

coupa Supplier User Guide

For vendors & partners connected to the
Gates Foundation and its Subsidiaries Coupa account

Last Updated
March 2025

Section Links



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TIP

 Search this document for keywords.

Keyboard shortcut:
CTRL + F to bring up search.

Gates Foundation and its Subsidiaries is the name of the Coupa account used for

- Gates Foundation – gatesfoundation.org
- Gates Agricultural Innovations – gatesagone.org
- Gates Medical Research Institute - gatesmri.org



The green diamond will be used throughout this guide, to indicate when instructions vary depending on which organization you are doing business with.



Coupa Help Center
supplier.coupa.com/help

Get support directly from Coupa

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Coupa Registration & Coupa Supplier Portal (CSP)

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Coupa Introduction

What is Coupa?

Coupa is a cloud-based Business Spend Management platform that allows organizations to manage their spend across Procurement, Supply Chain, and Finance.

Who do I contact with questions regarding Coupa?

If there are any Coupa related questions from you, please do not contact your Investment Owners / Investment Coordinators. Instead, please use the corresponding supplier support emails:

Gates Foundation – supplierhelp@gatesfoundation.org

Gates Agricultural Innovations – supplierhelp@gatesagone.org

Gates Medical Research Institute – supplierhelp@gatesmri.org



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Coupa Introduction

The Gates Foundation and Subsidiaries (Gates MRI and Gates Ag One) have adopted Coupa as the tool to drive efficiencies across Sourcing, Contracting, Supplier Onboarding and Management, and Purchase Order (PO) Processing.

Benefits of Coupa

1. **Enhanced visibility** into the status of your purchase orders (POs), invoices, and credit notes.
2. **Automated PO Transmission:** POs are being introduced as part of our purchasing processes. Coupa will notify suppliers that a PO has been transmitted, and suppliers can receive and acknowledge them in the Coupa Supplier Portal (CSP).
3. **Invoice Management:** Gates MRI is the **only** affiliate using Coupa for invoicing. Suppliers and partners for the foundation and Gates Ag One will continue to follow their current invoicing process. [Refer to the Invoicing pathways page.](#)
4. **Information Management:** On the CSP, suppliers will be able to maintain their customer information such as contacts, addresses, and banking details.

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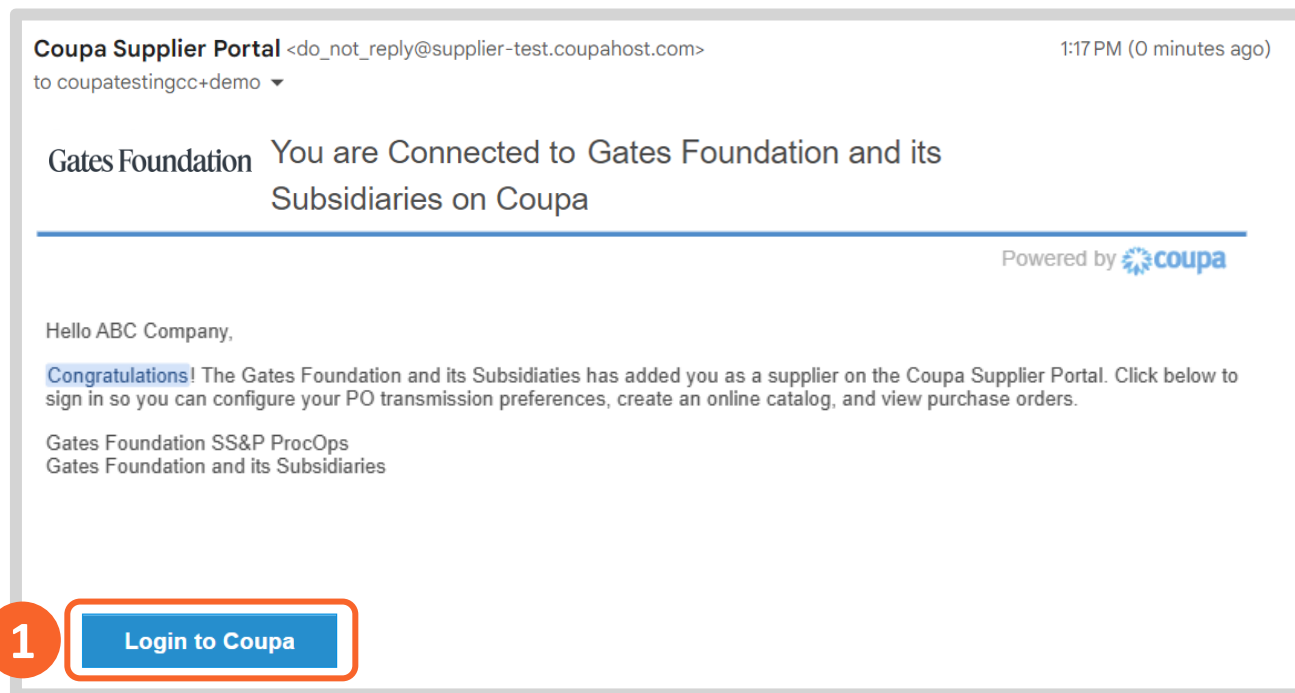
Registration for Suppliers already using Coupa

Email Invitation for existing or previously registered Coupa Users

Suppliers that have previously used the CSP with other customers will receive the following Invitation email.

- Click **Login to Coupa**. You will now be linked with us in the CSP.

NOTE: Check your Spam/Junk folders if the invitation email is not in your Primary Inbox.



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First Time Registration (1 / 3)


Email Invitation

Suppliers that have not used the Coupa Supplier Portal (CSP) with other customers will receive the following Invitation Email.


1. Click Join Coupa

NOTE: Check your Spam/Junk folders if the invitation email is not in your Primary Inbox.

Action Required - Gates Foundation and its Subsidiaries Registration Instructions

 Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com>
To:

Gates Foundation Action Required - Gates Foundation and its Subsidiaries
Registration Instructions

Powered by  **coupa**

Hello Coupa Software Incorporated,


We handle all business spend electronically to make sure you're paid on time and prevent lost documents.

To ensure your ability to do business with us, you have 48 hours to register your account. Please contact us at supplier@coupa.com if you are unable to register for any reason!

Gates Foundation SS&P ProcOps
Gates Foundation and its Subsidiaries

1 [Join Coupa Supplier Portal](#)

Forward Invitation

 **coupa**
Business Spend Management

← Reply

→ Forward

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First Time Registration (2 / 3)

Create a CSP Account

- Confirm or update the pre-populated information
- Create and confirm your CSP password
- Provide tax registration details
- Accept the Privacy Policy and the Terms of Use
- Click **Create an Account**. A verification code will be sent to your email.

Create an Account

Gates Foundation and its Subsidiaries is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Gates Foundation and its Subsidiaries so you're ready to do business together.

2 * Business Name

Your legal business name (or legal personal name if an individual)

3 * Email

4 * First Name * Last Name

5 * Password * Confirm Password

Use at least 8 characters and include a number and a letter.

6 * Country/Region * Tax ID ⓘ

I do not have a Tax ID

5 [accept the Privacy Policy and the Terms of Use](#)

6 Create an Account

Already have an account? [LOG IN](#)

[Forward this to someone](#)

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First Time Registration (3 / 3)

Join an Existing Account

Coupa will use your email domain to identify any existing CSP accounts that may be affiliated with your organization.

7. Confirm whether there is an existing account by selecting **View existing accounts matching email domain** and clicking **Next**:

- **Potential Account Exists:** A new window will appear with the list of possible CSP accounts for your organization. Fill in any required information and click **Next** to send a Join Request to the account's admin.

8. Select **No, continue creating a new account** if there are no existing account matches. Click **Next** to finish setting up your new CSP account.

NOTE: If you submit a Join Request to an existing account, you will receive email confirmation of your request. You won't be able to proceed until that request is processed. You will receive a new CSP Invitation Email once approved.

coupa supplier portal Secure

Join an Existing Account?

Provide any of the additional info to get better suggestions.

