

**BILL & MELINDA GATES
MEDICAL RESEARCH
INSTITUTE**

Coupa Supplier Guide

September 2023

Key Training Topics

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



Coupa Supplier Portal (CSP) Overview & Set Up

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Coupa Introduction (1 / 2)

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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)

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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)

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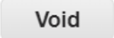



Coupa Terms








Term	Description
Coupa Supplier Portal (CSP)	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.
Supplier Actionable Notification (SAN)	Notifications suppliers receive via email to manage and acknowledge purchase orders, create invoices, and update company information.
Legal Entity	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.
Remit-To Accounts	Accounts where Gates MRI pays invoices to your company. Remit-To Accounts are created and maintained by your company in Coupa.
Payment Term	Payment terms are agreed upon during the contracting process with Gates MRI. They reflect payment due date.
Purchase Order (PO)	A legal and commercial document sent from a customer to a supplier, committing Gate MRI's purchase of goods and / or services.
PO Acknowledgement	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.
Advance Ship Notice (ASN)	Electronic documents that suppliers send to Gates MRI to notify them an ordered item has shipped.
Invoice	Billing document issued to Gates MRI stating the financial obligations for goods received or services performed.
Disputed Invoice	An invoice rejected by Gates MRI that has been sent back to a supplier for revision and resubmission.
Credit Note	An invoice with a negative value that offers credit to Gates MRI.

Key Terminology (2 / 2)

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Coupa Icons

Icon	Action / Function
MRI-117	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

First Time Registration (1 / 2)


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Email Invitation


Suppliers that are **new** to the Coupa Supplier Portal (CSP) will receive the following Coupa Invitation Email from Gates MRI.

1. Click Join Coupa

Bill & Melinda Gates Foundation and its Subsidiaries Registration Instructions - Action Required

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

Bill & Melinda Gates Foundation and its Subsidiaries Registration
Instructions - Action Required

Powered by  coupa

Hello CSP Demo,

We handle all our business spend electronically in order to prevent lost documents and make sure you are paid on time. Within the next 48 hours, click the button below to register your account. If you are not the right person at your company, send this request to the appropriate person by using the forward link.

Note: not registering in a timely manner may impact your ability to do business with us. Let us know if you are unable to register for any reason.

Caitlin Cyron
Bill & Melinda Gates Foundation and its Subsidiaries

1 [Join Coupa](#) [Forward this invitation](#)

First Time Registration (2 / 2)

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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.

Create an Account

Bill & Melinda 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 Bill & Melinda 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)
- * Email**
- * First Name** *** Last Name**
- 3** *** Password**
*** Confirm Password**
Use at least 8 characters and include a number and a letter.
- 4** I accept the [Privacy Policy](#) and the [Terms of Use](#)
- 5**

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

[Forward this to someone](#)

Returning Supplier Registration

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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.

The screenshot shows an email from 'Coupa Supplier Portal' to 'coupatestingcc+demo'. The subject is 'You are Connected to Bill & Melinda Gates Foundation and its Subsidiaries on Coupa'. The email body includes a greeting to 'Seawell Industry Inc', a congratulatory message about being added as a supplier, and a 'Login to Coupa' button highlighted with a red circle and the number '1'.

Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com> 1:17 PM (0 minutes ago)
to coupatestingcc+demo ▾

You are Connected to Bill & Melinda Gates Foundation and its Subsidiaries on Coupa

Powered by coupa

Hello Seawell Industry Inc,

Congratulations! Bill & Melinda Gates Foundation and its Subsidiaries has added you as a supplier on the Coupa Supplier Portal. Click below to sign in so you can Configure your PO transmission preferences, Create an online catalog, View purchase orders, Create electronic invoices.

Caitlin Cyron
Bill & Melinda Gates Foundation and its Subsidiaries

1 Login to Coupa

Merge Requests and Suggestions

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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

The screenshot displays the Coupa Supplier Portal interface. At the top, the user is logged in as JOHN with 22 notifications. The navigation menu includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Setup (highlighted with a red circle and a '2' notification badge). A banner for 'Verify Your Account' features a 'Get Verified' button. Below this, the user's profile for 'Seawell Industry Inc' is shown with a 'Get Verified' button and a progress indicator of 29%. The 'Recent Activity' section lists several 'Information Request' entries from 'Bill & Melinda Gates Foundation and its Subsidiaries - Seawell Industry' with statuses like 'Approved', 'Submitted', and 'Due Now'. On the right, an 'Announcements' box shows 'No Announcements'. At the bottom, a summary card displays: 'Two Factor Security: 0 of 1 User', 'Join Requests: 0 Users', 'Merge Suggestions: 1 (highlighted with a red circle and '1' badge) Duplicates', and 'Linked Customers: 2 Connections'.

Legal Entity Setup (1 / 7)

Accessing Legal Entity Information

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Coupa uses Legal Entities to provide customers with the information they need to do business in Coupa. It includes addresses, payment methods, and remit-to details.

1. Click **Setup** in the navigation ribbon
2. Click **Legal Entity Setup**
3. Click **Add Legal Entity**

The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'CAIT', 'NOTIFICATIONS 1', and 'HELP' are on the right. A navigation ribbon contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Admin, and Setup. The 'Setup' link is highlighted with a red circle and the number '1'. Below the ribbon, the 'Admin' section is active, showing 'Customer Setup' and 'Legal Entity Setup'. The 'Legal Entity Setup' link in the left sidebar is highlighted with a red circle and the number '2'. In the main content area, the 'Add Legal Entity' button is highlighted with a red circle and the number '3'. The main content area contains the following text: 'Let's get your company setup for electronic invoicing! We'll walk you through what's needed & keep it as short as possible. The first thing you'll need to do is add a legal entity. Please note, if you are a European Company, or have any operations in Europe, and you are based in one country/region but are registered for VAT in more than one country/region, you must complete your fiscal representatives before you set up your legal entity. Once you set those up, follow the E-Invoicing Setup to continue.'

Legal Entity Setup (2 / 7)

Business Location

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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**

Where's your business located?

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

4 * Legal Entity Name

* Country/Region

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

5

Legal Entity Setup (3 / 7)

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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**

The screenshot displays a web form for legal entity setup, divided into three main sections. Step 6, 'Which customers do you want to see this?', includes checkboxes for 'All' and 'Bill & Melinda Gates Foundation and its Subsidiaries', both of which are selected. Step 7, 'What address do you invoice from?', contains fields for 'Address Line 1', 'Address Line 2', 'City', 'State' (a dropdown menu), and 'Postal Code'. A 'Country/Region' dropdown is set to 'United States'. Below these fields are two checked checkboxes: 'Use this address for Remit-To' and 'Use this for Ship From address'. A blue callout box titled 'REQUIRED FOR INVOICING' provides instructions: 'Enter the registered address of your legal entity. This is the same location where you receive government documents.' Step 8, 'What is your Tax ID?', features a 'Country/Region' dropdown set to 'United States', a 'Tax ID' input field, and an unchecked checkbox for 'I don't have Tax ID Number'. A blue link 'Add additional Tax ID' is positioned below. The 'Miscellaneous' section at the bottom includes an 'Invoice From Code' input field and a 'Preferred Language' dropdown set to 'English (US)'. At the bottom right, there are 'Cancel' and 'Save & Continue' buttons, with the latter highlighted in blue and marked with a '9' in an orange circle.

Legal Entity Setup (4 / 7)

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Payment Information

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**

The screenshot shows a web form titled "Where do you want to receive payment?". At the top, there are four numbered steps: 1, 2, 3, and 4. Step 3 is highlighted in orange. A dropdown menu for "Payment Type" is open, showing options: "Bank Account" (selected), "Address", "Bank Account", and "Virtual Card".

Below the dropdown, the form fields are as follows:

- Bank Account Country/Region: United States
- Bank Account Currency: USD
- Beneficiary Name: CSP Demo
- Bank Name: [Empty]
- Account Number: [Empty]
- Confirm Account Number: [Empty]
- ACH Routing Number: [Empty]
- Wire Routing Number: [Empty]
- SWIFT/BIC Code: [Empty]
- My bank does not have a branch
- Branch Code: [Empty]
- Bank Account Type: Business
- Supporting Documents: No file chosen

On the right side, there is a modal window titled "What is your Bank's Branch Address?". It contains the following fields:

- Address Line 1: [Empty]
- Address Line 2: [Empty]
- City: [Empty]
- State: Select an Option (dropdown)
- Postal Code: [Empty]

Below the modal, there are two sections:

- Who is your Remit-To Contact? (optional) [Empty]
- What is your Remit-To Address? [Empty]

The Remit-To Address section is prepopulated with the following information:

- Address Line 1: 100 Market Street
- Address Line 2: [Empty]
- City: San Francisco
- State: CA
- Postal Code: 94105
- Country/Region: United States

At the bottom right of the form, there are two buttons: "Cancel" and "Save & Continue".

Annotations: A blue circle with the number "10" is next to the "Payment Type" dropdown. A blue circle with the number "11" is next to the "What are your Bank details?" label. A blue circle with the number "12" is next to the "Save & Continue" button.

Legal Entity Setup (5 / 7)

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Adding and Managing Remit-To Locations

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

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

13 **Add Remit-To**

Remit-To Account	Remit-To Address	Status	
Bank Account Bank of America CSP Demo *****2333 111110000	100 Market Street San Francisco CA 94105 United States	Active	14 Manage
Bank Account Chase Bank CSP Demo *****8999 000001111	100 Bleeker Street San Francisco CA 94105 United States	Active	Manage

15 **Next**

Deactivate Legal Entity Cancel

Legal Entity Setup (6 / 7)

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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.

Where do you ship goods from?

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different where your legal entity is registered. 16

Add Ship From

Title	Status	
100 Market Street San Francisco CA 94105 United States	Active	17 Manage
200 Shipping Lane Way Oakland CA 94501 United States	Active	Manage

18

Deactivate Legal Entity **Done**

Legal Entity Setup (7 / 7)

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Modifying Legal Entities

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.

Admin Legal Entity Setup Add Legal Entity

Legal Entity

CSP Demo Ltd 19 Actions

Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
309 London Road London London EC36 7ES United Kingdom	Bank Account 1 customer Bank Name Barclays Beneficiary CSP Demo Ltd Name Account *****6677 Number Transit Code 123456 SWIFT/BIC *****AXXX Code Remit-To Address 309 London Road London London EC36 7ES United Kingdom Active	309 London Road London London EC36 7ES United Kingdom	GB123456789	Bill & Melinda and its Subsidiaries

CSP Demo Actions

Invoice From	Remit-To Accounts	Locations	TAX IDs	Customers
100 Market Street San Francisc CA 94105 United States	Bank Account 1 customer Bank Name Bank of America Beneficiary CSP Demo Name Account *****2333	100 Market Street San Francisc CA 94105 United States	123456789	Bill & Melinda Gates Foundation and its Subsidiaries

Accessing the CSP

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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 screenshot displays the Coupa Supplier Portal login interface. At the top left, the Coupa logo is followed by the text 'supplier portal'. On the top right, there is a 'Secure' indicator with a lock icon. The central part of the page is a white box containing the login form. The form is titled 'Login' and includes two input fields: one for 'Email' and one for 'Password', both marked with a red asterisk. Below the password field is a link for 'Forgot your password?'. A prominent blue button labeled 'Login' is positioned below the form. At the bottom of the form area, there is a link that says 'New to Coupa? CREATE AN ACCOUNT'.

CSP Overview

CSP Interface and Navigation

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.

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1 Home 2 Profile 3 Orders 4 Invoices 5 Sourcing 6 Setup 7 User Profile

Verify Your Account
Coupa Verified makes your account more visible and trusted by thousands of customers.
Get Verified

SI Seawell Industry Inc Get Verified
Profile Progress 29% Last Updated: 7 days ago | View Profile

Recent Activity View ⓘ

Bill & Melinda Gates Foundation ... More...

