coupa Supplier User Guide

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

Last Updated
March 2025

Section Links

[Coupa Registration & Coupa Supplier Portal (CSP)]

[Supplier Information Management (SIM)]

[Purchase Order Processing]

How to use this guide

This **Table of Contents** is on every page,
use the links to quickly navigate this document.

3

main

sections

TIP

Search this document for keywords.

Keyboard shortcut:

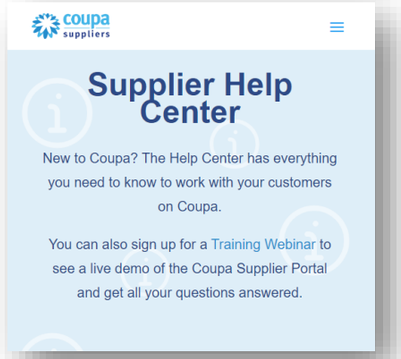
CTRL + F to bring up search.

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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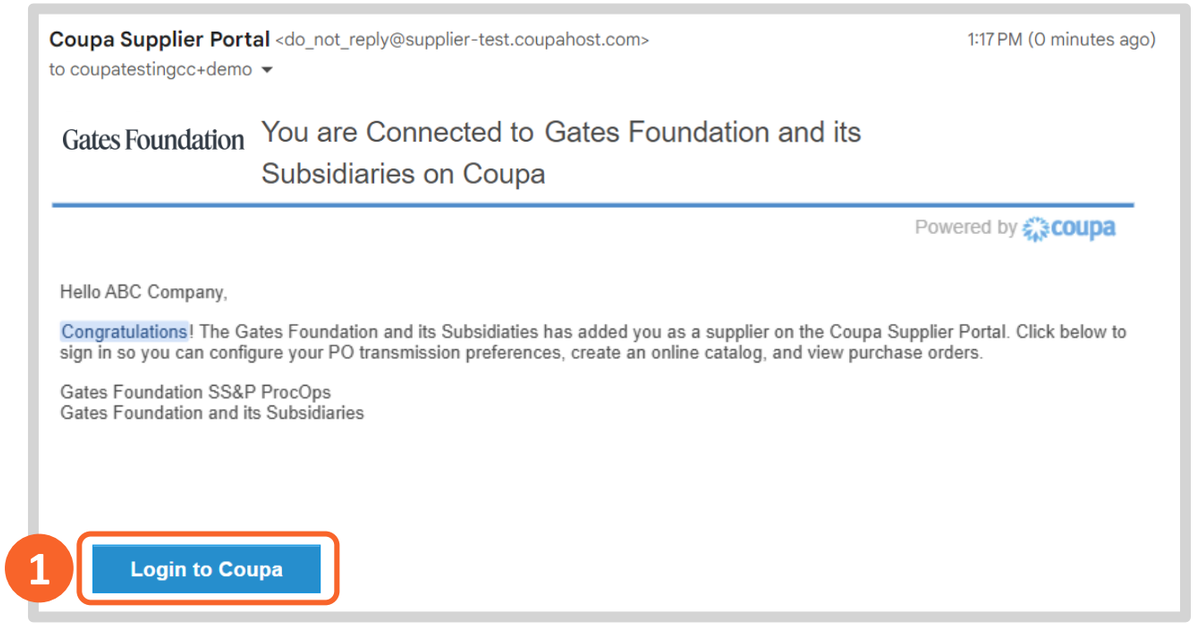
Registration for Suppliers already using Coupa

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.

1. 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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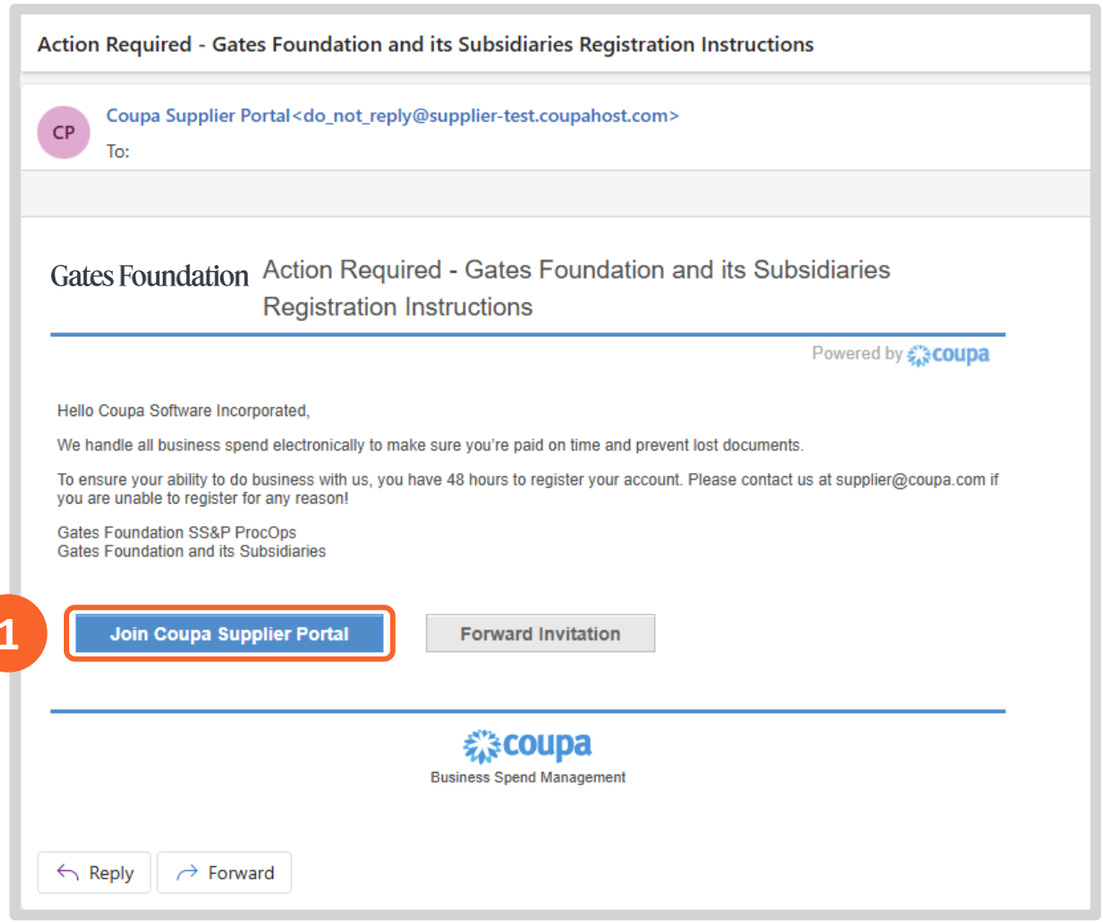
First Time Registration (1 / 3)

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.



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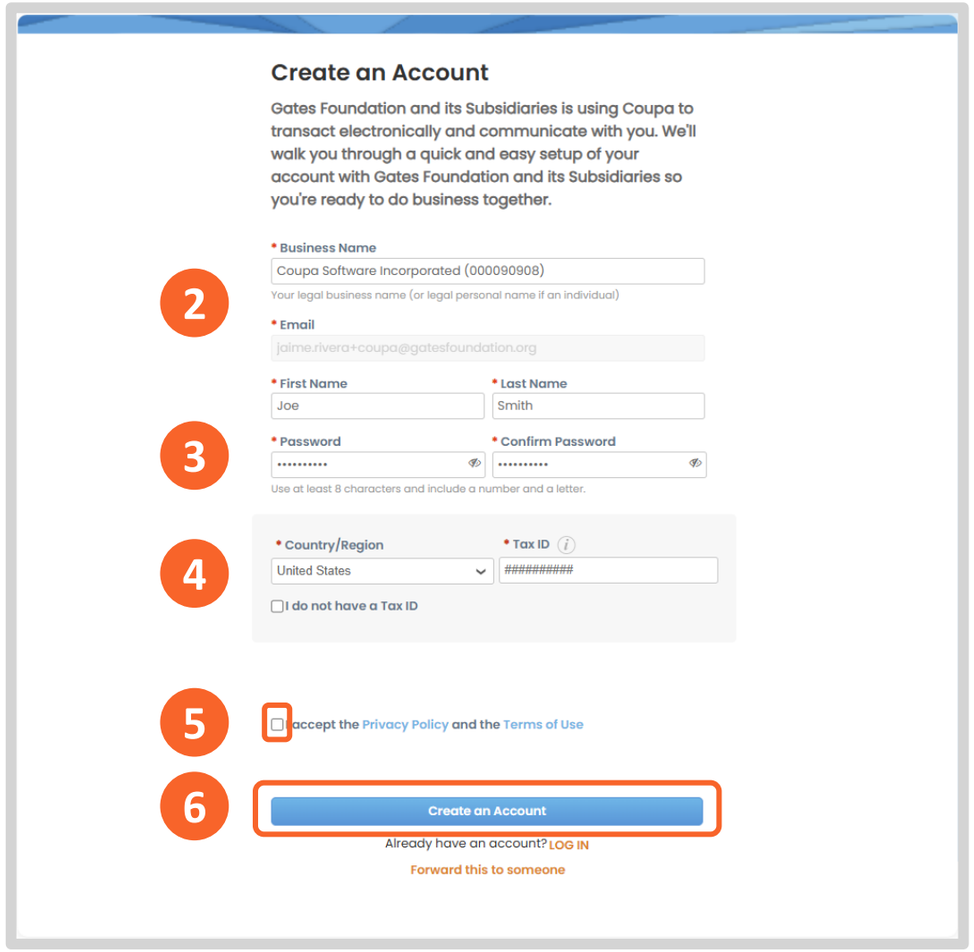
First Time Registration (2 / 3)

Create a CSP Account

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



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First Time Registration (3 / 3)

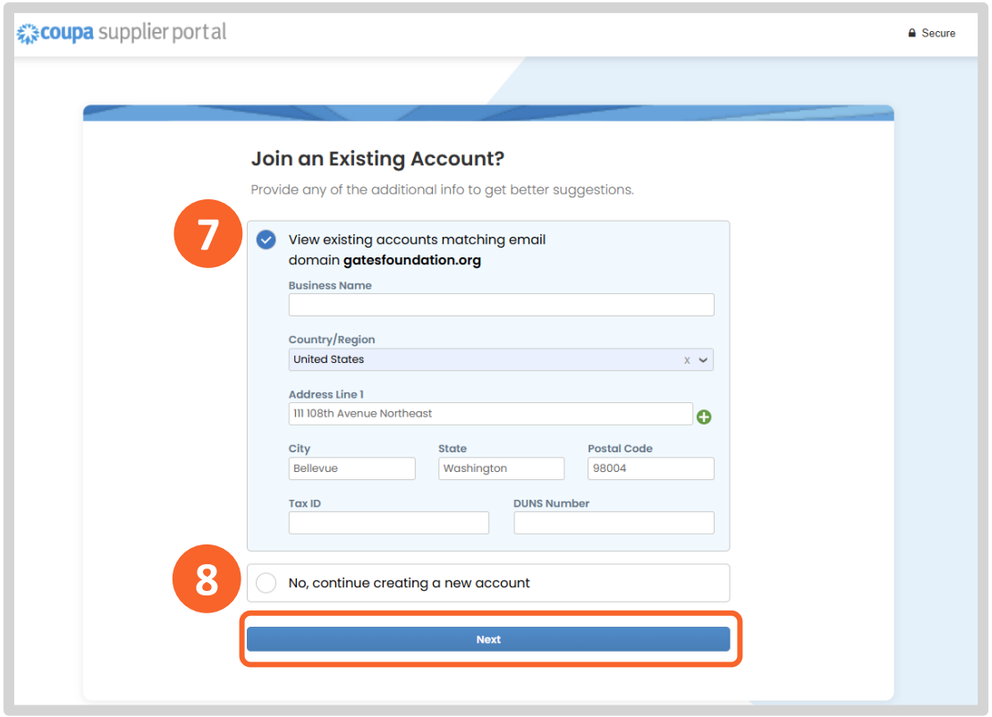
Join an Existing Account

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.



Section Break

CSP account creation complete!

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Accessing the CSP

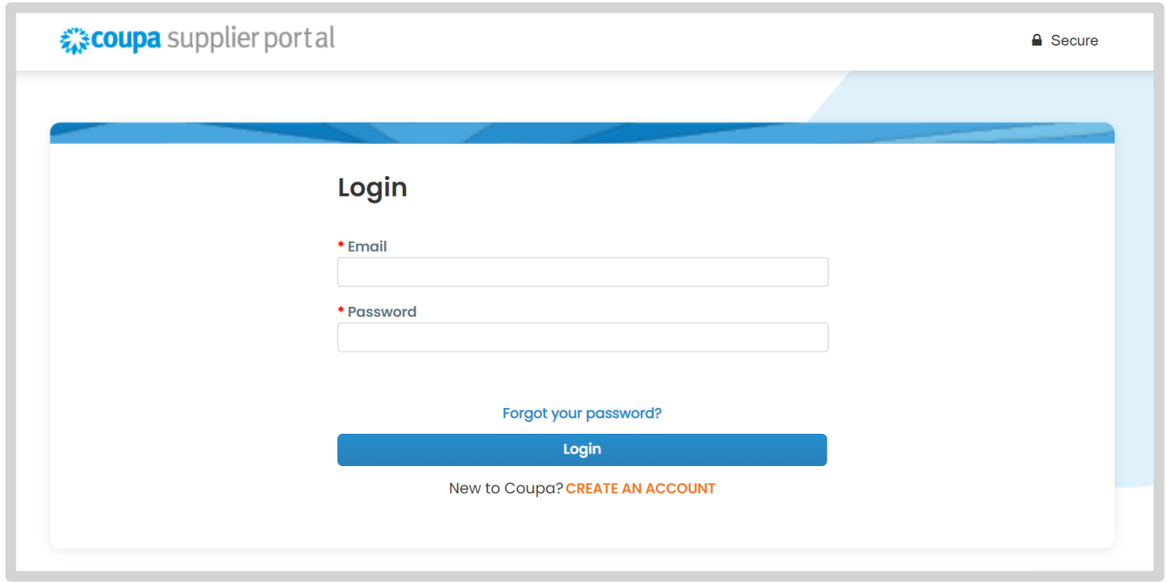
Portal Link and Supported Web Browsers

Coupa Supplier Portal Link:

https://supplier.coupahost.com/

Coupa supports the latest versions of these web browsers:

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



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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*