7 View existing accounts matching email domain **gatesfoundation.org**

Business Name

Country/Region United States

Address Line 1

City State Postal Code

Tax ID DUNS Number

8 No, continue creating a new account

Next

Section Break

**CSP account creation
complete!**

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Accessing the CSP

Portal Link and Supported Web Browsers

Coupa Supplier Portal Link:

<https://supplier.coupahost.com/>

Coupa supports the latest versions of these web browsers:

- Google Chrome (recommended)
- Mozilla Firefox
- Microsoft Edge

The screenshot displays the Coupa Supplier Portal login interface. At the top left, the Coupa logo and 'supplier portal' text are visible, along with a 'Secure' lock icon on the right. The central focus is the 'Login' section, which includes two input fields: 'Email' and 'Password', each preceded by a red asterisk. Below these fields is a 'Forgot your password?' link. A prominent blue button labeled 'Login' is positioned below the fields. At the bottom of the login area, there is a link that reads 'New to Coupa? CREATE AN ACCOUNT'.



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CSP Overview

CSP Interface and Navigation

The following sections of the CSP will help facilitate business with the foundation, Gates Ag One, and Gates MRI.

1. Home: View and update your public profile information

2. Invoices: Create and manage invoices and credit notes [Refer to Invoicing pathways page](#)

3. Orders: View and manage the purchase orders you receive

4. Profile: Manage the information that is shared with each of your customers

5. Setup: Manage users, remit-to addresses, merge requests, etc.

6. Sourcing: Participate in sourcing events your linked customers have invited you to

7. User Profile: Manage your specific user settings like account security, notifications, etc.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes a home icon (1), Invoices (2), Orders (3), Business Profile (4), Setup (5), Service Sheets, ASN, Sourcing (6), Forecasts, Catalogs, Community, and More... (7). The user profile is identified as JOE. A 'Get Verified' button is visible in the account verification banner. The main content area displays the user's profile for 'Coupa Software Incorporated (000090908)' and a 'Recent Activity' section showing no activity for 'Gates Foundation and its Subsidiaries'. A bottom section provides statistics for Multi Factor Security (0 of 1 Users), Join Requests (0 Users), Merge Suggestions (0 Duplicates), and Linked Customers (1 Connection).

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Merge Requests and Suggestions

Merge Criteria, Suggestions, and Requests

If you share an email domain and at least one other identifier such as company name, address, tax ID, DUNS number, etc. Coupa will suggest to merge the duplicate CSP accounts.

- Merge Suggestions will be listed on the CSP Home Page
- Merge Suggestions and Merge Requests can be accessed under Setup

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and user information 'JOE' and 'NOTIFICATIONS 0' are on the right. A navigation bar includes 'Invoices', 'Orders', 'Business Profile', 'Setup' (highlighted with a red box and a '2' in a red circle), 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Community', and 'More...'. Below the navigation bar is a green banner for 'Verify Your Account And Get Noticed' with a 'Get Verified' button. The main content area shows the user profile for 'Coupa Software Incorporated (000090908)' with a 'Get Verified' button. Under 'Recent Activity', there is a red arrow pointing to a '1' in a red circle, indicating a merge suggestion. At the bottom, a dashboard shows 'Merge Suggestions' with '0 Duplicates'.

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Managing Users (1 / 3)

Accessing the CSP Users Table

CSP admins can provision additional CSP users within your organization. Permissions and customer access can be set on a user basis.

1. Click **Setup** in the navigation ribbon

2. Click **Users**

3. Click **Invite User**

The screenshot shows the Coupa Supplier Portal Admin Users page. The navigation ribbon at the top includes 'Setup' (1), 'Service Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Community', and 'More...'. The left sidebar has 'Users' (2) highlighted. The main content area has 'Invite User' (3) highlighted. Below the navigation is a table of Admin Users.

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
Joe Smith	jaime.rivera+coupa@gatesfoundation.org	Active	ASNs Admin Business Performance Catalogs Community Early Payments Forecast Planner Hidden, Private, and Public Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service Sheets Sourcing	Gates Foundation and its Subsidiaries	Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing	Edit

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Inviting Users to the CSP

4. Enter the following information:

- User First Name
- User Last Name
- User Email
- Permissions based on their role
- Customers they should have access to

5. Click Send Invitation**6. Invited users will receive an email invitation. Click Join Coupa Supplier Portal**

NOTE: Invitations may be routed to Spam/Junk folders, not an invited user's primary inbox. Admins will receive an email notifying them when a new user is added to their organization's CSP account.

Invite User x

User Information

First Name

Last Name

*Email

Purpose ?

Phone Number

Country/Region

Area/City

Local

Extension

Permissions ?

All

Admin

Orders

All

Restricted Access to Orders

Invoices

Catalogs

Profiles

ASNs

Service Sheets

All

Restricted Access to Service Sheets

Payments

Order Changes

Early Payments

Business Performance

Sourcing

Private and Public

Hidden, Private, and Public

Community

Order Line Confirmation

Forecast Planner

Workers

View

Manage

Worker Assignments

View

Manage

Customers

All

Gates Four

Action Required - Join the Coupa Supplier Portal Inbox x

Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com>
to coupatestingcc+js

Action Required - Join the Coupa Supplier Portal

Hi John Smith,

A coworker invited you to join their account on Coupa. Once registered, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more.

Find out more using the links below, and use the button to register. Welcome!

Business Spend Management

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Join Requests

Individuals can request to join your organization's existing CSP account. Admins will be notified of these requests via email and must process them.

1. Click **Setup** in the navigation ribbon
2. Click **Requests to Join**
3. Click **Respond** to approve or reject a request.
 - **Invite Requester:** Select **Invite**, confirm you recognize the requester, and set their permissions and customer visibility.
 - **Reject Requester:** Select **Reject**
4. Click **Send** to notify the requester of your decision.

NOTE: The number of pending Join Requests is listed on the Homepage next to Merge Suggestions and Requests.

The screenshot displays the Coupa Supplier Portal Admin interface. The navigation ribbon at the top includes 'Setup', which is highlighted with a red circle and the number 1. The left sidebar contains a 'Requests to Join' link, highlighted with a red circle and the number 2. The main content area shows a table of 'Requests to Join' with a 'Respond' button highlighted by a red circle and the number 3. A modal window titled 'Response for Request to Join' is open, showing options to 'Invite' or 'Reject' the requester. The 'Invite' option is selected, and the 'Send' button at the bottom of the modal is highlighted with a red circle and the number 4.

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Security & Two-Factor Authentication (1 / 4)

Accessing Security & Two-Factor Authentication Settings

Each CSP user in your organization can set their own account security.

1. Hover over your username in the upper right-hand corner
2. Click **Account Settings** in the drop-down menu

The screenshot displays the Coupa Supplier Portal interface. At the top right, the user's name 'JOE' is visible next to a dropdown arrow. A red circle with the number '1' and an arrow points to this dropdown arrow. Below the name, a dropdown menu is open, showing options: 'Account Settings', 'Notification Preferences', and 'Log Out'. A red circle with the number '2' and an arrow points to the 'Account Settings' option. The main content area includes a 'Need help?' banner with a 'Get Started' button, a profile card for 'Coupa Software Incorporated (000090908)' with a 'Get Verified' button, and sections for 'Recent Activity' and 'Announcements'.

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Security & Two-Factor Authentication (2 / 4)

Accessing Security & Two-Factor Authentication Settings

3. Click Security & Two-Factor Authentication

4. A Two Factor Authentication App Pop-Up will appear. You can:

- Follow the listed steps and click **Enable**
- Click **Cancel** to see additional security options

The image shows a screenshot of the Coupa Supplier Portal. The top navigation bar includes the Coupa logo, 'supplier portal', and user information 'SALLY' with a dropdown arrow, 'NOTIFICATIONS' with a red badge containing the number '1', and 'HELP' with a dropdown arrow. Below the navigation bar is a menu with items: Invoices, Orders, Profile, Setup, Service/Time Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, and More... The main content area is titled 'My Account Security & Multi Factor Authentication'. On the left, there is a sidebar menu with 'Settings', 'Notification Preferences', and 'Security & Multi Factor Authentication' (highlighted with a red box and a red circle containing the number '3'). The main content area shows 'Multi Factor Authentication' settings with radio buttons for 'Disabled', 'For Payment Changes' (selected), and 'For Both Account Access'. Below this are sections for 'Via Authentication' and 'Via Text Message', each with a 'Default' radio button. A 'Recent Logins' section is partially visible. A pop-up window titled 'Multi Factor Authentication via App' is overlaid on the right. It contains a QR code and a 6-digit security key 'O6QAQK6343T4B5RQMNTF HS2HNGSPDVU6'. The pop-up has a red circle with the number '4' and arrows pointing to the QR code and the security key. Below the QR code is a 'Code' input field and 'Cancel' and 'Enable' buttons. The 'Enable' button is highlighted with a red box.

