

sanofi

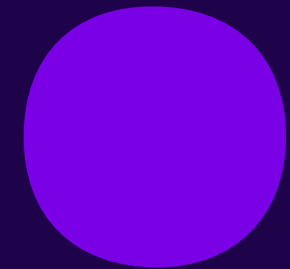
Coupa Supplier Portal (CSP) Training

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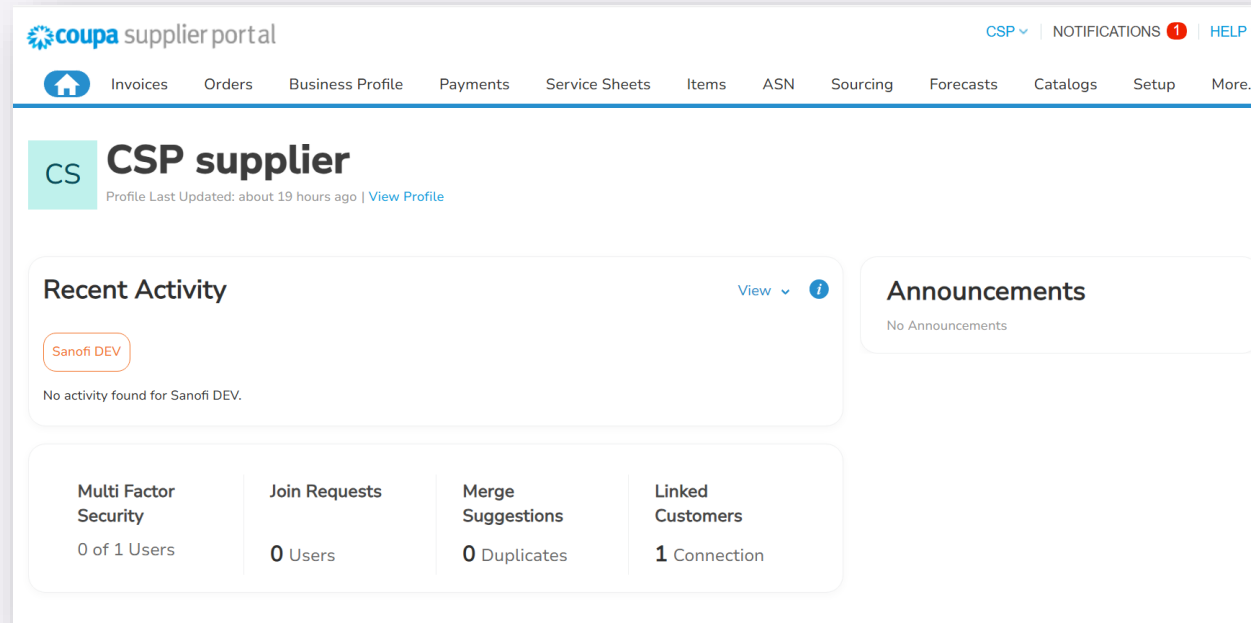


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01 Overview of the CSP



What is the Coupa Supplier Portal (CSP)?



What is the Coupa supplier Portal?

The **Coupa Supplier Portal (CSP)** is a free tool that enables suppliers to easily do business with their customers using Coupa.*

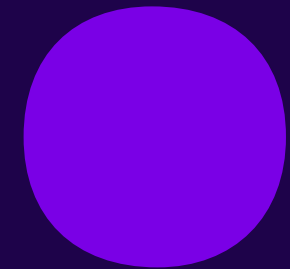
CSP will be the default collaboration channel for Sanofi and our suppliers, offering benefits such as:

- Creating electronic invoices fast and efficiently
- Faster invoice payments and real-time visibility of payment status
- Reduced manual intervention and streamlined order management
- No software or hardware installation required



***Note:** Coupa Advanced is an optional, premium subscription for suppliers using the Coupa Supplier Portal (CSP), designed to enhance your efficiency, streamline communication with customers and unlock powerful tools not available in the standard portal. To explore this option in more detail, please visit: [Coupa Advanced | Coupa](#).

02 CSP Registration for Suppliers Without a CSP Account



Registration Process: Suppliers Without a CSP Account (1/8)

1

Coupa Supplier Portal

TAKE ACTION: Join Coupa ...

1:09 PM

TAKE ACTION: Join Coupa Supplier Portal for a Win-Win!

Powered by

Dear CSP supplier,

Sanofi is switching to Coupa for invoicing, and we're thrilled to bring you along! As a key partner, you'll enjoy submitting invoices effortlessly, tracking payments in real-time, getting paid faster, cutting manual work, and ensuring accuracy—all free! This boosts your efficiency while streamlining our process for a stronger partnership. Click "Join Coupa Supplier Portal" to start!