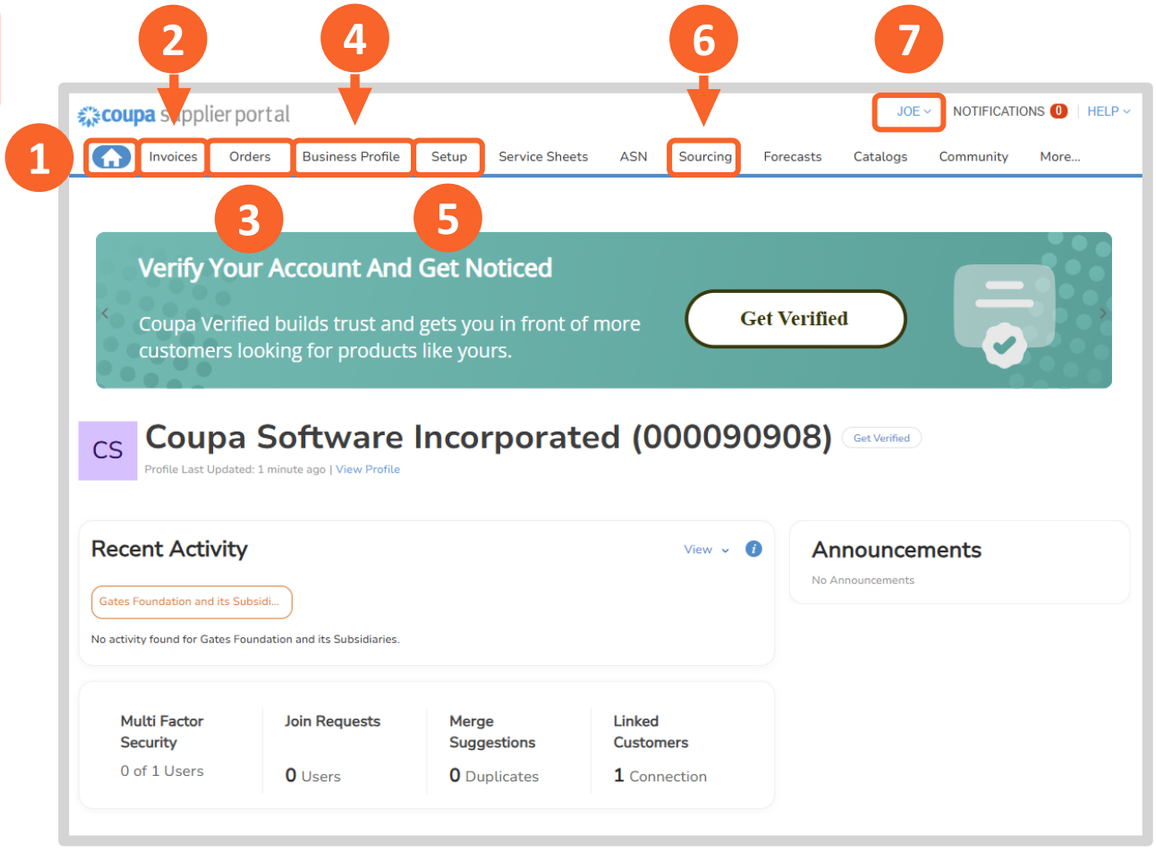
3. **Orders:** View and manage the purchase orders you receive

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.



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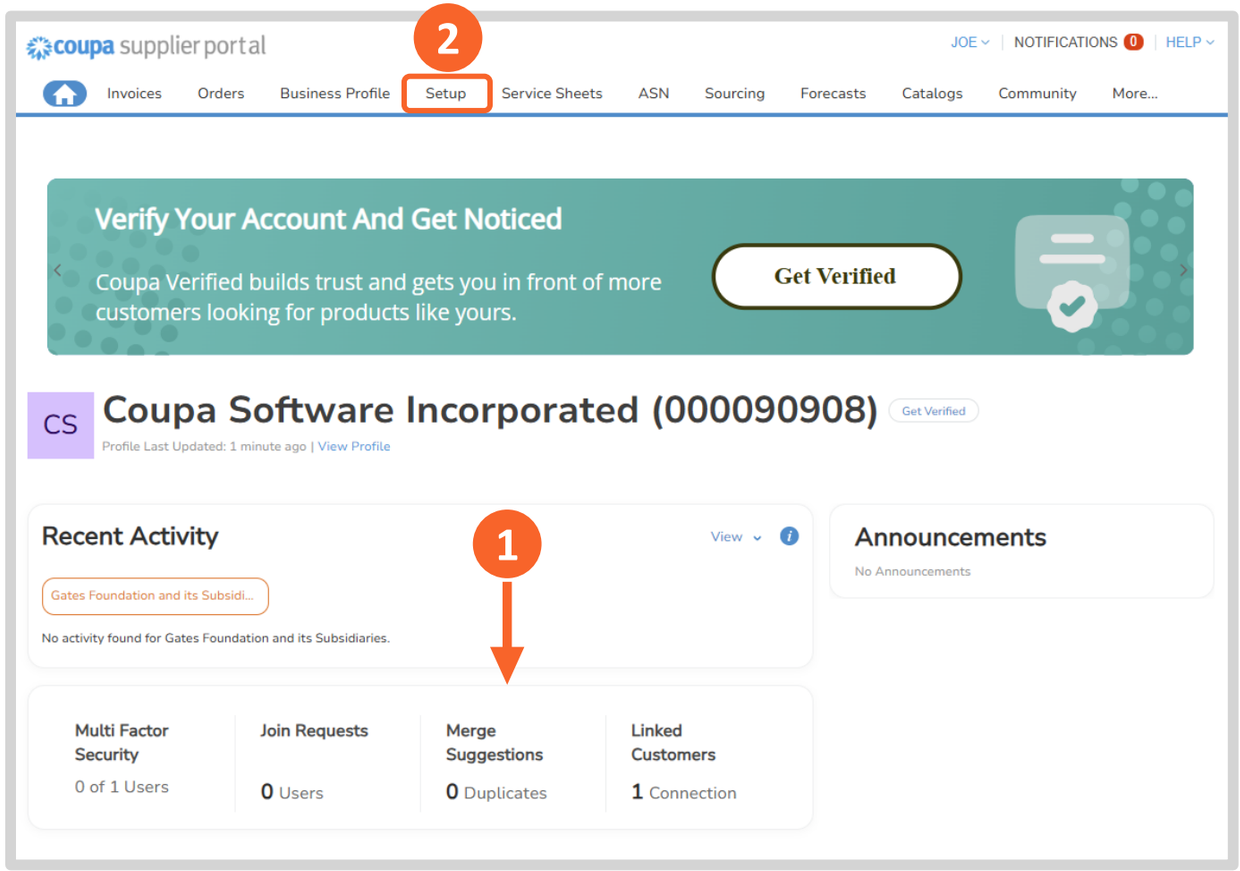
Merge Requests and Suggestions

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.

1. Merge Suggestions will be listed on the CSP Home Page

2. Merge Suggestions and Merge Requests can be accessed under Setup



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Managing Users (1 / 3)

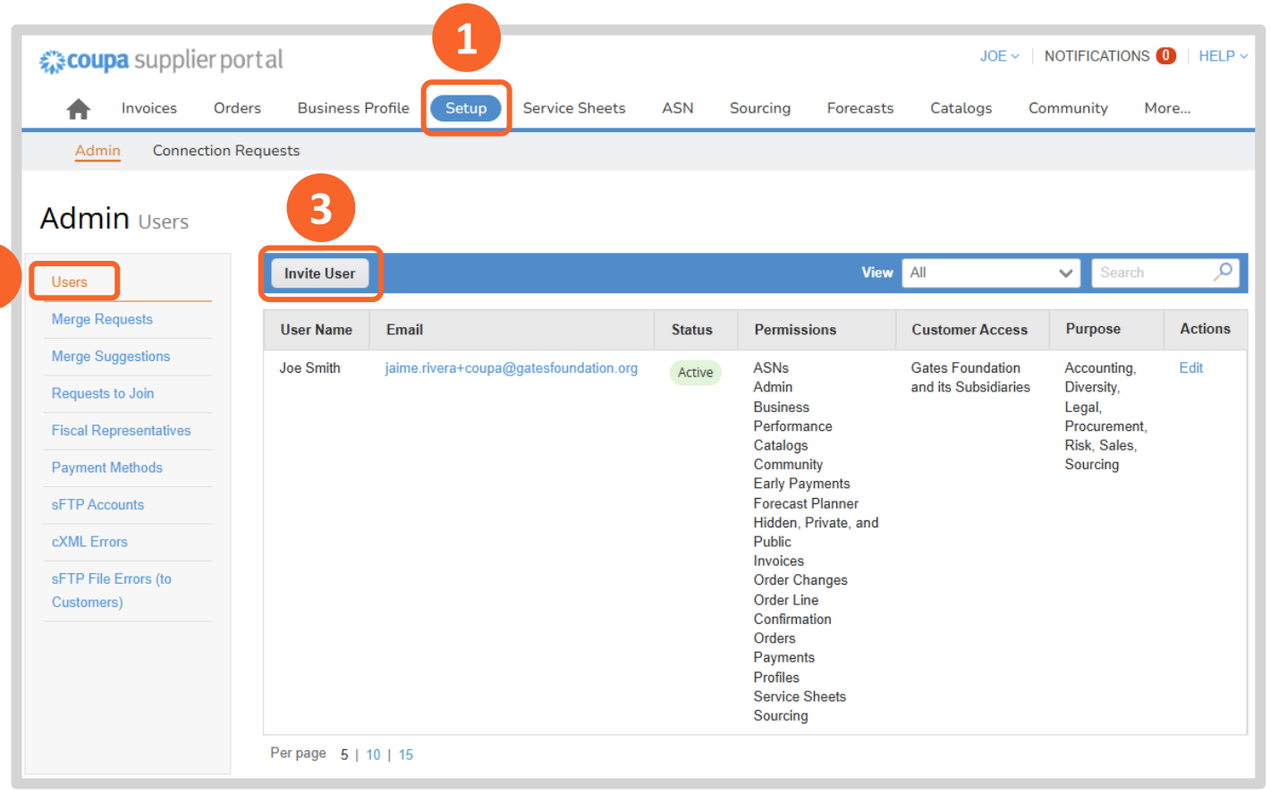
Accessing the CSP Users Table

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**



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Managing Users (2 / 3)

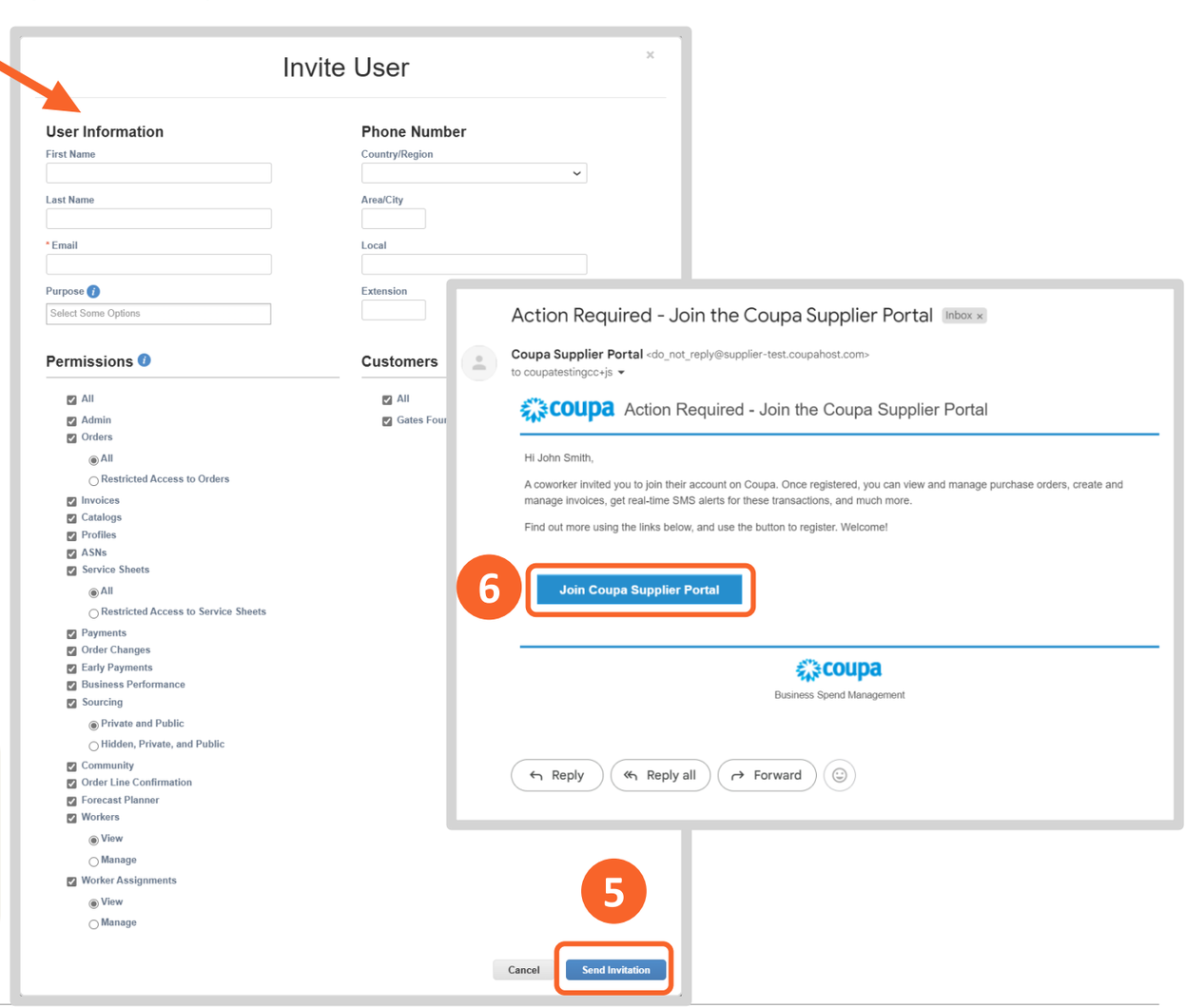
Inviting Users to the CSP

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.



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Managing Users (3 / 3)

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.

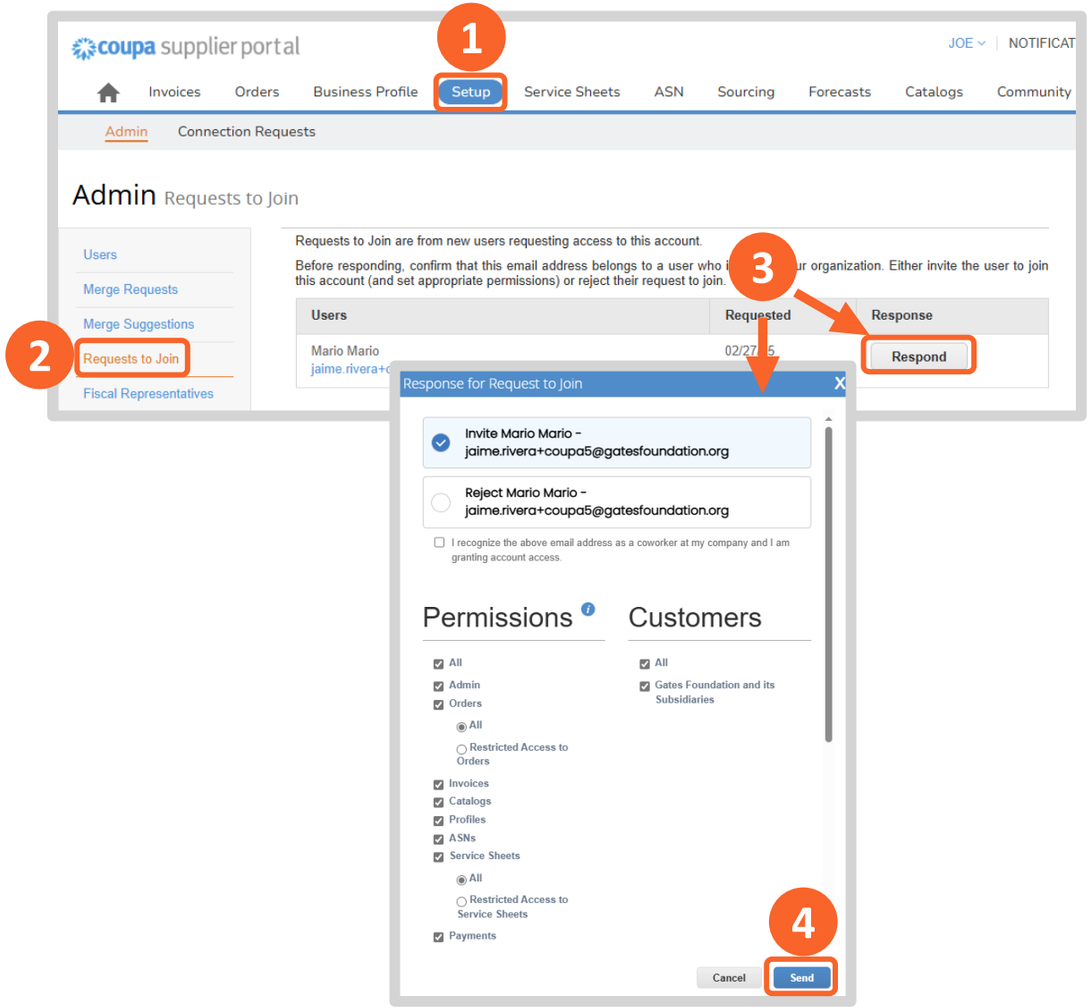
1. Click **Setup** in the navigation ribbon

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.



