Amazon product	No	450.00 USD		

Coupa Supplier Portal (CSP)

Creating an Invoice

Complete **mandatory fields** Invoice number & date on the Create Invoice screen. You can attach a copy of your invoice (JPEG only)

- 1 Complete required fields
- 2 Edit quantities, reference, shipping, handling as need
- 3 Select **calculate** to update total
- 4 Click **submit**

The screenshot shows the 'Create Invoice' interface with the following sections and callouts:

- General Info:** * Invoice # (1200001), * Invoice Date (01/28/20), * Payment Term (120 Days Due Net From Invoice Date (T&I2)), * Currency (USD), Delivery Number, Status (Draft), Supplier Note, and Attachments (Add File | URL | Text).
- From:** * Supplier (0015126659), Supplier Tax ID (90-7567598), * Invoice From Address (Supplier Legal Entity Name, IFC7598, 230 S. Wacker Drive, Chicago, Illinois 90909, United States), * Remit-To Address (Supplier Legal Entity Name, RTA7598, 230 S. Wacker Drive, Chicago, IL 90909, United States), and * Ship From Address (Supplier Legal Entity Name, SFA7598, 230 S. Wacker Drive, Chicago, Illinois 90909, United States).
- Lines:** A table with columns for Type, Description, Price, and Match Reference Key. The Price field (1,500.00) and Match Reference Key (1234567) are highlighted.
- Totals & Taxes:** Lines Net Total (1,500.00), Shipping, Tax (0%), Tax Reference, Handling, Tax (0%), Tax Reference, Misc, Tax (0%), Tax Reference, Total Tax (0.00), Net Total (1,500.00), and Total (1,500.00). Buttons for Delete, Cancel, Save, Calculate, and Submit are at the bottom.

Callouts 1-4 indicate the steps: 1 (General Info fields), 2 (Lines table), 3 (Calculate button), and 4 (Submit button).

Creating an Invoice

In this case, a tax part pop up:

☰ Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	US test	100.0000	Each	100.00	10,000.00 ✕

PO Line: [CP-324526-1](#) Service/Time Sheet Line: None Contract: Supplier Part Number:

Billing Note: Billing: UK01-213-Financial Services-175600---100

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>

You can choose tax description, but better not touch that part. Just tick the box, this is the only specific request.

If you forget to tick the line level taxation box, the tax part is untouchable for AP, so we can't process the invoice.

Invoice Requirements

- Company Header (name and address)
- Invoice Number
- Invoice Date
- PO Number or Thermo Fisher Requester Name
- Thermo Fisher Bill-To Address
- Remit-to Address
- Item /service description
- Total amount
- Currency
- *Ship-to address, payment terms and banking information, are helpful although not mandatory*

- Invoices must be submitted in CSP up to 7 days after the invoice date
- After 7 days the invoice date must be updated and the invoice resubmitted

If you experience any difficulties, invoices can be submitted via email:

- To mailbox invoices+APAC@thermofisher.coupahost.com (*for invoice submission only; please do not submit inquiries to this address*)
- Invoices must be submitted in **non-editable PDF format**
- Invoices must be submitted to AP Mailbox as soon as they are issued; late submission might cause late payment
- Invoices **must include the PO number**
- PDF files submitted via e-mail must only contain only 1 invoice
- Multiple PDFs (max 10 pdfs) can be attached to a single e-mail

Why Invoice via CSP

There are a number of key benefits for you to invoice via the CSP:

- You can monitor the status of your invoice through to payment
- Invoices are processed, and potentially approved, automatically
- Faster processing than generating your own invoices
- Creating and sending invoices

Thermo Fisher Legal Entities in Scope

The following entities can be transacted with via CSP – page 1:

Legal Entity Name	Address	Country
Thermo Services Philippines Corp	27th Floor GBF Center 1 Bridgetowne Boulevard, E. Rodriguez Jr. Avenue, Barangay Ugong Norte, Quezon City.	Phillipines

Support

CSP Onboarding Queries



RTPManila.Indirectprocurement@thermofisher.com

General Accounts Payable Queries



invoices+APAC@thermofisher.coupahost.com

Thank you

