Key Training Topics

1. Coupa Supplier Portal (CSP) Overview & Set Up
2. Purchase Order (PO) Processing
3. Invoice Processing
4. Supplier Information Management
1. Coupa Supplier Portal (CSP) Overview & Set Up
Table of Contents
Coupa Supplier Portal (CSP) Overview & Setup

• Coupa Introduction
• Key Terminology
• First Time Supplier Registration
• Returning Supplier Registration
• Merge Requests and Suggestions
• Legal Entity Setup
• Accessing the CSP
• CSP Navigation
• Security & Two Factor Authentication
• Invite Additional Users
• Language Settings
• Help and Support
Coupa Introduction (1 / 2)

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.

Bill & Melinda Gates Medical Research Institute (Gates MRI) will be adopting Coupa as the tool to drive efficiencies across the following processes:

• Sourcing
• Contracting
• Supplier Onboarding and Due Diligence
• Supplier Information Management
• Purchase Order (PO) Processing
• Invoice Processing
Coupa Introduction (2 / 2)

Benefits of Coupa

Coupa is a platform free of charge for suppliers that provides the following:

1. **Enhanced visibility** into the status of your purchase orders (POs), invoices, and credit notes.

2. **Automated PO Transmission**: Gates MRI will be introducing purchase orders as part of their purchasing process. Coupa will notify suppliers that a PO has been transmitted, and suppliers can receive and acknowledge POs in the Coupa Supplier Portal (CSP) or via email.

3. **Invoice Management**: Suppliers can submit invoices and credit notes via Coupa and monitor their statuses, as well as a historical record of all past invoices.

4. **Information Management**: On the CSP, suppliers will be able to maintain their customer information such as contacts, addresses, and banking details.
## Key Terminology (1 / 2)

### Coupa Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Coupa Supplier Portal (CSP)</strong></td>
<td>A web portal for suppliers to manage business with customers. Suppliers can view and track POs issued by Gates MRI, create and manage invoices/credit notes, and maintain their company information on the portal.</td>
</tr>
<tr>
<td><strong>Supplier Actionable Notification (SAN)</strong></td>
<td>Notifications suppliers receive via email to manage and acknowledge purchase orders, create invoices, and update company information.</td>
</tr>
<tr>
<td><strong>Legal Entity</strong></td>
<td>A legal entity is a representation of your company and gives Gates MRI the information needed 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.</td>
</tr>
<tr>
<td><strong>Remit-To Accounts</strong></td>
<td>Accounts where Gates MRI pays invoices to your company. Remit-To Accounts are created and maintained by your company in Coupa.</td>
</tr>
<tr>
<td><strong>Payment Term</strong></td>
<td>Payment terms are agreed upon during the contracting process with Gates MRI. They reflect payment due date.</td>
</tr>
<tr>
<td><strong>Purchase Order (PO)</strong></td>
<td>A legal and commercial document sent from a customer to a supplier, committing Gate MRI’s purchase of goods and / or services.</td>
</tr>
<tr>
<td><strong>PO Acknowledgement</strong></td>
<td>Supplier confirmation that they have received a PO and will deliver the stated goods and / or services at the specified prices within the specified time period.</td>
</tr>
<tr>
<td><strong>Advance Ship Notice (ASN)</strong></td>
<td>Electronic documents that suppliers send to Gates MRI to notify them an ordered item has shipped.</td>
</tr>
<tr>
<td><strong>Invoice</strong></td>
<td>Billing document issued to Gates MRI stating the financial obligations for goods received or services performed.</td>
</tr>
<tr>
<td><strong>Disputed Invoice</strong></td>
<td>An invoice rejected by Gates MRI that has been sent back to a supplier for revision and resubmission.</td>
</tr>
<tr>
<td><strong>Credit Note</strong></td>
<td>An invoice with a negative value that offers credit to Gates MRI.</td>
</tr>
</tbody>
</table>
## Key Terminology (2 / 2)

### Coupa Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action / Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>MRI-117</td>
<td>Hyperlinks take you to the View page of the object</td>
</tr>
<tr>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>Save</td>
</tr>
<tr>
<td></td>
<td>Print</td>
</tr>
<tr>
<td></td>
<td>Void (Cancel)</td>
</tr>
<tr>
<td></td>
<td>Create Invoice against a PO</td>
</tr>
<tr>
<td></td>
<td>Create Credit Note against a PO</td>
</tr>
<tr>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action / Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Delete</td>
</tr>
<tr>
<td></td>
<td>Download a report</td>
</tr>
<tr>
<td></td>
<td>Expand Table</td>
</tr>
<tr>
<td></td>
<td>Calendar</td>
</tr>
<tr>
<td></td>
<td>Information</td>
</tr>
<tr>
<td></td>
<td>Add Item</td>
</tr>
<tr>
<td></td>
<td>Resolve</td>
</tr>
</tbody>
</table>
Suppliers that are new to the Coupa Supplier Portal (CSP) will receive the following Coupa Invitation Email from Gates MRI.