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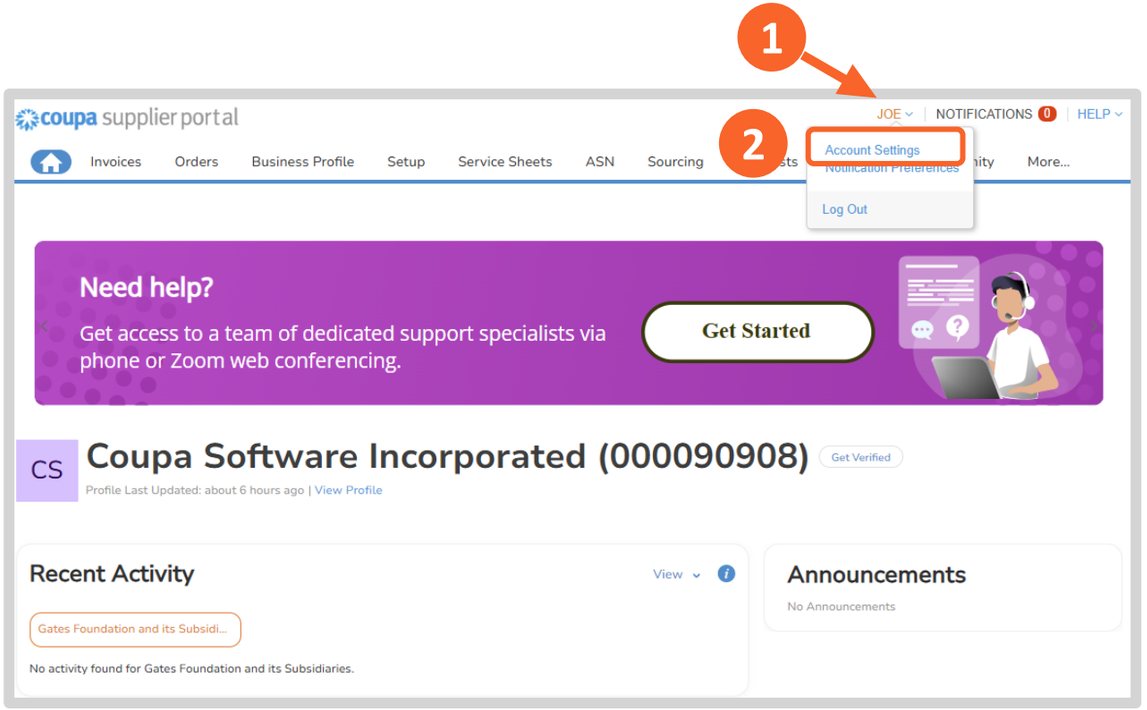
Security & Two-Factor Authentication (1 / 4)

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



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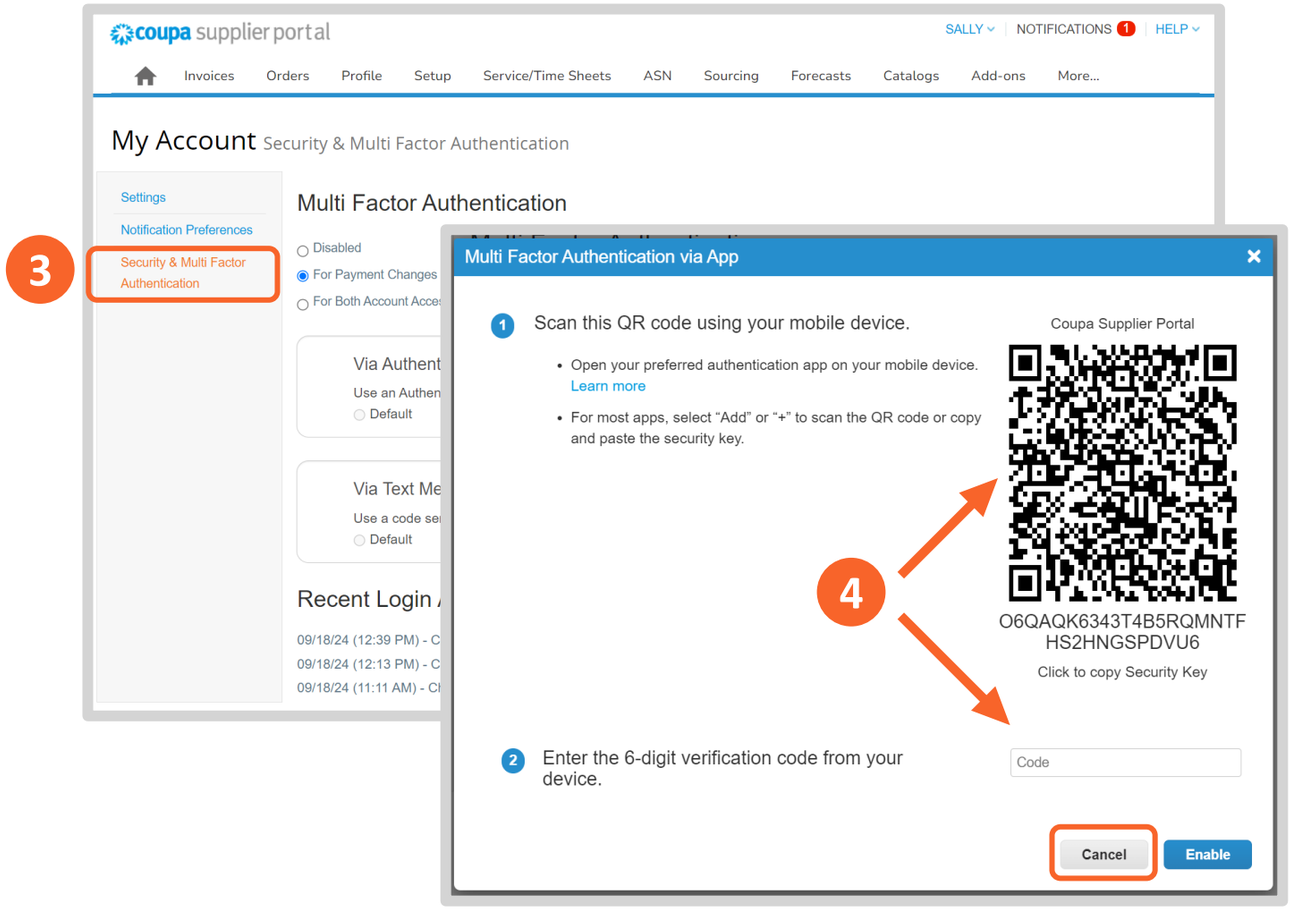
Security & Two-Factor Authentication (2 / 4)

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



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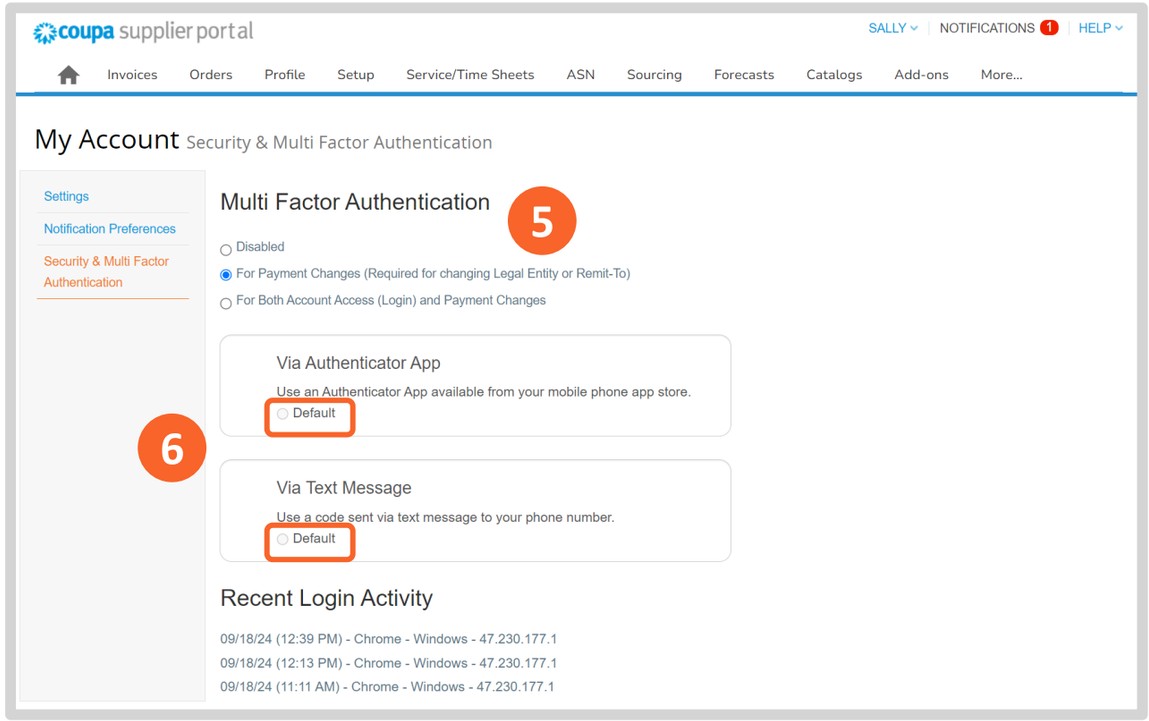
Security & Two-Factor Authentication (3 / 4)

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



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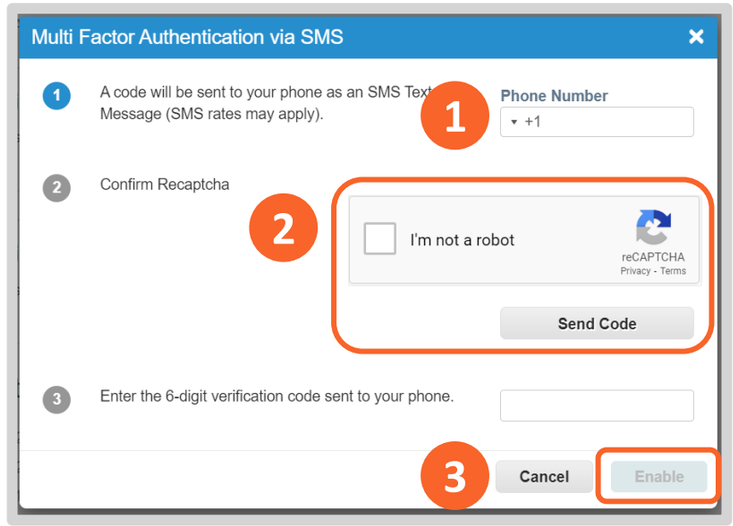
Security & Two-Factor Authentication (4 / 4)

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.



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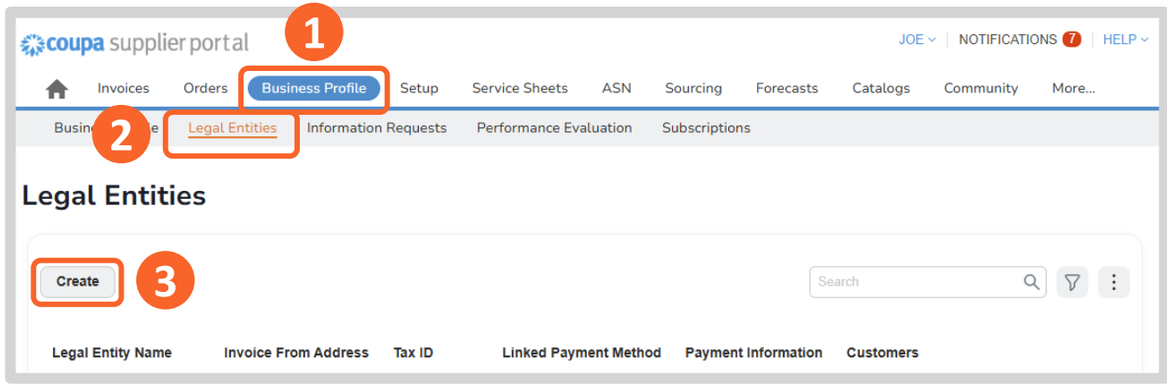
Legal Entity Setup (1 / 9)

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

4. Enter the entity's Legal Name and Country/Region.

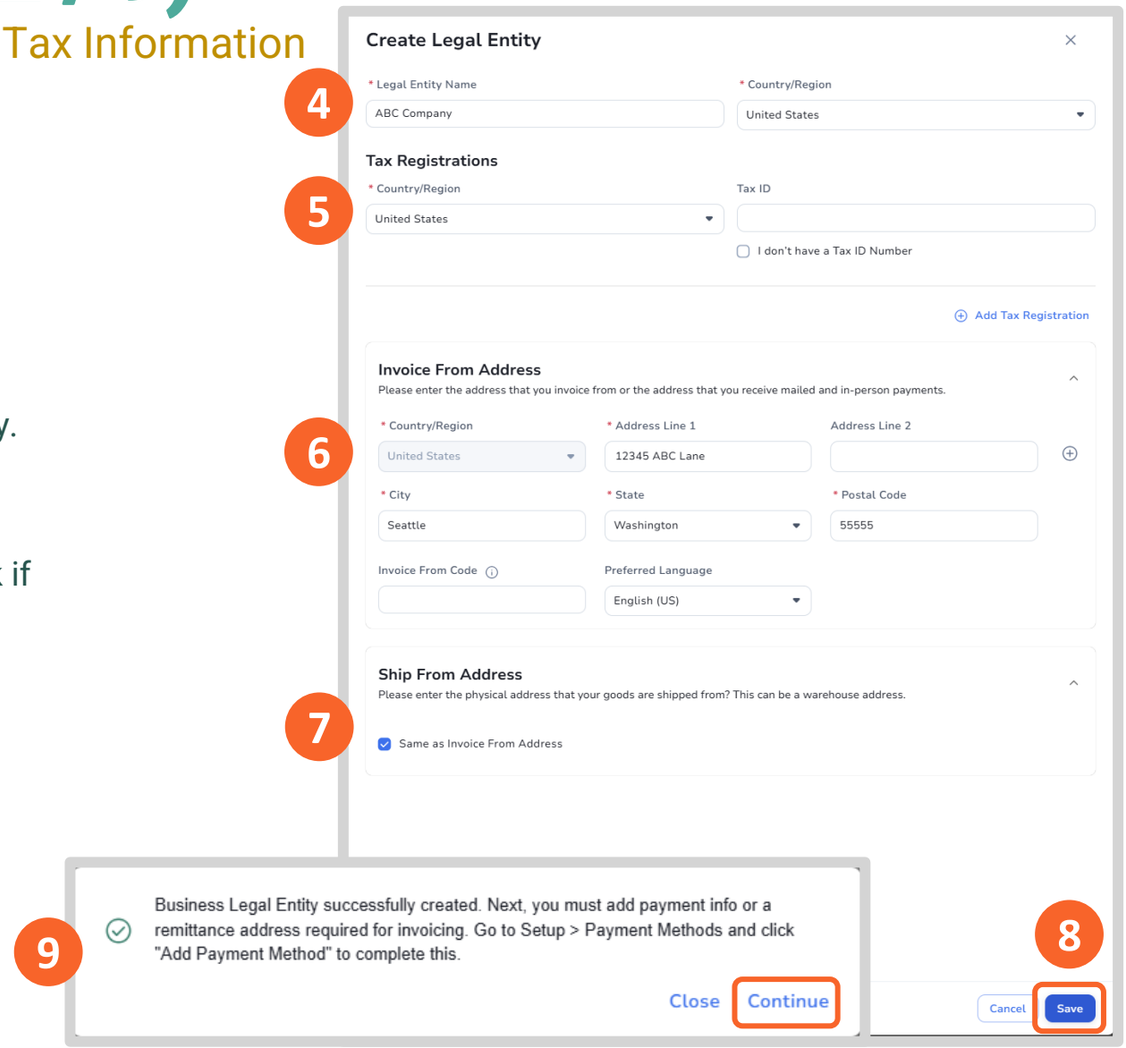
5. Enter the Country/Region and Tax ID.