Wrong contact? Click "Forward Invitation" and get it to the right person. Questions? Reach invoicing.europe@sanofi.com. More info: Sanofi Supplier Portal (<https://url.de.m.mimecastprotect.com/s/HD1zCXQyOpFEVMzR5hVh8hWW21E?domain=urldefense.com>) Act NOW—let's succeed together! Note: Not signing up may impact our partnership.

Elsa Robinson
Sanofi DEV

2

Join Coupa Supplier Portal

3

Forward Invitation

Registration Process: Suppliers Without a CSP Account (1/8)

1. If you do not currently have a Coupa Supplier Portal (CSP) account, you will receive an invite from Sanofi via **email***
2. Click the **"Join Coupa Supplier Portal" button** in the email, after this you will be directed to the CSP website where you will be required to input your credentials to complete your CSP registration
3. If you are not the correct recipient for the invitation, click on the **"Forward Invitation Button"** to forward the invitation to the correct person within your business



***Note: this email will come from a Do-not-reply Coupa email box and not the Sanofi supplier enablement email address.**

Registration Process: Suppliers Without a CSP Account (2/8)

Create an account

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

4

*** Business Name**
CSP supplier
Your legal business name (or legal personal name if an individual)

*** Email**
elsa.robinson@sanofi.com

*** First Name** CSP *** Last Name** Supplier

*** Password** *** Confirm Password**
Use at least 8 characters and include a number and a letter.

5

*** Country/Region** *** Tax Registration** i

☐ I do not have a Tax ID

6

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

7

Create an account

Already have an account? [Log In](#)
[Forward this to someone](#)

Registration Process: Suppliers Without a CSP Account (2/8)

4. Input your **"Business name"** and create a **"Password"***
5. Input your companies **"Country/ Region"** and **"Tax Registration"** if you do not have a Tax ID check the **"I do not have a Tax ID"** tick box
6. As a new Coupa user, you will also be asked to **"accept the Privacy Policy and the Terms of Use"** – please access via the hyperlinks and read and confirm accordingly
7. Click on the **"Create an Account"** button, which will direct you to a new page for email verification



***Note:** The "Email", "First Name" and "Last Name" fields will prepopulate based on the information provided by Sanofi, however, you are able to edit the Business, First and Last Name fields if required.

Registration Process: Suppliers Without a CSP Account (3/8)

Email Verification

We sent a one time verification code to elsa.robinson@sanofi.com

8

Didn't receive the Verification Code? [Request a New Code](#)

9

Next

Registration Process: Suppliers Without a CSP Account (3/8)

8. Input the **Verification Code** that you will have received via email
9. Click on the **"Next"** button*



***Note:** You will be directed to the Coupa Supplier Portal, where you will be required to complete (1) the legal entity and (2) the remit-to account setup.

Registration Process: Suppliers Without a CSP Account (4/8)

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

[Account Details](#) [Payment Information](#)

10 **Primary Address**

* Country/Region: United Kingdom ▼

* Address Line 1:

Address Line 2: (+)

* City:

* State: ▼

* Postal Code:

United Kingdom

* Type of Company ⓘ:

Board of Directors ⓘ:

Invoice From Code ⓘ:

Preferred Language: English (UK) ▼

11 **Save and Next**

Registration Process: Suppliers Without a CSP Account (4/8)

As you are accessing the CSP for the first time, a pop-up window will display for you to complete your CSP profile setup.*

On the Coupa Supplier Portal Onboarding page, you will need to complete the **"Account Details"** section first:

10. Complete all the required fields to set up your **"Primary Address"** and other invoice-from details
 - **"Invoice From Code"** field should not be blank for suppliers who have agreed to enable cXML as the invoice transmission channel
11. Once you have completed this section, click on the **"Save and Next"** button



***Note:** As you are signing up to the CSP for the first time, you will need to provide this information before you can successfully submit an invoice.

Registration Process: Suppliers Without a CSP Account (5/8)

12

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

✓ Primary Address saved successfully

Account Details Payment Information

Payment Method (**Virtual Card** | Bank Account | Remit-To Address)

Virtual Card ⓘ
Please enter the following information to receive Virtual Card payments.

* Payment Method Name ⓘ * Email Address

☐ Process credit cards automatically

☐ Do not accept Virtual Card payments from Sanofi DEV

13 **Save and Next**

Registration Process: Suppliers Without a CSP Account (5/8)

After setting up your primary address (i.e. the invoice-from details), you will then need to complete the **"Payment Information"** section:

12. Complete all the required fields for **"Virtual Card"** payment setup
 - To opt out of this payment methods, select the **"Do not accept Virtual Card payments from Sanofi"** checkbox
13. Once you have completed this section, click on the **"Save and Next"** button

Registration Process: Suppliers Without a CSP Account (6/8)

14

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Great News! The payment information has been successfully shared with the following customers and has been validated: Sanofi DEV