Information Request Approved Aug 23
Bill & Melinda Gates Foundation and its Subsidiaries - Seawell Industry . Received 7 days ago

Information Request Submitted Aug 23
Bill & Melinda Gates Foundation and its Subsidiaries - Seawell Industry . Received 7 days ago

Information Request Due Now Aug 23
Bill & Melinda Gates Foundation and its Subsidiaries - Seawell Industry . Received 7 days ago

Information Request Approved Aug 18
Bill & Melinda Gates Foundation and its Subsidiaries - Seawell Industry . Received 12 days ago

Information Request Submitted Aug 18
Bill & Melinda Gates Foundation and its Subsidiaries - Seawell Industry . Received 12 days ago

Announcements
No Announcements

Two Factor Security 0 of 1 User	Join Requests 0 Users	Merge Suggestions 0 Duplicates	Linked Customers 2 Connections
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Security & Two-Factor Authentication (1 / 4)

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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 'JOHN' is visible with a dropdown arrow. A red notification badge shows '22' next to 'NOTIFICATIONS', and a 'HELP' link is also present. A blue navigation bar contains various menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Setup. A dropdown menu is open under the 'JOHN' user name, with 'Account Settings' highlighted in orange. Other options in the menu include 'Notification Preferences' and 'Log Out'. Below the navigation bar, a green banner reads 'Verify Your Account' with a 'Get Verified' button. The main content area shows the user's profile for 'Seawell Industry Inc' with a 'Get Verified' button and profile progress information. Below the profile, there are sections for 'Recent Activity' and 'Announcements'.

Security & Two-Factor Authentication (2 / 4)

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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 screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes the Coupa logo, 'supplier portal', and user information (CAIT, NOTIFICATIONS, HELP). The main navigation menu lists: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The 'My Account' section is active, with 'Security & Two-Factor Authentication' selected. A sidebar on the left contains 'Settings', 'Notification Preferences', and 'Security & Two-Factor Authentication' (highlighted with an orange box and a '3' in a circle). The main content area shows 'Two-Factor Authentication' settings with radio buttons for 'Disabled', 'Enable only for Payment' (selected), and 'Enable for Both Accounts'. Below are sections for 'Via Authenticator App' and 'Via SMS', each with an 'Enable' checkbox and 'Using store/verification' text. A pop-up window titled 'Two Factor Authentication App' is overlaid, containing instructions, app store download buttons (App Store and Google Play), a QR code, a 'Two Factor Code' input field, and 'Cancel' and 'Enable' buttons (the 'Enable' button is highlighted with an orange box and a '4' in a circle).

Security & Two-Factor Authentication (3 / 4)

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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

The screenshot shows the 'coupa supplier portal' interface. At the top, there is a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. On the right, there are links for CAIT, NOTIFICATIONS (with a red '1' badge), and HELP. Below the navigation bar, the page title is 'My Account Security & Two-Factor Authentication'. A left sidebar contains a menu with 'Settings' (highlighted with a blue circle and the number '5'), 'Notification Preferences', and 'Security & Two-Factor Authentication'. The main content area is titled 'Two-Factor Authentication' and features three radio button options: 'Disabled', 'Enable only for Payment Changes (Required for changing Legal Entity or Remit-To)', and 'Enable for Both Account Access (Login) and Payment Changes'. Below these options, there are two sections for authentication methods, both currently 'Disabled' (indicated by a red circle and the number '6'). The first section is 'Via Authenticator App' with an 'Enable' checkbox and the text 'Using an Authenticator App available from your mobile phone app store'. The second section is 'Via SMS' with an 'Enable' checkbox and the text 'Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.'

Security & Two-Factor Authentication (4 / 4)

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Enabling Security & Two-Factor Authentication Settings

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

Verify your mobile phone

To enable two factor authentication via SMS, a code will be sent to your mobile phone number. Enter the verification code when prompted and select OK

Mobile Phone

Invalid format. Example: +1 123-456-7890

Cancel Next

Save Your Backup Codes

Backup codes are the only way to restore access if you lose access to your authenticating phone or app. Keep these somewhere safe but accessible

YZUj8w	kOfsdw
sbXuhw	qm32bQ
IKMXWQ	LS7Zvg

You can only use each backup code once. These codes were generated on July 10, 2023

Download Print

Two-Factor Authentication

Enter the validation code that we sent to: +15103252775

* Code

Cancel Resend Code OK

Via SMS Enabled

Enabled Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.

+15103252775 [Change Phone Number](#)

Show Recovery Codes Regenerate Recovery Codes

Invite Additional Users (1 / 2)

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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**

The screenshot shows the Coupa Supplier Portal interface. At the top, the navigation ribbon includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup' (highlighted with a blue box and a '1' in a circle). Below the ribbon, the 'Admin' section is active, showing 'Customer Setup'. The main content area is titled 'Admin Users' and features a left sidebar with a 'Users' link highlighted (2). The main table displays user information for 'Cait Cyron' (email: coupatestingcc+csp@gmail.com, Status: Active) with an 'Edit' button. The table has three columns: 'Users', 'Permissions', and 'Customer Access'. The 'Permissions' column lists various system functions like ASNs, Admin, Business Performance, Catalogs, Early Payments, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, Profiles, Service/Time Sheets, and Sourcing. The 'Customer Access' column shows 'Bill & Melinda Gates Foundation and its Subsidiaries'. An 'Invite User' button is highlighted with a blue box and a '3' in a circle.

Users	Permissions	Customer Access
Cait Cyron coupatestingcc+csp@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Bill & Melinda Gates Foundation and its Subsidiaries

Invite Additional Users (2 / 2)

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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**

NOTE: Have invited users check their Spam/Junk folder if the email is not in their primary inbox.

The image shows two screenshots from a training document. The top screenshot is a 'Invite User' form with a red circle '4' in the top left corner. It has input fields for 'First Name', 'Last Name', and '*Email'. Below these are two columns: 'Permissions' and 'Customers'. The 'Permissions' column has several checked items: All, Admin, Orders, Invoices, Catalogs, Profiles, ASNs, and Service/Time Sheets. The 'Customers' column has 'All' and 'Bill & Melinda Gates Foundation and its Subsidiaries' checked. At the bottom of the form is a 'Send Invitation' button with a red circle '5' next to it. The bottom screenshot is an email invitation from Coupa with a red circle '6' next to the 'Join Coupa' button. The email subject is 'Action Required for CSP Demo Supplier - Click Below to Join Coupa' and is addressed to 'Caitlin'. It includes the Coupa logo and a 'Join Coupa' button.

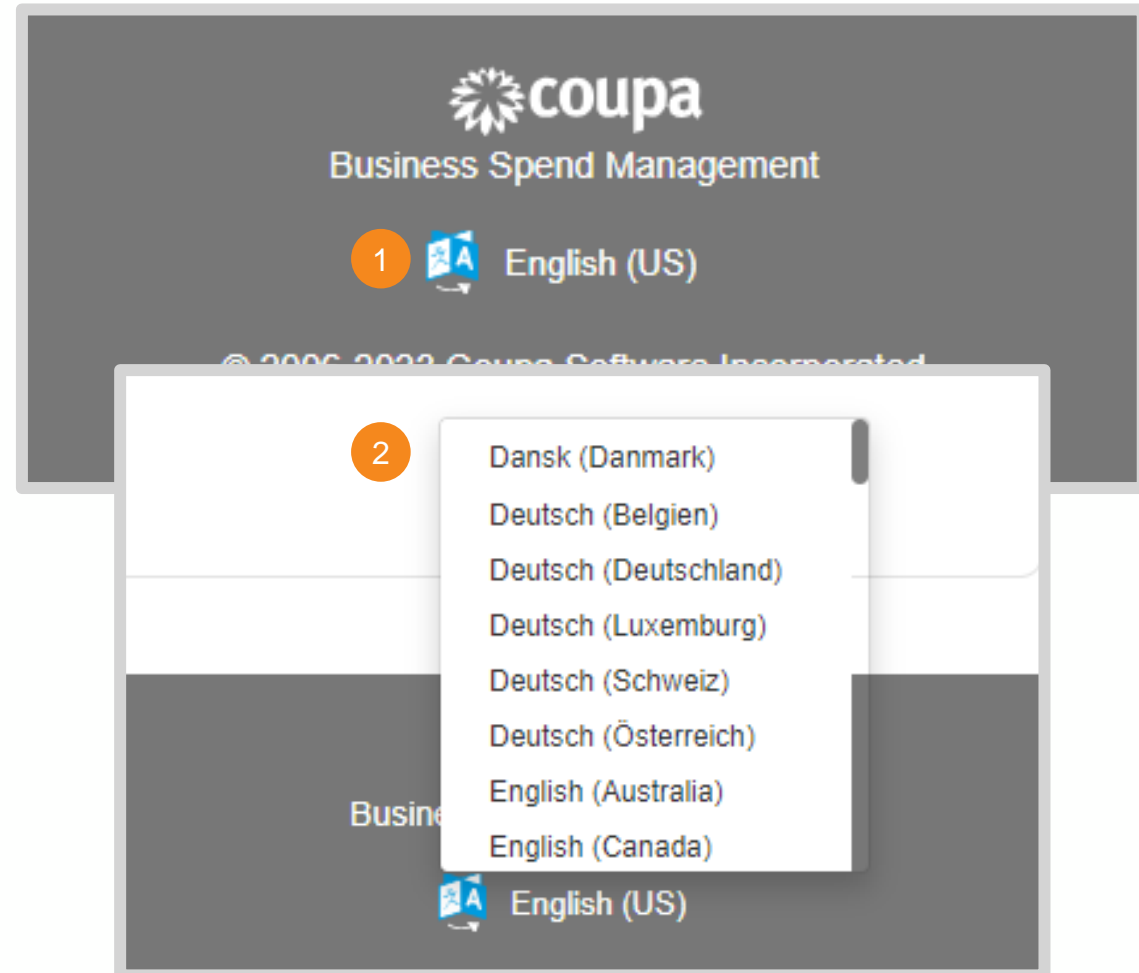
Language Settings

Changing CSP Display Language

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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.



Help & Support

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 support for a specific issue

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The screenshot displays the Coupa Supplier Portal interface. At the top, the user is logged in as 'JOHN' and has a notification bell icon with a '1' badge. A 'HELP' dropdown menu is open, showing options for 'Online Help', 'Blog', and 'Help Tour'. The main navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the navigation bar is a 'Verify Your Account' banner with a 'Get Verified' button. The user's profile is for 'Seawell Industry Inc' with a 'Get Verified' button and a progress indicator showing 29% completion. The 'Recent Activity' section lists several 'Information Request' items from 'Bill & Melinda Gates Foundation and its Subsidiaries - Seawell Industry' with statuses like 'Approved', 'Submitted', and 'Due Now'. The 'Announcements' section shows 'No Announcements'. At the bottom, there are four cards: 'Two Factor Security' (0 of 1 User), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (2 Connections). A 'Chat with Coupa Support' button is visible in the bottom right corner, with a '2' badge.

Coupa Supplier Portal (CSP) Set Up & Navigation

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



Gates MRI Requirements

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

- **Legal Entity/Remit-To Payment Type:** Bank Account is the required payment method for Gates MRI. Gates MRI does not pay via check or virtual card.

CSP Account Reminders

- **Coupa Registration & Profile Set Up:** 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.
- **Merging Accounts:** 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.
- **Legal Entities:** You are required to set up at least one legal entity in the CSP in order to electronically submit invoices.
- **CSP Link:** <https://supplier.coupahost.com/>
- **Supported Browsers:** Google Chrome, Mozilla Firefox, Microsoft Edge
- **User Management:** After joining the CSP, you will be able to invite additional to your organization's account. Permissions and customer visibility are customizable by user.
- **Security & Two-Factor Authentication:** Each user will be able to configure their own account security and two-factor authentication preferences.