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Security & Two-Factor Authentication (3 / 4)

Selecting Security & Two-Factor Authentication Settings

5. Select your preferred degree of security

6. Check **Default** for one or both Authentication Methods:

- **Via Authenticator App:** Return to Step 4 for set-up instructions
- **Via Text Message:** Proceed to the next slide for set-up instructions

The screenshot shows the 'coupa supplier portal' interface. The user is logged in as 'SALLY'. The navigation menu includes Invoices, Orders, Profile, Setup, Service/Time Sheets, ASN, Sourcing, Forecasts, Catalogs, Add-ons, and More... The main content area is titled 'My Account Security & Multi Factor Authentication'. On the left, there is a sidebar with 'Settings', 'Notification Preferences', and 'Security & Multi Factor Authentication'. The 'Security & Multi Factor Authentication' section is active. Under 'Multi Factor Authentication', there are three radio button options: 'Disabled', 'For Payment Changes (Required for changing Legal Entity or Remit-To)', and 'For Both Account Access (Login) and Payment Changes'. The 'For Both Account Access' option is selected. Below this, there are two authentication method boxes. The first is 'Via Authenticator App' with a sub-option 'Default' selected. The second is 'Via Text Message' with a sub-option 'Default' selected. A 'Recent Login Activity' section at the bottom shows three login events on 09/18/24 from Chrome on Windows.

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Security & Two-Factor Authentication (4 / 4)

Enabling Security & Two-Factor Authentication Settings

1. Enter a phone number that will receive text verification codes.
2. Confirm Captcha. Click **Send Code**.
3. Enter the code and click **Enable**. Once enabled, you can save your backup codes.

The screenshot shows a 'Multi Factor Authentication via SMS' dialog box with three numbered steps:

- 1**: A code will be sent to your phone as an SMS Text Message (SMS rates may apply). The 'Phone Number' field is highlighted with a red circle and contains '+1'.
- 2**: Confirm Recaptcha. The reCAPTCHA area, including the 'I'm not a robot' checkbox and the 'Send Code' button, is highlighted with a red box.
- 3**: Enter the 6-digit verification code sent to your phone. The 'Enable' button at the bottom right is highlighted with a red box.

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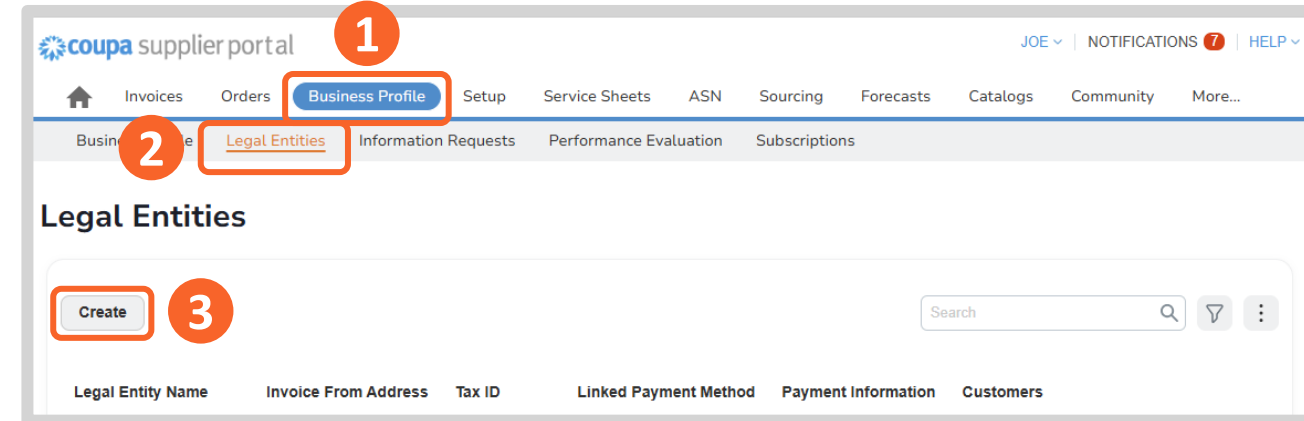
Legal Entity Setup (1 / 9)

Setup Menu

Legal Entities provide customers with the information they need to do business with you in Coupa. It includes addresses, payment methods, and remit-to details. Legal Entities associated with Payment Methods **cannot** be edited once created.

1. Click **Business Profile** in the navigation ribbon
2. Click **Legal Entity**
3. Click **Create**

NOTE: [Contact your CSP admins](#) to request access if you can't access Legal Entity setup.



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Legal Entity Setup (2 / 9)

Business Location Invoice Address, and Tax Information

- Enter the entity's Legal Name and Country/Region.
- Enter the Country/Region and Tax ID.
- Enter the registered address for this Legal Entity. Click + to add additional address lines.
- Review the Ship From Address checkbox, check if shipping goods from the Invoice address, uncheck and add a new address if different.
- Click on **Save**
- Once saved, the following message will pop up, click **Continue** to go to Payment Methods

Create Legal Entity

* Legal Entity Name: ABC Company

* Country/Region: United States

Tax Registrations

* Country/Region: United States

Tax ID:

I don't have a Tax ID Number

[+ Add Tax Registration](#)

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

* Country/Region: United States

* Address Line 1: 12345 ABC Lane

Address Line 2:

* City: Seattle

* State: Washington

* Postal Code: 55555

Invoice From Code:

Preferred Language: English (US)

Ship From Address

Please enter the physical address that your goods are shipped from? This can be a warehouse address.

Same as Invoice From Address

Business Legal Entity successfully created. Next, you must add payment info or a remittance address required for invoicing. Go to Setup > Payment Methods and click "Add Payment Method" to complete this.

[Close](#) [Continue](#) [Cancel](#) [Save](#)

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Legal Entity Setup (3 / 9)

Add Payment Method

10. Click **Setup** in the navigation ribbon

11. Click **Payment Methods**

12. Click **Add Payment Method**

The screenshot shows the Coupa Supplier Portal interface. The navigation ribbon at the top includes 'Setup', which is highlighted with a red box and a '10' callout. Below the ribbon, the 'Admin' section is visible, with 'Payment Methods' highlighted in the left sidebar and a '11' callout. The main content area shows a table with one row of payment method data, and the 'Add Payment Method' button is highlighted with a red box and a '12' callout.

Payment Method Name	Remit-To Address	Payment Type	Legal Entity	Customer Sharing Status	Actions
None	12345 ABC Lane Seattle WA 55555 United States	Address	ABC Company	None	

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Legal Entity Setup (4 / 9)