Account Details | Payment Information

Payment Method (Virtual Card | **Bank Account** | Remit-To Address)

Bank Transfer
Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

* Bank Account Country/Region: United Kingdom * Bank Account Currency: GBP

Beneficiary Name: Bank Name:

Account Number ⓘ Confirm Account Number:

Sort Code ⓘ

☐ My company expects to receive urgent/wire payments

Branch Code: Beneficiary Type: Business

Remittance Email ⓘ Remit-To Code ⓘ

Supporting Documents ⓘ
Drop or Browse Files
Browse

☐ Do not accept Bank Transfer payments from Sanofi DEV

15 Save and Next

Registration Process: Suppliers Without a CSP Account (6/8)

After setting up your Virtual Card payments, you will need to set up your **Bank Transfer payments**:

14. Complete all the required fields for **"Bank Transfer"** payment setup
 - **"Remit-To Code"** field should not be blank for suppliers who have agreed to enable cXML as the invoice transmission channel
 - To opt out of this payment methods, select the **"Do not accept Bank Transfer payments from Sanofi"** checkbox
15. Once you have completed this section, click on the **"Save and Next"** button

Registration Process: Suppliers Without a CSP Account (7/8)

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal.

Great News! The payment information has been successfully shared with the following customers and has been validated.
Sanofi DEV

Account Details Payment Information

Payment Method (Virtual Card | Bank Account | **Remit-To Address**)

16 **Remit-To Address**
Please enter the following information to receive Check payments.

* Payment Method Name ⓘ

Country/Region
United Kingdom

* Street 1
Test 1

Street 2
Fulham

+ Street 3

* City
London

* County
London - LND

* Postal Code
L1 233

Remit-To Code ⓘ

☐ Do not accept Check payments from Sanofi DEV

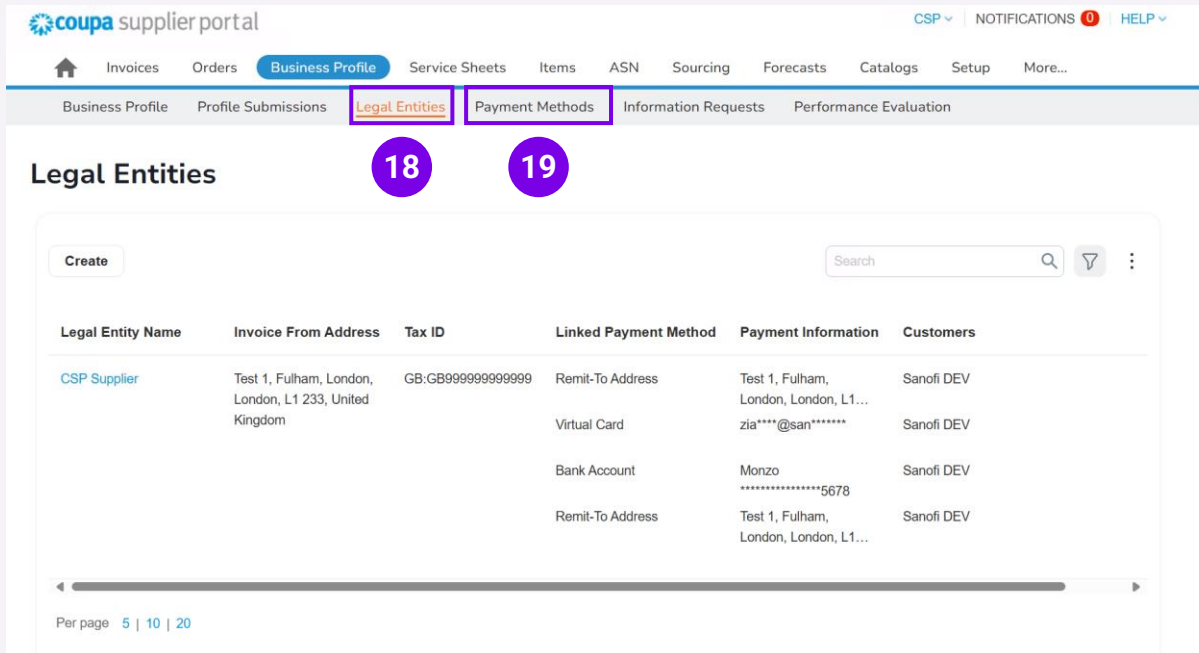
17 **Save and Next**

Registration Process: Suppliers Without a CSP Account (7/8)

After setting up your Bank Transfer payments, you will need to set up your **Check payments**:

16. Complete all the required fields for **"Remit-To Address"** setup:
 - Most fields will be auto-populated based on the Primary Address details as you set up previously – you can edit as required
 - The **"Remit-To Code"** field should not be blank for suppliers who have agreed to enable cXML as the invoice transmission channel
 - To opt out of this payment methods, select the **"Do not accept Check payments from Sanofi"** checkbox
17. Once you have completed this section, click on the **"Save and Next"** button

