

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

 The world leader in serving science

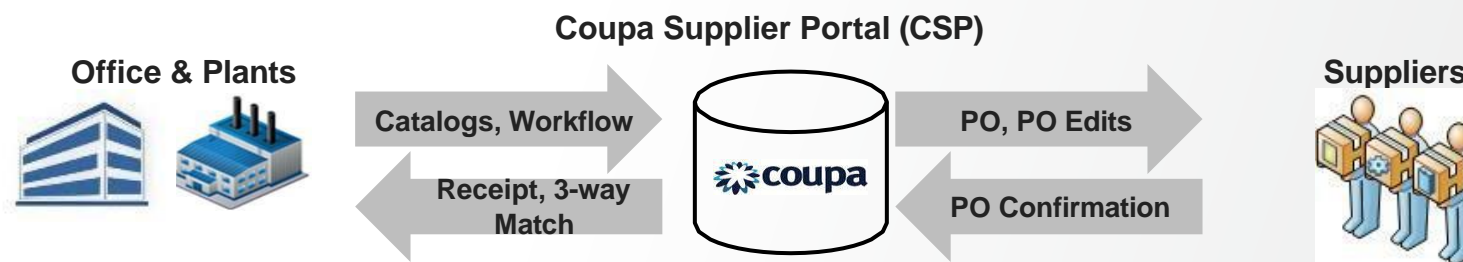
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Coupa Supplier Portal (CSP)

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

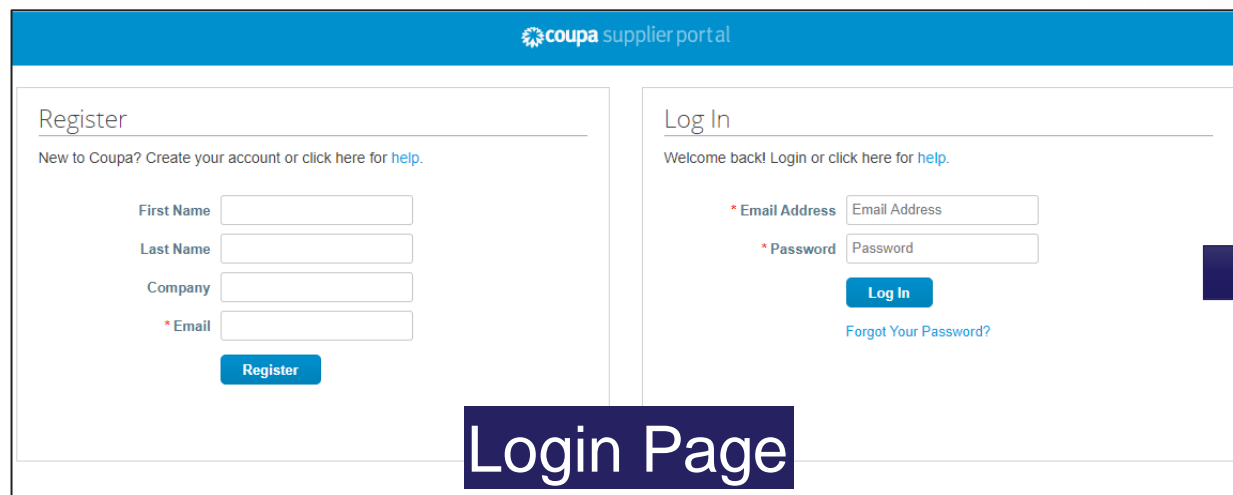
Invoices

Network
Supplier Actionable Notification (SAN)
cXML

Coupa Supplier Portal (CSP)