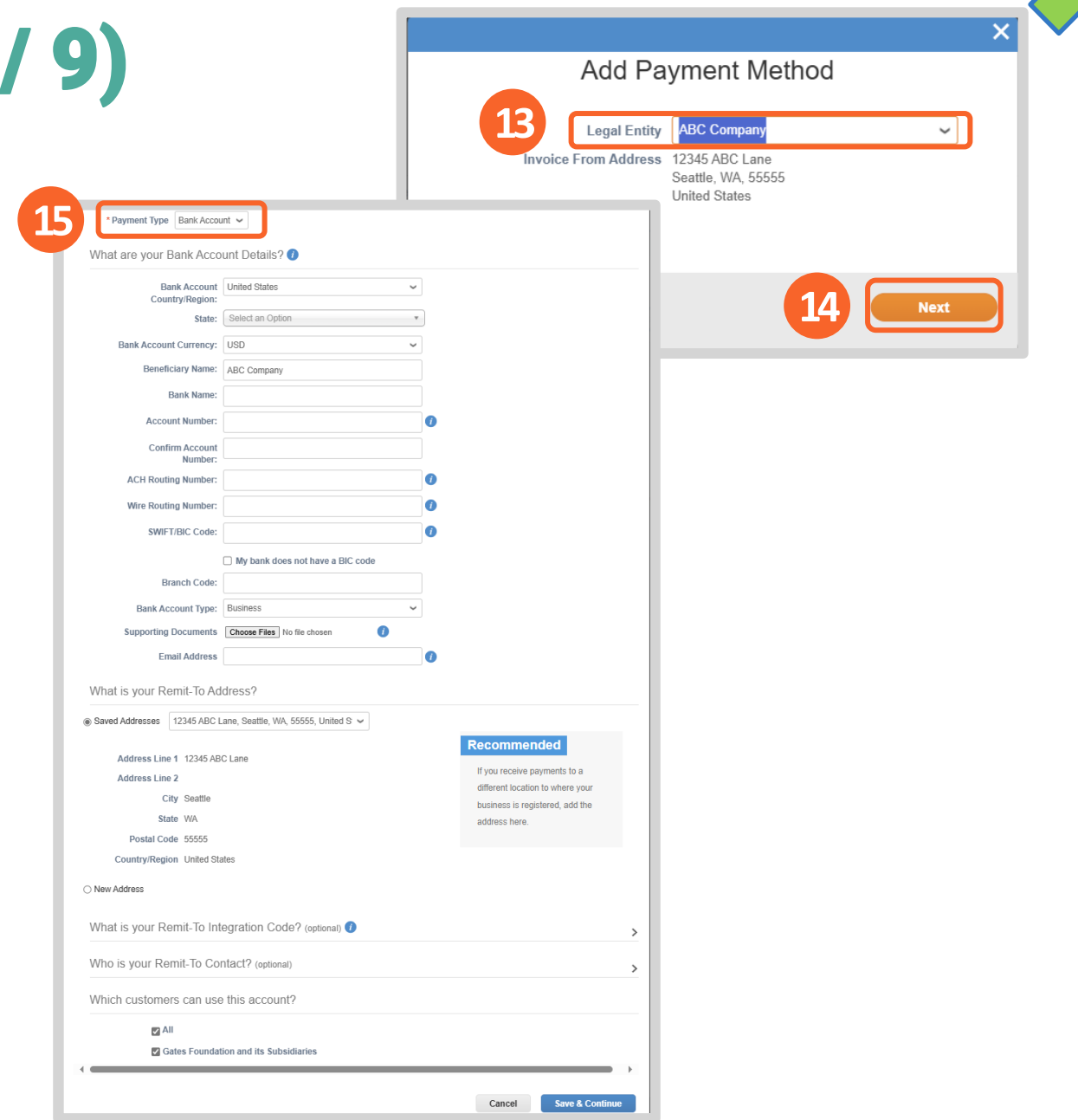
Add Payment Method

13. Select the Legal Entity the Payment method is being created for

14. Click Next

15. Select the payment type

 **Note:** Bank Account is the required Payment Type for Gates MRI. Gates MRI does not accept payments via check or virtual card.



13 Add Payment Method

Legal Entity **ABC Company**

Invoice From Address 12345 ABC Lane
Seattle, WA, 55555
United States

14 Next

15 * Payment Type Bank Account

What are your Bank Account Details?

Bank Account Country/Region: United States

State: Select an Option

Bank Account Currency: USD

Beneficiary Name: ABC Company

Bank Name:

Account Number:

Confirm Account Number:

ACH Routing Number:

Wire Routing Number:

SWIFT/BIC Code:

My bank does not have a BIC code

Branch Code:

Bank Account Type: Business

Supporting Documents **Choose Files** No file chosen

Email Address:

What is your Remit-To Address?

@ Saved Addresses 12345 ABC Lane, Seattle, WA, 55555, United S

Address Line 1 12345 ABC Lane

Address Line 2

City Seattle

State WA

Postal Code 55555

Country/Region United States

Recommended

If you receive payments to a different location to where your business is registered, add the address here.

New Address

What is your Remit-To Integration Code? (optional)

Who is your Remit-To Contact? (optional)

Which customers can use this account?

All

Gates Foundation and its Subsidiaries

Cancel Save & Continue

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Legal Entity Setup (5 / 9)

Payment Information & Remit-To Addresses

16. Enter the payment details. Required information is based on the selected Legal Entity Country/Region and Payment Type.

17. Select the Remit-To Address from the dropdown OR create a new Remit-To Address.

18. Select the customers that should have access to this Legal Entity

19. Click **Save & Continue**

Payment Type: Bank Account

What are your Bank Account Details?

Bank Account: United States

Country/Region: [Select an Option]

State: [Select an Option]

Bank Account Currency: USD

Beneficiary Name: ABC Company

Bank Name: [Text Field]

Account Number: [Text Field]

Confirm Account Number: [Text Field]

ACH Routing Number: [Text Field]

Wire Routing Number: [Text Field]

SWIFT/BIC Code: [Text Field]

My bank does not have a BIC code

Branch Code: [Text Field]

Bank Account Type: Business

Supporting Documents: Choose Files | No file chosen

Email Address: [Text Field]

What is your Remit-To Address?

Saved Addresses: 12345 ABC Lane, Seattle, WA, 55555, United S

Address Line 1: 12345 ABC Lane

Address Line 2: [Text Field]

City: Seattle

State: WA

Postal Code: 55555

Country/Region: United States

New Address: [Text Field]

What is your Remit-To Integration Code? (optional)

Who is your Remit-To Contact? (optional)

Which customers can use this account?

All

Gates Foundation and its Subsidiaries

Cancel | **Save & Continue**

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Legal Entity Setup (6 / 9)

Adding Payment Method

20. Review the Payment Method created from the list, click **Next**.

- Additional Payment Methods can be added by clicking **Add Payment Method**

21. Click **Done** to complete adding the Payment.

22. On the pop-up window, click **x** to close the window

The image displays three overlapping screenshots of the Coupa system interface, illustrating the steps for adding a payment method:

- Top Screenshot:** Shows the 'Add a new Payment Method' window. It contains a table with columns for 'Payment Method Name', 'Remit-To Address', and 'Status'. A 'Next' button is highlighted with a red circle labeled '20'.
- Middle Screenshot:** Shows the 'Add a new Payment Method' window with a form for adding a new method. A 'Done' button is highlighted with a red circle labeled '21'.
- Bottom Screenshot:** Shows a 'Setup Complete' confirmation window with a green checkmark and the text 'Congratulations!'. A 'Done' button is highlighted with a red circle labeled '22'.

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Legal Entity Setup (7 / 9)

Adding and Managing Ship From Addresses

19. Click on **Business Profile**

19. Click on **Legal Entities**

19. Click on the **Legal Entity** you want to modify the Ship From Address for

19. Click on **Manage** to modify the Ship From Address

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', 'JOE', 'NOTIFICATIONS 8', and 'HELP'. The main navigation menu has 'Business Profile' highlighted with a red circle and the number 23. Below it, the 'Legal Entities' menu item is highlighted with a red circle and the number 24. The 'Legal Entities' page displays a table with columns: Legal Entity Name, Invoice From Address, Tax ID, Linked Payment Method, Payment Information, and Customers. The first row, 'ABC Company', is highlighted with a red circle and the number 25. The 'Manage' button for this row is highlighted with a red circle and the number 26. A modal window is open for 'ABC Company', showing fields for 'Legal Entity Name', 'Invoice From', 'Ship From', and 'Tax Registrations'. The 'Manage' button is also highlighted in the modal.

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
ABC Company	12345 ABC Lane, Seattle, WA, 55555, United States	None	Check	12345 ABC Lane, Seattle, WA, 55555,...	Gates Foundation and its Subsidiaries
ABC Company			Bank Account	Best Bank *****5555	Gates Foundation and its Subsidiaries

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Legal Entity Setup (8 / 9)

Adding and Managing Ship From Addresses

- Click **Add Ship From** to add a new Ship From Address or **Manage** to edit or deactivate the current Ship To Address.
- Enter or Modify the Ship From Address.
- Enter or Modify the Contact Information and which customers can see this
- Click **Continue**.
 - Existing Ship From Addresses being modified will have a **Deactivate Ship From** icon.

27

Where do you ship goods from?

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Manage

Title	Status
12345 ABC Lane Seattle WA 55555 United Sta	Active

28

Where do you ship goods from?