Registration Process: Suppliers Without a CSP Account (8/8)



Legal Entities

18

19

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
CSP Supplier	Test 1, Fulham, London, London, L1 233, United Kingdom	GB:GB999999999999	Remit-To Address	Test 1, Fulham, London, London, L1...	Sanofi DEV
			Virtual Card	zia****@san*****	Sanofi DEV
			Bank Account	Monzo *****5678	Sanofi DEV
			Remit-To Address	Test 1, Fulham, London, London, L1...	Sanofi DEV

Per page 5 | 10 | 20

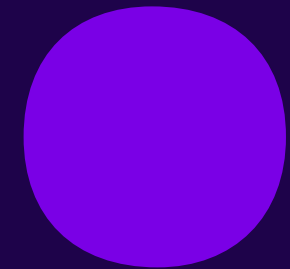
Registration Process: Suppliers Without a CSP Account (8/8)

After completing your CSP profile setup, you can navigate to **"Business Profile"** tab to view your Legal Entity and Payment Method information:

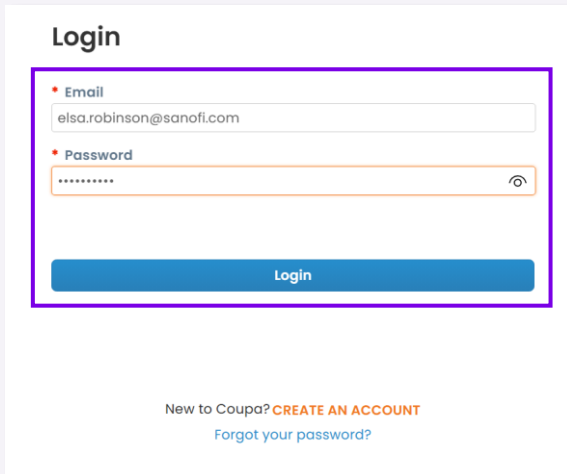
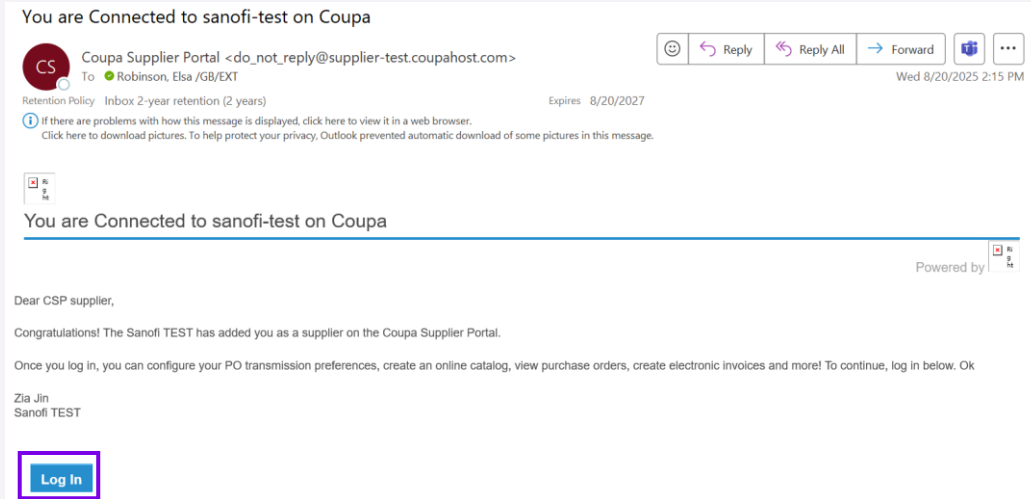
18. Click **"Legal Entities"** sub-tab to view legal entity setup details
19. Click **"Payment Methods"** sub-tab to view payment methods setup details

Now you have completed your CSP profile setup, and you are ready to receive POs and issue Invoices via CSP with Sanofi.

03 CSP Registration for Suppliers With an Existing CSP Account



Registration Process: Suppliers With an Existing CSP Account (1/6)