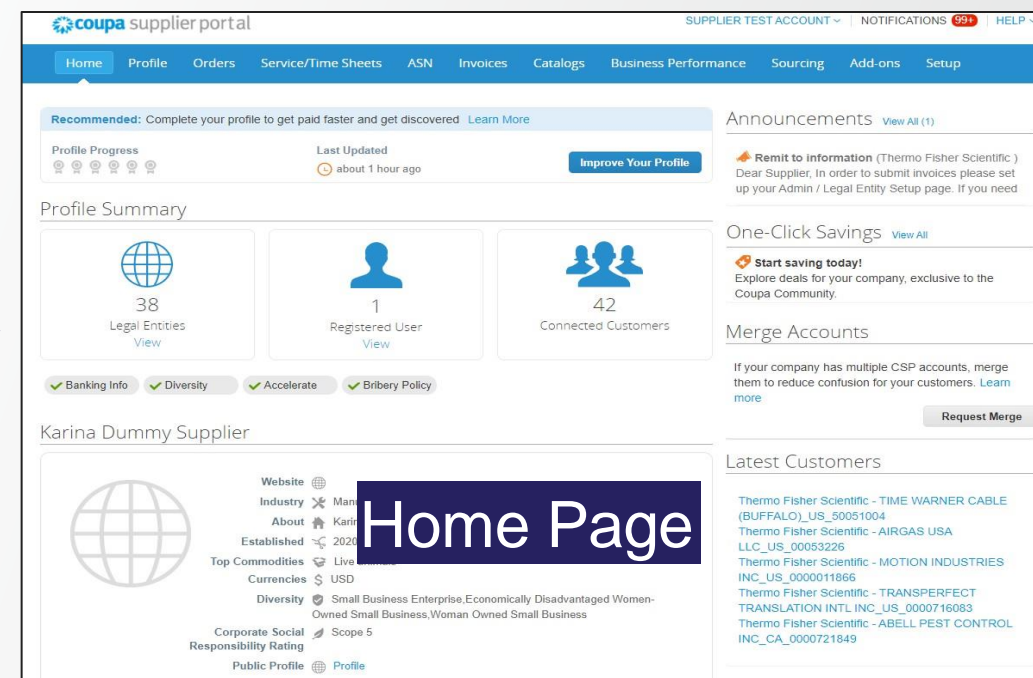
Introduction to Coupa Supplier Portal (CSP)

- 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 the login page of the Coupa Supplier Portal. It features a blue header with the 'coupa supplier portal' logo. Below the header, there are two main sections: 'Register' and 'Log In'. The 'Register' section includes fields for First Name, Last Name, Company, and Email, with a 'Register' button. The 'Log In' section includes fields for Email Address and Password, with a 'Log In' button and a link for 'Forgot Your Password?'. A large blue arrow points from the login page to the home page.

Login Page



The image shows the home page of the Coupa Supplier Portal. It features a blue header with the 'coupa supplier portal' logo and a navigation menu. Below the header, there are several sections: 'Recommended: Complete your profile to get paid faster and get discovered', 'Profile Progress', 'Last Updated', 'Announcements', 'One-Click Savings', 'Merge Accounts', and 'Latest Customers'. The 'Profile Summary' section shows 38 Legal Entities, 1 Registered User, and 42 Connected Customers. The 'Karina Dummy Supplier' section shows a profile card with various details. A large blue arrow points from the login page to the home 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: SupplierEnablementEMEA@thermofisher.com

The screenshot displays the 'coupa suppliers' portal interface. On the left, the 'Get Started' section includes a 'Request an Invite' button, which is pointed to by a red arrow from a 'Register Here' label. On the right, the 'Log In' section features fields for 'Email' and 'Password', a 'Log In' button, and a 'Forgot your password?' link. A red arrow points from a 'Login Here' label to the 'Log In' button, and another red arrow points from a 'Forgot password?' label to the 'Forgot your password?' link.

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 (CSP) interface. At the top, the header includes 'coupa supplier portal', 'SUPPLIER TEST ACCOUNT', 'NOTIFICATIONS 99+', and 'HELP'. Below the header is a navigation bar with tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The 'Setup' tab is highlighted with a red box and a circled '1'. Below the navigation bar is a sub-menu with 'Admin', 'Customer Setup', and 'Connection Requests'. The 'Admin' section is active, showing 'Legal Entity Setup'. On the left side of the 'Legal Entity Setup' page, there is a sidebar with options: Users, Merge Requests, Legal Entity Setup (highlighted with a red box and a circled '2'), Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences, Static Discounting, sFTP Accounts, cXML Errors, sFTP File Errors (to Customers), and sFTP File Status (from Customers). On the right side of the 'Legal Entity Setup' page, there is a table titled 'Legal Entity' with columns for the entity name and an 'Actions' button. The table lists five entities: Karina Dummy Supplier, AIRGAS DRY ICE LLC, Karina Dummy Supplier, abbott laboratories, and Sonoco_US_0000064122. An 'Add Legal Entity' button is located at the top right of the table, highlighted with a red box and a circled '3'. Below the table, there is a pagination link: '← Previous 1 2 3 4 5 6 7 8 Next →'.