What is your Ship From Address?

* Address Line 1

* City

State

* Postal Code

* Country/Region

What is the physical address that your goods are shipped from? This can be a warehouse address.

What is your Remit-To Integration Code? [?](#)

Code

Show fewer fields ▾

Contact Information

First Name

Last Name

Email

Work Phone

Mobile Phone

Fax Number

Web Site

Which customers do you want to see this?

All

Gates Foundation and its Subsidiaries

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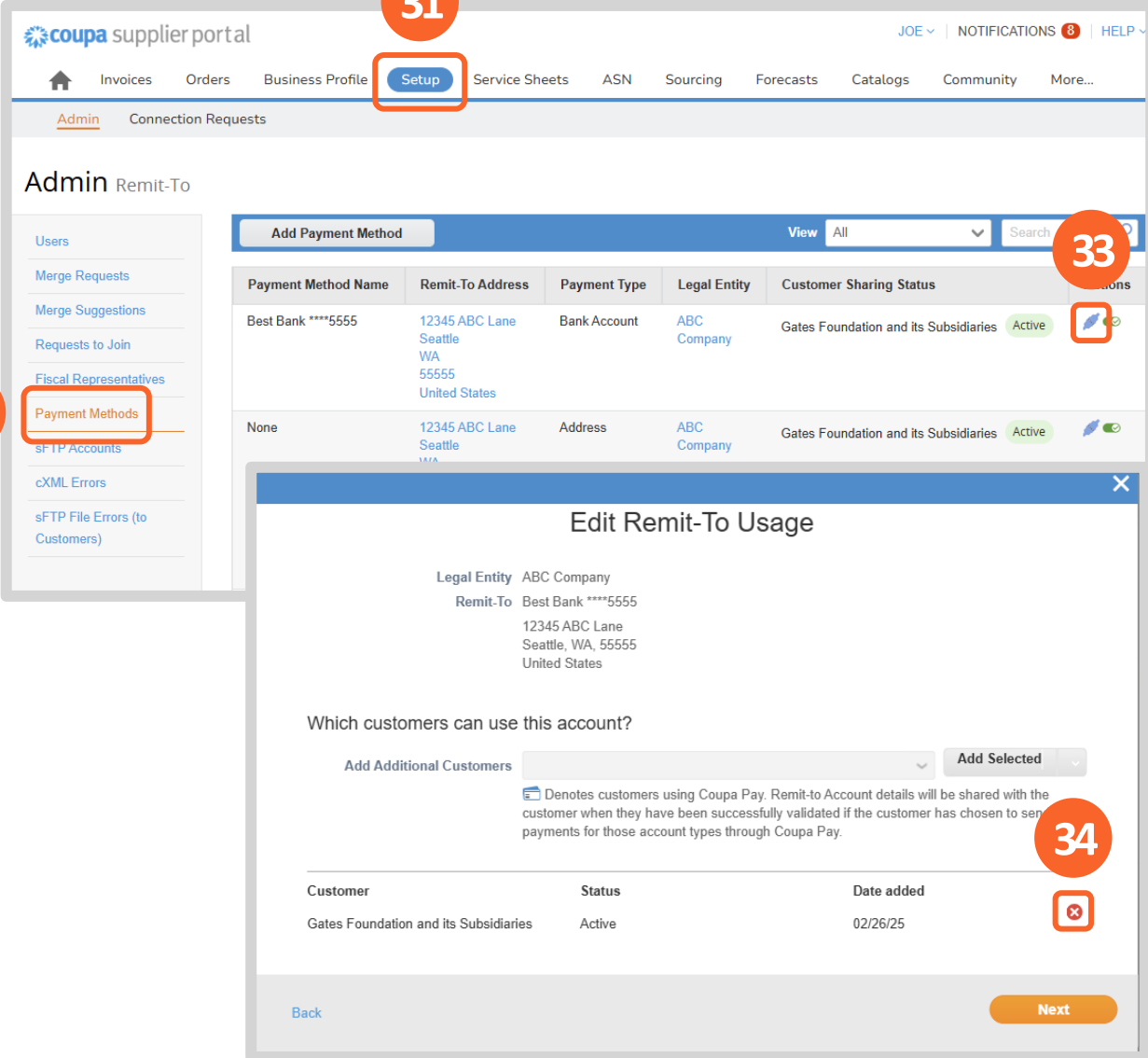
Managing Remit-To Addresses

27. Click **Setup** from the navigation ribbon.

28. Click **Payment Methods**.

29. Click  to edit the Remit-To Address

30. Click  to remove the Remit-To Address







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Admin Remit-To


Payment Method Name	Remit-To Address	Payment Type	Legal Entity	Customer Sharing Status	Actions
Best Bank ****5555	12345 ABC Lane Seattle WA 55555 United States	Bank Account	ABC Company	Gates Foundation and its Subsidiaries	Active  
None	12345 ABC Lane Seattle WA	Address	ABC Company	Gates Foundation and its Subsidiaries	Active  


Edit Remit-To Usage

Legal Entity: ABC Company
Remit-To: 12345 ABC Lane
Seattle, WA, 55555
United States

Which customers can use this account?

Add Additional Customers: **Add Selected**

 Denotes customers using Coupa Pay. Remit-to Account details will be shared with the customer when they have been successfully validated if the customer has chosen to send payments for those account types through Coupa Pay.

Customer	Status	Date added	Actions
Gates Foundation and its Subsidiaries	Active	02/26/25	

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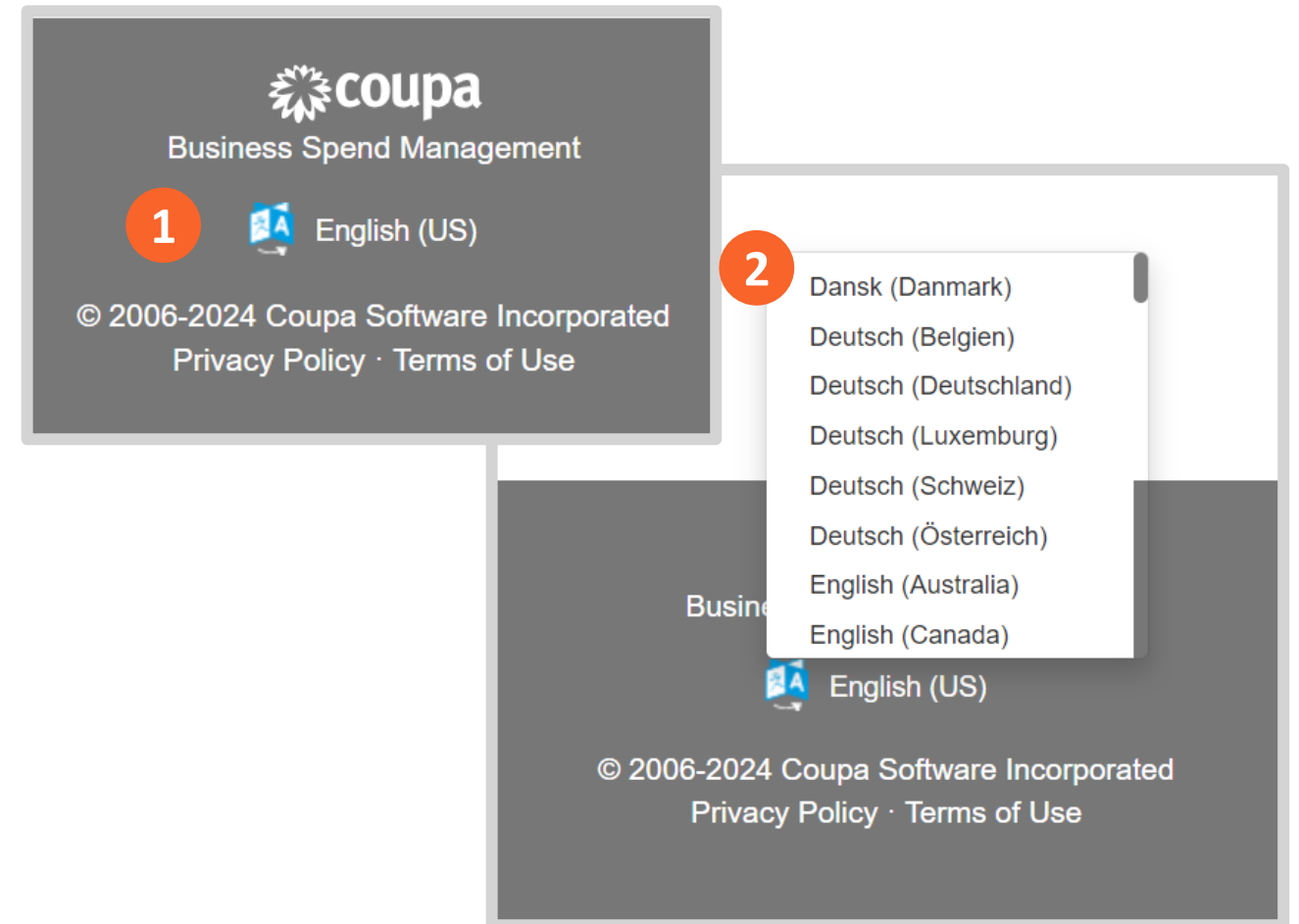
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Language Settings

Changing CSP Display Language

Users can change the display language for the CSP.