For additional support setting up your CSP account, click [here](#) to view resources and videos from Coupa. Please contact supplierhelp@gatesmri.org with questions specific to Gates MRI and Coupa.



Purchase Order (PO) Processing

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Purchase Order (PO) Processing

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Purchase Order (PO) Processing *via SAN*

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View Purchase Order (1 / 3)

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Purchase Order Processing in the CSP

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

The screenshot shows the Coupa Supplier Portal interface. The navigation menu includes Home, Orders (highlighted with a red circle 1), Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the navigation menu, there are sub-navigation options: Orders (highlighted with a red circle 1), Order Lines, Returns, Order Changes, Order Line Changes, Order Confirmations, Order Confirmation Lines, Promised Deliveries, and Shipments. The main content area displays the 'Purchase Orders' page for the customer 'Bill & Melinda Gates Foundation and its Subsidiaries' (selected in a dropdown menu, highlighted with a red circle 2). The page shows 'Instructions From Customer' (highlighted with a red circle 3) and a table of purchase orders. The table has columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. A search bar (highlighted with a red circle 4) is located at the bottom right of the table area.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
MRI-145	07/18/23	Issued	None	Sample Goods Sample Services	No	750,000.00 USD		

View Purchase Order (2 / 3)

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Purchase Order Processing in the CSP

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

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'coupa supplier portal' on the left and 'CAIT', 'NOTIFICATIONS 1', and 'HELP' on the right. Below this is a main menu with 'Home', 'Profile', 'Orders' (highlighted), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Under 'Orders', there are sub-links: 'Orders', 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', 'Order Confirmations', 'Order Confirmation Lines', 'Promised Deliveries', and 'Shipments'. A 'Select Customer' dropdown is set to 'Bill & Melinda Gates Foundation and its Subsi...'. The main heading is 'Purchase Orders'. Below it, 'Instructions From Customer' states: 'You *must* acknowledge the PO prior to creating an invoice. Please use the "print view" on your POs to see the terms and conditions.' A button says 'Click the Action to Accept the Purchase Order and Create an Invoice using its data'. Below this is a table with columns: 'Export to', 'View', 'All', and 'Search'. The table has one row with the following data: PO Number: MRI-145, Order D: 07/18/23, Status: Issued, Acknowledged At: None, Items: Sample Goods, Sample Services, Unanswered Comments: No, Total: 750,000.00 USD, Assigned To: (empty), and Actions: (icons). Red circles with numbers 5 and 6 highlight the PO Number and Status columns respectively.

Export to	View	All	Search							
5	PO Number	Order D	6	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
	MRI-145	07/18/23		Issued	None	Sample Goods Sample Services	No	750,000.00 USD		

View Purchase Order (3 / 3)

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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

Purchase Orders

Instructions From Customer

You *must* acknowledge the PO prior to creating it.

Click the Action

Export to

PO Number	Order Date	Status	Acknowledged
MRI-3	08/04/23	Issued	None
MRI-2	08/04/23	Issued	08/04/23

Purchase Order #MRI-2

Order unacknowledged

General Info

Status: Issued - Sent via Email
Order Date: 08/04/23
Revision Date: 08/04/23
Requester: Caitlin Cyron
Email: caitlin.cyron@gatesfoundation.org
Payment Term: Net60
Attachments: None
Acknowledged:

Shipping

Ship-To Address: One Kendall Square, Building 600, Suite 6-301, Cambridge, MA 02139, United States, Attn: Caitlin Cyron
Terms: FOB - Destination

Shipment Tracking: No shipment tracking.

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Sample Goods	1	Each	250,000.00	250,000.00	0.00
Need By: 08/04/23				Supplier Part Number: None	Manufacturer Name: None	Manufacturer Part Number: None
2	Sample Services			500,000.00	500,000.00	0.00
Need By: 08/04/23				Supplier Part Number: None	Manufacturer Name: None	Manufacturer Part Number: None

Total USD 750,000.00

Create Invoice **8** Print View

Acknowledge Purchase Order

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Purchase Order Processing in the CSP

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

The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Orders' section is active, showing a table of purchase orders. The table has columns for 'PO Number', 'Order Date', 'Status', and 'Acknowledged A'. The second row, with PO Number 'MRI-2', is highlighted, and its 'Acknowledged' checkbox is checked. Below the table, the 'Purchase Order #MRI-2' details are shown, including 'General Info' and 'Shipping' sections. The 'Acknowledged' checkbox is also checked in the 'Attachments' section. The 'Lines' section shows two items: 'Sample Goods' and 'Sample Services'.

Purchase Orders

Instructions From Customer

You *must* acknowledge the PO prior to creati

Click the Action

Export to

PO Number	Order Date	Status	Acknowledged A
MRI-3	08/04/23	Issued	None
MRI-2	08/04/23	Issued	08/04/23

Purchase Order #MRI-2

Order acknowledged

General Info

Status: Issued - Sent via Email
Order Date: 08/04/23
Revision Date: 08/04/23
Requester: Caitlin Cyron
Email: caitlin.cyron@gatesfoundation.org
Payment Term: Net60
Attachments: None

Shipping

Ship-To Address: One Kendall Square, Building 600, Suite 6-301, Cambridge, MA 02139, United States, Attn: Caitlin Cyron
Terms: FOB - Destination
Shipment Tracking: No shipment tracking.

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Sample Goods	1	Each	250,000.00	250,000.00	0.00
Need By: 08/04/23				Supplier Part Number: None	Manufacturer Name: None	Manufacturer Part Number: None
2	Sample Services			500,000.00	500,000.00	0.00
Need By: 08/04/23				Supplier Part Number: None	Manufacturer Name: None	Manufacturer Part Number: None

Add Comments to Purchase Order

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Purchase Order Processing in the CSP

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 screenshot displays the 'Purchase Orders' page in the Coupa system. At the top right, there is a 'Select Customer' dropdown menu with 'Bill & Melinda Gates Foundation and its Subs...' selected. Below this, the page title 'Purchase Orders' is followed by 'Instructions From Customer' which states: 'You *must* acknowledge the PO prior to creating an invoice. Please use the "print view" on your POs to see the terms and conditions.' A button with a hand icon says 'Click the Action to Accept the Purchase Order and Create an Invoice using its data'. Below this is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table has two rows: one for 'MRI-3' (08/04/23, Issued, None, Additional Services, No, 500,000.00 USD) and one for 'MRI-2' (08/04/23, Issued, 08/04/23, 1 Each of Sample Goods, Yes, 750,000.00 USD). A modal window titled 'Comment' is open over the 'MRI-2' row. It has a 'Mute Comments' dropdown, an 'Enter Comment' text area with 'comment' typed in, and an 'Add Comment' button. Below the text area, it says 'Send Comment notification to a user by typing @name (ex. @JohnSmith)'. At the bottom of the modal, it shows 'Participants: Cait Cyron' and a comment history section with a comment from 'Cait Cyron' on '08/04/23 at 04:54 AM'.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
MRI-3	08/04/23	Issued	None	Additional Services	No	500,000.00 USD		
MRI-2	08/04/23	Issued	08/04/23	1 Each of Sample Goods	Yes	750,000.00 USD		

Create Order Table View (1 / 2)

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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**

Select Customer: Bill & Melinda Gates Foundation and its Subs...

Purchase Orders

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	Actions
MRI-3	08/04/23	Issued	None	Additional Services	No	
MRI-2	08/04/23	Issued	08/04/23	1 Each of Sample Goods Sample Services	Yes	

Export to: All

Search:

- All
- Confirmations Awaiting Buyer Review
- Open Orders
- Orders not acknowledged
- Orders not invoiced
- Orders past due
- Orders Pending Confirmation
- Orders with pending changes
- Overdue Confirmations
- POs with service lines
- Create View**

Create Order Table View (2 / 2)

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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

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
Comments	PO Number
Payment Agreements	Order Date
PO ID	Status
	Acknowledged At
	Items
	Unanswered Comments
	Total
	Assigned To
	Actions

Default Sort Order

Sort by in order.

4

View Purchase Order

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Purchase Order Processing via SAN

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

Purchase Order #MRI-145 Inbox x

foundation-test.coupa.com

Powered by coupa

Bill & Melinda Gates Medical Research Institute Purchase Order #MRI-145

Order Summary

Date 07/18/23
PO Total 750,000.00 USD
Shipping Terms FOB - Destination
Payment Terms Net60
Contact Caitlin Cyron
caitlin.cyron@gatesfoundation.org

1 **Manage Order** **Create Invoice**

Orders details below

Acknowledge PO Add Shipment Tracking Add Comment

BILL & MELINDA GATES MEDICAL RESEARCH INSTITUTE

CSP Demo
Attn: Cait Cyron
coupatestingcc-csp@gmail.com

Bill & Melinda Gates Medical Research Institute PURCHASE ORDER

PO NUMBER MRI-145
DATE 07/18/23
PAYMENT TERMS Net60
SHIPPING TERMS FOB - Destination
CURRENCY USD
CONTRACT 185
CONTACT Caitlin Cyron
caitlin.cyron@gatesfoundation.org

Ship To
Bill & Melinda Gates Medical Research Institute
One Kendall Square
Building 600, Suite 5-301
Cambridge, MA 02139
United States
Attn: Caitlin Cyron

Bill To
Bill & Melinda Gates Medical Research Institute
One Kendall Square
Building 600, Suite 6-301
Cambridge, MA 02139
United States
Attn: Caitlin Cyron

Line	Description	Need By Date	Qty	Unit	Price	Total
1	Sample Goods				250,000.00	250,000.00
2	Sample Services				500,000.00	500,000.00
						750,000.00 USD

To ensure payment, suppliers are required to provide PO Number on all invoices

PURCHASE ORDER TERMS AND CONDITIONS

THIS PURCHASE ORDER FOR GOODS OR SERVICES ("Order") is between the Bill & Melinda Gates Medical Research Institute ("Purchaser") and the Supplier identified above ("Supplier") and is effective as of the Order Date. The Order includes the cover page above and these Terms and Conditions. If this Order references another contract that expressly supersedes this Order's terms, then such other contract shall prevail. Each party to this Order may be referred to individually as a "Party" and together as the "Parties." Any shipment, delivery, acceptance of payment, beginning performance of the services, or other tender of performance by Supplier will be deemed assent to and acceptance of this entire Order.