6. Enter the registered address for this Legal Entity. Click ⊕ to add additional address lines.

7. Review the Ship From Address checkbox, check if shipping goods from the Invoice address, uncheck and add a new address if different.

8. Click on **Save**

9. Once saved, the following message will pop up, click **Continue** to go to Payment Methods



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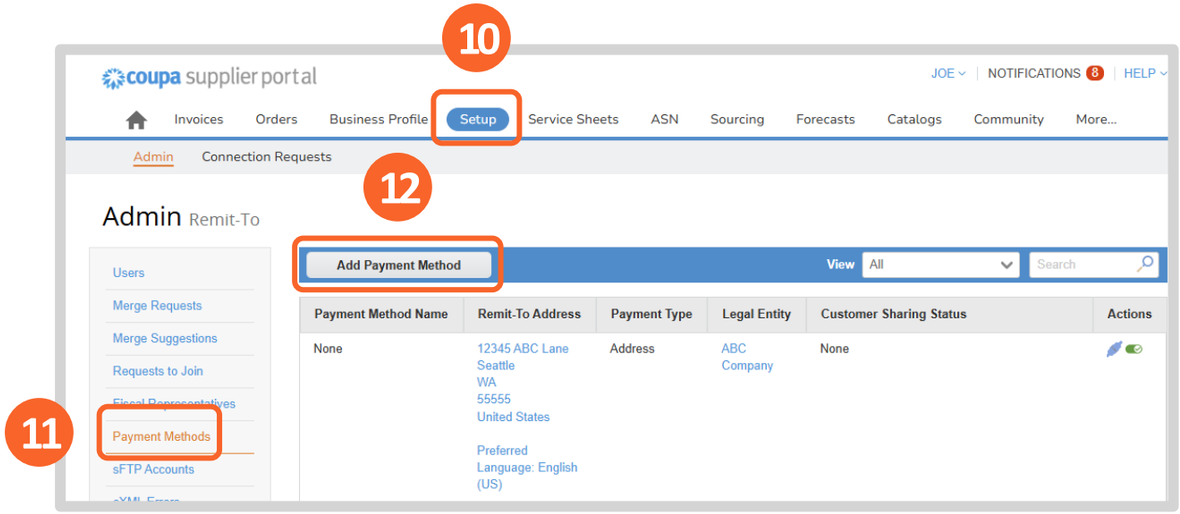
Legal Entity Setup (3 / 9)

Add Payment Method

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

11. Click **Payment Methods**

12. Click **Add Payment Method**



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Legal Entity Setup (4 / 9)

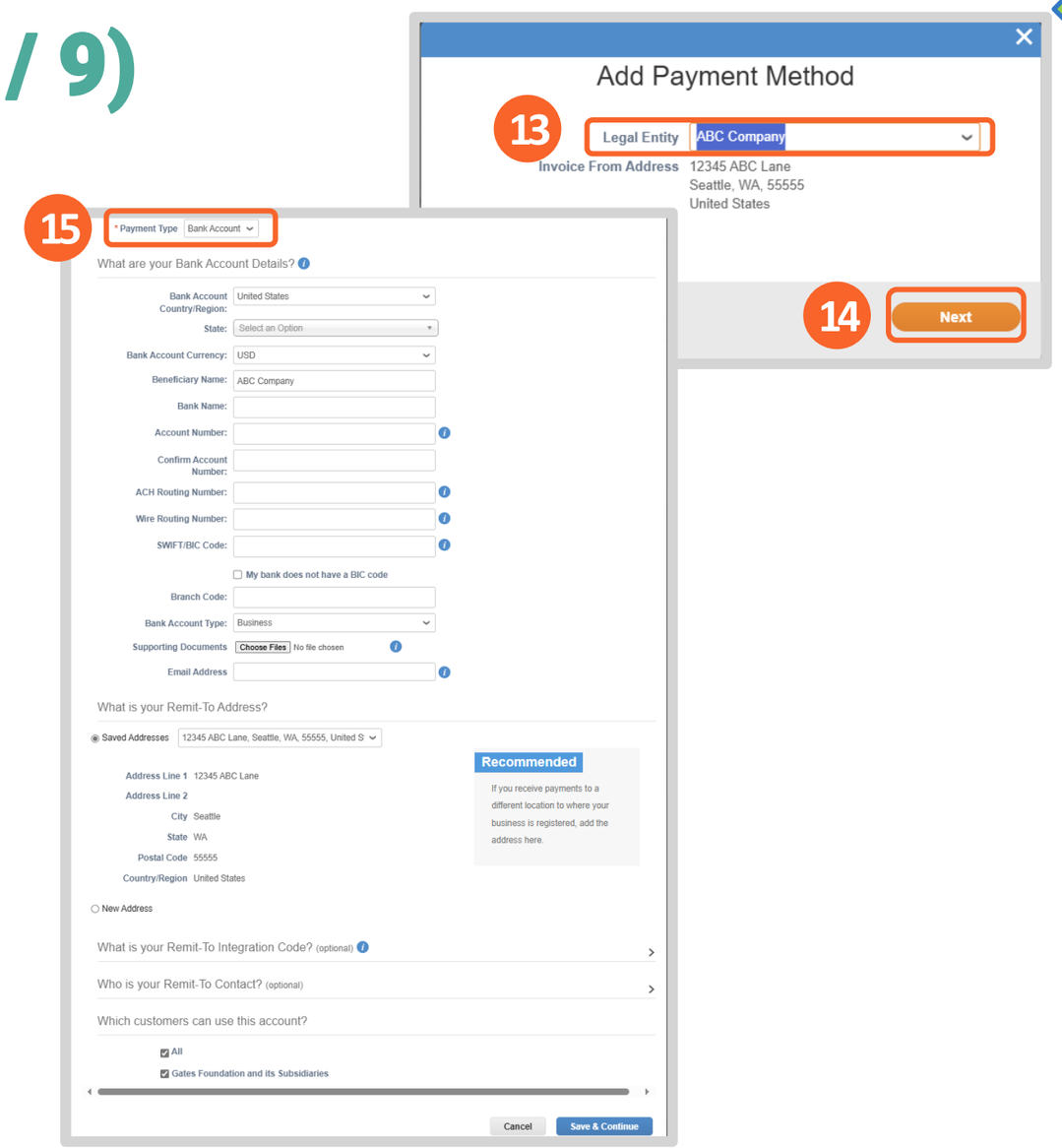
Add Payment Method

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.*



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Legal Entity Setup (5 / 9)

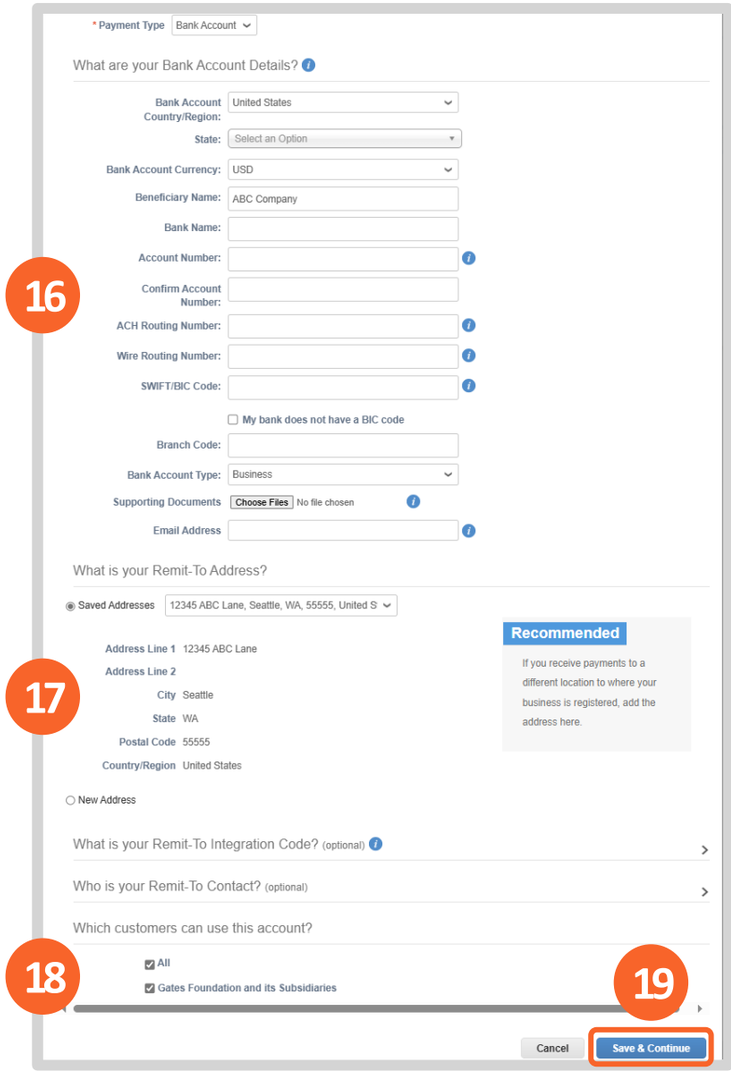
Payment Information & Remit-To Addresses

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**



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Legal Entity Setup (6 / 9)

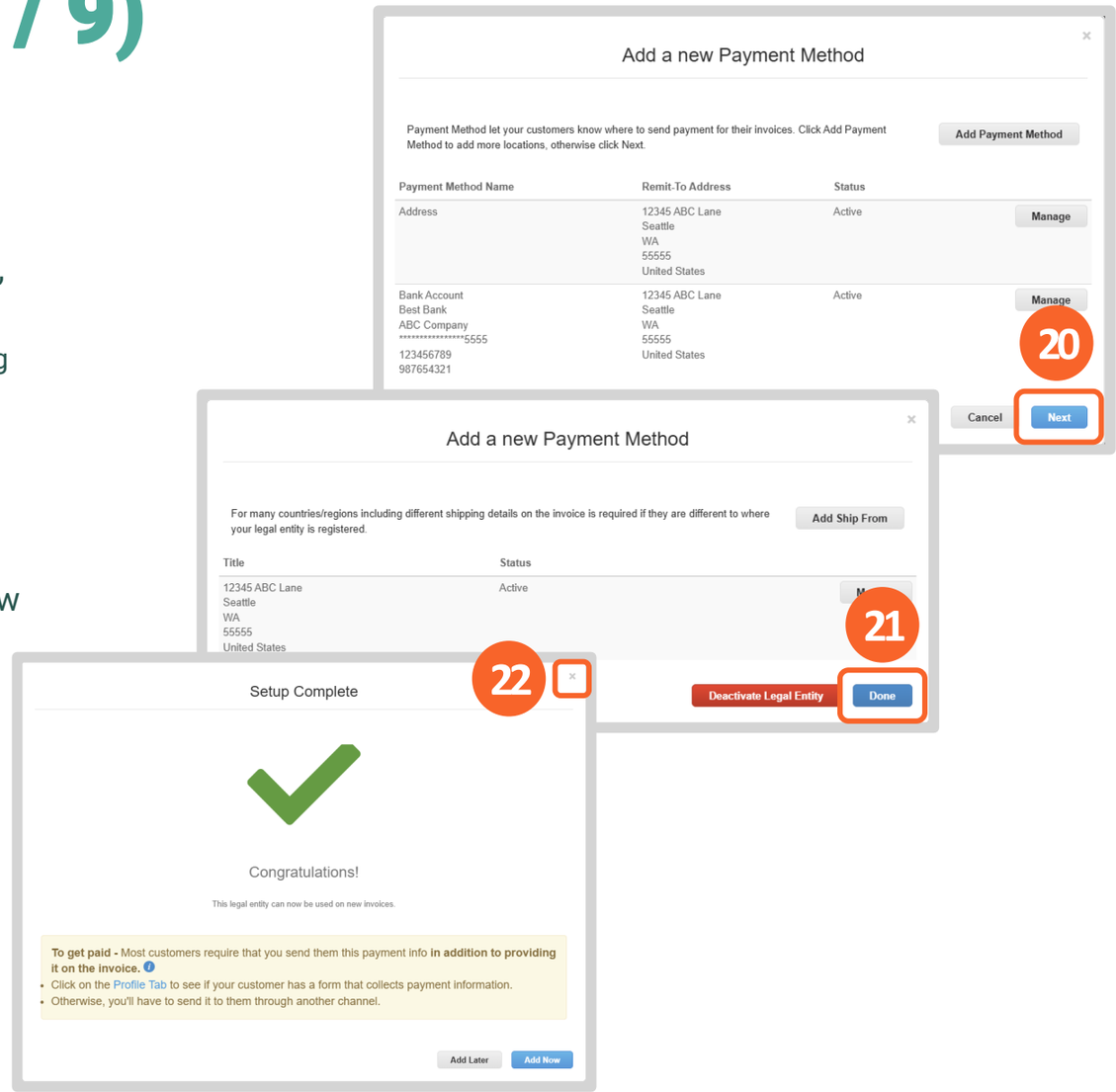
Adding Payment Method

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 × to close the window



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Legal Entity Setup (7 / 9)