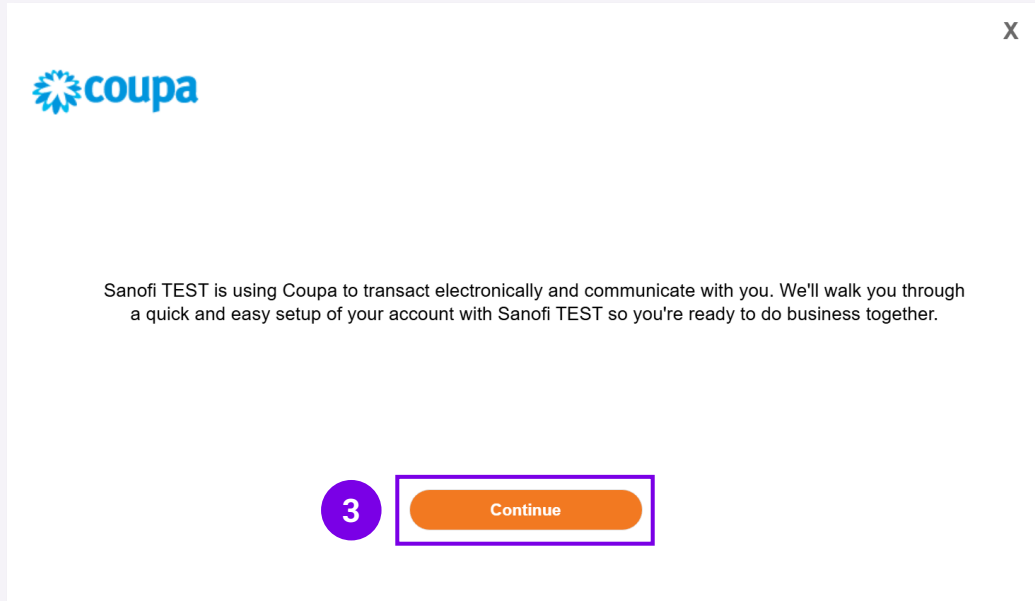
Registration Process: Suppliers With an Existing CSP Account (1/6)

1. If you have an existing Coupa Supplier Portal (CSP) account you will receive a notification from Sanofi via **email***, click **"Login"** to navigate to the Login page.
2. Input your **"Email"** and **"Password"** and click **"Login"** to access the Coupa Supplier Portal.



***Note: this email will come from a Do-not-reply Coupa email box and not the Sanofi supplier enablement email address.**

Registration Process: Suppliers With an Existing CSP Account (2/6)



Registration Process: Suppliers With an Existing CSP Account (2/6)

After you have logged into the CSP, you will be able to see a pop-up screen for a quick account setup:

3. Click the "**Continue**" button

You will then be taken to the **Payment Methods** page to set up your **invoice-from**, **ship-from**, and **remit-to details** with Sanofi.

Registration Process: Suppliers With an Existing CSP Account (3/6)

Payment Method (Virtual Card)

Virtual Card

Please enter the following information to receive Virtual Card payments.

4 ☐ Payment Method
elsa.robinson@sanofi.com

5 [+ Add New](#)

6 ☐ Do not accept Virtual Card payments from this customer

7 [Cancel](#) [Save and Next](#)

Registration Process: Suppliers With an Existing CSP Account (3/6)

On the **Payment Method (Virtual Card)** page, you will be provided with options to either opt-in or opt-out of Virtual card.

4. To use the existing Virtual Card payment method – select **the radio button** of the corresponding option
5. To create a new Virtual Card payment method – click on the **"Add New"** button and populate the required fields
6. To opt out Virtual Card payments – select the **"Do not accept Virtual Card payments from this customer"** checkbox
7. Once you have completed this section, click on the **"Save and Next"** button

Registration Process: Suppliers With an Existing CSP Account (4/6)

Payment Method (Bank Account)

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

8 ☒ X
HSBC - *****5678

9 ☐ New Test
HSBC - *****5678

+ Add New

10 ☐ Do not accept Bank Transfer payments from this customer

11

Registration Process: Suppliers With an Existing CSP Account (4/6)

On the **Payment Method (Bank Account)** page, you will need to set up the Bank Transfer payment details for Sanofi:

8. To use the existing Bank Transfer payment method – select the **corresponding radio button(s)**
9. To create a new Bank Transfer payment method – click **"Add New"** button and populate the required fields
10. To opt out Bank Transfer payments – select the **"Do not accept Bank Transfer payments from this customer"** checkbox
11. Once you have completed this section, click on the **"Save and Next"** button

Registration Process: Suppliers With an Existing CSP Account (5/6)

Payment Method (Remit-To Address)

Remit-To Address

Please enter the following information to receive Check payments.