1. Click Join Coupa
First Time Registration (2 / 2)

Create a CSP Account

2. Confirm or update the following information populated from Gates MRI’s record for your organization:
   - Legal Business Name
   - Email
   - First Name
   - Last Name

3. Create and confirm your CSP password

4. Accept the Privacy Policy and the Terms of Use

5. Click Create an Account

NOTE: Once the page refreshes, a series of pop-ups will appear asking for general company information (e.g., Primary Address, Industry, Areas Served). This information is not customer specific and can be updated anytime under the Profile section of the CSP.
Returning Supplier Registration

Email Invitation

Suppliers that have previously used the CSP with other customers will receive the following Coupa Invitation Email from Gates MRI.

1. Click Login to Coupa. Upon log in, you will be linked with Gates MRI in the CSP.
Merge Requests and Suggestions

Merge Criteria, Suggestions, and Requests

Coupa will suggest a merge with other CSP accounts if you have the same confirmed email domain and at least one common credential such as Company Name, Address, Tax ID, DUNS Number.

1. Merge Suggestions will be listed here

2. Merge Suggestions and Merge Requests can be accessed in Setup
Coupa uses Legal Entities to provide customers with the information they need to do business in Coupa. It includes addresses, payment methods, and remittance details.

1. Click **Setup** in the navigation ribbon
2. Click **Legal Entity Setup**
3. Click **Add Legal Entity**
4. Enter the Legal Name of the entity you are adding and its location

   Note: Additional fields may be required depending on the selected Country/Region.

5. Click Continue
Legal Entity Setup (3 / 7)
Customer Visibility, Invoice Address, and Tax Information

6. Select which customers you want to see this Legal Entity

7. Enter the registered address for this Legal Entity

8. Enter the tax ID(s) for this Legal Entity
   Note: Additional fields may be required depending on the selected Country/Region.

9. Click Save & Continue
10. Select the payment type for your preferred method of payment
   - **Bank Account**: For payments via deposit into your bank account. This is the required payment method for Gates MRI. Gates MRI does not pay via check or virtual card.

11. Enter your payment details
    
    **Note**: The available fields are based on the selected **Legal Entity Country/Region** and **Payment Type**. Fields may prepopulate based on previously entered information.

12. Click **Save & Continue**
All Remit-To Accounts associated with a Legal Entity will be listed here.

13. Click **Add Remit-To** to add additional Remit-To Addresses and Accounts for this Legal Entity

14. Remit-To Accounts are **not** editable once created. Sensitive information is masked. Click **Manage** to:
- Add Supporting Banking Documentation
- Revise customer visibility for an account
- Deactivate a Remit-To that is no longer in use

15. Click **Next** after all Remit-To Accounts have been added for this Legal Entity
Legal Entity Setup (6 / 7)

Adding and Managing Ship To Addresses

Addresses allowed to be used as Ship From Addresses in Step 7 will be listed here.

16. Click Add Ship From to add additional Ship From Address for this Legal Entity

17. Ship From Addresses are not editable once they have been created. Click Manage to:
   - Revise customer visibility for an address
   - Deactivate an address that is no longer in use

18. Click Done once all Ship From Addresses have been added. Legal Entity Setup is now complete.
The Legal Entity Setup page lists all addresses, remit-to accounts, tax IDs, and customers for each Legal Entity.

19. Under Actions, the following can be done:

- **Manage Legal Entity**: Opens the Legal Entity setup workflow (Steps 1-18). Only addresses are editable. If significant changes are needed, create a new Legal Entity.

- **Manage Remit-To Accounts**: Opens the list of remit-to accounts for the Legal Entity (Step 13). You can also manage remit-to information from the Remit-To setup page.

- **Deactivate Legal Entity**: Deactivates the Legal Entity so it can no longer be used by you or your Coupa customers.

**WARNING**: This action cannot be undone. Check with customers prior to deactivating to ensure there will be no invoicing disruptions.
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 111.0
- Mozilla Firefox 111.0
- Microsoft Edge 111.0
The following sections of the CSP will help facilitate business with Gate MRI.

1. **Home**: View and update your public profile information
2. **Profile**: Manage the information that is shared with each of your customers
3. **Orders**: View and manage the purchase orders you receive
4. **Invoices**: Create and manage invoices and credit notes
5. **Sourcing**: Participate in sourcing events your linked customers have invited you to
6. **Setup**: Manage users, remit-to addresses, merge requests, etc.
7. **User Profile**: Manage your specific user settings like account security, notifications, etc.
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 dropdown menu
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
Selecting Security & Two-Factor Authentication Settings

5. Select your preferred degree of security

6. Check Enable for one or both Authentication Methods:
   - Via Authenticator App: Return to Step 4 for set-up instructions
   - Via SMS: Proceed to the next slide for set-up instructions
1. Enter a phone number that will receive SMS verification codes. Click Next.