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

Test INC

Country/Region

United States

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

Cancel

Continue

5 Enter your company Invoice address and Tax ID number

What address do you invoice from?

* Address Line 1

1234 Street Test

Address Line 2

* City

Austin

State

Texas - TX

* Postal Code

1234

Country/Region

United States

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. [i](#)

☒ Use this address for Remit-To [i](#)

☒ Use this for Ship From address [i](#)

What is your Tax ID? [i](#)

Country/Region

United States

Tax ID

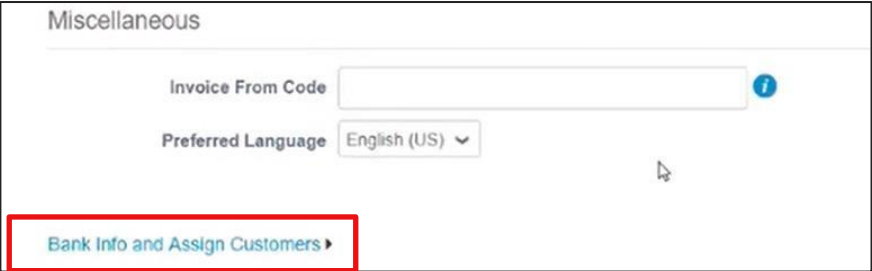
11-1111111

☐ I don't have Tax ID Number

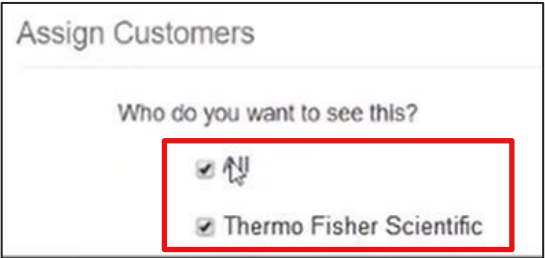
Managing your Coupa Supplier Portal (CSP) Account

STEP 1: Setup Company / Legal Entity profile

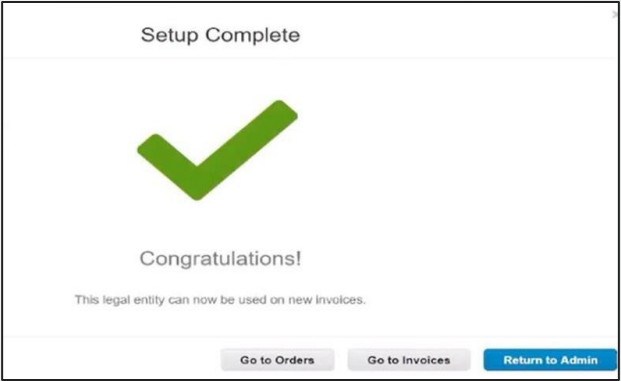
6 At the base of the screen, click: Bank Info and Assign Customers



7 Select the customers to be included and click Done



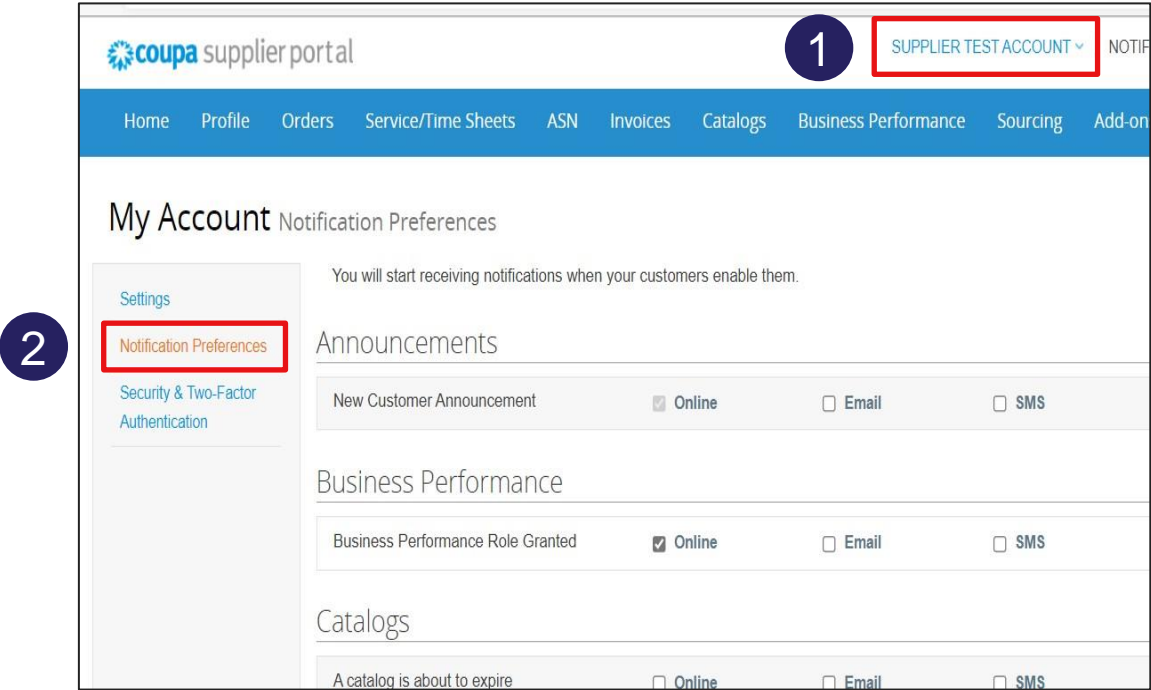
8 Coupa Will confirm the setup is complete