12

☐ None
3 North Street Park, Stewartstown, NIR, BT71 5JG, United Kingdom

☐ None
1, London, L1 233, United Kingdom

☐ None
1 Street, London, LND, L1 123, United Kingdom

13

+ Add New

14

☐ Do not accept Check payments from this customer

15

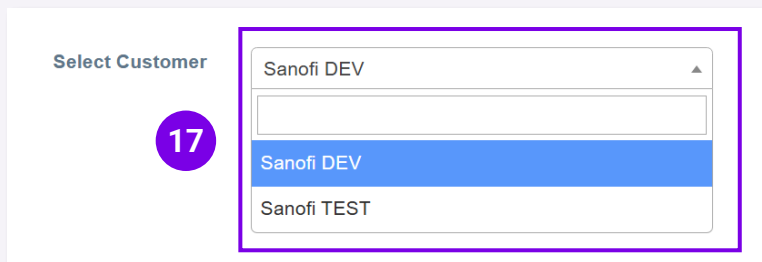
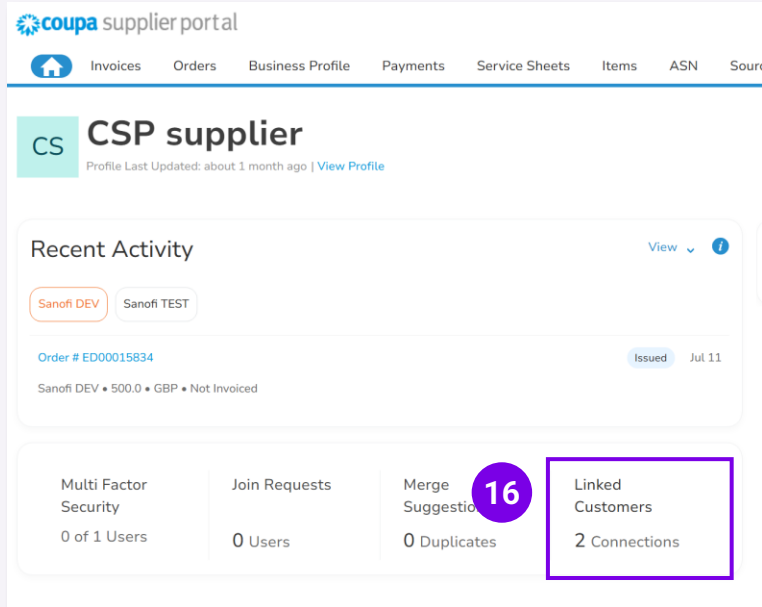
Save and Next

Registration Process: Suppliers With an Existing CSP Account (5/6)

On the **Payment Method (Remit-To Address)** page, you will need to set up the **Check payments** for Sanofi:

- 12.To use the existing Check payment method(s) – select the **corresponding radio button(s)**
- 13.To create a new Check payment method – click **"Add New"** button and populate the required fields
- 14.To opt out Check payments – select the **"Do not accept Check payments from this customer"** checkbox
- 15.Once you have completed this section, click on the **"Save and Next"** button

Registration Process: Suppliers With an Existing CSP Account (6/6)



Registration Process: Suppliers With an Existing CSP Account (6/6)

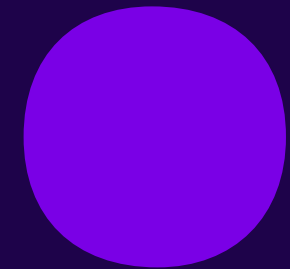
After you have completed your payment methods setup, you will be directed back to the CSP homepage, and on the CSP dashboard:

16. You will be able to see 1 more customer has been linked to your existing CSP account

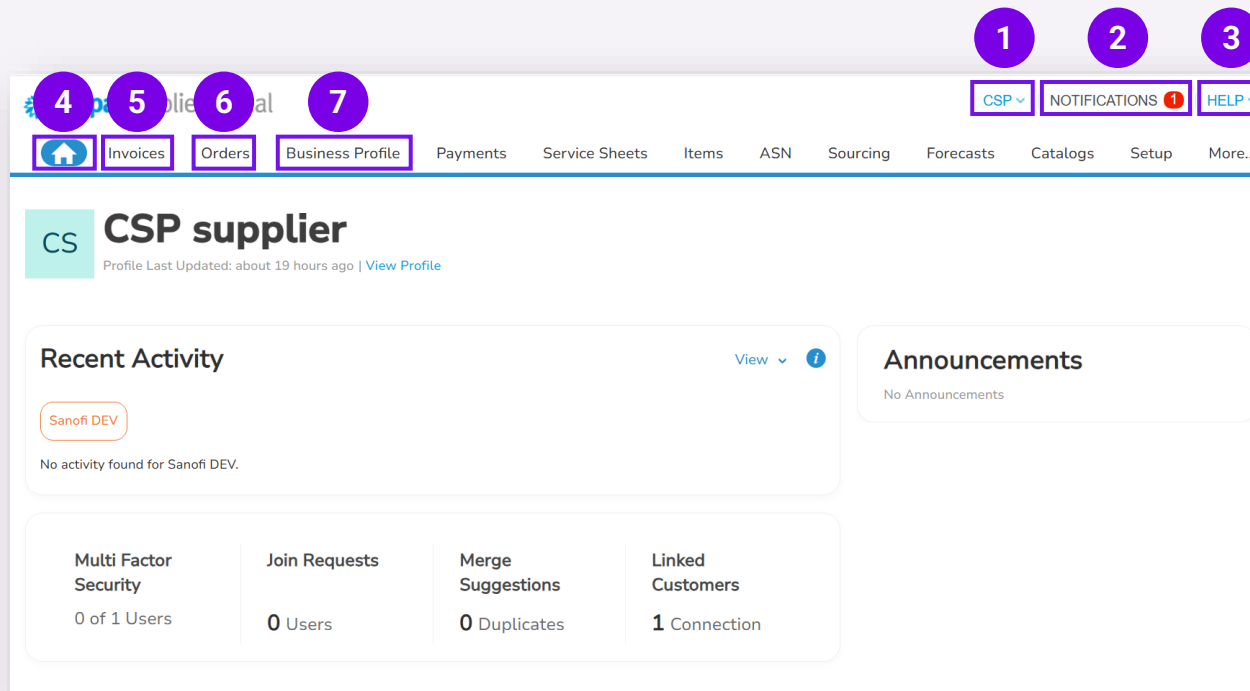
And by navigating to other tabs, e.g. **"Invoices"** and **"Orders"**:

17. You will be able to see the corresponding Sanofi POs and Invoices by selecting Sanofi from the **"Select Customer"** dropdown list

04 How to Navigate Through CSP



How to Navigate Through CSP (1/2)



How to Navigate Through CSP (1/2)

- 1. Account:** Your account name with an associated drop-down sub-menu – to manage your CSP account.
- 2. Notifications:** To view notifications and manage notification preferences.
- 3. Help:** To access the CSP help sub-menu:
 - **Coupa Compass**: where you can find resources, such as support articles, to better use Coupa.
 - **Training Webinars**: where you can register for a supplier training webinar.
 - **Help Tour**: of the open page in question.
- 4. Home:** To navigate to the CSP homepage.
- 5. Invoices:** To access, manage, and create Invoices.
- 6. Orders:** To access and manage Purchase Orders.
- 7. Business Profile:** To manage your profile information.

How to Navigate Through CSP (2/2)

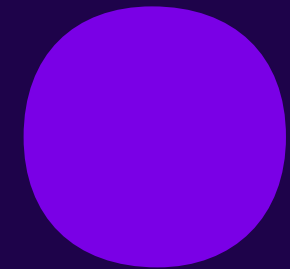
The screenshot shows the Coupa Supplier Portal interface for a CSP supplier. The header includes the Coupa logo, 'supplier portal', and navigation links for CSP, NOTIFICATIONS (1), and HELP. A secondary navigation bar lists various portal sections: Invoices, Orders, Business Profile, Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, Catalogs, Setup, and More... The main content area is titled 'CSP supplier' and includes a sub-header 'Profile Last Updated: about 19 hours ago | View Profile'. Below this, there are three main sections: 'Recent Activity' (showing 'Sanofi DEV' and 'No activity found for Sanofi DEV.'), 'Announcements' (showing 'No Announcements'), and a row of four highlighted metrics: 'Multi Factor Security' (0 of 1 Users), 'Join Requests' (0 Users), 'Merge Suggestions' (0 Duplicates), and 'Linked Customers' (1 Connection). Each metric is enclosed in a purple-bordered box with a corresponding number in a purple circle above it.

Metric	Value
Multi Factor Security	0 of 1 Users
Join Requests	0 Users
Merge Suggestions	0 Duplicates
Linked Customers	1 Connection

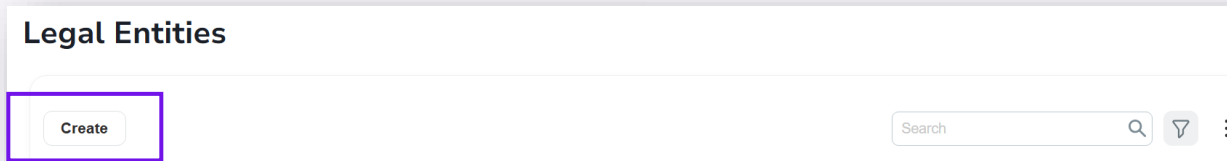
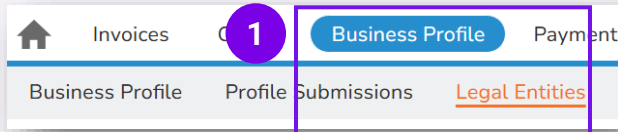
How to Navigate Through CSP (2/2)

- 9. Multi Factor Security:** Number of users who have completed the two-factor authentication setup.
- 10. Join Requests:** Requests from new users to access this account.
- 11. Merge Suggestions:** Suggestions to merge multiple CSP accounts with the same confirmed email domain.
- 12. Linked Customers:** Number of your trading customers on Coupa.