2. Enter the code sent via text. Click OK.

3. Save your Backup Codes

4. Once enabled, manage SMS Verification in the Security & Two Factor Authentication Menu
Invite Additional Users (1 / 2)

Accessing the CSP Users table

CSP admins can manage 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**
Invite Additional Users (2 / 2)

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

NOTE: Have invited users check their Spam/Junk folder if the email is not in their primary inbox.
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 to reflect the selected language.
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 support for a specific issue
**Coupa Supplier Portal (CSP) Set Up & Navigation**

**Bill & Melinda Gates Medical Research Institute (Gates MRI) Key Takeaways**

<table>
<thead>
<tr>
<th>Gates MRI Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NOTE:</strong> Gates MRI’s customer name in Coupa is <strong>Bill &amp; Melinda Gates Foundation and its Subsidiaries</strong>.</td>
</tr>
<tr>
<td><strong>Legal Entity/Remit-To Payment Type:</strong> Bank Account is the required payment method for Gates MRI. Gates MRI does not pay via check or virtual card.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CSP Account Reminders</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Coupa Registration &amp; Profile Set Up:</strong> First time and returning CSP users will receive an email invitation to link with Gates MRI in the portal. You will be walked through the steps to create your CSP Profile, if applicable.</td>
</tr>
<tr>
<td><strong>Merging Accounts:</strong> If your organization already has a CSP account you are not aware of, you will have the ability to merge the two for a more seamless customer experience.</td>
</tr>
<tr>
<td><strong>Legal Entities:</strong> You are required to set up at least one legal entity in the CSP in order to electronically submit invoices.</td>
</tr>
<tr>
<td><strong>CSP Link:</strong> <a href="https://supplier.coupahost.com/">https://supplier.coupahost.com/</a></td>
</tr>
<tr>
<td><strong>Supported Browsers:</strong> Google Chrome, Mozilla Firefox, Microsoft Edge</td>
</tr>
<tr>
<td><strong>User Management:</strong> After joining the CSP, you will be able to invite additional to your organization's account. Permissions and customer visibility are customizable by user.</td>
</tr>
<tr>
<td><strong>Security &amp; Two-Factor Authentication:</strong> Each user will be able to configure their own account security and two-factor authentication preferences.</td>
</tr>
</tbody>
</table>

For additional support setting up your CSP account, click [here](#) to view resources and videos from Coupa. Please contact [supplierhelp@gatesmri.org](mailto:supplierhelp@gatesmri.org) with questions specific to Gates MRI and Coupa.
Purchase Order (PO) Processing
Table of Contents

Purchase Order (PO) Processing

Purchase Order (PO) Processing *in the CSP*
- View Purchase Order
- Acknowledge Purchase Order
- Add Comments to Purchase Order
- Create Order Table View

Purchase Order (PO) Processing *via SAN*
- View Purchase Order
- Acknowledge Purchase Order
- Add Comments to Purchase Order
When a purchase order (PO) is issued, it will appear in the CSP Orders table. You may receive email and / or platform notifications per your notification settings.

1. Click **Orders**

2. Select **Bill & Melinda Gates Foundation and its Subsidiaries** as your customer

3. Instructions From Customer feature requirements specific to Bill & Melinda Gates Foundation and its Subsidiaries

4. Use the search bar to locate a specific PO
5. POs issued by Gates MRI will have a PO number with a “MRI-” prefix

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

8. Click Print View to view the PO’s PDF version
You are required to acknowledge Gates MRI 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
Add Comments to Purchase Order

Use Coupa’s comment functionality to contact Gates MRI 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 Gates MRI.

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 Gates MRI
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
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.
When a PO is issued, you will receive an email notification. You can execute a handful of tasks from the email.

1. Click **Manage Order** to open PO details in a new tab

2. Scroll to the bottom of the email to view and/or download the PDF version of the PO
You are required to acknowledge Gates MRI POs within 2 business days of receipt.

1. Click Acknowledge PO
2. Alternatively, check Acknowledged when viewing PO details
Add Comments to Purchase Order

Purchase Order Processing via SAN

Use Coupa’s comment functionality to contact Gates MRI with questions or clarifications on a PO.

1. Click Add Comment

2. PO details will open in a new tab. Scroll to the bottom of the screen. Enter your comment and click Add Comment to notify Gates MRI.

3. Comment history will always be visible at the bottom of the PO. You will receive an email when Gates MRI replies.
3 Invoice Processing
Table of Contents

Invoice Processing

Invoice Processing *in the CSP*
- Create Invoice
- Partial Invoice
- Start Up or Up-Front Fees
- Create Credit Note
- View Invoice
- Create Invoice Table View
- Manage Disputed Invoices

Invoice Processing *via SAN*
- Create Invoice
- Partial Invoice
- Start Up or Up-Front Fees
- Create Credit Note
- Manage Disputed Invoices
Create Invoice (1 / 5)

Invoice Processing in the CSP

There are two ways to create an invoice from the CSP Orders table:

1. Click the Gold Coins in the Actions column

2. Click Create Invoice at the bottom of the page when viewing PO details
3. Select invoice details. Click Add New if the Legal Entity, Remit-To, or Ship From Address has not been previously created.