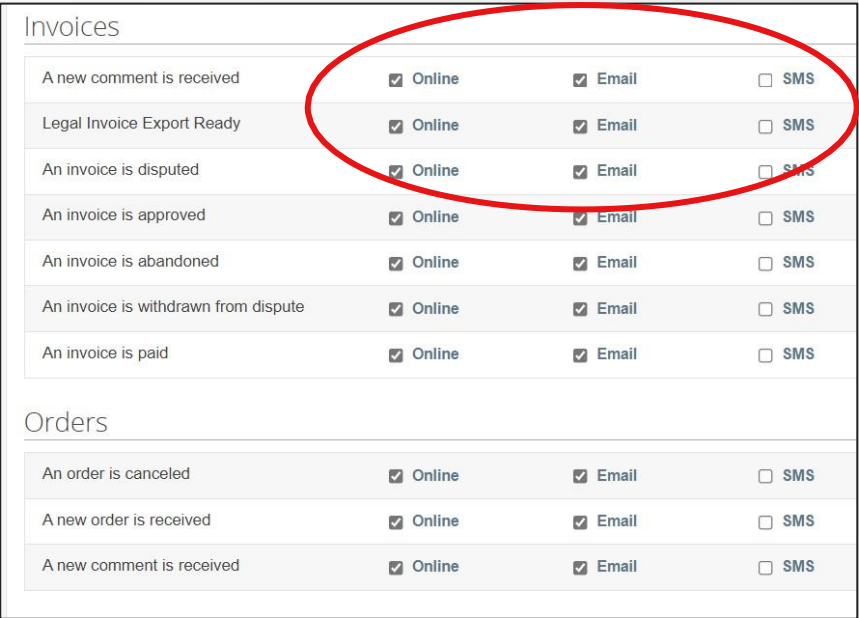
Managing your Coupa Supplier Portal (CSP) Account

STEP 2: Notification Preferences (3 sub-steps)