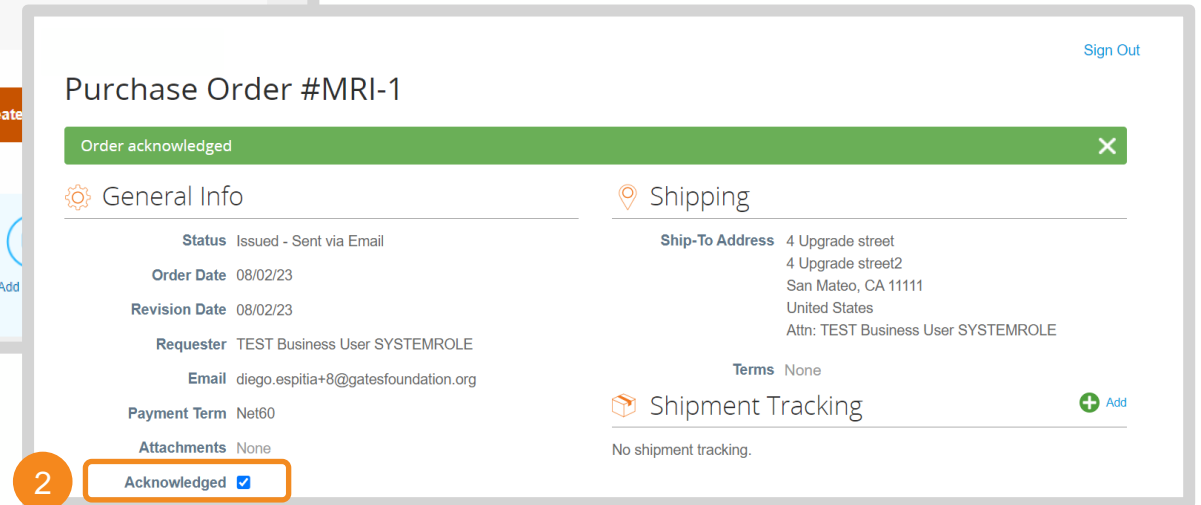
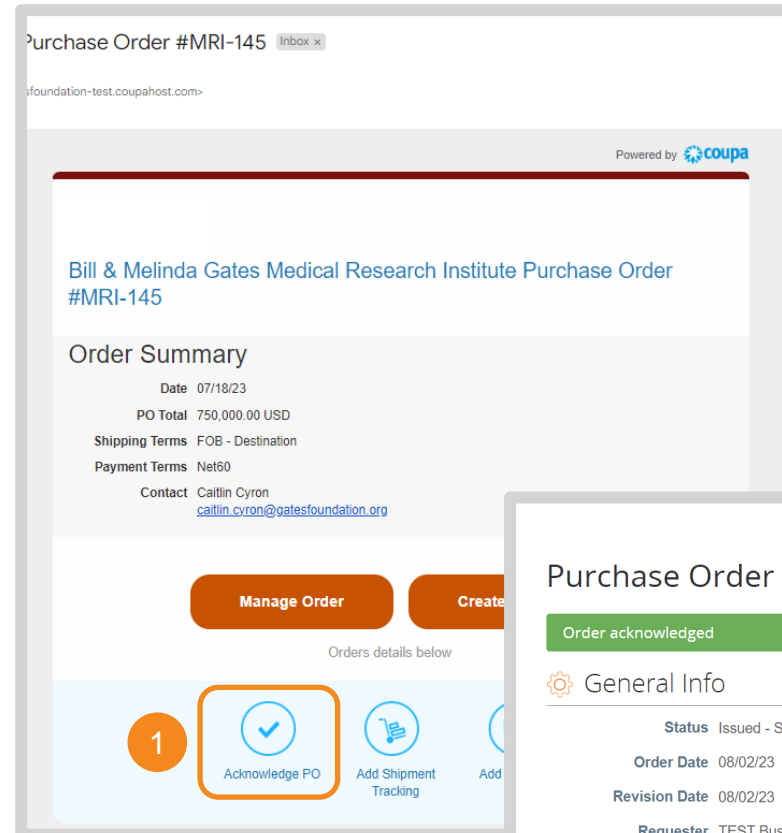
Acknowledge Purchase Order

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Purchase Order Processing via SAN

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

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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.

The screenshot displays the Coupa Purchase Order interface for Purchase Order #MRI-145. The interface is powered by Coupa and shows the following details:

- Order Summary:**
 - Date: 07/18/23
 - PO Total: 750,000.00 USD
 - Shipping Terms: FOB - Destination
 - Payment Terms: Net60
 - Contact: Caitlin Cyron (caitlin.cyron@gatesfoundation.org)
- Buttons:** Manage Order, Create Invoice, Acknowledge PO, Add Shipment Tracking, Add Comment (highlighted with a red circle 1).
- Comment Form:** A modal window titled "Comment" is open, showing a text input field with "comment 2", an "Add File | URL" option, and an "Add Comment" button (highlighted with a red circle 2).
- Participants:** The comment is from a "Supplier User" (highlighted with a red circle 3).



Invoice Processing

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Invoice Processing

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Invoice Processing *via SAN*

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Create Invoice (1 / 5)

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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

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Orders' tab is active, showing a 'Purchase Order #MRI-2' modal window. The modal is divided into 'General Info' and 'Shipping' sections. The 'General Info' section includes fields for Status (Issued - Sent via Email), Order Date (08/04/23), Revision Date (08/04/23), Requester (Caitlin Cyron), Email (caitlin.cyron@gatesfoundation.org), Payment Term (Net60), Attachments (None), and Acknowledged status. The 'Shipping' section shows the Ship-To Address (One Kendall Square, Building 600, Suite 6-301, Cambridge, MA 02139, United States, Attn: Caitlin Cyron) and Terms (FOB - Destination). Below these sections is a 'Lines' table with columns for Type, Item, Qty, Unit, Price, Total, and Invoiced. The table contains two rows: Line 1 (Sample Goods, Qty 1, Price 250,000.00, Total 250,000.00, Invoiced 0.00) and Line 2 (Sample Services, Price 500,000.00, Total 500,000.00, Invoiced 0.00). At the bottom of the modal, a 'Total USD 750,000.00' is displayed. An orange box highlights the 'Create Invoice' button at the bottom right of the modal. Another orange box highlights the 'Actions' column in the background table, with a red circle containing the number '1' next to it, indicating the first step in the process.

Create Invoice (2 / 5)

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Invoice Processing in the CSP

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.

None

3 Choose Invoicing Details

* Legal Entity CSP Demo + Add New

Invoice From 100 Almond Avenue
Los Altos, CA 94022
United States
United States (123456789)

* Remit-To Wells Fargo ***666 (100 Almon) + Add New

* Ship From Address 100 Almond Avenue, Los Altos, + Add New

Cancel 4 Save

Create Invoice (3 / 5)

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Invoice Processing in the CSP

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

Create Invoice Create

5 **General Info**

* Invoice #

* Invoice Date

Payment Term

* Currency

Status

* Image Scan No file chosen

Supplier Note

Attachments [Add](#) [File](#) | [URL](#) | [Text](#)

From

* Supplier

Supplier Tax ID

* Invoice From Address
100 Almond Avenue
Los Altos, CA 94022
United States

* Remit-To Address
100 Almond Avenue
Los Altos, CA 94022
United States

Bank Name:

Beneficiary Name:

Bank Account Number:

Routing Number:

* Ship From Address
100 Almond Avenue
Los Altos, CA 94022
United States

To

Customer

Create Invoice (4 / 5)

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Invoice Processing in the CSP

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.

6 Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	Sample Goods	1.0000	Each	250,000.00	250,000.00
PO Line MRI-2-1		Service/Time Sheet Line None	Contract 		Supplier Part Number <input type="text"/>
Billing Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential					
Type	Description			Price	
	Sample Services			500,000.00	500,000.00
PO Line MRI-2-2		Service/Time Sheet Line None	Contract 		Supplier Part Number <input type="text"/>
Billing Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential					

[+ Add Line](#) [+ Pick lines from Contract](#) Totals & Taxes

Create Invoice (5 / 5)

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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 Invoice**

The screenshot shows the 'Totals & Taxes' section of an invoice form. It includes fields for 'Lines Net Total' (750,000.00), 'Shipping', 'Tax' (with a dropdown and percentage input), and 'Tax Reference' (with a text input). There are also sections for 'Handling' and 'Misc' with similar tax and reference fields. At the bottom, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. A confirmation dialog box titled 'Are You Ready to Send?' is overlaid on the form, displaying the message: 'You're about to send an invoice to Bill & Melinda Gates Foundation and its Subsidiaries for a total amount of 250,000.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.' The dialog has 'Continue Editing' and 'Send Invoice' buttons. The 'Calculate' and 'Submit' buttons are highlighted with orange circles and boxes, corresponding to steps 8 and 9. The 'Send Invoice' button in the dialog is highlighted with an orange circle and box, corresponding to step 10.

Partial Invoice

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Invoice Processing in the CSP

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.

The screenshot displays the 'Lines' section of an invoice processing interface. It features two main line items, each with a header row and a detailed row below. The first line item is 'Sample Goods' with a quantity of 1.0000 and a price of 250,000.00. The second line item is 'Sample Services' with a price of 500,000.00. Both line items have a red 'X' icon in the top right corner, indicating they can be deleted. The interface includes fields for Type, Description, Qty, UOM, Price, PO Line, Service/Time Sheet Line, Contract, and Supplier Part Number. A 'Line Level Taxation' checkbox is visible in the top right. At the bottom, there are buttons for '+ Add Line' and '+ Pick lines from Contract', and a 'Totals & Taxes' section.

Type	Description	Qty	UOM	Price	
	Sample Goods	1.0000	Each	250,000.00	250,000.00
PO Line MRI-2-1			Service/Time Sheet Line None	Contract ▼	Supplier Part Number <input type="text"/>
Billing	Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential				
Type	Description			Price	
	Sample Services			500,000.00	500,000.00
PO Line MRI-2-2			Service/Time Sheet Line None	Contract ▼	Supplier Part Number <input type="text"/>
Billing	Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential				

[+ Add Line](#) [+ Pick lines from Contract](#) Totals & Taxes

Start Up or Up-Front Fees (1 / 2)

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Invoice Processing in the CSP

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

The screenshot displays the 'Lines' section of a software interface. It features two line items, each with a header row and a details row. The first line item has a 'Type' icon of a house with a dollar sign, a 'Description' field containing 'CRO Fees', and a 'Price' field containing '0.00'. A delete button (X) is circled in orange with the number 3. The details row includes 'PO Line MRI-446-1', 'Service/Time Sheet Line None', 'Contract Demo SOW (Published)', and 'Supplier Part Number'. The second line item has a 'Type' icon of a house with a dollar sign, a 'Description' field containing 'Prepay Fees (\$20,000)', and a 'Price' field containing '20,000.00'. A delete button (X) is circled in orange with the number 1. The details row includes 'PO Line MRI-446-4', 'Service/Time Sheet Line None', 'Contract Demo SOW (Published)', and 'Supplier Part Number'. A 'Line Level Taxation' checkbox is visible in the top right corner.

Start Up or Up-Front Fees (2 / 2)

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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.

Lines

Line Level Taxation

Type	Description	Price	
	CRO Fees	4 20,000	0.00 
PO Line MRI-446-1	Service/Time Sheet Line None	Contract Demo SOW (Published) 	Supplier Part Number <input type="text"/>
Billing Gates MRI-70600-5565-RS000001-USA-Non-Confidential			
Type	Description	Price	
	Prepay Fees (\$20,000)	5 -20,000	0.00 
PO Line MRI-446-4	Service/Time Sheet Line None	Contract Demo SOW (Published) 	Supplier Part Number <input type="text"/>
Billing Gates MRI-70600-1315-RS000001-USA-Non-Confidential			

Create Credit Note (1 / 5)

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Invoice Processing in the CSP

Credit notes can be created from the CSP Orders table:

1. Click the **Red Coins** in the Actions column

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Orders' tab is active. Below the navigation bar, there are sub-tabs for 'Orders', 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', 'Order Confirmations', 'Order Confirmation Lines', 'Promised Deliveries', and 'Shipments'. The main content area is titled 'Purchase Orders' and includes a 'Select Customer' dropdown menu set to 'Bill & Melinda Gates Foundation and its Subs...'. Below this, there is a section for 'Instructions From Customer' with a message: 'You *must* acknowledge the PO prior to creating an invoice. Please use the "print view" on your POs to see the terms and conditions.' A button with a red coin icon and the text 'Click the Action to Accept the Purchase Order and Create an Invoice using its data' is visible. At the bottom, there is a table with columns: 'Export to', 'View', 'Create View', 'Search', 'PO Number', 'Order Date', 'Status', 'Acknowledged At', 'Items', 'Unanswered Comments', 'Total', 'Assigned To', and 'Actions'. The table contains two rows of data. The 'Actions' column for the first row (MRI-3) has a red coin icon highlighted with an orange circle and the number '1'.

Export to	View	Create View	Search	PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
				MRI-3	08/04/23	Issued	None	Additional Services	No	500,000.00 USD		
				MRI-2	08/04/23	Issued	08/04/23	1 Each of Sample Goods Sample Services	Yes	750,000.00 USD		

Create Credit Note (2 / 5)

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Invoice Processing in the CSP

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.