4. Click Save

**NOTE:** Remit-Tos selected on an invoice need to be provided to Gates MRI via SIM as well. Please update the latest SIM form via self-service or email supplierhelp@gatesmri.org to request an Update Form.
5. Enter the following general info:

- **Invoice #:** Must be less than 20 characters and a unique number.
- **Invoice Date:** Cannot be pre or post dated
- **Currency:** Must match agreed upon currency stated in both the invoice’s corresponding contract and PO
- **Image Scan:** Image of invoice and/or supporting documentation
- **Supplier Note:** Any additional context for Gates MRI
- **Attachments:** Any additional context for Gates MRI
6. If you are invoicing in full, no action is required when reviewing PO lines.

Note: Go to Partial Invoicing for instructions on how to remove and adjust PO lines.
7. Enter tax amounts and percentages

8. Click **Calculate** to update the Invoice Total

9. Click **Submit**

10. Click **Send Invoice**
Partial invoicing in the CSP follows the same steps as invoicing in full. There are three options for submitting a partial invoice:

1. Click X to delete an entire line from the invoice
2. Adjust the line’s quantity to reflect what has been fulfilled
3. Adjust the line’s price to reflect what service has been rendered

**NOTE:** If you unintentionally delete a line item, scroll to the bottom of the invoice and click **Cancel**. You can re-enter the order or invoice from their respective table and restart invoice creation.
When invoicing for start up fees, there will be a $0 line on the PO. Start up fee invoicing in the CSP follows the same invoice creation steps, except for Line adjustments.

1. The Line Description will include the start up fee amount. Invoice against this line.

   Note: This line will be “overdrawn”. This negative balance will be offset when the start up/ up-front fees are “used” via a credit.

2. Adjust the line’s price to reflect the value included in the Line Description.

3. Click X to delete an entire line from the invoice.
Start Up or Up-Front Fees (2 / 2)

Invoice Processing in the CSP

There will be a corresponding PO line to offset the credit balance of a up front or start-up fee line. Start up fee invoicing in the CSP follows the same invoice creation steps, except for Line adjustments.

4. Adjust this corresponding line’s price to reflect the credit balance that has been used against the prepaid line.

   Note: This can be done in full or for a partial balance.

5. Adjust the start up or up-front line’s price to reflect the negative value provided in Step 1.

   Note: This value must be negative to correctly draw down the balance.
Create Credit Note (1 / 5)

Invoice Processing in the CSP

Credit notes can be created from the CSP Orders table:

1. Click the Red Coins in the Actions column

Credit notes can be created from the CSP Orders table:
2. Select credit note details. Click **Add New** if the Legal Entity, Remit-To, or Ship From Address has not been previously created.

3. Click **Save**

**NOTE:** Remit-To selected on an invoice need to be provided to Gates MRI via SIM as well. Please update the latest SIM form via self-service or email supplierhelp@gatesmri.org to request an Update Form.
Create Credit Note (3 / 5)

Invoice Processing in the CSP

4. Enter the following general info:

- **Credit Note #:** Must be less than 20 characters and a unique number.
- **Credit Note Date:** Cannot be pre or post dated
- **Currency:** Must match agreed upon currency stated in both the credit note’s corresponding contract and PO
- **Original Invoice #:** Invoice # for invoice tied to credit note
- **Original Invoice Date:** Invoice date for invoice tied to credit note
- **Image Scan:** Image of credit note and / or supporting documentation
- **Supplier Note:** Any additional context for Gates MRI
- **Attachments:** Any additional context for Gates MRI
5. Adjust the price of the line(s) requiring credit

6. Click X to remove any unnecessary lines

**NOTE:** The price must be negative for credit to properly be issued.
Create Credit Note (5 / 5)

Invoice Processing in the CSP

7. Enter tax amounts and percentages

8. Click **Calculate** to update the Invoice Total

9. Click **Submit**

10. Click **Send Credit Note**
View Invoice

Invoice Processing in the CSP

When an invoice is drafted it will appear in the CSP Invoices table.

1. Click Invoices

2. Select Bill & Melinda Gates Foundation and its Subsidiaries as your customer

3. Instructions From Customer feature requirements specific to Bill & Melinda Gates Foundation and its Subsidiaries

4. Use the search bar to locate a specific Invoice

5. Click on a hyperlinked Invoice Number to view the Invoice’s details
Create Invoice Table View (1 / 2)

Invoice 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
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.
Manage Disputed Invoices (1 / 2)

Invoice Processing in the CSP

When an invoice is disputed by Gates MRI its status will update in the CSP invoices table. You may receive email and / or platform notifications per your notification settings.

1. Invoice Status will update to **Disputed**

2. Gates MRI reason for disputing the invoice will appear in the **Dispute Reason** column

3. Click **Resolve** icon in the Actions column

---

When an invoice is disputed by Gates MRI its status will update in the CSP invoices table. You may receive email and / or platform notifications per your notification settings.