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

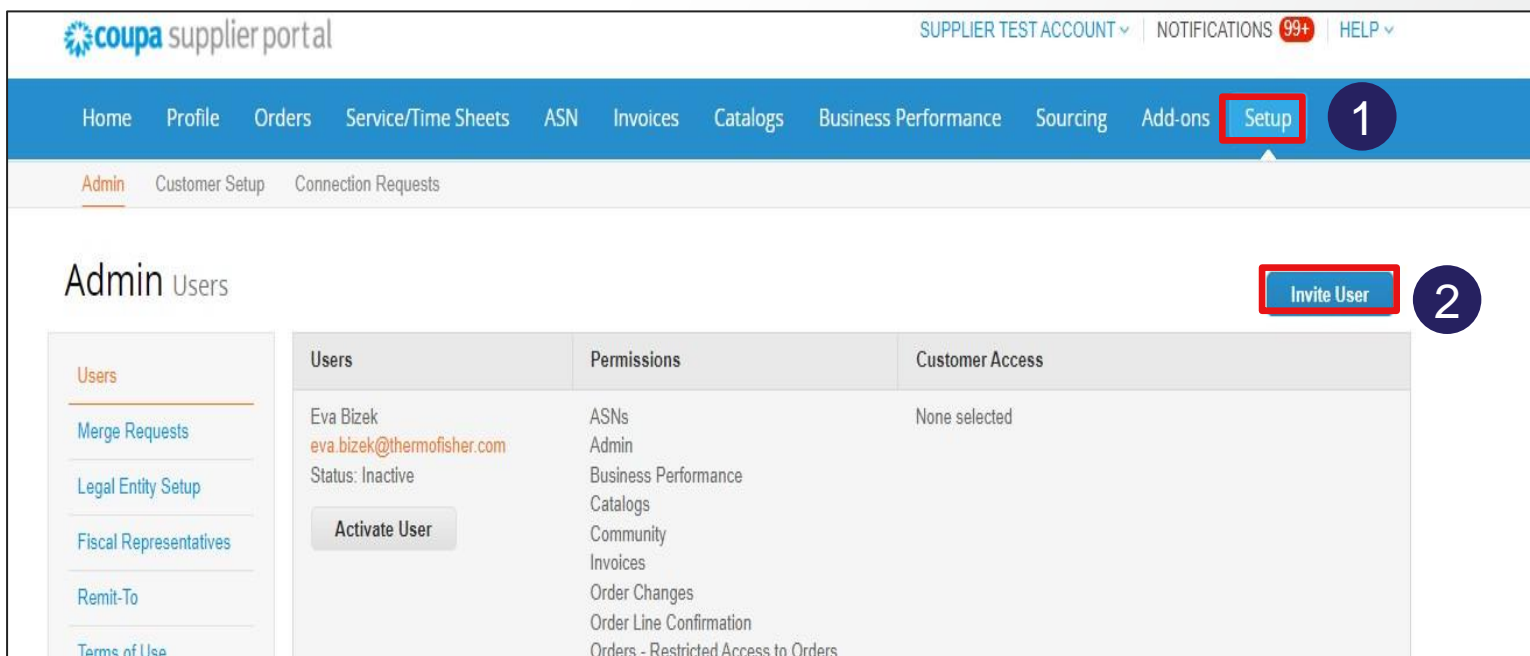


- 3 Select preferences. Coupa will confirm the setup is complete



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

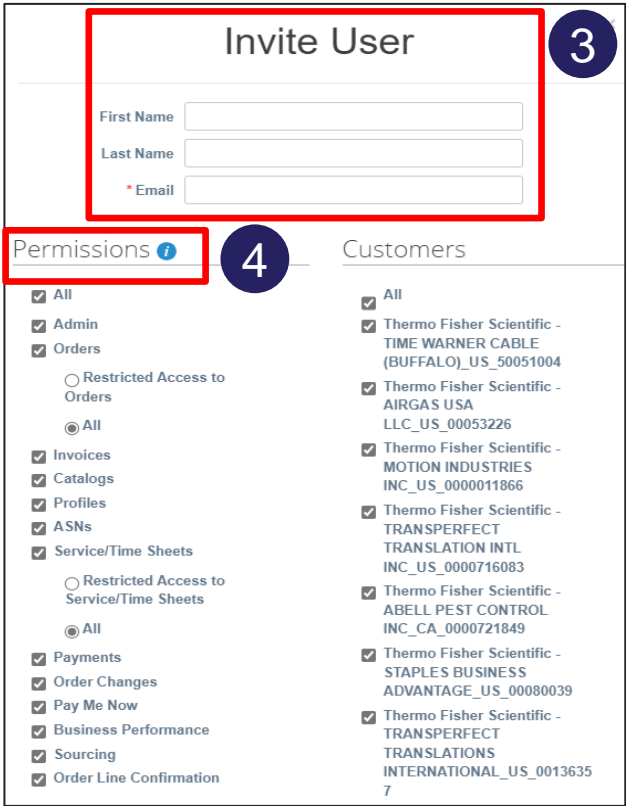
- 1 From the **Main Menu**, click the **Setup** Tab
- 2 Click the **Invite User** button