None

2 Choose Invoicing Details

* Legal Entity CSP Demo + Add New

Invoice From 100 Almond Avenue
Los Altos, CA 94022
United States
United States (123456789)

* Remit-To Wells Fargo ***666 (100 Almon) + Add New

* Ship From Address 100 Almond Avenue, Los Altos, + Add New

Cancel 3 Save

Create Credit Note (3 / 5)

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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

Create Credit Note Create

4 General Info 📍 From

* Credit Note #	<input type="text"/>	* Supplier	CSP Demo
* Credit Note Date	08/04/23	Supplier Tax ID	123456789
Payment Term	Net60	* Invoice From Address	CSP Demo 100 Almond Avenue Los Altos, CA 94022 United States
* Currency	USD	* Remit-To Address	CSP Demo 100 Almond Avenue Los Altos, CA 94022 United States
Status	Draft	Bank Name:	Wells Fargo
* Original Invoice #	<input type="text"/>	Beneficiary Name:	CSP Demo
* Original Invoice Date	mm/dd/yy	Bank Account Number:	*****5666
* Image Scan	<input type="button" value="Choose File"/> No file chosen	Routing Number:	*****0000
Supplier Note	<input type="text"/>	* Ship From Address	CSP Demo 100 Almond Avenue Los Altos, CA 94022 United States
Attachments	Add File URL Text	📍 To	

Customer Bill & Melinda Gates Foundation and its Subsidiaries

Create Credit Note (4 / 5)

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Invoice Processing in the CSP


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.

☰ Lines Line Level Taxation

Adjustment Type Price ▾

Type	Description	Price	
	<input type="text" value="Additional Services"/>	<input type="text" value="-100000"/>	500,000.00 6 X
PO Line MRI-3-1	Service/Time Sheet Line None	Contract ▾	Supplier Part Number <input type="text"/>
Billing Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential			

Create Credit Note (5 / 5)

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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**

The screenshot shows the 'Totals & Taxes' section of a software interface. It contains several rows for 'Shipping', 'Handling', and 'Misc', each with a 'Tax' dropdown menu, a percentage input field (set to 0.000), and a 'Tax Reference' text box. At the bottom, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. A confirmation dialog box titled 'Are You Ready to Send?' is overlaid on the right side, displaying the message: 'You're about to send an credit note to Bill & Melinda Gates Foundation and its Subsidiaries for a total amount of -100,000.00. Once sent, you'll have to contact your customer directly to make changes to the credit note.' The dialog has 'Continue Editing' and 'Send Credit Note' buttons. A 'Total' row at the bottom shows a value of 750,000.00. Orange circles with numbers 7, 8, 9, and 10 are placed over the 'Calculate' and 'Submit' buttons, the 'Send Credit Note' button, and the 'Total' value respectively.

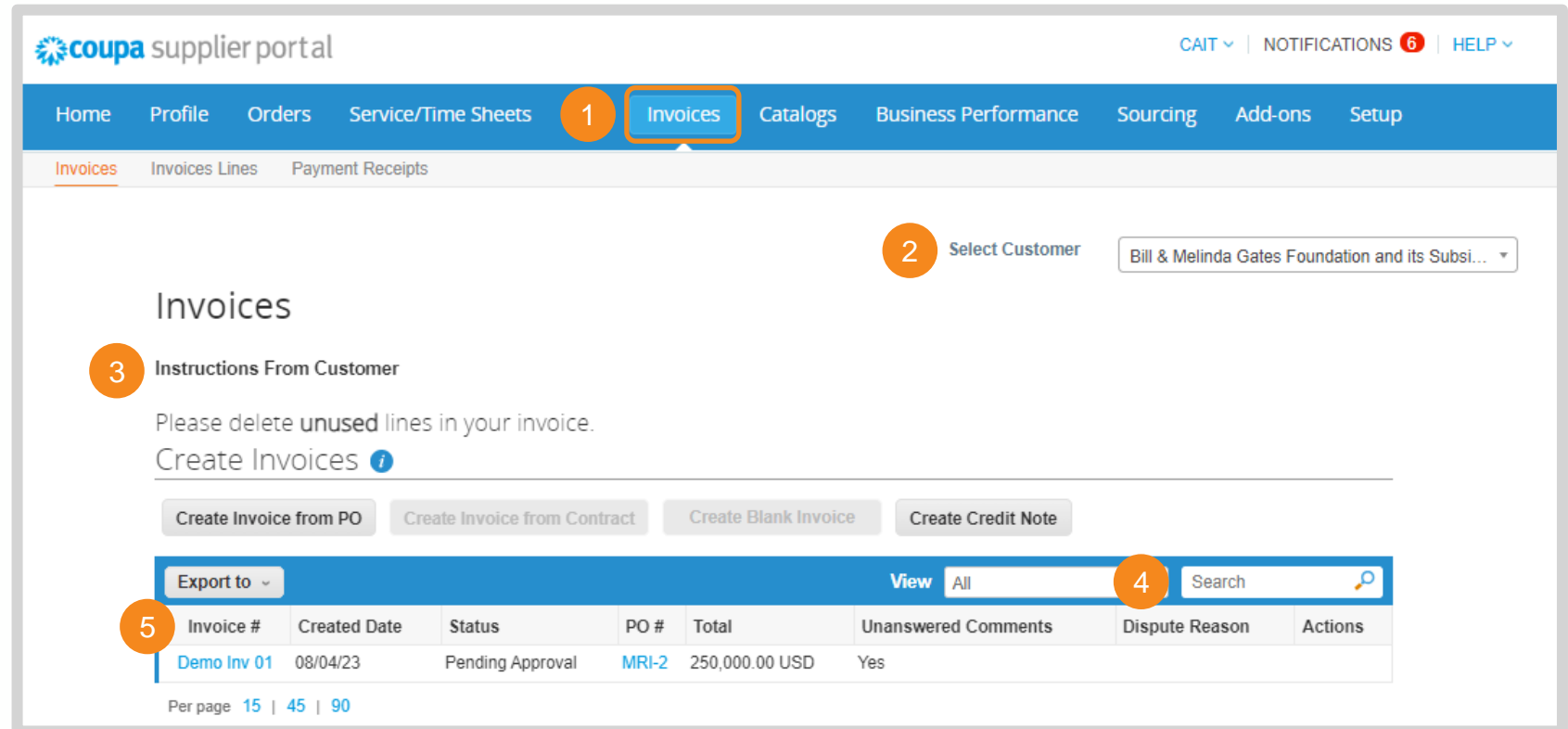
View Invoice

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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



The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'Invoices' (1), 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below the navigation bar, the 'Invoices' section is active, showing a customer selection dropdown (2) set to 'Bill & Melinda Gates Foundation and its Subsidiaries'. The main content area features a title 'Invoices' and a section for 'Instructions From Customer' (3) with the text 'Please delete unused lines in your invoice.' and a 'Create Invoices' button. Below this, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A search bar (4) is used to find a specific invoice, and the search results table (5) shows the following data:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
Demo Inv 01	08/04/23	Pending Approval	MRI-2	250,000.00 USD	Yes		

Per page 15 | 45 | 90

Create Invoice Table View (1 / 2)

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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**

Select Customer: Bill & Melinda Gates Foundation and its Subs...

Invoices

Instructions From Customer

Please delete **unused** lines in your invoice.

Create Invoices ⓘ

Create Invoice from PO | Create Invoice from Contract | Create Blank Invoice | Create Credit Note

Export to | **View** All | Search

Invoice #	Created Date	Status	PO #	Total	Unanswered	Person	Actions
Demo Inv 01	08/04/23	Pending Approval	MRI-2	250,000.00 USD	Yes		

Per page: 15 | 45 | 90

View dropdown menu options: All, Abandoned, Approved, Credit Notes, Disputed, Disputes with a supplier response, Disputes without supplier response, Draft, Overdue invoices, Payment Information, Pending Approval, Processing, Unpaid invoices, Voided, **Create View**

Create Invoice Table View (2 / 2)

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Invoice 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

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
Commented	Invoice #
Comments	Created Date
Date Of Supply	Status
Date Of Supply	PO #
Delivery Number	Total
Disputed Date	Unanswered Comments
Document Type	Dispute Reason
Invoice Date	Actions
Last Updated Date	
Linked Document	
Original Invoice Date	
Original Invoice Number	
Paid	

Default Sort Order

Sort by in order.

4

Manage Disputed Invoices (1 / 2)

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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


Invoices


Instructions From Customer

Please delete **unused** lines in your invoice.

Create Invoices 

[Create Invoice from PO](#) [Create Invoice from Contract](#) [Create Blank Invoice](#) [Create Credit Note](#)

Export to View Search 

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
Dispute Demo	08/17/23	Disputed	MRI-446	10.00 USD	No	Invoice date inaccur	
Demo Invoice 3	08/16/23	Approved	MRI-446	2,550,000.00 USD	No		
Prepay Demo 2	08/16/23	Approved	MRI-446	0.00 USD	No		
Prepay 1 Demo	08/16/23	Approved	MRI-446	700,000.00 USD	No		

Manage Disputed Invoices (2 / 2)

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Invoice Processing in the CSP

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.

Please review the invoice and determine the resolution option: ▼

Void
If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.

Correct Invoice
If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.

Void Invoice ✕

disputed status. Once voided, this invoice will be archived for review for payment. Please confirm if you would like to

4

Create Invoice (1 / 4)

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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.

The image shows two overlapping screenshots of a web application. The background screenshot is an email interface for Purchase Order #MRI-145. It displays the order summary with a 'Create Invoice' button circled in orange and labeled with a '1'. The foreground screenshot is the 'Purchase Order #MRI-2' details page. It shows a 'Create Invoice' button at the bottom right, also circled in orange and labeled with a '2'. The details page includes sections for General Info, Shipping, and Lines.

Purchase Order #MRI-145

foundation-test.coupahost.com

Powered by

Bill & Melinda Gates Medical Research Institute Purchase Order #MRI-145

Order Summary

Date 07/18/23
PO Total 750,000.00 USD
Shipping Terms FOB - Destination
Payment Terms Net60
Contact Caitlin Cyron
caitlin.cyron@foundation.org

Manage Order Create Invoice

Orders details below

Acknowledge PO Add Shipment Tracking Add Comment

Purchase Order #MRI-2

Order unacknowledged

General Info

Status Issued - Sent via Email
Order Date 08/04/23
Revision Date 08/04/23
Requester Caitlin Cyron
Email caitlin.cyron@gatesfoundation.org
Payment Term Net60
Attachments None
Acknowledged

Shipping

Ship-To Address One Kendall Square
Building 600, Suite 6-301
Cambridge, MA 02139
United States
Attn: Caitlin Cyron
Terms FOB - Destination

Shipment Tracking No shipment tracking.

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Sample Goods	1	Each	250,000.00	250,000.00	0.00
2	Sample Services			500,000.00	500,000.00	0.00

Per page 15 | 45 | 90

Total USD 750,000.00

Create Invoice Save Print View

Create Invoice (2 / 4)

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Invoice Processing via SAN

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.

Create Invoice Create

4 General Info

* Invoice #

* Invoice Date

Payment Term

* Currency

Status

* Image Scan No file chosen

Supplier Note

Attachments [File](#) | [URL](#) | [Text](#)

3 From

* Supplier

Supplier Tax ID

* Invoice From Address
100 Almond Avenue
Los Altos, CA 94022
United States

* Remit-To Address
100 Almond Avenue
Los Altos, CA 94022
United States

Bank Name:

Beneficiary Name:

Bank Account Number:

Routing Number:

* Ship From Address
100 Almond Avenue
Los Altos, CA 94022
United States


To




Customer




Create Invoice (3 / 4)



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Invoice Processing via SAN

5  Lines Line Level Taxation

Type	Description	Qty	UOM	Price	
	Sample Goods	1.0000	Each	250,000.00	250,000.00 
PO Line MRI-2-1		Service/Time Sheet Line None	Contract 		Supplier Part Number <input type="text"/>
Billing Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential					

Type	Description	Price			
	Sample Services	500,000.00	500,000.00 		
PO Line MRI-2-2		Service/Time Sheet Line None	Contract 		Supplier Part Number <input type="text"/>
Billing Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential					

 Add Line  Pick lines from Contract Totals & Taxes

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)

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Invoice Processing via SAN

6

Totals & Taxes

Lines Net Total	0.00
-----------------	------

Shipping

Tax

Tax Reference

Handling

Tax

Tax Reference

Misc

Tax

Tax Reference

Tax

Total Tax

Net Total

Total

0.00

7

8

9

Are You Ready to Send?