1. Invoice Status will update to **Disputed**

2. Gates MRI reason for disputing the invoice will appear in the **Dispute Reason** column

3. Click **Resolve** icon in the Actions column

---

When an invoice is disputed by Gates MRI its status will update in the CSP invoices table. You may receive email and / or platform notifications per your notification settings.

1. Invoice Status will update to **Disputed**

2. Gates MRI reason for disputing the invoice will appear in the **Dispute Reason** column

3. Click **Resolve** icon in the Actions column

---

When an invoice is disputed by Gates MRI its status will update in the CSP invoices table. You may receive email and / or platform notifications per your notification settings.

1. Invoice Status will update to **Disputed**

2. Gates MRI reason for disputing the invoice will appear in the **Dispute Reason** column

3. Click **Resolve** icon in the Actions column
4. Scroll to the bottom of the invoice and select one of the following options:

- **Void**: On the pop-up, click **Yes** to confirm that this invoice does not need to be reviewed for payment.

- **Correct Invoice**: Adjust the invoice and resubmit. Click here for invoice creation instructions.
Create Invoice (1 / 4)

Invoice Processing via SAN

There are two ways to create an invoice from a SAN email:

1. Click **Create Invoice** in the email

2. Click **Manage Order** to open PO details in a new tab. Click **Create Invoice** at the bottom of the page.
3. Your supplier data will prepopulate if you have previously invoiced via SAN. Click the **Magnifying Glass** to create new Invoice From, Remit-To, and / or Ship From Addresses.

4. Enter the following general info:
   - **Invoice #:** Must be less than 20 characters and a unique number.
   - **Invoice Date:** Cannot be pre or post dated
   - **Currency:** Must match agreed upon currency stated in both the invoice’s corresponding contract and PO
   - **Image Scan:** Image of invoice and / or supporting documentation
   - **Supplier Note:** Any additional context for Gates MRI
   - **Attachments:** Any additional context for Gates MRI

**NOTE:** Remit-To selected on an invoice need to be provided to Gates MRI via SIM as well. Please email supplierhelp@gatesmri.org to request an Update Form.
5. If you are invoicing in full, no action is required when reviewing PO lines.

Note: Go to Partial Invoicing for instructions on how to remove and adjust PO lines.
Create Invoice (4 / 4)

Invoice Processing via SAN

6. Enter tax amounts and percentages

7. Click **Calculate** to update the Invoice Total

8. Click **Submit**

9. Click **Send Invoice**. You will receive emails when Gates MRI receives the invoice and as it is processed.
Credit notes can be created from the Orders table:

1. Click Manage Order

2. Edit the URL so that it reads https://gatesfoundation.coupa hosted.com/supplier_order_headers/. Press Enter

3. Click the Red Coins in the Actions column
2. Select credit note details. Click **Create New Remit-To** if the Legal Entity, Remit-To, or Ship From Address has not been previously created.

3. Enter your organization’s remit-to information.

4. Click **Create and Use**

**NOTE:** Remit-Tos selected on an invoice need to be provided to Gates MRI via SIM as well. Please email supplierhelp@gatesmri.org to request an Update Form.
4. Enter the following general info:

- **Credit Note #**: Must be less than 20 characters and a unique number.
- **Credit Note Date**: Cannot be pre or post dated
- **Currency**: Must match agreed upon currency stated in both the credit note’s corresponding contract and PO
- **Original Invoice #**: Invoice # for invoice tied to credit note
- **Original Invoice Date**: Invoice date for invoice tied to credit note
- **Image Scan**: Image of credit note and / or supporting documentation
- **Supplier Note**: Any additional context for Gates MRI
- **Attachments**: Any additional context for Gates MRI
5. Adjust the price of the line(s) requiring credit

6. Click X to remove any unnecessary lines

NOTE: The price must be negative for credit to properly be issued.
Create Credit Note (5 / 5)

Invoice Processing via SAN

7. Enter tax amounts and percentages

8. Click **Calculate** to update the Invoice Total

9. Click **Submit**

10. Click **Send Credit Note**
Partial invoicing via SAN follows the same steps as invoicing in full. There are three options for submitting a partial invoice:

1. Click X to delete an entire line from the invoice

2. Adjust the line’s quantity to reflect what has been fulfilled

3. Adjust the line’s price to reflect what service has been rendered

NOTE: If you unintentionally delete a line item, scroll to the bottom of the invoice and click Cancel. You can re-enter the order from the PO email and restart invoice creation.
When invoicing for start up fees, there will be a $0 line on the PO. Start up fee invoicing via SAN follows the same invoice creation steps, except for Line adjustments.

1. The Line Description will include the start up fee amount. Invoice against this line.
   
   Note: This line will be “overdrawn”. This negative balance will be offset when the start up/ up-front fees are “used” via a credit.

2. Adjust the line’s price to reflect the value included in the Line Description

3. Click X to delete an entire line from the invoice
There will be a corresponding PO line to offset the credit balance of a up front or start-up fee line. Start up fee invoicing via SAN follows the same invoice creation steps, except for Line adjustments.

4. Adjust this corresponding line’s price to reflect the credit balance that has been used against the prepaid line. 
   
   Note: This can be done in full or for a partial balance.