1. Scroll to the bottom of any page of the CSP. Hover over the language listed.
2. Select the desired display language. The CSP will refresh.



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Help & Support (1 / 2)

Support within the CSP

There are multiple ways to receive help and support in the CSP.

1. Hover over Help in the upper right-hand corner to access the following resources:
 - **Online Help:** Be redirected to the Coupa Suppliers Help Page in a new tab
 - **Blog:** Be redirected to the Coupa Suppliers Blog in a new tab
 - **Help Tour:** Watch the introductory tour for the section of the CSP you are in (e.g., Orders, Invoices)
2. Click **Chat with Coupa Support** to get assistance with a specific issue

The screenshot shows the Coupa Supplier Portal interface. At the top right, there is a 'HELP' dropdown menu, which is indicated by a red circle with the number '1' and a downward arrow. The main content area includes a 'Need help?' banner with a 'Get Started' button. Below this, the profile for 'Coupa Software Incorporated (000090908)' is displayed. The 'Recent Activity' section shows no activity for 'Gates Foundation and its Subsidiaries'. The 'Announcements' section shows no announcements. At the bottom right, a 'Chat with Coupa Support' button is highlighted with a red box and a red circle with the number '2'.

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Help & Support (2 / 2)

Locate your CSP Admins

CSP admins should be the first point of contact if you do not have access to a necessary customer or section of the CSP. Non-admin CSP users can locate their account admins on the CSP Homepage.

1. Hover over **View Admins to access the admin drop down menu:**

- **Active Admins:** Shows the five most recently active admins. Click on a hyperlinked name to draft an email to them.
- **No Admins:** If your account has no active admins, please reach out to Coupa Support. Click on the hyperlink to draft an email to them.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a header with the Coupa logo, 'supplier portal', and user information: 'JAIME', 'NOTIFICATIONS 0', and 'HELP'. Below the header, there are navigation links for 'Orders' and 'Profile'. A prominent green banner reads 'Verify Your Account And Get Noticed' with a 'Get Verified' button. The main content area features a profile card for 'ABC Corporation' with a 'Get Verified' button and a red circle with the number '1' next to it. A dropdown menu is open under 'View Admins', showing a table of active admins:

Admins	Last sign on
Sally Jones	9 minutes ago

Below the admin list, there's a 'Recent Activity' section with a blue information icon and a note: 'No recent activity. When you interact with your customers, you will see recent Invoices, Orders, and Information Requests here.' To the right, there's an 'Announcements' section with the text 'No Announcements'.

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Key Terminology (1 / 2)

Coupa Terms

Term	Description
Coupa Supplier Portal (CSP)	A web portal for suppliers to manage business with customers. Suppliers can view and track POs, create and manage invoices / credit notes, and maintain company information.
Legal Entity	A representation of your company that shares information required to do business with you in Coupa. This includes addresses, payment methods, and remit-to details. Legal entities need to be validated by a tax document.
Remit-To Accounts	Accounts where invoices will be paid. Remit-To Accounts are created and maintained by your company in Coupa.
Payment Term	Specifies when a payment is due. Payment terms are agreed upon during our contracting process.
Purchase Order (PO)	A legal and commercial document sent from a customer to a supplier, committing to the purchase of goods and / or services.
PO Acknowledgement	Confirmation that a supplier has received a PO and will deliver the stated goods and / or services at the specified prices within the specified period.
Advance Ship Notice (ASN)	Electronic documents sent by suppliers to notify customers that goods have shipped.
Invoice	Billing document stating the financial obligations for goods received and / or services performed.
Disputed Invoice	A rejected invoice that has been sent back to a supplier for revision and resubmission.
Credit Note	Billing document that offers a customer a return or adjustment of funds for a previously issued invoice.

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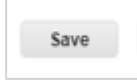





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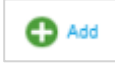

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Key Terminology (2 / 2)

Coupa Icons

Icon	Action / Function
	Hyperlinks take you to the View page of the object
	Edit
	Save
	Print
	Void (Cancel)
	Create Invoice against a PO
	Create Credit Note against a PO
	View

Icon	Action / Function
	Delete
	Download a report
	Expand Table
	Calendar
	Information
	Add Item
	Resolve

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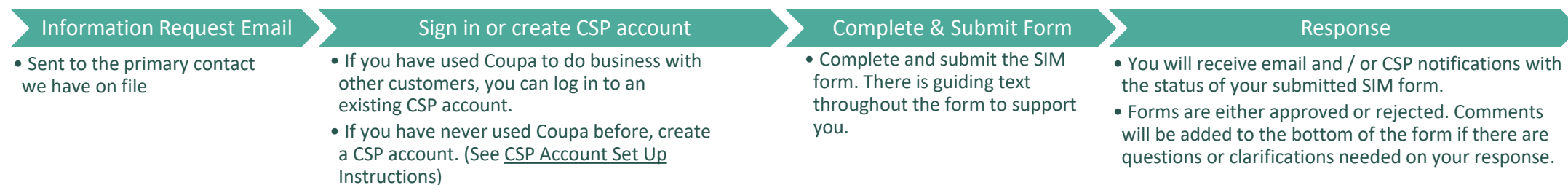
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Coupa Supplier Information Management (SIM)

What is SIM?

The Coupa Supplier Information Management (SIM) module uses **forms** to gather and validate information suppliers share with customers. The information collected and maintained includes contacts, addresses, banking details, tax registrations, and diversity certifications.

Form Request & Submission Process



Form Reminders

1 Pay close attention to hint text below each field to ensure you are providing the intended information. →

Doing Business As or Disregarded Entity Name

Names provided must be on tax form. If your legal name is already populated: update the field to reflect any DBAs or please leave as is (do not delete).

2 * A red Asterix indicates a required field. You will not be able to submit a form if any required fields are left blank. →

* Legal Name

ABC Corporation

3 See [Managing Comments](#) for when more information is needed.



Coupa SIM Forms



	Form Name	Description	Information Collected
Gates foundation	GATES FOUNDATION ENTITY INFORMATION FORM	If you are a prospective supplier, you will receive this form prior to participating in a sourcing event or signing an NDA.	<ul style="list-style-type: none"> Legal Name Company Contacts Company Addresses Tax Registration(s) Diversity Certifications
	GATES FOUNDATION EXTERNAL INFORMATION FORM	If you are a new or existing supplier that has been approved for business, you will receive this form to complete and maintain your profile.	<ul style="list-style-type: none"> Legal Name Company Contacts Company Addresses Tax Registration(s) Diversity Certifications Banking Details
Gates Ag One	GATES AG ONE ENTITY INFORMATION FORM	If you are a prospective supplier, you will receive this form prior to participating in a sourcing event or signing an NDA.	<ul style="list-style-type: none"> Legal Name Company Contacts Company Addresses Tax Registration(s) Diversity Certifications
	GATES AG ONE EXTERNAL INFORMATION FORM	If you are a new or existing supplier that has been approved for business, you will receive this form to complete and maintain your profile.	<ul style="list-style-type: none"> Legal Name Company Contacts Company Addresses Tax Registration(s) Diversity Certifications Banking Details
Gates MRI	GATES MRI ENTITY INFORMATION FORM	If you are a prospective supplier, you will receive this form prior to participating in a sourcing event or signing an NDA.	<ul style="list-style-type: none"> Legal Name Company Contacts Company Addresses Tax Registration(s) Diversity Certifications
	GATES MRI ONBOARDING FORM	If you are a new supplier that has been approved for business, you will receive this form to complete your profile.	<ul style="list-style-type: none"> Banking Details
	GATES MRI UPDATE FORM	If you are an existing supplier and need to update your information, you will receive this form or update your information in the CSP.	<ul style="list-style-type: none"> Legal Name Company Contacts Company Addresses Tax Registration(s) Diversity Certifications Banking Details

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Note: **Banking or Tax questions?**, please contact supplierhelp@gatesfoundation.org.