You're about to send an invoice to Bill & Melinda Gates Foundation and its Subsidiaries for a total amount of 250,000.00. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing 9

Send Invoice

Delete Cancel Save as Draft Calculate Submit

Email me status updates for invoices I create this way

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.

Create Credit Note (1 / 5)

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Invoice Processing via SAN

Credit notes can be created from the Orders table:

1. Click **Manage Order**
2. Edit the URL so that it reads https://gatesfoundation.coupa host.com/supplier_order_headers/. Press Enter
3. Click the **Red Coins** in the Actions column

Purchase Order #MRI-145 Inbox x

foundation-test.coupa host.com

Powered by coupa

Bill & Melinda Gates Medical Research Institute Purchase Order #MRI-145

Order Summary

Date 07/18/23
PO Total 750,000.00 USD
Shipping Terms FOB - Destination
Payment Terms Net60
Contact Caitlin Cyron
caitlin.cyron@gatesfoundation.org

1 **Manage Order** **Create Invoice**

Orders details below

Sign Out

Purchase Orders

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.

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
MRI-164	08/10/23	Issued	08/16/23	TESTING	No	300.00 USD		

Create Credit Note (2 / 5)

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Invoice Processing via SAN

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.

The screenshot shows a software interface with three overlapping dialog boxes. The background dialog is titled "Enter a new address" and contains a text area with instructions: "Create a Remit To address to make it available on invoices to specify the details of how you would want to be paid. The Remit To name helps when creating invoices online." Below this are several input fields, including a dropdown menu for "United States" and a red-bordered input field. The middle dialog is titled "Choose Invoice From Address" and contains the text: "No Invoice From Addresses to choose from. To add a new address click Create New Remit-To." It has two buttons: "Cancel" (with a circled '2') and "Create New Remit-To" (highlighted with an orange border). The bottom dialog is titled "3 Remit To Name" and has a "3" in a red circle. It contains a "Remit To Name" input field, followed by four "Line" input fields labeled "Line 1", "Line 2", "Line 3", and "Line 4". At the bottom of this dialog are two buttons: "Cancel" (with a circled '4') and "Create and Use" (highlighted with an orange border).

Create Credit Note (3 / 5)

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Invoice Processing via SAN

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

Create Credit Note Create

4 General Info 📍 From

* Credit Note #	<input type="text"/>	* Supplier	CSP Demo
* Credit Note Date	08/04/23	Supplier Tax ID	123456789
Payment Term	Net60	* Invoice From Address	CSP Demo 100 Almond Avenue Los Altos, CA 94022 United States
* Currency	USD	* Remit-To Address	CSP Demo 100 Almond Avenue Los Altos, CA 94022 United States
Status	Draft	Bank Name:	Wells Fargo
* Original Invoice #	<input type="text"/>	Beneficiary Name:	CSP Demo
* Original Invoice Date	mm/dd/yy	Bank Account Number:	*****5666
* Image Scan	<input type="button" value="Choose File"/> No file chosen	Routing Number:	*****0000
Supplier Note	<input type="text"/>	* Ship From Address	CSP Demo 100 Almond Avenue Los Altos, CA 94022 United States
Attachments	Add File URL Text	📍 To	

Customer Bill & Melinda Gates Foundation and its Subsidiaries

Create Credit Note (4 / 5)

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Invoice Processing via SAN

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.

☰ Lines Line Level Taxation

Adjustment Type Price ▾

Type	Description	Price	
	<input type="text" value="Additional Services"/>	<input type="text" value="-100000"/>	500,000.00 6 ✕
PO Line MRI-3-1	Service/Time Sheet Line None	Contract ▾	Supplier Part Number <input type="text"/>
Billing Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential			

Create Credit Note (5 / 5)

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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**

The screenshot shows the 'Totals & Taxes' section of a credit note form. The form is divided into three sections: Shipping, Handling, and Misc. Each section has a 'Tax' field with a dropdown menu, a percentage field, and a 'Tax Reference' field. The 'Lines Net Total' is 750,000.00. At the bottom, there are buttons for 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. A confirmation dialog box titled 'Are You Ready to Send?' is overlaid on the form, displaying the message: 'You're about to send an credit note to Bill & Melinda Gates Foundation and its Subsidiaries for a total amount of -100,000.00. Once sent, you'll have to contact your customer directly to make changes to the credit note.' The dialog box has a 'Continue Editing' button and a 'Send Credit Note' button. The 'Calculate' and 'Submit' buttons are highlighted with orange boxes and numbered 8 and 9 respectively. The 'Send Credit Note' button in the dialog box is highlighted with an orange box and numbered 10. The 'Total' field at the bottom of the form shows 750,000.00.

Partial Invoice

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Invoice Processing via SAN

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.

The screenshot displays the 'Lines' section of an invoice system. It features two line items, each with a header row and a details row. The first line item is 'Sample Goods' with a quantity of 1.0000 and a price of 250,000.00. The second line item is 'Sample Services' with a price of 500,000.00. The interface includes fields for Type, Description, Qty, UOM, Price, PO Line, Service/Time Sheet Line, Contract, and Supplier Part Number. There are also buttons for 'Add Line', 'Pick lines from Contract', and 'Totals & Taxes'. Three orange circles with numbers 1, 2, and 3 highlight the delete button, the quantity field, and the price field respectively.

Type	Description	Qty	UOM	Price	
Shopping Cart	Sample Goods	1.0000	Each	250,000.00	250,000.00
PO Line		Service/Time Sheet Line	Contract	Supplier Part Number	
MRI-2-1		None			
Billing	Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential				
Type	Description	Price			
Truck	Sample Services	500,000.00		500,000.00	
PO Line		Service/Time Sheet Line	Contract	Supplier Part Number	
MRI-2-2		None			
Billing	Gates MRI-10499-5405-GAFA0001-USA-Non-Confidential				

+ Add Line + Pick lines from Contract Totals & Taxes

Start Up or Up-Front Fees (1 / 2)

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Invoice Processing via SAN

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

Lines

Line Level Taxation

Type	Description	Price	
	<input type="text" value="CRO Fees"/>	<input type="text" value="0.00"/>	0.00 3 
PO Line MRI-446-1	Service/Time Sheet Line None	Contract Demo SOW (Published) 	Supplier Part Number <input type="text"/>
Billing Gates MRI-70600-5565-RS000001-USA-Non-Confidential			

Type	Description	Price	
	1 <input type="text" value="Prepay Fees (\$20,000)"/>	2 <input type="text" value="20,000.00"/>	0.00 
PO Line MRI-446-4	Service/Time Sheet Line None	Contract Demo SOW (Published) 	Supplier Part Number <input type="text"/>
Billing Gates MRI-70600-1315-RS000001-USA-Non-Confidential			

Start Up or Up-Front Fees (2 / 2)

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Invoice Processing via SAN

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.

Lines

Line Level Taxation

Type	Description	Price	
	CRO Fees	4 20,000	0.00 
PO Line MRI-446-1	Service/Time Sheet Line None	Contract Demo SOW (Published) 	Supplier Part Number <input type="text"/>
Billing Gates MRI-70600-5565-RS000001-USA-Non-Confidential			

Type	Description	Price	
	Prepay Fees (\$20,000)	5 -20,000	0.00 
PO Line MRI-446-4	Service/Time Sheet Line None	Contract Demo SOW (Published) 	Supplier Part Number <input type="text"/>
Billing Gates MRI-70600-1315-RS000001-USA-Non-Confidential			

Manage Disputed Invoices (1 / 3)

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Invoice Processing via SAN

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**

The screenshot shows an email notification with the following content:

Invoice #Dispute Demo 2 has been marked as Disputed by Bill & Melinda Gates Foundation and its Subsidiaries

Hi,

Your Invoice **Dispute Demo 2** has been marked as disputed by your customer, Bill & Melinda Gates Foundation and its Subsidiaries.

Dispute Reason(s)

- Invoice date inaccurate

Date: 2023-08-17

Additional Comments: None

This invoice is available on the [Coupa Supplier Po](#) disputed invoice would mean you are creating a cc be submitted to Bill & Melinda Gates Foundation a

Resolving the disputed invoice links the corrected, resolve the disputed invoice, Bill & Melinda Gates choose to withdraw it from this status.

If you are a supplier using Coupa Invoicing in Euro cancel an invoice you must first create and submit canceled, you can create and submit a new invoice

This process is recommended to comply with tax l so that you do not expose yourself or your custom corrected.

Invoice Dispute Demo 2 has been received successfully

Good news,

Your invoice has been received successfully by your customer, Bill & Melinda Gates Foundation and its Subsidiaries.

You will receive e-mail notifications with status updates as your customer processes this invoice. If you have any questions, you can simply contact your customer through regular channels, or enter a comment on the invoice if your customer allows it.

Callout 1: A button labeled "View Online" is highlighted with a red border and a red circle containing the number 1.

Callout 2: Two buttons, "View Status" and "Add Comments", are highlighted with red borders and a red circle containing the number 2.

Manage Disputed Invoices (2 / 3)

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Invoice Processing via SAN

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

Instructions From Customer

Please delete **unused** lines in your invoice.
Create Invoices 

[Create Invoice from PO](#) [Create Invoice from Contract](#) [Create Blank Invoice](#) [Create Credit Note](#)

View Search 

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
Dispute Demo 2	08/17/23	Disputed	MRI-446	10.00 USD	No	Invoice date inaccurate	
Dispute Demo	08/17/23	Voided	MRI-446	10.00 USD	No	Invoice date inaccurate	
Demo Invoice 3	08/16/23	Approved	MRI-446	2,550,000.00 USD	No		
Prepay Demo 2	08/16/23	Approved	MRI-446	0.00 USD	No		
Prepay 1 Demo	08/16/23	Approved	MRI-446	700,000.00 USD	No		

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Manage Disputed Invoices (3 / 3)

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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.

Please review the invoice and determine the resolution option: ▼

Void
If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.

Correct Invoice
If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.

6

Void Invoice ✕

disputed status. Once voided, this invoice will be archived
review for payment. Please confirm if you would like to

Void **Correct Invoice**

No **Yes**

Coupa Supplier Portal (CSP) Purchase Order (PO) 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").

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)

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- [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:

ENTITY INFORMATION FORM

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.

Key Information Requested:
Legal Name, Company Contacts, Company Addresses, Tax Registration(s), Diversity Certifications

ONBOARDING FORM

If you are a new supplier for Gates MRI that has been approved for business, you will receive this form to complete your profile.

Key Information Requested:
Banking Details

UPDATE FORM

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.

Note: If your tax ID has changed, you will need to request a new onboarding form.