5. Adjust the start up or up-front line’s price to reflect the negative value provided in Step 1. 
   
   Note: This value must be negative to correctly draw down the balance.
When an invoice is disputed by Gates MRI, you will receive the following email:

1. Click **View Online**
   
   *Note: Follow these steps to log in to the CSP to correct the invoice. Once logged in, you can manage the disputed invoice.*

2. Alternatively, locate the email confirming the Disputed Invoice was received successfully. Click **View Status**
3. Invoice Status will update to Disputed

4. Gates MRI reason for disputing the invoice will appear in the Dispute Reason column

5. Click Resolve icon in the Actions column
Manage Disputed Invoices (3 / 3)

Invoice Processing via SAN

6. Scroll to the bottom of the invoice and select one of the following options:

- **Void**: On the pop-up, click Yes to confirm that this invoice does not need to be reviewed for payment.

- **Correct Invoice**: Adjust the invoice and resubmit. Click here for invoice creation instructions.
Gates MRI Order and Invoicing Requirements

NOTE: Gates MRI’s customer name in Coupa is Bill & Melinda Gates Foundation and its Subsidiaries.

• Gates MRI Purchase Order (PO) Number: Orders specific to Gates MRI will have a PO number prefix of “MRI”.
• PO Acknowledgement: POs must be acknowledged within 2 business days of receipt.
• PO Change Request: If you do not agree with the specifics of a PO, use the comment functionality to contact Gates MRI to request a PO change within 2 business days of receipt.
• No-PO No-Pay: You cannot submit an invoice without a backing document. Invoices submitted with no backing document will be rejected until a PO or other approved document is presented.
• Invoice Submission: You are allowed to submit invoices only after services have been rendered or goods have been delivered.
• Invoice Numbers: Invoice numbers must be less than 20 characters and unique.
• Governing Terms: If your company has a Master Service Agreement (MSA), General Terms and Conditions (GTC) or other master agreement with Gates MRI, those terms and conditions will supersede any conflicting terms contained within the Purchase Order (“PO”).

For additional support managing orders and invoices in the CSP, click here to view resources and videos from Coupa. Please contact supplierhelp@gatesmri.org with questions specific to Gates MRI and Coupa.
Supplier Actionable Notifications (SAN) Purchase Order and Invoice Processing

Bill & Melinda Gates Medical Research Institute (Gates MRI) Key Takeaways

Gates MRI Order and Invoicing Requirements

**NOTE:** Gates MRI’s customer name in Coupa is **Bill & Melinda Gates Foundation and its Subsidiaries**.

- **Gates MRI Purchase Order (PO) Number:** Orders specific to Gates MRI will have a PO number prefix of “MRI”.
- **PO Acknowledgement:** POs must be acknowledged within **2 business days** of receipt.
- **PO Change Request:** If you do not agree with the specifics of a PO, use the comment functionality to contact Gates MRI to request a PO change within **2 business days** of receipt.
- **No-PO No-Pay:** You cannot submit an invoice without a backing document. Invoices submitted with no backing document will be rejected until a PO or other approved document is presented.
- **Invoice Submission:** You are allowed to submit invoices only after services have been rendered or goods have been delivered.
- **Invoice Numbers:** Invoice numbers must be less than 20 characters and unique.
- **Governing Terms:** If your company has a Master Service Agreement (MSA), General Terms and Conditions (GTC) or other master agreement with Gates MRI, those terms and conditions will supersede any conflicting terms contained within the Purchase Order (“PO”).

**SAN Reminders**

- SAN only routes orders to a single email address. Join the Coupa Supplier Portal (CSP) to allow multiple individuals visibility to Gates MRI orders.
- **Partial Invoicing:** If you are submitting a partial invoice, you will need to keep track of the original PO email to submit subsequent invoices for the outstanding balance.

Please contact **supplierhelp@gatesmri.org** if you are experiencing difficulties processing orders via SAN.
Supplier Information Management (SIM)
## Table of Contents

Supplier Information Management (SIM)

- **SIM Introduction**
- **SIM Notifications**
- **Gates MRI SIM Forms**
  - Entity Information Form
  - Onboarding Form
  - Update Form
- **Managing Comments, Rejection, and Approvals**
- **Self-Service in the CSP**
What is SIM?

SIM Introduction

Coupa’s Supplier Information Management (SIM) module uses forms to gather and validate information suppliers share with customers.

- Gates MRI uses SIM to collect and maintain supplier information including contacts, addresses, banking details, tax registrations, and diversity certifications.