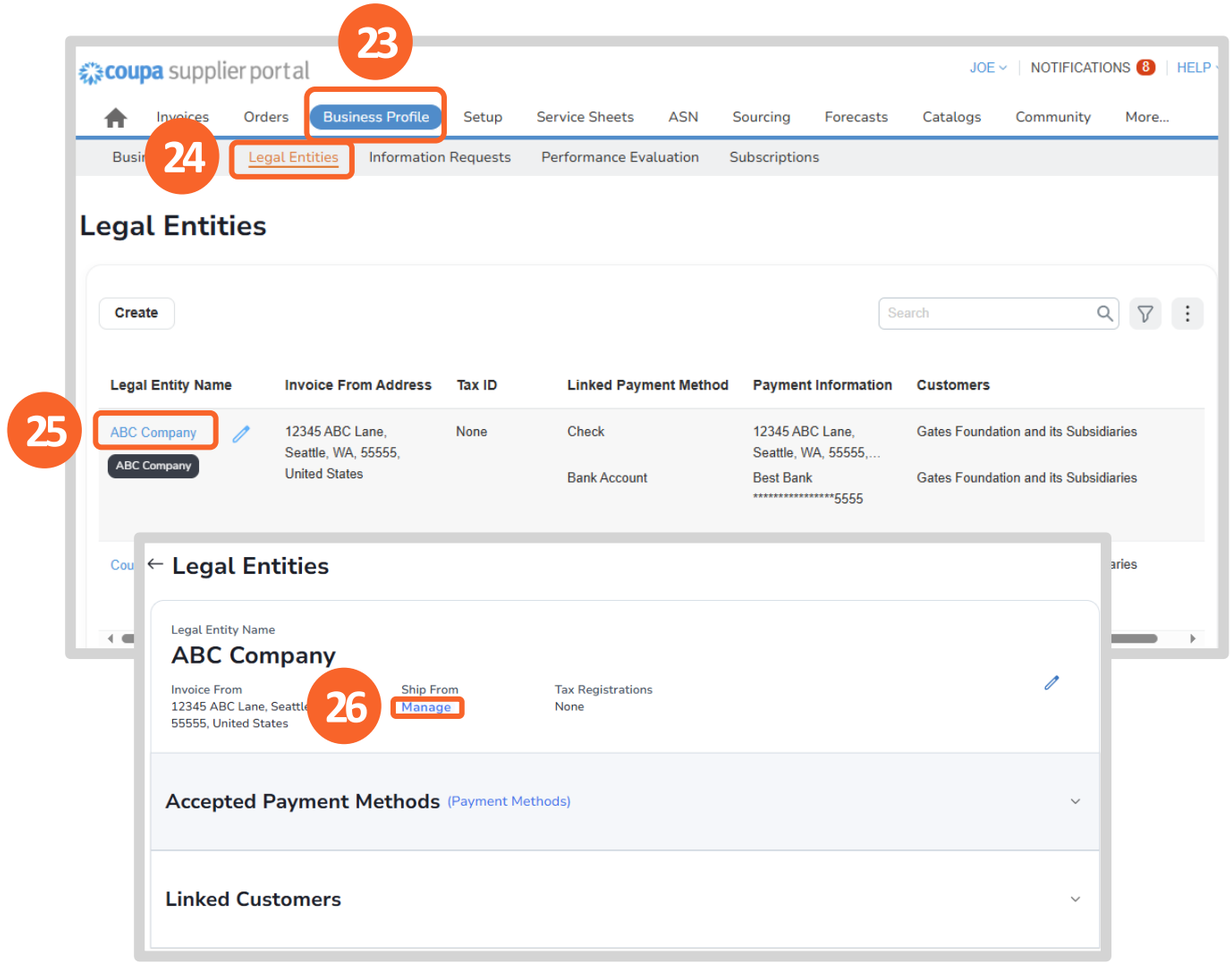
Adding and Managing Ship From Addresses

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



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Legal Entity Setup (8 / 9)

Adding and Managing Ship From Addresses

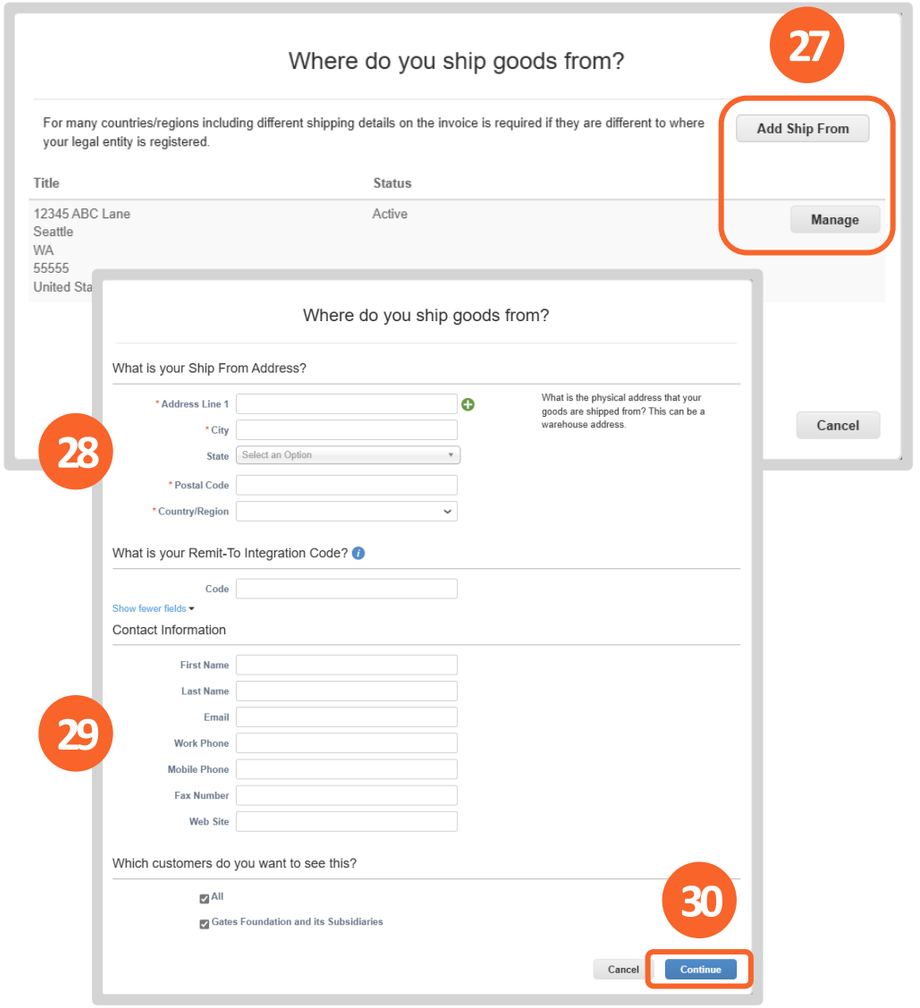
27. Click **Add Ship From** to add a new Ship From Address or **Manage** to edit or deactivate the current Ship To Address.

28. Enter or Modify the Ship From Address.

29. Enter or Modify the Contact Information and which customers can see this

30. Click **Continue.**

- Existing Ship From Addresses being modified will have a Deactivate Ship From icon.



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Legal Entity Setup (9 / 9)

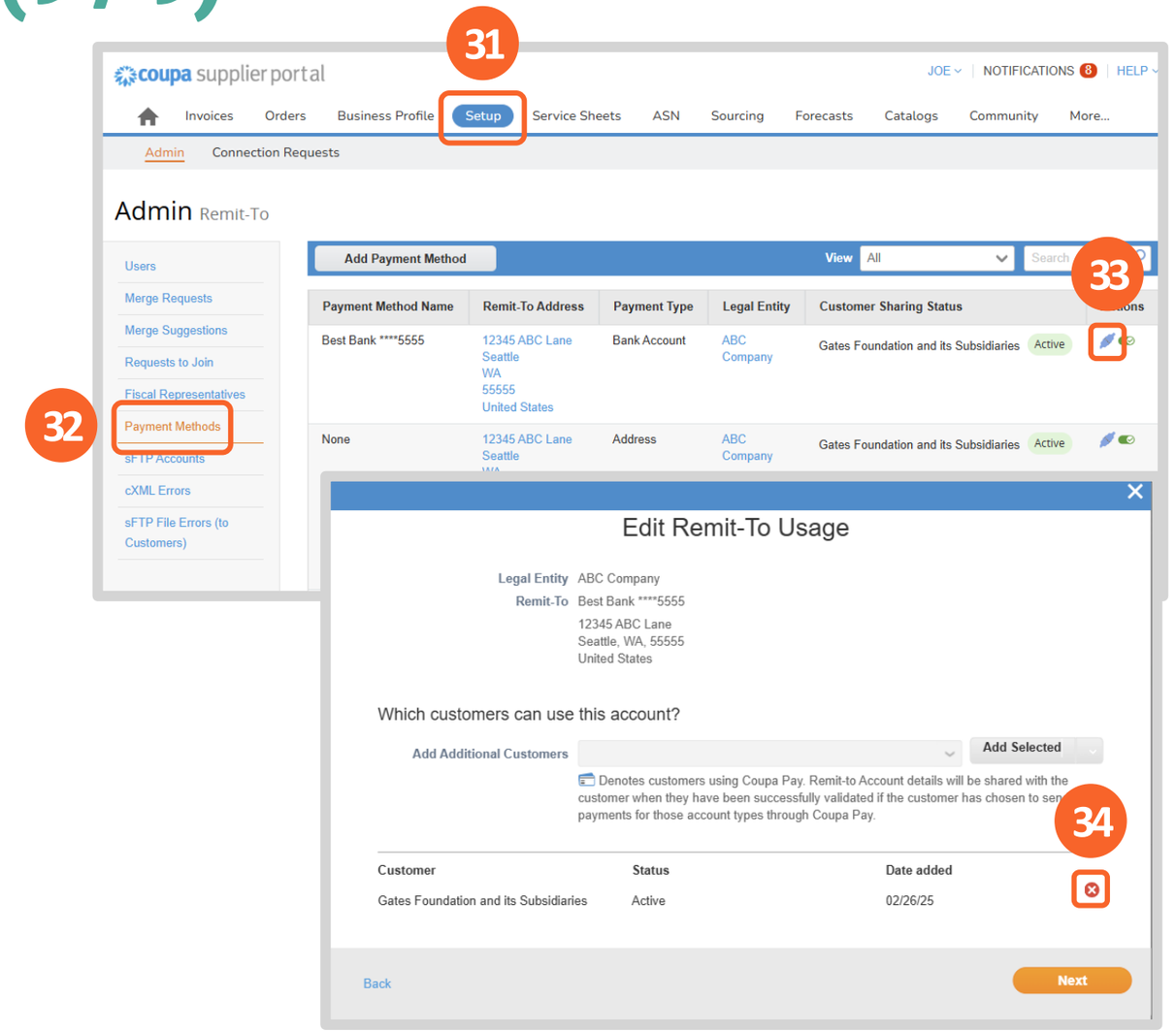
Managing Remit-To Addresses

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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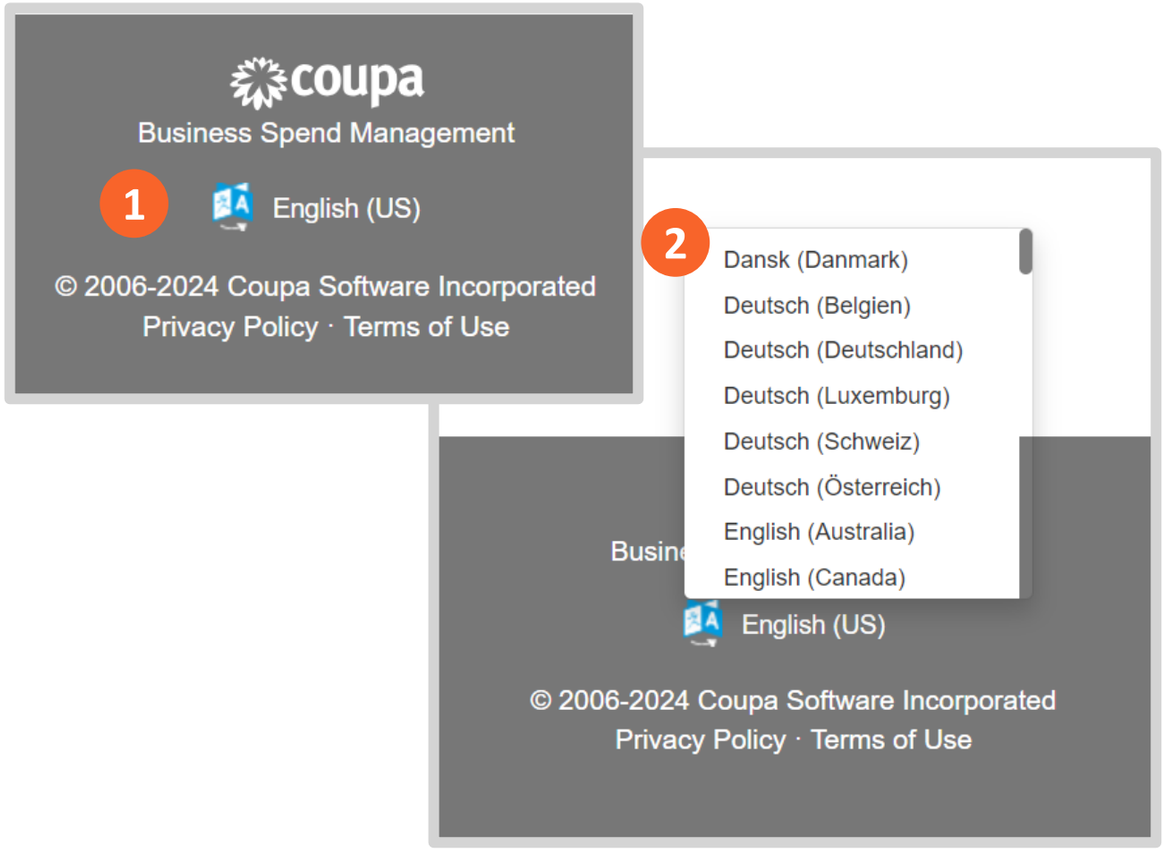
Language Settings