Email Notification

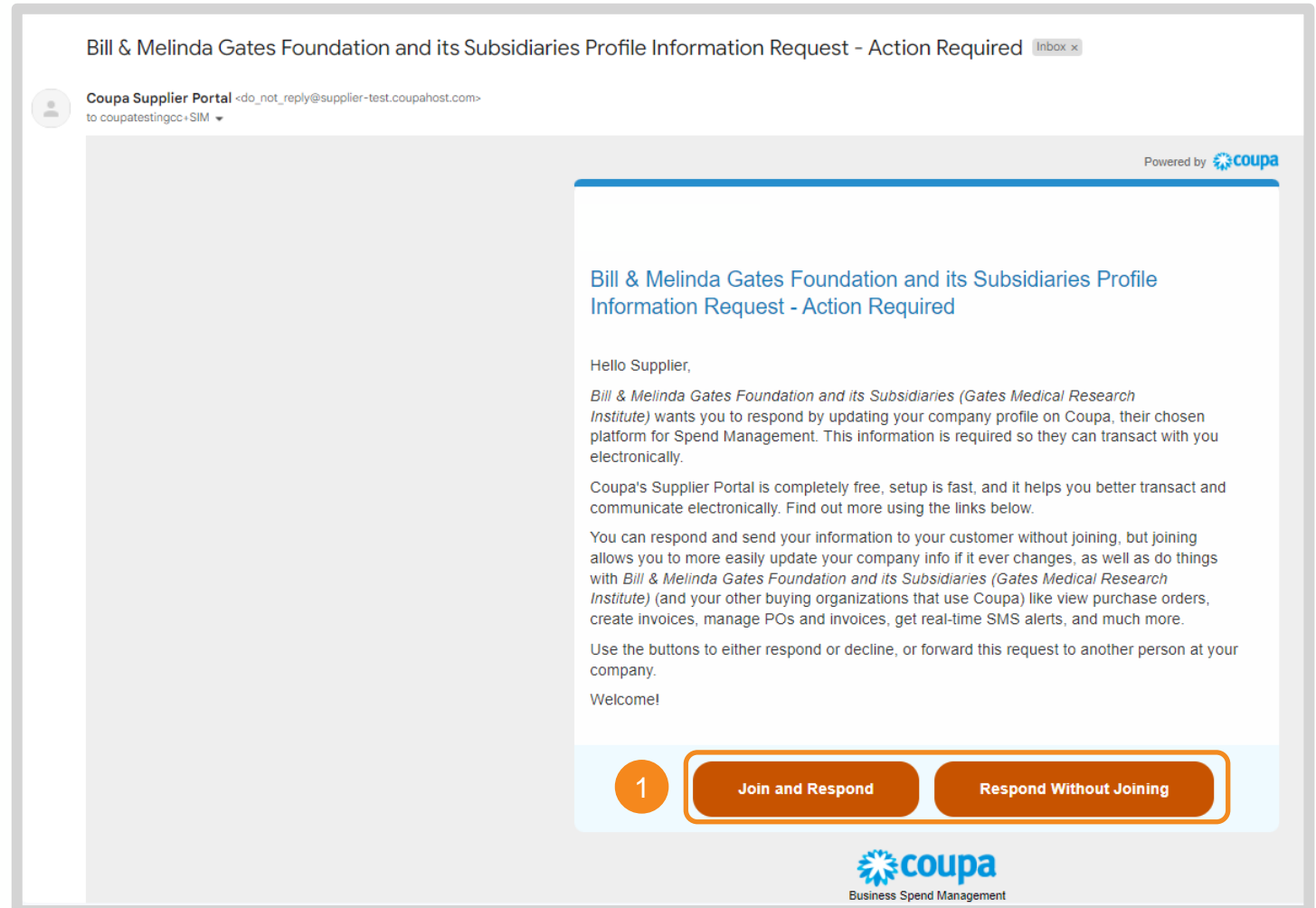
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SIM Notifications

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.



CSP Notification

SIM Notifications

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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

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', and 'Business Performance'. A notification badge with the number '1' is visible in the top right corner. A dropdown menu is open, showing a notification: 'An information update request is received. Update your profile for Bill & Melinda Gates Foundation and its Subsidiaries'. A second badge with the number '2' points to the notification. Below the notification, the main content area shows the profile for 'Bill & Melinda Gates Foundation and its Subsidiaries'. A yellow banner indicates that some information has been auto-filled from the user's Public Profile. The 'Supplier Information' section is visible, with a 'SIM Demo' entry. Below this, the 'Bill & Melinda Gates Medical Research Institute Supplier Information' section is shown, including a contact email and a form for the 'Legal Name' with the value 'SIM Demo'.

Entity Information Form (1 / 5)

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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.

The screenshot displays the Coupa Supplier Portal interface. At the top, the user is identified as JOHN with 22 notifications. The navigation menu includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The current page is the 'Information Requests' section under the 'Profile' tab, specifically for 'Bill & Melinda Gates Foundation and its Subsidiaries - Seawell Industry'. A notification states that some information has been auto-filled from the user's Public Profile. The form contains two main sections: 'Supplier Information' and 'Bill & Melinda Gates Medical Research Institute Supplier Information'. The 'Supplier Information' section includes a text input field for 'Legal Name' (containing 'Seawell Industry Inc') and a 'Legal Name Confirmation' field. The 'Doing Business As' section includes a text input field (containing 'Seawell Industry Inc'). Red circled numbers 1 and 2 highlight the 'Legal Name' and 'Doing Business As' fields, respectively. A note at the bottom of the form states: 'Names provided must be on tax form.'

Entity Information Form (2 / 5)

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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.

The screenshot displays the 'Company Contacts' form. It is divided into two main sections. The top section, titled 'Company Contacts', contains a 'Primary Contact' form with fields for First Name (Cait), Last Name (Komatsu), Email address (coupatestingcc+SIM@gmail.com), Work Phone, Mobile Phone, and Fax. Each phone field includes a dropdown for 'US/Canada' and a text input with the placeholder '650-555-1212'. A blue 'Add Contact' button is highlighted with an orange circle and the number 4. The bottom section, titled 'Contacts', contains an 'Additional Contacts' form with a 'Contact Purpose' dropdown (Select Some Options), and fields for First Name (Cait), Last Name (Komatsu), Email address (coupatestingcc+SIM@gmail.com), and Mobile Phone. A red 'X' icon in a box is highlighted with an orange circle and the number 6. Information icons (i) are present next to the Contact Purpose, Email address, and Mobile Phone fields. A note above the 'Additional Contacts' section reads: 'Please provide the contact we should reach out to for financial issues below. If you have other additional contacts, click the "Add" button again to add another contact, repeat as needed. NOTE: If the "Add" button was clicked in error, click the red "X" to remove the additional section(s).'

Entity Information Form (3 / 5)

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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.

Company Addresses

For primary and additional addresses, please provide an address purpose, and leave the Location Code field blank.

Primary Address

Address Purpose
Select Some Options

* Region
Country/Region
United States

State Region
None

State ISO Code

Address Name

* Street Address

Street Address 2

Street Address 3

Street Address 4

* City

* Postal Code

Location Code

* Do you have additional addresses you'd like to provide at this time?
 Yes
 No

Addresses

Add one or more Addresses.

Add Address

Additional Addresses

Address Purpose
Select Some Options

X

Entity Information Form (4 / 5)

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Gates MRI SIM Forms

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.

The screenshot displays two overlapping form sections. The top section is titled "Tax Registration" and contains instructions: "To add your Tax Registration information if it did not auto-populate please click the 'Add' button." and "If you have more than one Tax Registration then click the 'Add' button again to add another tax registration, repeat as needed." A note states: "NOTE: If the 'Add' button was clicked in error, click the red 'X' to remove the additional section(s)." Below the instructions is a form titled "* Tax Registration" with a red circle containing the number "11" next to the "Country" dropdown menu, which is set to "Germany". Below the country field is the "VAT ID" field with the value "123456789". There is a "Local" checkbox which is unchecked. A note at the bottom of this section reads "**Leave 'Local' box unchecked**". The bottom section is titled "* Federal Tax Form" and has a red circle containing the number "12" next to the "* Type" dropdown menu, which is set to "W8". Below this is the "* Attachments" section, which includes an "Add File" button and a file upload area containing a dummy attachment named "This_is_a_dummy_attachment.docx".

Entity Information Form (5 / 5)

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Gates MRI SIM Forms

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 LGBTQ+ 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.

The screenshot shows a web form titled "Diversity". It is divided into several sections:

- Diversity:** A required field with the question "Do you have any diversity certifications?". It has two radio button options: "Yes" (selected) and "No".
- Supplier Diversity:** A section with the instruction "If you are a small or diverse business, add the categories that apply to you." Below this is an "Add Diversity" button.
- Supplier Diversity (Card):** A card containing:
 - Country:** A dropdown menu with "United States" selected. A red "X" icon in a box is next to it.
 - Diversity Category:** A text input field with "Woman Owned Business Enterprise" entered.
- Diversity Certificate:** A section with three fields:
 - Agency:** A text input field with "NWBOC" entered.
 - Effective Date:** A date picker with "08/15/23" selected.
 - Expiration Date:** A date picker with "11/25/23" selected.
- Attachments:** A section with an "Add File" button and a file upload area containing "Diversity_Certification.pdf".

At the bottom right, there is a navigation bar with three buttons: "Decline", "Save" (with a "17" callout), and "Submit for Approval" (highlighted with an orange border).

Onboarding Form (1 / 8)

Gates MRI SIM Forms

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

1. Legal Name

2. Doing Business As

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

Supplier Information

CSP Demo

Bill & Melinda Gates Medical Research Institute Supplier Information

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

1 Legal Name
CSP Demo

2 Doing Business As

Names provided must be on tax form.

Onboarding Form (2 / 8)

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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.

Company Contacts

Please review the primary contact information populated below, and update as needed.

3 Primary Contact

First Name
Cait

Last Name
Komatsu

Email address
coupatestingcc+SIM@gmail.com

Work Phone
US/Canada 650-555-1212

Mobile Phone
US/Canada 650-555-1212

Fax
US/Canada 650-555-1212

Please provide the contact we should reach out to for financial issues below.
If you have other additional contacts, click the "Add" button again to add another contact, repeat as needed.
NOTE: If the "Add" button was clicked in error, click the red "X" to remove the additional section(s).

4 Add Contact

Contacts
Add one or more Contacts.

5 Additional Contacts

Contact Purpose
Select Some Options

First Name
Cait

Last Name
Komatsu

Email address
coupatestingcc+SIM@gmail.com

Mobile Phone
US/Canada 650-555-1212

6 X

Onboarding Form (3 / 8)

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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.

The screenshot shows the 'Company Addresses' form. At the top, it says 'Company Addresses' and 'For primary and additional addresses, please provide an address purpose, and leave the Location Code field blank.' Below this is a section for 'Primary Address' with fields for 'Address Purpose' (with a callout 7), 'Region', 'Country/Region' (set to 'United States'), 'State Region' (set to 'None'), 'State ISO Code', 'Address Name', and 'Street Address'. To the right of these fields are 'Street Address 3', 'Street Address 4', 'City', 'Postal Code', and 'Location Code'. Below these is a question: '* Do you have additional addresses you'd like to provide at this time?' with radio buttons for 'Yes' (selected) and 'No'. At the bottom of the primary address section is an 'Add Address' button (with callout 8). Below this is a section for 'Additional Addresses' with a callout 9 pointing to the 'Address Purpose' dropdown. At the bottom right of the form is a callout 10 pointing to a red 'X' icon in a box, used for removing address cards.

Onboarding Form (4 / 8)

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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.

The screenshot shows a web form titled "Remit-To Addresses" with a blue header. Below the header, there is a text box with instructions: "To add your remit-to information if it did not auto-populate please click the 'Add Remit-To' button." and "If you have more than one remit-to then click the 'Add Remit-to' button to add the additional addresses." A note below reads: "NOTE: If the 'Add Remit-to' button was clicked in error, click the red 'X' to remove the additional section(s)." The form has a section titled "Remit-To Addresses" with a sub-header "Add one or more Remit-To Addresses by either filling out a n...". A blue button labeled "Add Remit-To" is highlighted with a red circle and the number 11. A "Choose Remit-To Address" popup window is overlaid on the form, also highlighted with a red circle and the number 12. The popup has a blue header and a close button (X). It contains a yellow box with text: "Choose a Remit-to Location below - Recommended" and "It's a few more fields, but provides compliance, verification, and re-usability. Otherwise, click 'Cancel' to add info to your customer's form manually." Below this, there is a section "Choose existing or create new Remit-To Address:" with two entries. The first entry shows "100 Market Street, San Francisco, CA 94105, United States" and "Bank Account (Bank of America)" with a "Choose" button. The second entry shows "100 Bleeker Street, San Francisco, CA 94105" and "Bank Account (Chase Bank)" with a "Choose" button. At the bottom of the popup, there is a "+ Create New Remit-To Address" button and a "Cancel" button.