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SIM Notifications (1 / 2)

Email Notifications

When a SIM form is sent to your organization, the Primary Contact listed in our system will receive an email notification.

1. Click **Join and Respond** or **Update Profile** to access the form. For help joining the CSP, please go to our [account set up section](#).

Powered by 

Gates Foundation

[Update your profile for Gates Foundation and its Subsidiaries](#)

Hello Coupa Software Incorporated,


Gates Foundation and its Subsidiaries has requested you to provide information about your company. This information is required so they can transact with you electronically.

Use the "Log In" button to respond or decline.

Gates Foundation SS&P ProcOps
Gates Foundation and its Subsidiaries

[Log In](#)

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Total Spend Management - Make Margins Multiply

To get immediate updates via SMS or change notification preferences, go [here and adjust your settings](#)

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SIM Notifications (2 / 2)

CSP Notifications

When a SIM form is sent to your organization, CSP users with foundation and Profile access will receive a CSP notification.

1. Hover over the Notifications drop-down menu
2. Click on the request details to access the form

The screenshot shows the Coupa Supplier Portal interface. At the top right, there is a user profile 'SALLY' and a 'NOTIFICATIONS' dropdown menu with a red circle containing the number '1'. A notification is displayed, stating 'A form response needs your attention' and 'First reminder from Gates Foundation and its Subsidiaries: Your information request is still pending.' Below the notification is a 'See All Notifications' link. In the main content area, there is a section for 'Gates Foundation and its Subsidiaries' with a green checkmark indicating that some information has been auto-filled. Below this, there is a 'Supplier Information' section for 'ABC Corporation' and a 'Gates Foundation Supplier Information' form. The form includes fields for 'Legal Name' (pre-filled with 'ABC Corporation') and 'Legal Name Confirmation'. A red circle with the number '2' is placed over the notification details area.

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Managing Comments

Managing Comments, Rejections, and Approvals

Use Coupa's comment functionality to contact us with questions or clarifications on a form.

1. Scroll to the bottom of the form. Enter your comment and click **Add Comment** to notify us.
2. Comment history will always be visible at the bottom of the form.
3. You will receive an email and/or CSP notification when we reply.

Comment

Mute Comments

Enter Comment

comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Participants: Cait Cyron

from supplier

Cait Cyron

comment

08/04/23 at 04:54 AM

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Gates Foundation

[New Comment on Profile Info submitted to Gates Foundation and its Subsidiaries](#)

Gates Foundation SS&P ProcOps Test User 20 at Gates Foundation and its Subsidiaries added a new comment on **02/25/25 at 11:29 AM** to the company information profile you submitted.

The comment is **"comment on form"**

You can review the profile of submitted information or respond by clicking below.

[View Profile](#) [Respond](#)

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To get immediate updates via SMS or change notification preferences, go [here](#) and [adjust your settings](#)

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Form Rejection

Managing Comments, Rejections, and Approvals

You will receive Rejection and New Comment emails if a SIM form was rejected.

1. Click **Update Info** to revise and resubmit the form
2. Click **View Profile** or **Respond** to revise and resubmit the form

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Gates Foundation

Profile Info submitted to Gates Foundation and its Subsidiaries was Not Approved


Hi Joe,

The company profile information that you submitted to your customer, Gates Foundation and its Subsidiaries was not accepted.

This usually means that some information was not correct and they cannot activate your new information as is.

You can click below to view additional details or update your info.

1 **Update Info**

Powered by 

Gates Foundation


New Comment on Profile Info submitted to Gates Foundation and its Subsidiaries

Gates Foundation SS&P ProcOps Test User 20 at Gates Foundation and its Subsidiaries added a new comment on **02/25/25** at **01:59 PM** to the company information profile you submitted.

The comment is **"Rejection from the Gates Foundation"**

You can review the profile of submitted information or respond by clicking below.

2 **View Profile** **Respond**

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Form Approval

Managing Comments, Rejections, and Approvals

You will receive email confirmation once a submitted SIM Form has been reviewed and approved by the foundation.

Powered by  coupa

Gates Foundation

Profile Info submitted to Gates Foundation and its Subsidiaries was Approved


Hi Joe,

The company profile information that you submitted to your customer, Gates Foundation and its Subsidiaries was recently approved.

This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).

No further action is required but you can click below to view additional details.

[View Profile Info](#)

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Self-Service in the CSP

SIM in the CSP

You can make updates to the information shared with the Gates Foundation and its Subsidiaries in the CSP at any time.

1. Click **Profile** in the navigation ribbon
2. Click **Information Requests**
3. Select **Gates Foundation and its Subsidiaries** as your customer
4. Scroll to the bottom of the form and click **Update Info** to edit the form and resubmit.

NOTE: This is only available if you have previously completed a SIM form in the CSP. Only the most recent SIM form submitted to the *Gates Foundation and its Subsidiaries* is accessible. Contact supplierhelp@gatesfoundation.org if you are unsure whether you have the correct form available or if none are visible.

The screenshot shows the Coupa Supplier Portal interface. The navigation ribbon at the top includes 'Invoices', 'Orders', 'Profile', 'Setup', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. The 'Profile' tab is highlighted with a red circle and arrow labeled '1'. Below the navigation ribbon, the 'Information Requests' tab is highlighted with a red circle and arrow labeled '2'. The main content area shows the 'Gates Foundation and its Subsidiaries' profile page. A dropdown menu for 'Profile' is open, showing 'Gates Foundation and its Subsidiaries' selected, with a red circle and arrow labeled '3'. At the bottom of the form, the 'Update Info' button is highlighted with a red circle and arrow labeled '4'. The form content includes 'Gates Foundation External Information Form', 'Supplier Information' (ABC Corporation), and 'Gates Foundation Supplier Information'.

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Purchase Order (PO) Processing

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View Purchase Order (1 / 3)

Purchase Order Processing in the CSP

When a purchase order (PO) is issued, it will appear in the CSP Orders table. Email and / or platform notifications will be sent per your notification settings.

1. Click Orders**2. Select Gates Foundation and its Subsidiaries as your customer****3. Instructions From Customer features requirements and announcements specific to Gates Foundation and its Subsidiaries.****4. Use the search bar to locate a specific PO.**

1 Click **Orders**

2 Select **Gates Foundation and its Subsidiaries** as your customer







3 **Purchase Orders**

4 Use the search bar to locate a specific PO.

Instructions From Customer

You *must* acknowledge the PO prior to creating an invoice. Please use the *"print view"* on your POs to see the terms and conditions.