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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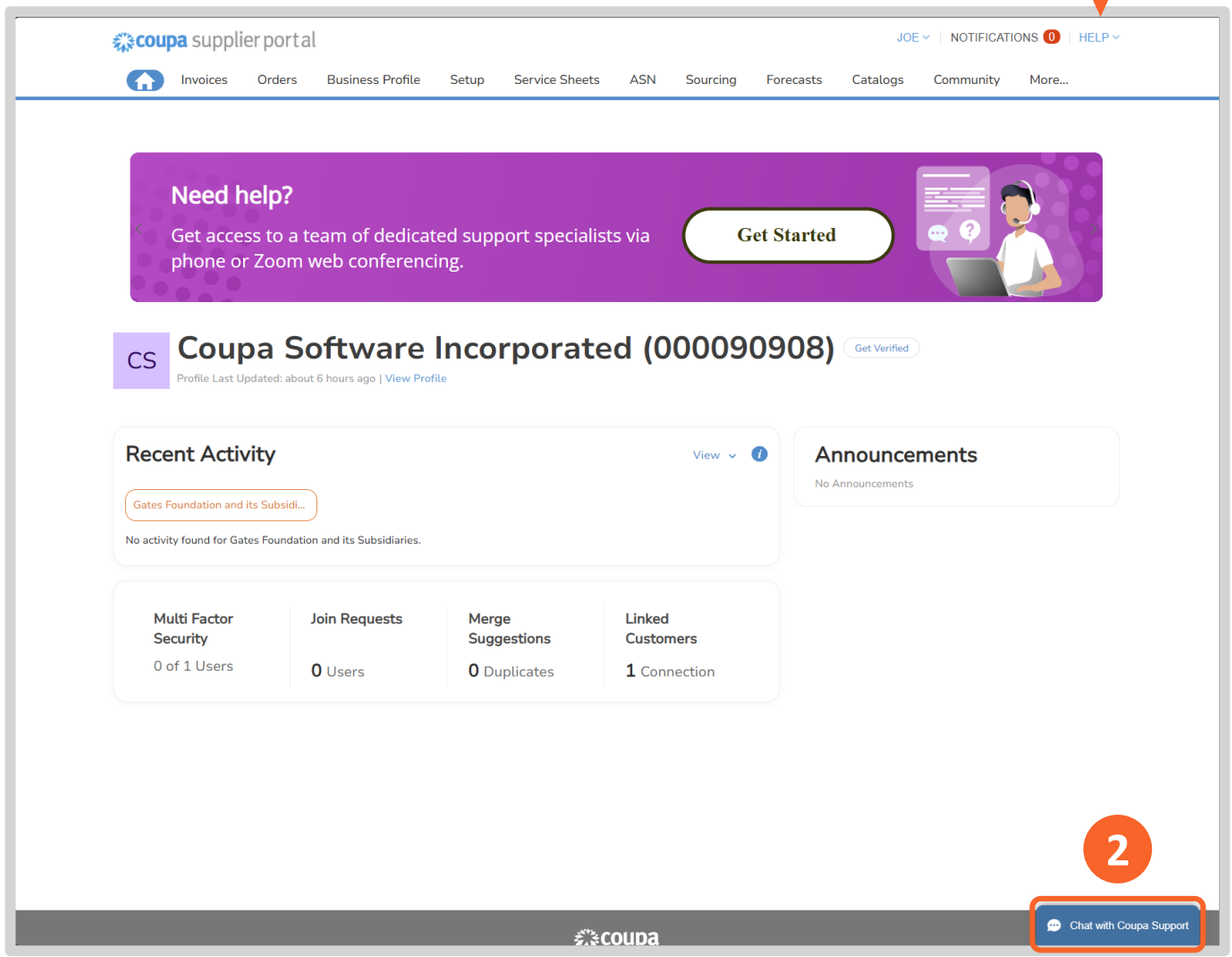
Help & Support (1 / 2)

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



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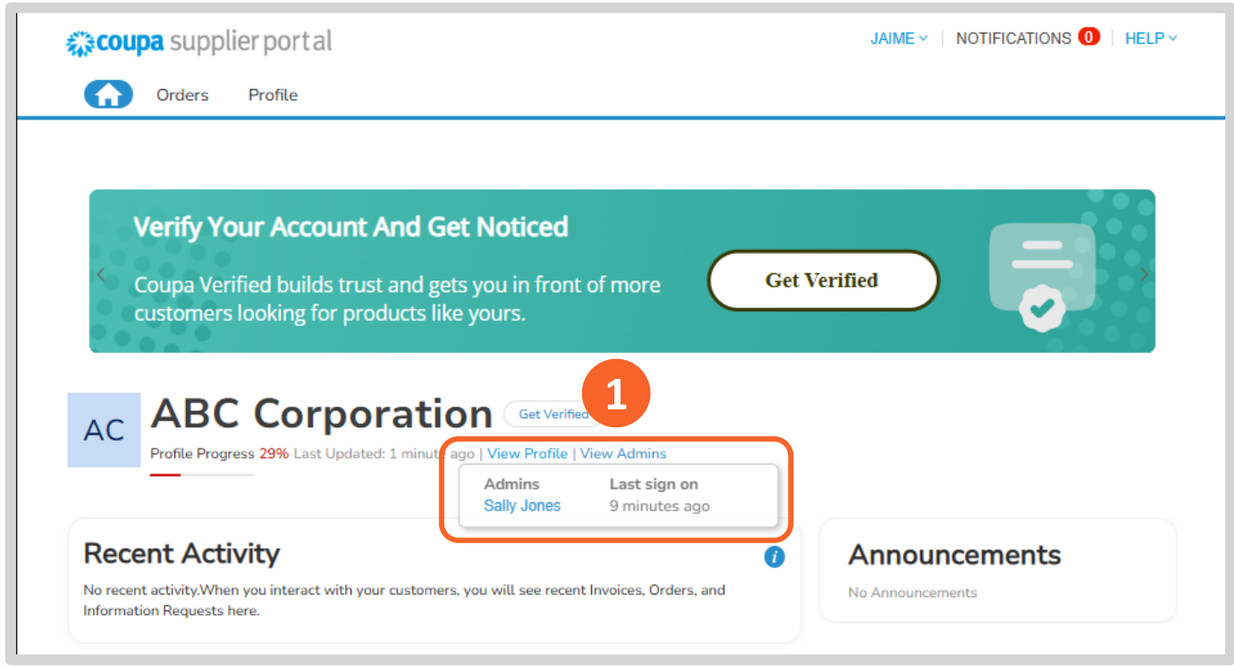
Help & Support (2 / 2)

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.



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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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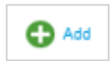
Key Terminology (2 / 2)

Coupa Icons

Icon	Action / Function
GF-1400	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

2

Supplier Information Management (SIM)

- SIM Introduction
- Coupa SIM Forms
- International Banking Guidance
- SIM Notifications
- Managing Comments, Rejection, and Approvals
- Self-Service in the CSP

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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

Information Request Email

- Sent to the primary contact we have on file

Sign in or create CSP account

- If you have used Coupa to do business with other customers, you can log in to an existing CSP account.
- If you have never used Coupa before, create a CSP account. (See CSP Account Set Up Instructions)

Complete & Submit Form

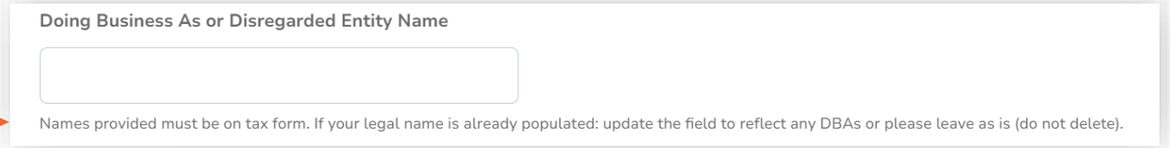
- Complete and submit the SIM form. There is guiding text throughout the form to support you.

Response

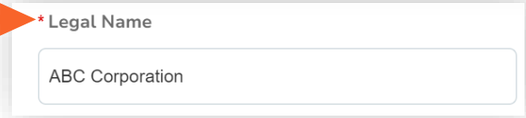
- You will receive email and / or CSP notifications with the status of your submitted SIM form.
- Forms are either approved or rejected. Comments will be added to the bottom of the form if there are questions or clarifications needed on your response.

Form Reminders

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



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



3. See Managing Comments for when more information is needed.

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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.	• 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.	• 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.	• 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.	• 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.	• 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.	• 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.	• Legal Name • Company Contacts • Company Addresses • Tax Registration(s) • Diversity Certifications • Banking Details

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

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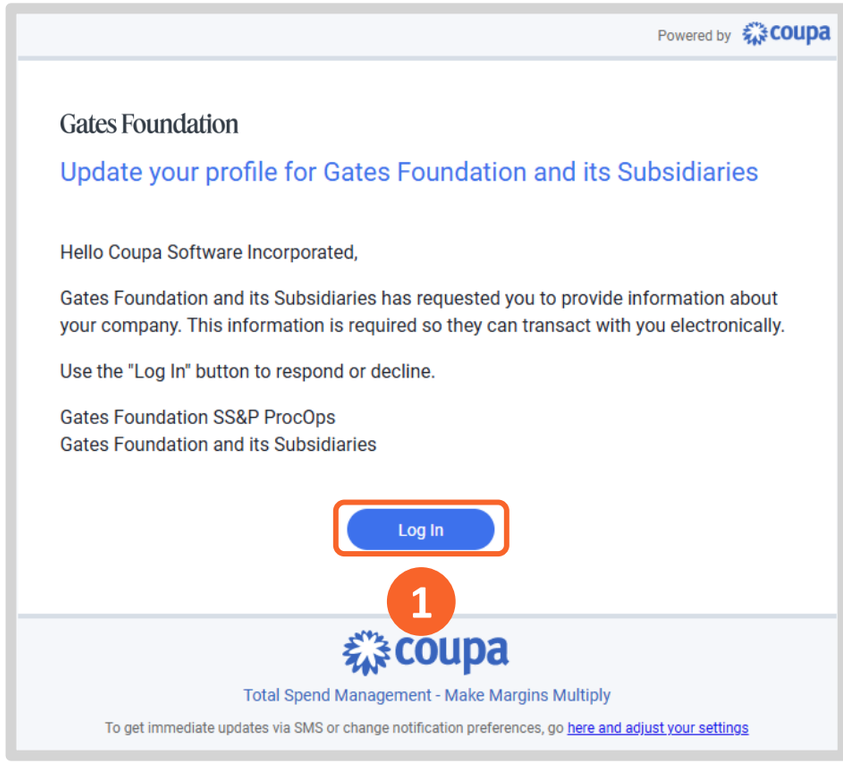
SIM Notifications (1 / 2)

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.



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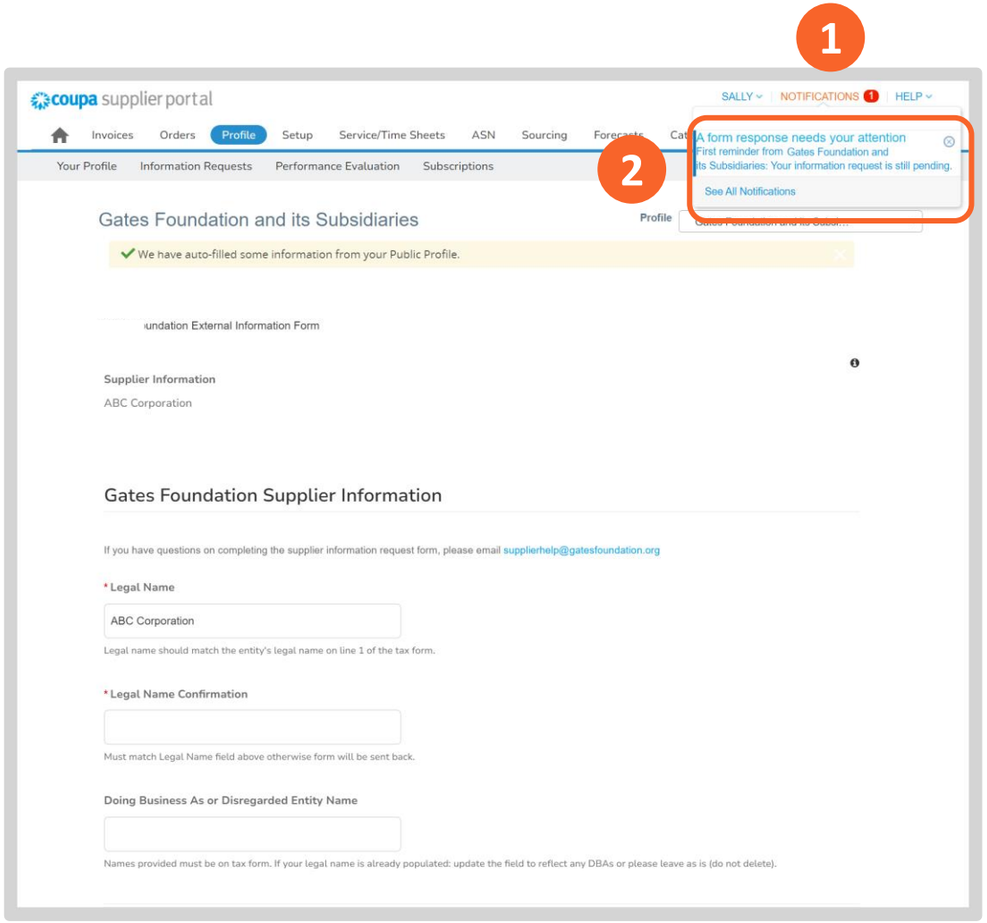
SIM Notifications (2 / 2)

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



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Managing Comments

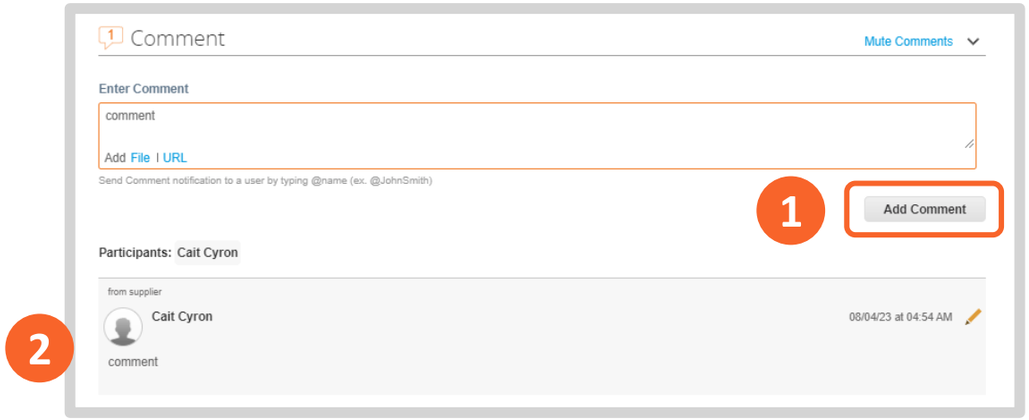
Managing Comments, Rejections, and Approvals

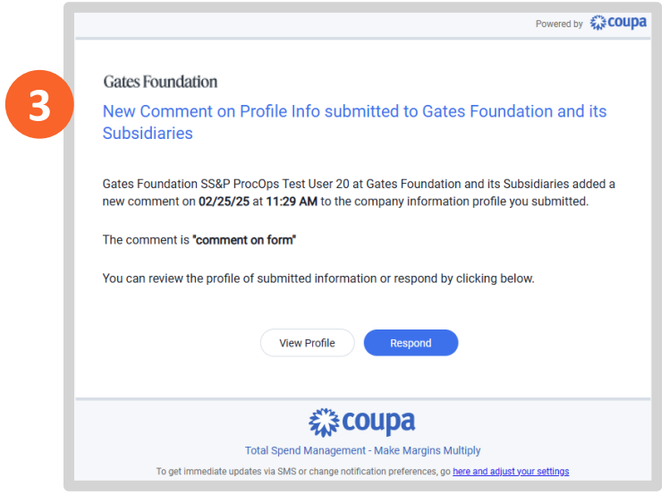
Use Coupa's comment functionality to contact us with questions or clarifications on a form.

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.