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

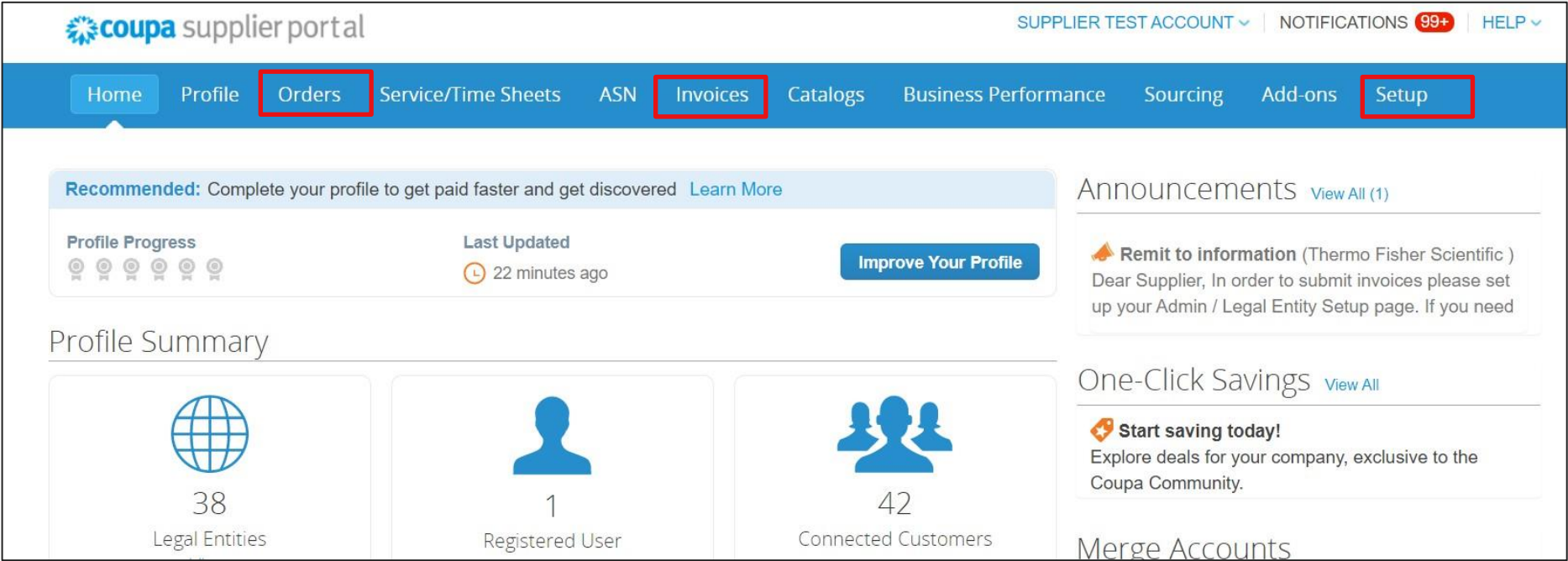


- 5 Click **Save** to send invitation
Your colleague will receive an email notification with a link to register