Gates MRI leverages three SIM Forms to manage supplier information:

<table>
<thead>
<tr>
<th>ENTITY INFORMATION FORM</th>
<th>ONBOARDING FORM</th>
<th>UPDATE FORM</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you are a prospective supplier for Gates MRI, you will receive this form prior to participating in a sourcing event or signing an NDA.</td>
<td>If you are a new supplier for Gates MRI that has been approved for business, you will receive this form to complete your profile.</td>
<td>If you are an existing supplier for Gates MRI and need to update your information, you will receive this form or update your information in the CSP.</td>
</tr>
<tr>
<td><strong>Key Information Requested:</strong> Legal Name, Company Contacts, Company Addresses, Tax Registration(s), Diversity Certifications</td>
<td><strong>Key Information Requested:</strong> Banking Details</td>
<td><strong>Note:</strong> If your tax ID has changed, you will need to request a new onboarding form.</td>
</tr>
</tbody>
</table>
Email Notification

SIM Notifications

When Gates MRI initiates a SIM request, your organization’s Primary Contact will receive an email notification.

1. Click one of the following buttons to view and complete the SIM form:
   - **Join and Respond**: Create a CSP account or log in to your company’s existing account
   - **Respond without Joining**: Complete the SIM form in a new tab without joining or logging in to the CSP

**NOTE**: It is strongly encouraged to Join and Respond for a more seamless Coupa SIM experience. Click [here](#) for support setting up your CSP account.
When Gates MRI initiates a SIM request, your organization’s Primary Contact will receive the following notification in the CSP.

1. Hover over the Notifications drop-down menu
2. Click on the request to be taken to the Information Requests section of the Profile Page
Entity Information Form (1 / 5)

Gates MRI SIM Forms

Confirm or update the following information populated from Gates MRI’s records:

1. Legal Name and Legal Name Confirmation

2. Doing Business As

NOTE: Fields with a * are required and must be completed.
3. Primary Contact

4. Click Add Contact to create another contact card

5. Enter the information for additional, relevant contacts within your organization

6. Click X to remove unnecessary contact cards from the form

NOTE: Fields with a * are required and must be completed.
7. Primary Address

8. Click Add Address to create another address card

9. Enter the information for additional, relevant addresses for your organization
   
   Note: Remit-To address will not be collected on this form

10. Click X to remove unnecessary address cards from the form

NOTE: Fields with a * are required and must be completed.
11. Enter the country and corresponding identification number for your tax registration

12. Select the type of Federal Tax Form for your organization. Attach a copy of the documents

**NOTE:** Fields with a * are required and must be completed.
13. Click **Yes** if you are a diverse organization

   *Note: Self-reporting without a third-party certification is allowed when at least 51% of your business is owned and operated by one or members of a disadvantaged minority group, women, veterans, and/or LGBQ+ persons.*

14. Click **Add** to create another certificate card

15. Click **X** to remove unnecessary certificate cards from the form

16. Enter the information for the diversity certification(s) held by your organization

17. Click **Submit for Approval**. You will be notified once Gates MRI has reviewed and approved your inputs.

**NOTE:** Fields with a * are required and must be completed.
Confirm or update the following information populated from Gates MRI’s records:

1. Legal Name

2. Doing Business As

NOTE: Fields with an * are required and must be completed.
Onboarding Form (2 / 8)

Gates MRI SIM Forms

3. Primary Contact

4. Click **Add Contact** to create another contact card

5. Enter the information for additional, relevant contacts within your organization

6. Click **X** to remove unnecessary contact cards from the form

**NOTE:** Fields with a * are required and must be completed.
Onboarding Form (3 / 8)

Gates MRI SIM Forms

7. Primary Address

8. Click Add Address to create another address card

9. Enter the information for additional, relevant addresses for your organization
   
   Note: Remit-To address will not be collected on this form

10. Click X to remove unnecessary address cards from the form

NOTE: Fields with a * are required and must be completed.
Onboarding Form (4 / 8)

Gates MRI SIM Forms

11. Click **Add Remit-To**

   Note: You can add multiple remit-to addresses pertinent to doing business with Gates MRI

12. In the CSP, a Choose Remit-To Address popup will appear

   Note: Go to Legal Entity Setup for instructions on creating a new Remit-To Address in the CSP

**NOTE:** Fields with a * are required and must be completed.
13. Remit To Email Address

14. Financial Contact Name

15. Financial Contact Phone Number

16. Enter remit-to address details

**NOTE:** If you are using the CSP after completing the Remit-To Address pop-up, information will auto populate Gates MRI’s form.
17. Indicate whether your bank is US based  
   Note: Your response will dictate whether you will be prompted to complete US or non-US banking fields.

18. Enter the name, address, and contact information for your bank  

   NOTE: Fields with a * are required and must be completed.
19. Indicate whether your beneficiary name differs from your legal name

*Note: If yes, you will be required to provide additional documentation explaining the discrepancy.*

20. Enter the account information for this Remit-To

*Note: The fields present here are dictated by your response to Step 17.

**NOTE:** Fields with a * are required and must be completed.
Onboarding Form (8 / 8)

21. Indicate whether you have an intermediary bank
   Note: If yes, additional information is required

22. Indicate whether you have further credit information
   Note: If yes, additional information is required

23. Enter your organization’s DUNS number

24. Enter the email PO information should be sent to

25. Click Submit for Approval. You will be notified once Gates MRI has reviewed and approved your inputs.

NOTE: Fields with a * are required and must be completed.
If your tax identification number has changed:

1. Enter the email address that should receive a new supplier onboarding form for Gates MRI

**NOTE:** Fields with a * are required and must be completed.

---

**Bill & Melinda Gates Medical Research Institute Supplier Information**

If you have questions on completing the supplier information request form, please email suppinfohelp@gatesmri.org.