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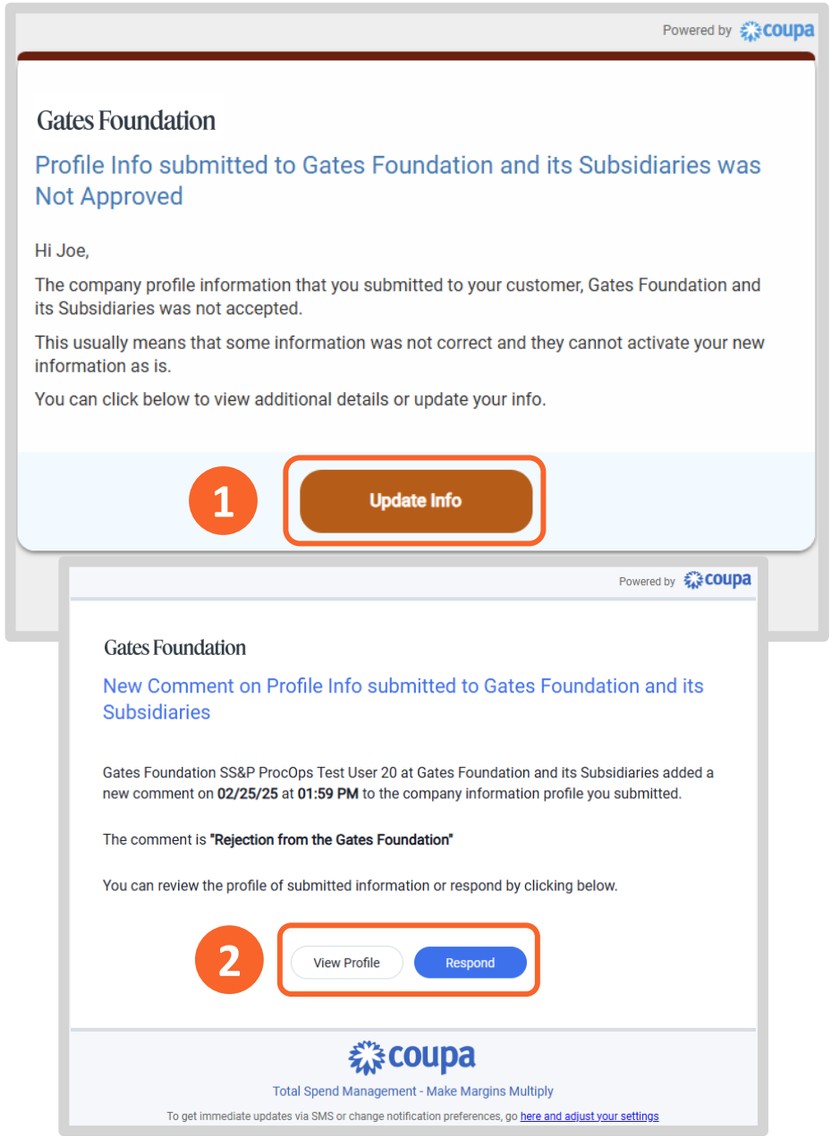
Form Rejection

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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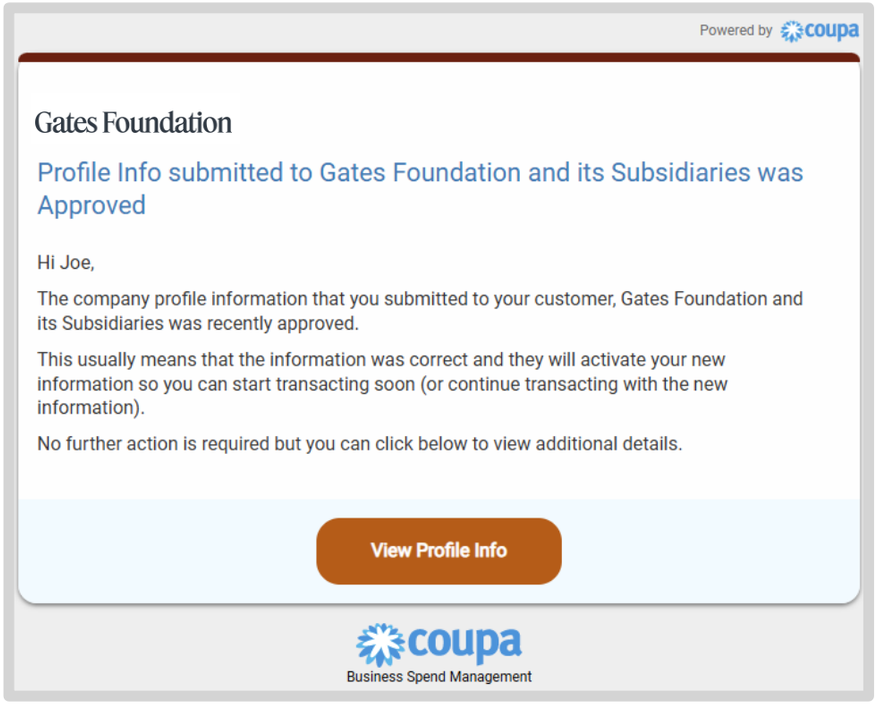
Form Approval

Managing Comments, Rejections, and Approvals

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



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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.

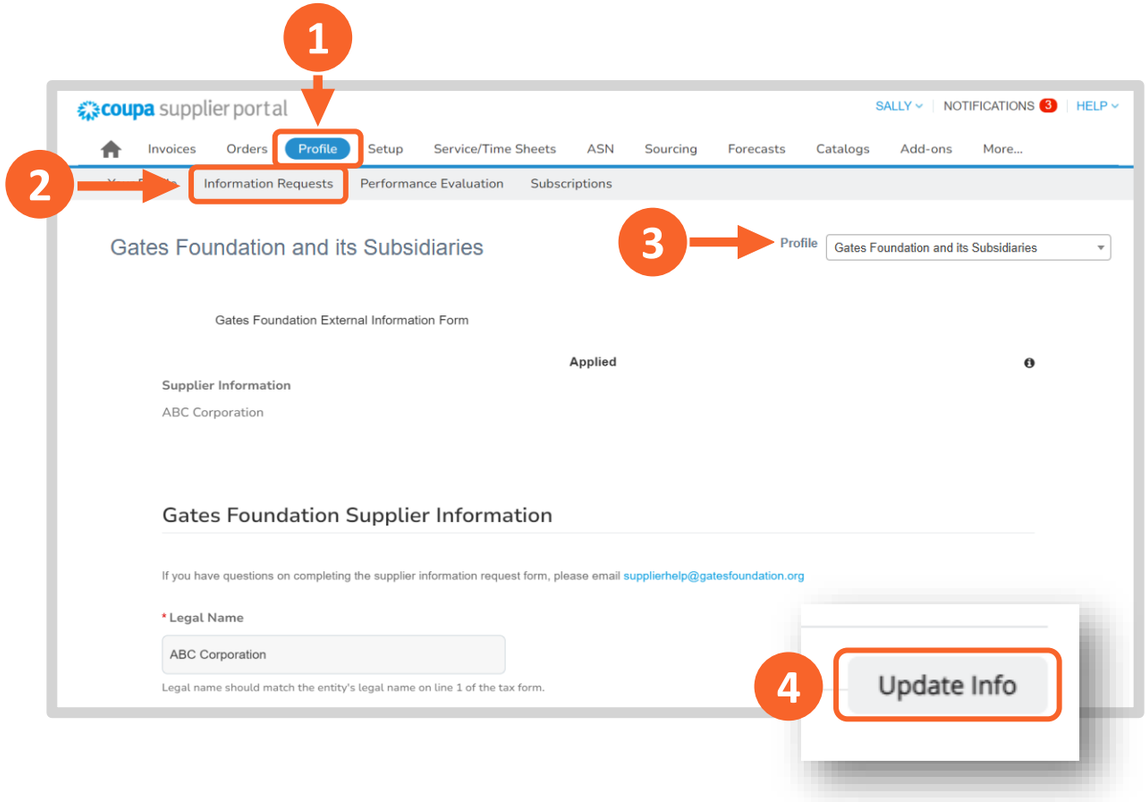
1. Click **Profile** in the navigation ribbon

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.



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Purchase Order (PO) Processing

Jump to a section

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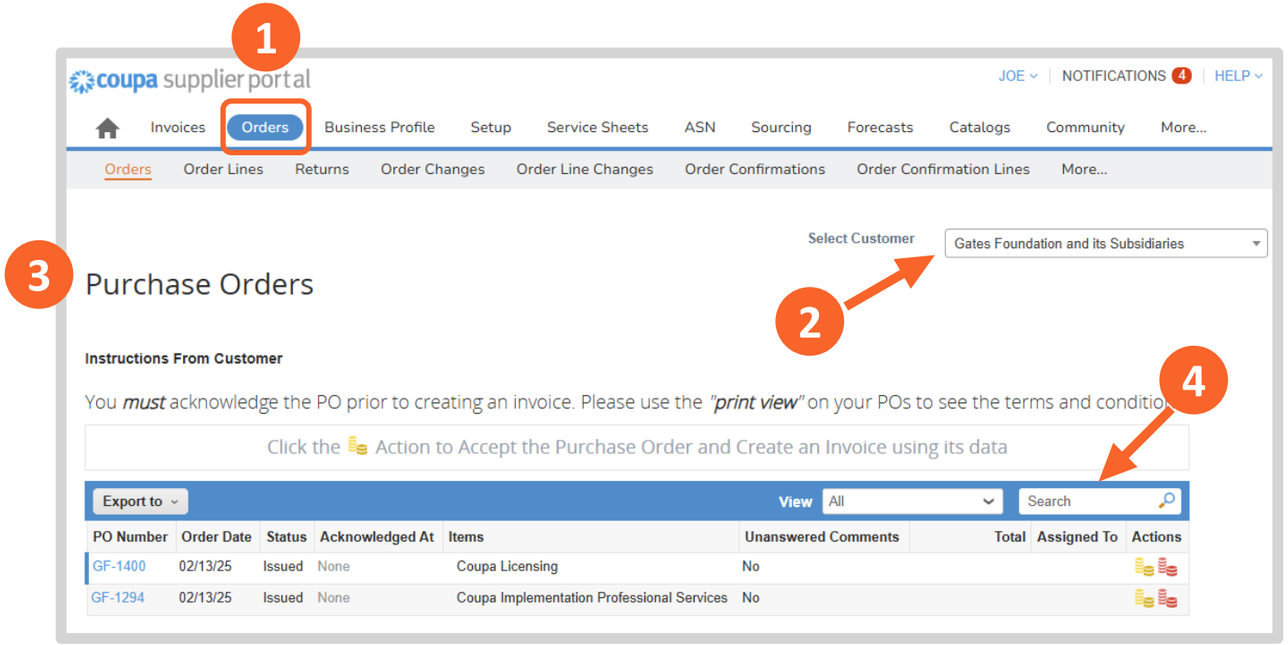
View Purchase Order (1 / 3)

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.



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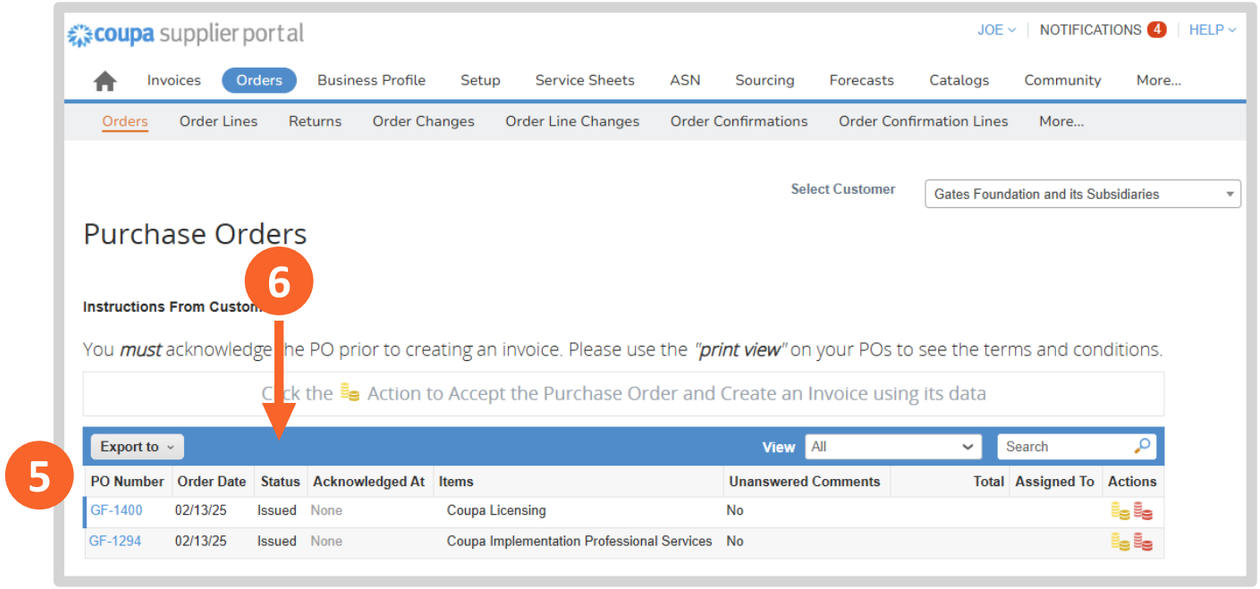
View Purchase Order (2 / 3)

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 Statuses 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



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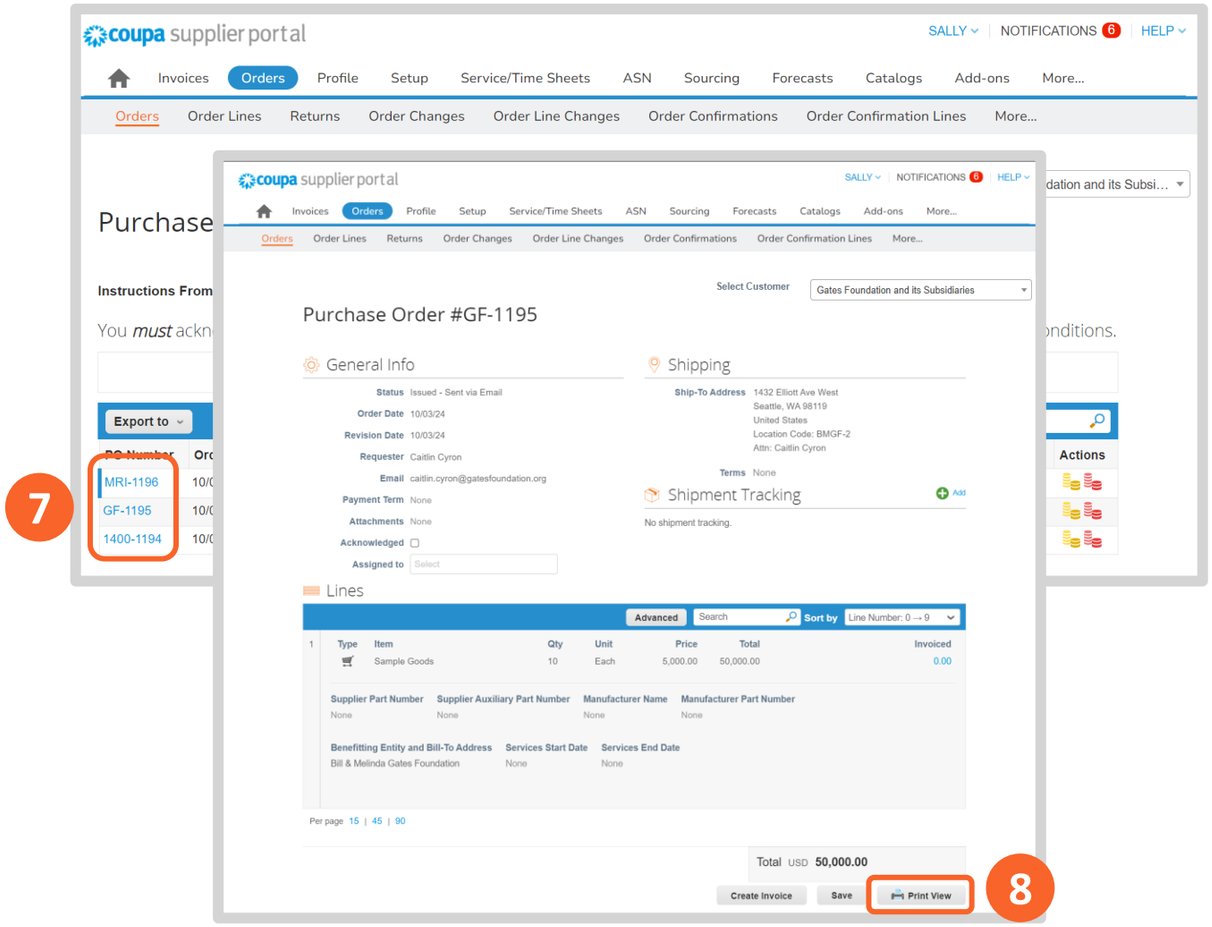
View Purchase Order (3 / 3)