Onboarding Form (5 / 8)

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Gates MRI SIM Forms

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.

The screenshot shows a web form titled "Remittance Information" with two main sections: "Remit-To Details" and "Address Details".

- Remit-To Details:**
 - Field 13: "* Remit To Email Address" with the value "coupatestingcc+RTA@gmail.com".
 - Field 14: "* Financial Contact Name" (empty).
 - Field 15: "* Financial Contact Phone Number" (empty).
- Address Details:**
 - Field 16: "Address Name" (empty).
 - * Street Address: "100 Almond Avenue".
 - Street Address 2: (empty).
 - * City: "Los Altos".
 - * Region: "United States" (dropdown).
 - State Region: "California - CA" (dropdown).
 - State ISO Code: "US-CA".
 - * Postal Code: "94022".

Onboarding Form (6 / 8)

Gates MRI SIM Forms

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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.

Beneficiary Bank Address and Contact Details

17 * Is your bank located in the United States?

18 * Bank Name

* Bank Address

No special characters (#, -, &, and /).

* Bank City

* Bank State or Region

Format: Capitalized state abbreviation (e.g. NY).

* Bank Country/Region

Bank Contact Name

Bank Contact Phone Number

Onboarding Form (7 / 8)

Gates MRI SIM Forms

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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.

Banking Details

19 * Is your Beneficiary Name different than your Legal Name?

Yes
 No

If legal name and account holder do not match, explanation required here & documentation must be attached.

* Bank Account Currency

20 USD

Bank account currency must match the currency defined on agreement.

* Bank Account Type

e.g. Checking, Savings, Other

* Bank Account Number

*****666

* Bank ACH Routing Number

*****000

* Bank Wire Routing Number

Onboarding Form (8 / 8)

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Gates MRI SIM Forms

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.

The Gates Medical Research Institute transacts with suppliers in many different countries with unique banking requirements. Please complete the fields required by your banking institution.

An intermediary bank is a bank that acts on behalf of the beneficiary bank. A sender is generally not required to know intermediary bank information.

21 * Do you have intermediary bank information to provide at this time?

Yes
 No

For further credit information is used in rare circumstances where a second beneficiary is required. Please indicate the name and account number of the final beneficiary account holder at a brokerage or bank.

22 * Does your bank require further credit information to receive payments?

Yes
 No

Additional Information

DUNS Number

23 *i*

PO Email

24 *i*

25

Update Form (1 / 6)

Gates MRI SIM Forms

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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 supplierhelp@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)

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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.

* Did your legal name change?
 Yes
 No

2 * Do you have supporting documentation for the legal name change?
 Yes
 No

3 * New Legal Name
CSP Demo
Legal name should match the entity's legal name on lir

4 New Doing Business As
Names provided must be on tax form.

5

Confirm your new legal name is affiliated with the tax identification number on file with Gates Medical Research Institute (Gates MRI). Gates MRI's policy for tax identification number changes is to create a new supplier record. If your tax ID has changed, please return to the top of the form, and change your answer to "Did your Tax Identification number change" to Yes.

* Tax Registrations
Use this section to add all your applicable tax registrations.
[Add Tax Registration](#)

* Tax Registration

Country
United States

Tax ID
111222334

Local

Update Form (3 / 6)

Gates MRI SIM Forms

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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.

Please provide one more more of the following supporting documents that reflect the new Legal Name of your organization:

- IRS Name Change Acknowledgement Letter (US Only)
- Amended Organizational Documentation (e.g. Articles of Incorporation, Trust Agreement)
- Name Change Verification from State or other Government Agency
- If you are a government agency, copy of Government Action providing for a name change
- A Governmental document that reflects the approved name change

* Legal Name Change Supporting Documentation

6 No file chosen

7 * Federal Tax Form

* Type

* Attachments

Add [File](#)

Please attach your updated tax form.

Update Form (4 / 6)

Gates MRI SIM Forms

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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.

The screenshot shows a web form with the following sections:

- * Did your tax classification change?**
 - Yes
 - No
- * Tax Classification** (Step 8): A dropdown menu.
- * Federal Tax Form** (Step 9):
 - * Type**: A dropdown menu.
 - * Attachments**: A section with an "Add File" link.

At the bottom of the form, there is a note: "If not provided to support a Legal Name change above, please attach your updated tax form. If provided above for a Legal Name change, please re-attach here as well."

Update Form (5 / 6)

Gates MRI SIM Forms

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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.

The screenshot displays a multi-step form interface. Step 10 is a section titled '* Did your PO Email Address change?' with radio buttons for 'Yes' (selected) and 'No'. Below this is a text input field for '* PO Email' containing 'coupatestingcc+PO'. Step 11 is a section titled '* Remit-To Addresses' with a sub-header '**Click "Add Remit-to" for each Remit-to currently associated with your profile. If your current remit-to address is inactive, click the red "X" to deactivate it. For all new Remit-to's click "Add Remit-to" and populate all required fields**'. It includes a button 'Add Remit-To' and a sub-section '* Remit-to Update Form' containing a 'Remit-To Details' card. The card has a title 'Remit-To Details', a sub-section 'Remit To Email Address' with an input field containing 'coupatestingcc+RTA@gmail.com' and an information icon, and a label 'What email address should your remittance information be sent to?'. A red 'X' icon is visible in the top right of the card. Step 12 is a red 'X' icon in the top right corner of the 'Remit-To Details' card.

Update Form (6 / 6)

Gates MRI SIM Forms

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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.

13 * Is there additional information you would like to update?

Yes

No

Decline

Save 14

Submit for Approval

Managing Comments

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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

The screenshot illustrates the process of submitting a comment and receiving a notification. On the left, a comment form is shown with a text input field containing the word "comment" and an "Add Comment" button. A "Participants" list below the form shows "Cait Cyron" as the user. On the right, a notification email is displayed, titled "New Comment on Profile Info submitted to Bill & Melinda Gates Foundation and its Subsidiaries". The email body contains the Coupa logo, the user's name "Caitlin Cyron", the date and time of the comment, and the text of the comment. At the bottom of the email, there are "View Profile" and "Respond" buttons.

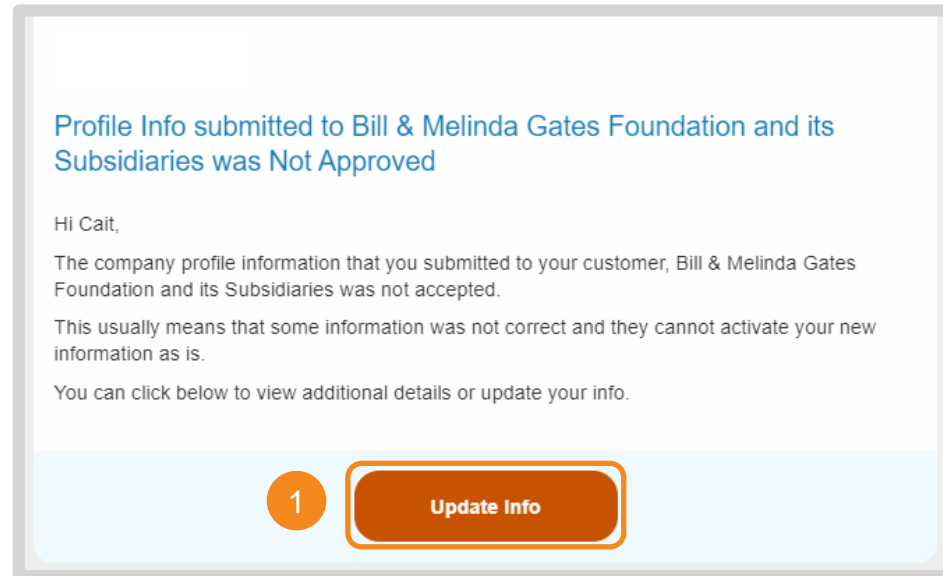
Form Rejection

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Managing Comments, Rejection, and Approvals

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



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

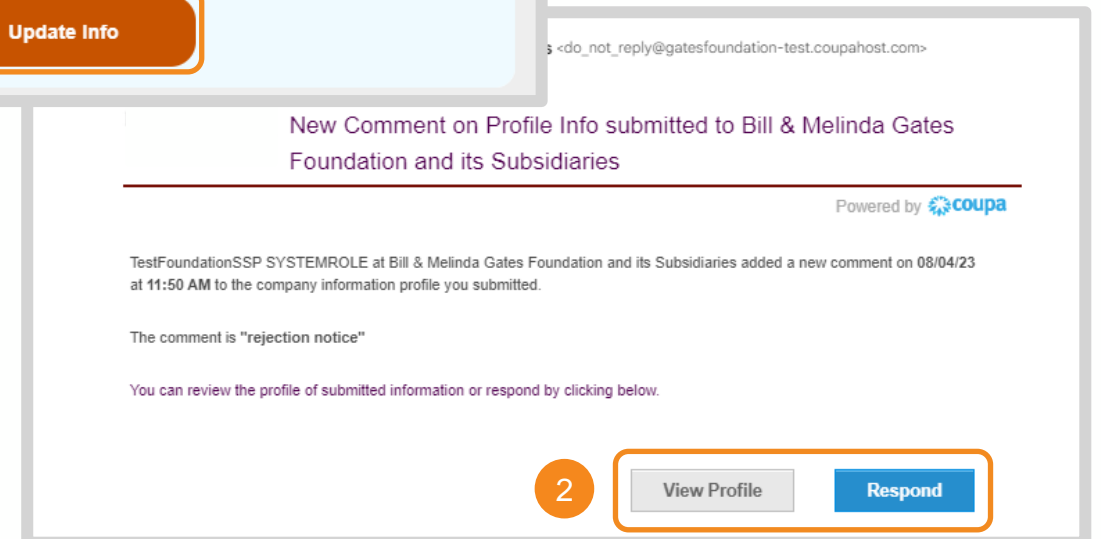
Hi Cait,

The company profile information that you submitted to your customer, Bill & Melinda 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**



<do_not_reply@gatesfoundation-test.coupa.com>

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

Powered by 

TestFoundationSSP SYSTEMROLE at Bill & Melinda Gates Foundation and its Subsidiaries added a new comment on 08/04/23 at 11:50 AM to the company information profile you submitted.

The comment is "rejection notice"

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


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

Form Approval

Managing Comments, Rejection, and Approvals

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You will receive the following email once Gates MRI has reviewed and approved the information you submitted via SIM form.

Powered by 

Profile Info submitted to Bill & Melinda Gates Foundation and its Subsidiaries was Approved


Hi Cait,

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.

[View Profile Info](#)


Business Spend Management

Self-Service in the CSP

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SIM in the CSP

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.

The screenshot displays the Coupa supplier portal interface. The navigation ribbon at the top includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Profile' tab is selected and highlighted with a blue box and a '1' in a circle. Below the navigation ribbon, the 'Information Requests' link is highlighted with an orange box and a '2' in a circle. The main content area shows the profile for 'Bill & Melinda Gates Foundation and its Subsidiaries', with a dropdown menu for the customer name highlighted by a '3' in a circle. A green notification bar at the top of the form area states 'Your information has been submitted'. Below this, the 'Supplier Information' section is visible, showing 'CSP Demo' as the current information. At the bottom of the form, the 'Update Info' button is highlighted with an orange box and a '4' in a circle.

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.