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



Key Features of CSP

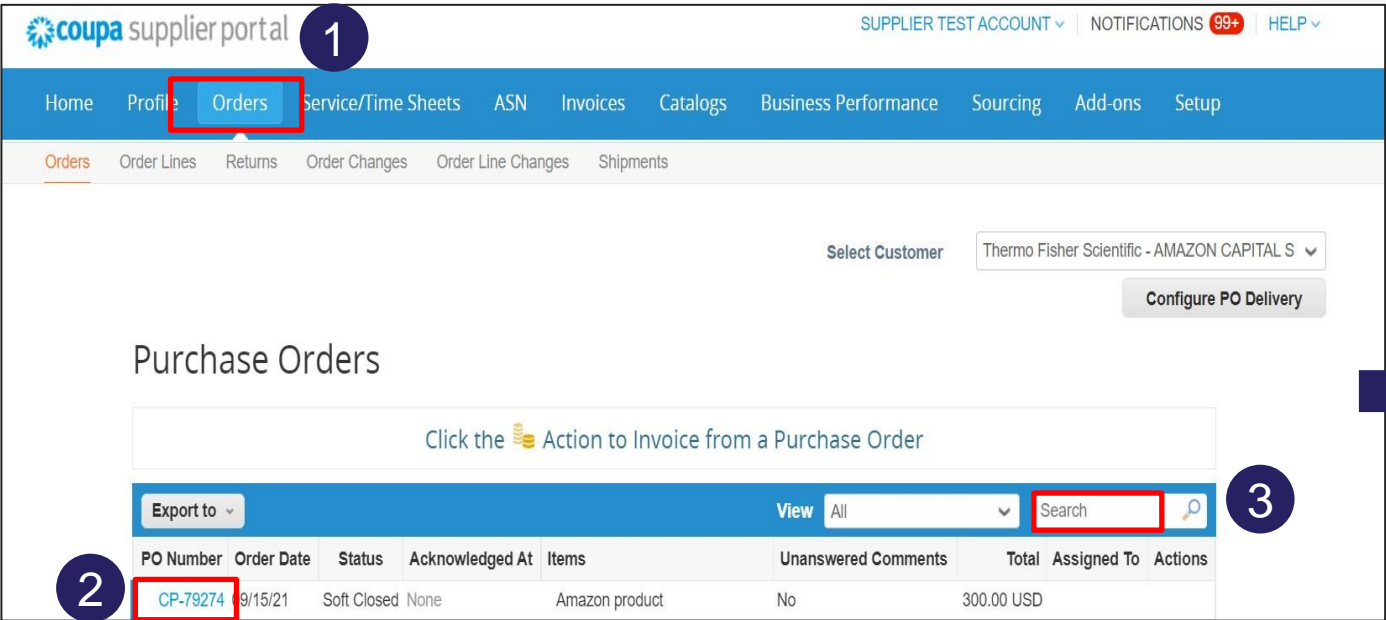


Orders	Review your purchase orders and submit invoices / credit memos
Invoices	Review status of invoices and credit memos
Set Up	Administration of your CPS account

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




1 Go to **Orders** tab

Select Customer: Thermo Fisher Scientific - AMAZON CAPITAL S

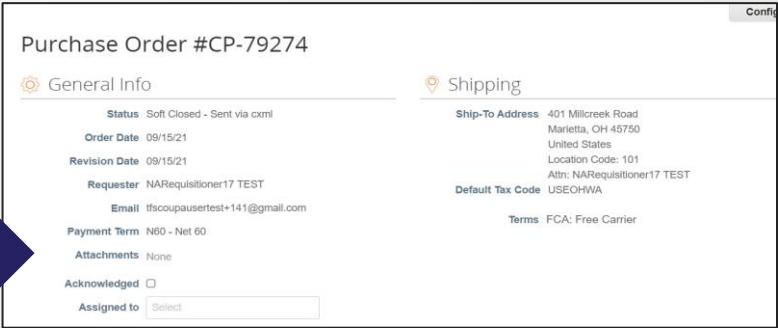
Configure PO Delivery

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
2 CP-79274	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: ifscoupauser141@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



Coupa Supplier Portal (CSP)


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**



The screenshot shows the Coupa Supplier Portal (CSP) interface. The top navigation bar includes tabs: Home, Profile, **Orders** (highlighted with a red box and a blue circle with '1'), /Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below the navigation bar, there are sub-tabs: Orders, Order Lines, Returns, Order Changes, Order Line Changes, and Shipments. The main content area is titled 'Purchase Orders'. It includes a 'Select Customer' dropdown menu set to 'Thermo Fisher Scientific - AMAZON CAPITAL' and a 'Configure PO Del' button. A message states: 'Click the  Action to Invoice from a Purchase Order'. Below this is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains one row with the following data: PO Number: CP-79261, Order Date: 09/15/21, Status: Issued, Acknowledged At: None, Items: Amazon product, Unanswered Comments: No, Total: 450.00 USD, Assigned To: (empty), and Actions:  (highlighted with a red box and a blue circle with '3'). A blue circle with '2' is placed next to the first row of the table.

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		

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 displays the 'Create Invoice' interface in the Coupa Supplier Portal. It is divided into several sections: 'General Info', 'From', 'Totals & Taxes', 'Lines', and a bottom action bar. Numbered callouts indicate the following steps:

- 1** (General Info): Points to the 'Invoice #' and 'Invoice Date' fields, which are highlighted with red boxes. Below them, the 'Payment Term' is '120 Days Due Net From Invoice Date (T812)', 'Currency' is 'USD', and 'Status' is 'Draft'. At the bottom of this section, the 'Attachments' area is also highlighted with a red box.
- 2** (Lines): Points to the 'Price' field in the 'Lines' table, which is highlighted with a red box. The table shows a single line item for 'TMS logistics Service' with a price of '1,500.00'.
- 3** (Totals & Taxes): Points to the 'Calculate' button in the bottom action bar, which is highlighted with a red box.
- 4** (Totals & Taxes): Points to the 'Submit' button in the bottom action bar, which is highlighted with a red box.