* Did your tax identification number change?
- [ ] Yes
- [ ] No

Gates Medical Research Institute's policy for tax identification number changes is to create a new supplier record. Please provide the email address where a new onboarding form should be sent.

1. *Email Address for New Onboarding Form*

Please click 'Submit' and a Gates MRI representative will take the next steps with the form and Tax Identification Number Change process.
Update Form (2 / 6)

Gates MRI SIM Forms

If your legal name has changed:

2. Indicate whether you have supporting documentation for the legal name change

3. Enter your new Legal Name

4. Enter your new Doing Business As

5. Confirm the new legal name is affiliated with the tax identification on file with Gates MRI.

NOTE: Fields with a * are required and must be completed.
If your legal name has changed:

6. Attach supporting documentation

7. Select the type of Federal Tax Form for your organization. Attach a copy of the documents

**NOTE:** Fields with a * are required and must be completed.
If your tax classification has changed:

8. Select your new tax classification

9. Select the type of Federal Tax Form for your organization. Attach a copy of the documents

NOTE: Fields with a * are required and must be completed.
Update Form (5 / 6)

Gates MRI SIM Forms

If your PO email address has changed:

10. Enter your new PO email

If your banking information has changed:

11. Click Add Remit-To to create new remit-to addresses
   Note: Go here for instructions on creating a new Remit-To Addresses

12. Click X to remove outdated Remit-To addresses

**NOTE:** Fields with a * are required and must be completed.
If you need to update any contact, address, diversity certifications, or your DUNS number:

13. Select Yes

14. Click Submit for Approval. You will be notified once Gates MRI has reviewed and approved your inputs.

NOTE: Fields with a * are required and must be completed.
Managing Comments
Managing Comments, Rejection, and Approvals

Use Coupa’s comment functionality to contact Gates MRI with questions or clarifications on a form.

1. Scroll to the bottom of the form. Enter your comment and click Add Comment to notify Gates MRI.

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

3. You will receive an email and/or CSP notification when Gates MRI replies.
You will receive Rejection and New Comment emails if Gates MRI has rejected the information you submitted on a SIM form.

1. Click Update Info to revise and resubmit the form.

2. Click View Profile or Respond to revise and resubmit the form.
You will receive the following email once Gates MRI has reviewed and approved the information you submitted via SIM form.

Hi Call,

The company profile information that you submitted to your customer, Bill & Melinda 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.
You can initiate updates to Gates MRI profile information in the CSP.

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

2. Click **Information Requests**

3. Select **Bill & Melinda Gates Foundation and its Subsidiaries** as your customer

4. Scroll to the bottom of the form and click **Update Info**

   Note: Step by step instructions on completing Gates MRI forms can be found [here](#).

**NOTE:** This is only available if you have previously completed a SIM form in the CSP. Contact supplierhelp@gatesmri.org to receive an update form if none are visible.
# Supplier Information Management (SIM)

**Bill & Melinda Gates Medical Research Institute (Gates MRI) Key Takeaways**

## Gates MRI Supplier Information Requirements

**NOTE:** Gates MRI’s customer name in Coupa is **Bill & Melinda Gates Foundation and its Subsidiaries**.

- SIM Forms for Gates MRI will have “Bill & Melinda Gates Medical Research Institute” in the header.
- It is recommended to join the Coupa Supplier Portal (CSP) to have a more seamless SIM experience.

## General Updates

- If Gates MRI needs updated information from your organization a SIM request for Updated Information will be sent to your Primary Contact via email.

**Updating your Gates MRI Profile in the CSP:**

- **Self Service Update:** If a Gates MRI Onboarding or Update SIM form is available in the profile section of the CSP, submit a revised form to Gates MRI for review.
- **Request an Update:** If there are no Gates MRI SIM forms available in the profile section of the CSP, email supplierhelp@gatesmri.org to request an Update Form.

**Updating your Gates MRI Profile via Supplier Actionable Notification (SAN):**

- If you have elected to not join the CSP and need to share updated information with Gates MRI, email supplierhelp@gatesmri.org to request an Update form.

## Tax ID Updates

**NOTE:** Gates MRI requires a new supplier record be created when there is a tax ID change.

**If your tax ID has changed and you do not have an Update form visible in the profile section of the CSP:**

1. Email supplierhelp@gatesmri.org to request a New Supplier form. Provide the email address it should be sent to.
2. Gates MRI will review your request and send a New Entity Information.
3. Complete and submit the form. Once reviewed, Gates MRI will send an Onboarding form.
4. You will receive an email notification once Gates MRI has reviewed the form and created a new supplier record.

Please contact supplierhelp@gatesmri.org if you are experiencing difficulties or have questions regarding supplier information management processes and requirements for Gates MRI.