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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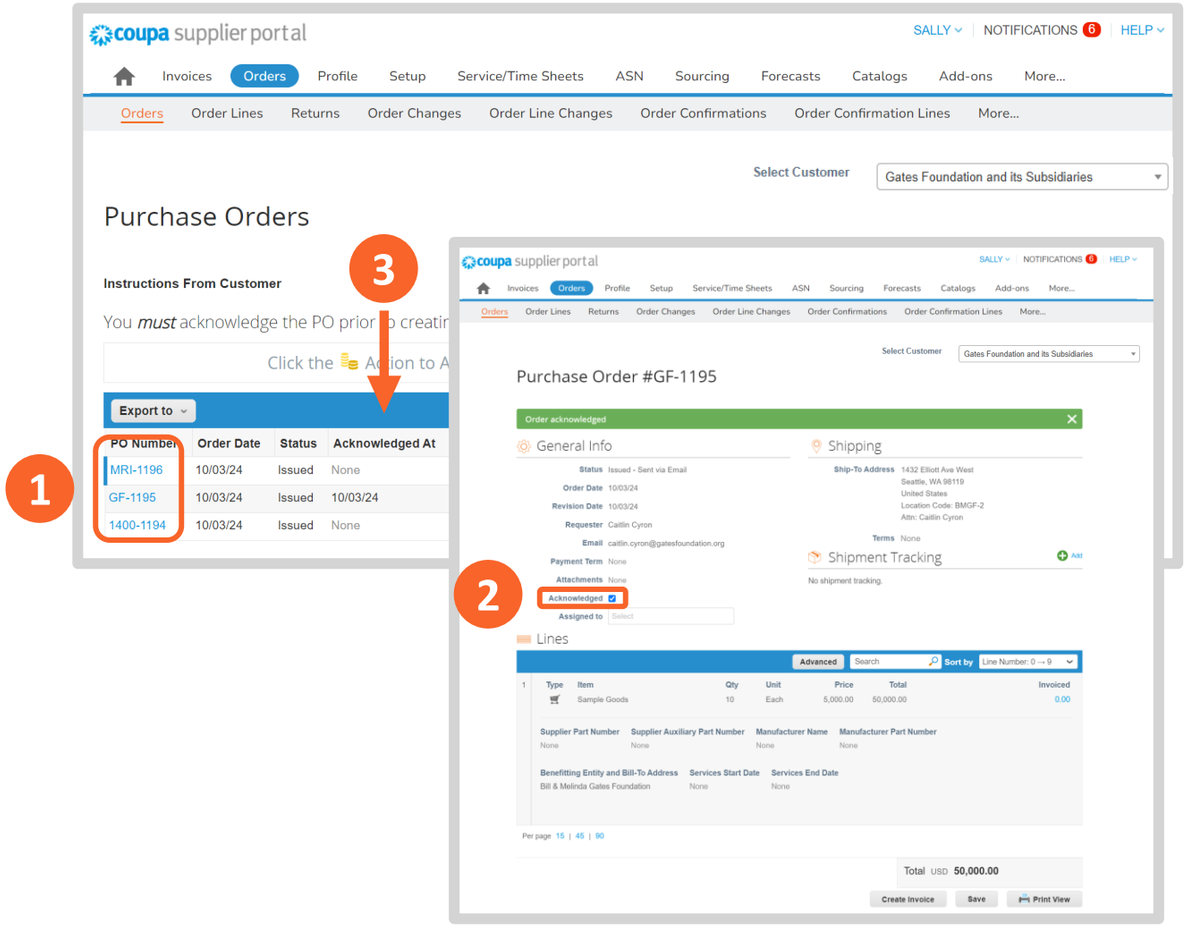
Acknowledge Purchase Order

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



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Add Comments to Purchase Order

Purchase Order Processing in the CSP

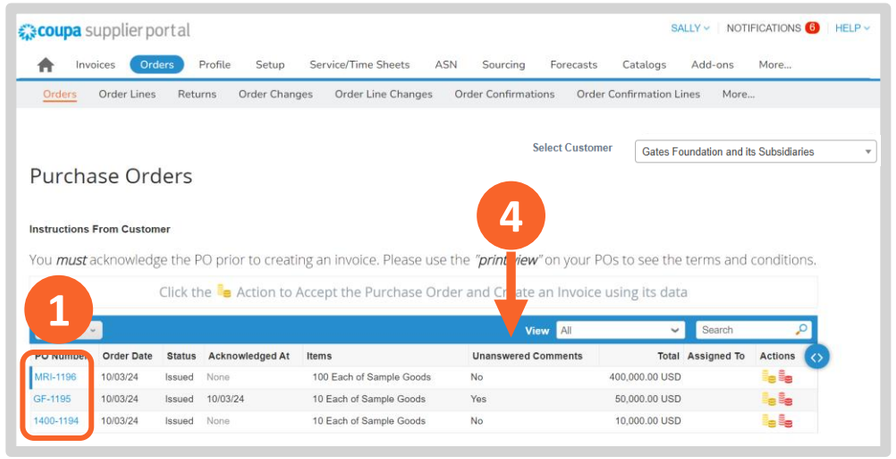
Use Coupa's comment functionality to contact us with questions or clarifications on a PO.

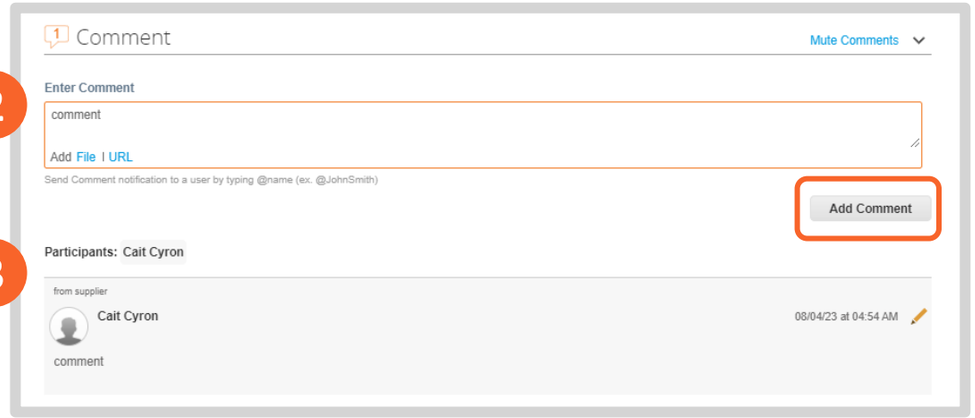
1. Click on a hyperlinked PO Number to view the PO's details.

2. Scroll to the bottom of the screen. Enter your comment and click **Add Comment** to notify us.

3. Comment history will always be visible at the bottom of the PO.

4. The Orders Table Unanswered Comments Column will state **Yes** if a PO has an unread comment left by the foundation.





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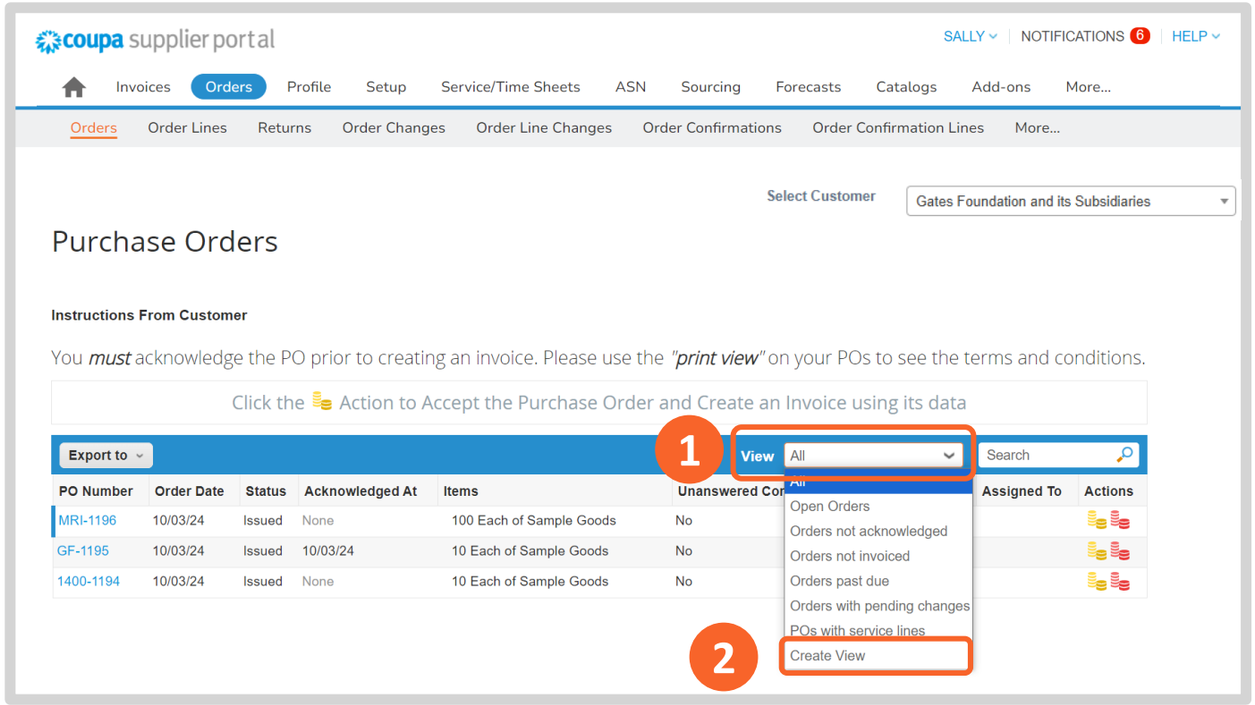
Create Order Table View (1 / 2)

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**



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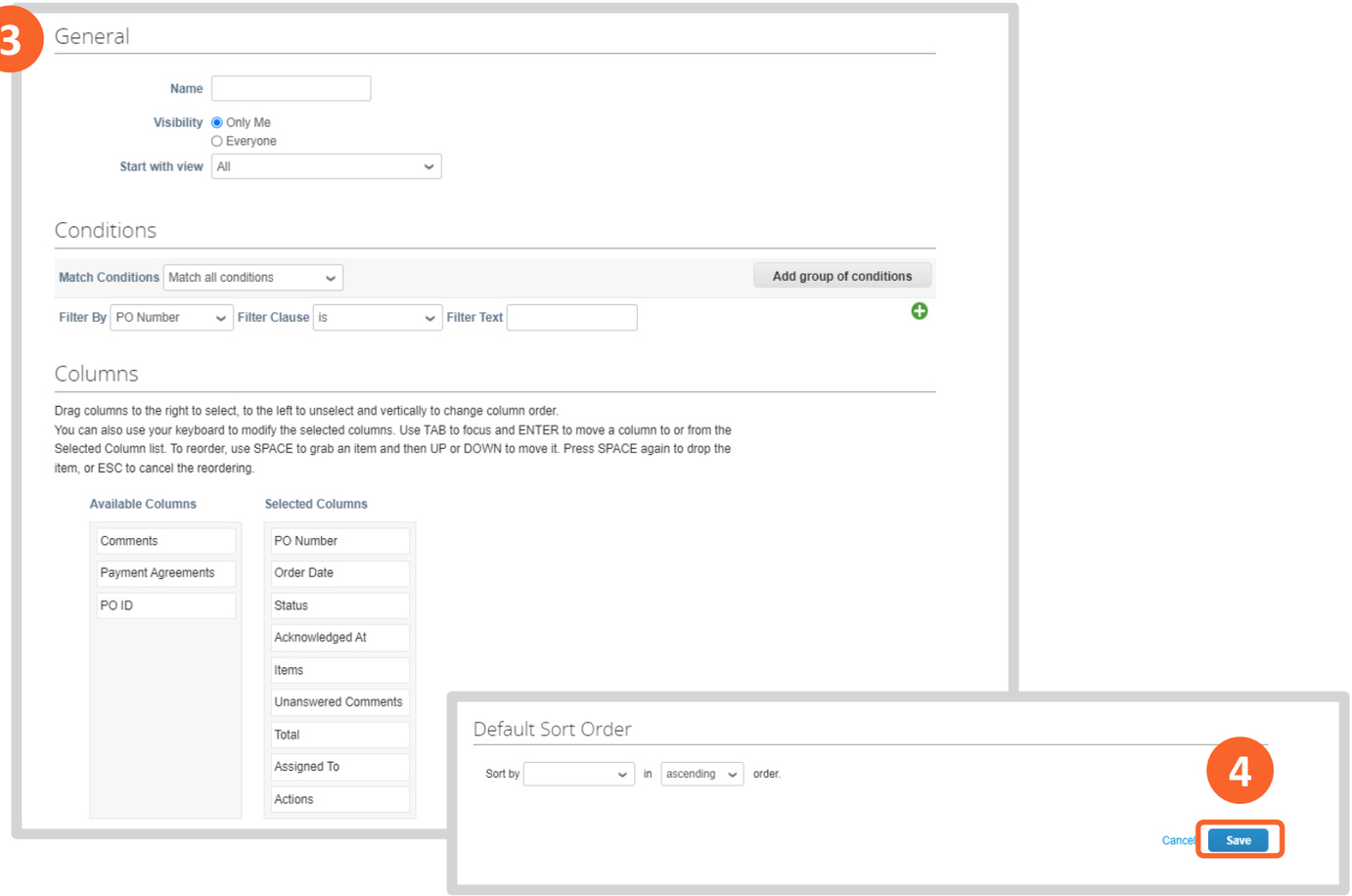
Create Order Table View (2 / 2)

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.



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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 *(Refer to the Supplier Training Guide at gatesmri.org/suppliers for more details)*
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.