Click the 📄 Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
GF-1400	02/13/25	Issued	None	Coupa Licensing	No			  
GF-1294	02/13/25	Issued	None	Coupa Implementation Professional Services	No			  

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Purchase Order Processing in the CSP

5. Entity Purchase Order Prefixes:

- **GF-xxxx:** Gates Foundation
- **1400-xxxx:** Gates Ag One
- **MRI-xxxx:** Gates MRI

6. PO Statures in Coupa:

- **Issued:** A PO has been created and issued by the customer
- **Cancelled:** A PO has been cancelled and does not need to be fulfilled
- **Soft Closed:** A PO is closed but can be reopened. Invoices cannot be created against a PO in this status
- **Closed:** The transaction has been completed and the PO cannot be reopened

The screenshot shows the Coupa Supplier Portal interface. The 'Orders' tab is selected, and the 'Purchase Orders' section is visible. A table lists two purchase orders:

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
GF-1400	02/13/25	Issued	None	Coupa Licensing	No			[Icons]
GF-1294	02/13/25	Issued	None	Coupa Implementation Professional Services	No			[Icons]

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Purchase Order Processing in the CSP

7. Click on a hyperlinked **PO Number** to view the PO's details

8. Click **Print View** to view the PO's PDF version

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The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', user 'SALLY', 'NOTIFICATIONS 6', and 'HELP'. The main menu has 'Invoices', 'Orders', 'Profile', 'Setup', 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. The 'Orders' sub-menu is expanded, showing 'Purchase Order #GF-1195'. The page content is divided into sections: 'General Info' (Status: Issued - Sent via Email, Order Date: 10/03/24, Revision Date: 10/03/24, Requester: Caitlin Cyron, Email: caitlin.cyron@gatesfoundation.org, Payment Term: None, Attachments: None, Acknowledged: , Assigned to: Select), 'Shipping' (Ship-To Address: 1432 Elliott Ave West, Seattle, WA 98119, United States, Location Code: BMGF-2, Attn: Caitlin Cyron, Terms: None, Shipment Tracking: No shipment tracking), and 'Lines' (Table with 1 line item: Sample Goods, Qty: 10, Unit: Each, Price: 5,000.00, Total: 50,000.00, Invoiced: 0.00). At the bottom right, the 'Print View' button is highlighted with a red box and a circled '8'.

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Acknowledge Purchase Order

Purchase Order Processing in the CSP

You are required to acknowledge POs within 2 business days of receipt.

1. Click on a hyperlinked **PO Number** to view the PO's details

2. Check **Acknowledged**

3. View the Acknowledged Date in the Orders Table

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', user 'SALLY', 'NOTIFICATIONS 6', and 'HELP'. The main navigation menu has 'Orders' selected. Below the navigation, there's a 'Select Customer' dropdown set to 'Gates Foundation and its Subsidiaries'. The main content area is titled 'Purchase Orders' and contains an 'Instructions From Customer' section with a note: 'You must acknowledge the PO prior to creating an invoice. Click the Action to Acknowledge button to acknowledge the PO.' Below this is an 'Export to' dropdown and a table of Purchase Orders.

PO Number	Order Date	Status	Acknowledged At
MRI-1196	10/03/24	Issued	None
GF-1195	10/03/24	Issued	10/03/24
1400-1194	10/03/24	Issued	None

Number 1 points to the 'GF-1195' link in the table. Number 2 points to the 'Acknowledged' checkbox in the PO details view. Number 3 points to the 'Acknowledged At' column in the table.

The 'Purchase Order #GF-1195' details view shows a green 'Order acknowledged' banner. The 'General Info' section includes: Status: Issued - Sent via Email; Order Date: 10/03/24; Revision Date: 10/03/24; Requester: Caitlin Cyron; Email: caitlin.cyron@gatesfoundation.org; Payment Term: None; Attachments: None; Assigned to: [Select]. The 'Shipping' section includes: Ship-To Address: 1432 Elliott Ave West, Seattle, WA 98119, United States; Location Code: BMGF-2; Attn: Caitlin Cyron; Terms: None; Shipment Tracking: No shipment tracking. The 'Lines' section shows a table with 1 line item: Type: Item; Item: Sample Goods; Qty: 10; Unit: Each; Price: 5,000.00; Total: 50,000.00; Invoiced: 0.00. Supplier Part Number, Supplier Auxiliary Part Number, Manufacturer Name, and Manufacturer Part Number are all None. Benefiting Entity and Bill-To Address: Bill & Melinda Gates Foundation; Services Start Date and Services End Date are None. The total is USD 50,000.00. Buttons for 'Create Invoice', 'Save', and 'Print View' are at the bottom.

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Add Comments to Purchase Order

Purchase Order Processing in the CSP

Use Coupa's comment functionality to contact us with questions or clarifications on a PO.

- Click on a hyperlinked PO Number to view the PO's details.
- Scroll to the bottom of the screen. Enter your comment and click **Add Comment** to notify us.
- Comment history will always be visible at the bottom of the PO.
- The Orders Table Unanswered Comments Column will state **Yes** if a PO has an unread comment left by the foundation.

The screenshot shows the 'coupa supplier portal' interface. The 'Orders' tab is selected. A table of Purchase Orders is displayed with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row is highlighted with a red circle containing the number 1, and the 'View' button next to it is circled with a red circle containing the number 4.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
MRI-1196	10/03/24	Issued	None	100 Each of Sample Goods	No	400,000.00 USD		
GF-1195	10/03/24	Issued	10/03/24	10 Each of Sample Goods	Yes	50,000.00 USD		
1400-1194	10/03/24	Issued	None	10 Each of Sample Goods	No	10,000.00 USD		

The screenshot shows the 'Comment' form. The 'Enter Comment' text area is highlighted with a red circle containing the number 2. The 'Add Comment' button is highlighted with a red circle containing the number 3.

Comment form details:

- Text area: comment
- Buttons: Add File | URL
- Participants: Cait Cyron
- Comment history: from supplier, Cait Cyron, 08/04/23 at 04:54 AM

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Create Order Table View (1 / 2)

Purchase Order Processing in the CSP

The CSP has standard views available for each of its tables. You can also make custom views.

1. Click on the View drop down menu to see available views

2. Click **Create View**

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', user 'SALLY', 'NOTIFICATIONS 6', and 'HELP'. The main navigation menu has 'Orders' selected. Below the navigation, there are tabs for 'Orders', 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', 'Order Confirmations', 'Order Confirmation Lines', and 'More...'. A 'Select Customer' dropdown is set to 'Gates Foundation and its Subsidiaries'. The main content area is titled 'Purchase Orders' and includes 'Instructions From Customer' and a search bar. Below the search bar is a table of purchase orders. The table has columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Conf, Assigned To, and Actions. The table contains three rows of data. A red circle with the number '1' is placed over the 'View' dropdown menu in the table header. A red circle with the number '2' is placed over the 'Create View' option in the dropdown menu.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Conf	Assigned To	Actions
MRI-1196	10/03/24	Issued	None	100 Each of Sample Goods	No		
GF-1195	10/03/24	Issued	10/03/24	10 Each of Sample Goods	No		
1400-1194	10/03/24	Issued	None	10 Each of Sample Goods	No		

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Create Order Table View (2 / 2)

Purchase Order Processing in the CSP

3. Build the view based on the necessary requirements.

4. Scroll to the bottom of the page and click **Save**. The custom view will now be available in the View drop down menu.

3 General

Name

Visibility Only Me
 Everyone

Start with view

Conditions

Match Conditions Add group of conditions

Filter By Filter Clause Filter Text +

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order. You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns	Selected Columns
<input type="checkbox"/> Comments	<input checked="" type="checkbox"/> PO Number
<input type="checkbox"/> Payment Agreements	<input checked="" type="checkbox"/> Order Date
<input type="checkbox"/> PO ID	<input checked="" type="checkbox"/> Status
	<input checked="" type="checkbox"/> Acknowledged At
	<input checked="" type="checkbox"/> Items
	<input checked="" type="checkbox"/> Unanswered Comments
	<input checked="" type="checkbox"/> Total
	<input checked="" type="checkbox"/> Assigned To
	<input checked="" type="checkbox"/> Actions

Default Sort Order

Sort by in order.

Cancel Save

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Invoicing Pathways

 Please continue to follow the current invoice submission process for each affiliate.

Affiliate	Current Invoice Submission Process
GATES FOUNDATION	Submit invoices via email to ap@gatesfoundation.org
GATES MEDICAL RESEARCH INSTITUTE	Submit invoices through the CSP <i>(Refer to the Supplier Training Guide at gatesmri.org/suppliers for more details)</i>
GATES AGRICULTURAL INNOVATIONS	Submit invoices via email to invoicesubmission@gatesagone.org

Invoicing Callouts:

- If you are invoicing for goods / services requested in a Coupa PO, please provide the PO number in addition to / in place of your Investment ID. If you do not have a Coupa PO, continue referencing your Investment ID.
- Invoices and credit notes for all affiliates will be visible in the CSP Invoice Table. Gates MRI invoices will be visible at all stages of the invoice submission process. Foundation and Gates Ag One invoices will be visible once they have been approved.