The 'Totals & Taxes' section on the right shows a 'Lines Net Total' of 1,500.00 and a 'Total' of 1,500.00. The bottom action bar includes buttons for 'Delete', 'Cancel', 'Save', 'Calculate', and 'Submit'.

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+EMEA@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
Oxoid Limited	Wade Road, Basingstoke, RG24 8PW	UK
Trek Diagnostic System Ltd	Birches Industrial Estate, East Grinstead, RH19 1XZ	UK
Remel Europe Ltd	Remel House, Clipper Blvd, West Crossways, Dartford, Kent, DA2 6PT	UK
G&M Procter Ltd	4 Auld Bond Road, Perth, Perthshire, PH1 3FX	UK
Thermo Fisher Diagnostics UK Ltd	16 Shenley Pavilions, Chalkdell Drive, Shenley Wood, Milton Keynes MK5 6LB	UK
Thermo Fisher Diagnostics AG	Zurlindenstrasse 3, 4133 Prattein, Switzerland	Switzerland
Thermo Fisher Diagnostics BV	Postbus 122, 1120 AC Landsmeer, Netherlands	Netherlands
Thermo Electron Manufacturing Ltd	Stafford House, 1 Boundary Park, Boundary Way, Hemel Hempstead, HP2 7GE	UK
Thermo Fisher Scientific B.V	Takkebijsters 1, 4817 BL Breda	Netherlands
Thermo Fisher Scientific (Schweiz) AG	Neuhofstrasse 11, 4153 Reinach	Switzerland
Thermo Services (Hungary) Kft.	Budapest, Váci út 41-43., 1134, Magyarország	Hungary

Thermo Fisher Legal Entities in Scope

The following entities can be transacted with via CSP – page 2:


Legal Entity Name	Address	Country
Thermo Fisher Scientific (Bremen) GmbH	Hanna-Kunath-Strasse 11, 28199 Bremen	Germany
Thermo Fisher Scientific GmbH	Im Steingrund 4, 63303 Dreieich	Germany
Thermo Electron LED SAS	4 Rue Edith Piaf, Euptouyou Nates Work Center, 44807 Saint-Herblain	France
Thermo Electron SAS	16 Av. Du Québec, 91140 Villebon-sur-Yvette	France
Thermo Fisher Scientific Milano SRL	Str. Rivoltana, Km 4, 20090 Rodano, Milano	Italy
Thermo Fisher Scientific S.P.A	Via San Bovia 3, 20054 Segrate, Milano	Italy
Thermo Electron Sweden AB	Lindhagensgatan 76, SE-112 18 Stockholm	Sweden
Thermo Fisher Scientific Wissenschaftliche Geräte GmbH	Dresdner Strasse 89, 1200 Wien	Austria
Brahms GmbH	Neuendorfstrasse 25, 16761 Hennigsdorf	Germany
Brahms Biotech GmbH	Neuendorfstrasse 25, 16761 Hennigsdorf	Germany
Oxoid Deutschland GmbH	AM Lippeglacis 4, 46483 Wesel	Germany

Thermo Fisher Legal Entities in Scope

The following entities can be transacted with via CSP – page 3:

Legal Entity Name	Address	Country
Thermo Fisher Diagnostics GmbH	Neuendorfstrasse 25, 16761 Hennigsdorf	Germany
Cezanne S.A.S	280 Allée Graham Bell, 30000, Nimes	France
Thermo Fisher Diagnostics SAS	6 Route du Paisy, ZI 69570 Dardilly	France
Microgenics B.V & Co. KG	Neuendorfstrasse 25, 16761 Hennigsdorf	Germany
Thermo Fisher Scientific SpA	Via San Bovio, 3 20054 Segrate (MI)	Italy
Thermo Fisher Diagnostics AB	Uppsala 75137	Sweden
Thermo Fisher Diagnostics (Austria)	Dresdner Strabe 89, 1200, Wien	Austria
BmT GmbH Laborprodukte	Meerbuscher Str. 74, 40670 Meerbusch	Germany

Support

CSP Onboarding Queries		SupplierEnablementEMEA@thermofisher.com
General Accounts Payable Queries		SupplyConnectEMEA@thermofisher.com

Thank you