05 How to Set up and Manage Legal Entities



How to Set up Legal Entities (1/3)



Create Legal Entity

* Legal Entity Name

* Country/Region

United Kingdom

Tax Registrations

* Country/Region

VAT ID

[Add Tax Registration](#)

Additional Company Information

* Type of Company ⓘ

Board of Directors ⓘ

How to Set up Legal Entities (1/3)

If you are accessing the CSP for the first time, a pop-up window will display for your **"Primary Address"** and **"Payment Information"** setup.* Alternatively, to set up your legal entity, follow the steps below:

1. Click the **"Business Profile"** tab and the **"Legal Entities"** sub-tab
2. Click on the **"Create"** button
3. Complete the **"Legal Entity Name"** and **"Country/Region"**
4. Complete the **"Tax Registrations"** and the **"Additional Company Information"** sections – those fields will display once country/region is selected



***Note: If you are signing up to the CSP for the first time, you will need to provide this information before you can successfully submit an invoice.**

How to Set up Legal Entities (2/3)

5

Invoice From Address

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

Country/Region *	Address Line 1 *	Address Line 2
<input type="text"/>	<input type="text"/>	<input type="text"/>
City *	State	Postcode *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Invoice-From Code ⓘ <input type="text"/>		

6

Ship-From Address

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

☒ Same as Invoice-From Address

Remit-To Address

Please enter the address to which you receive in-person payments.

☒ Same as Invoice-From Address

7

Cancel

Save

How to Set up Legal Entities (2/3)

5. Complete the mandatory fields in the **"Invoice From Address"** section*
6. If you need to use the same address and invoice-from code for your **"Ship-From Address"** and/or **"Remit-To Address"**, keep the **"Same as Invoice-From Address"** checkbox(es) selected
7. Click on the **"Save"** button



***Note: Ensure to input the "Invoice-From Code" if you are enabling cXML as the invoice transmission channel with Sanofi – otherwise the cXML Invoice will fail to pull the invoice-from details to Coupa.**

How to Set up Legal Entities (3/3)

8

9

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

☐ Same as Invoice From Address

* Country/Region

* Address Line 1

Address Line 2

* City

State

* Postal Code

Remit-To Integration Code ⓘ

10 **Save**

How to Set up Legal Entities (3/3)

8. If you need to add a different shipping address, deselect the **"Same as Invoice-From Address"** checkbox and additional fields will appear for you to add the **ship-from address**
9. Complete the mandatory fields for the **Ship-From Address***
10. Click on the save **"Save"** button



***Note:** Ensure to input the "Remit-To Integration Code" (i.e. the ship-from code) if you are enabling cXML as the invoice transmission channel with Sanofi – otherwise the cXML Invoice will fail to pull the ship-from details to Coupa.

How to Manage Legal Entity Information

Legal Entities

Legal Entity Name	Invoice From Address	Tax ID	Linked Payment Method	Payment Information	Customers
le	1, London, L1 233, United Kingdom	GB:GB999999999	Check	1, London, L1 233, United Kingdom	None

Legal Entities

Legal Entity Name: le

Invoice From: 1, London, L1 233, United Kingdom

Ship From [Manage](#)

Where do you ship goods from?

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

[Add Ship From](#)

Title	Status
1 London L1 233 United Kingdom	Active

[Manage](#)

How to Manage Legal Entity Information

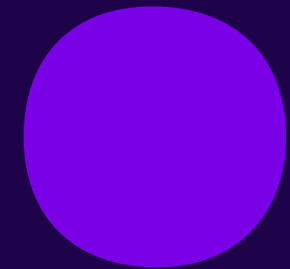
If you need to manage your ship-from address(es) or add new ship-from address(es) you can do so by*:

1. Click the **"Business Profile"** tab and the **"Legal Entities"** sub-tab
2. Click the **legal entity name hyperlink**
3. Click the **"Manage"** hyperlink in the **"Ship From"** field, and a **pop-up window** will display
4. Click the **"Add Ship From"** button, to add **additional shipping address(es)**
5. To manage existing shipping details, click the **"Manage"** button on the corresponding row



***Note: From a tax perspective, it is critical that ship-from information is accurate – especially when the ship-from address is in a different country to the registration country of the legal entity.**

06 How to Set up and Manage Payment Methods



How to Set up and Manage Payment Methods (1/2)

The screenshot shows the Sanofi CSP interface. The top navigation bar includes 'Invoices', 'Business Profile', 'Payments', 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', 'Setup', and 'More...'. The 'Business Profile' tab is selected, and the 'Payment Methods' sub-tab is highlighted. Below the navigation bar, the 'Payment Methods' section is displayed. It includes an 'Add Payment Method' button, a search bar, and a table of payment methods. The table has columns for 'Payment Method', 'Payment Method Name', 'Country', 'Currency', 'Linked Legal Entity', 'Shared With Customers', 'Payment Method Status', and 'Actions'. The first row shows a 'Check' payment method with the name '1, London, L1 233, United Kingdom', linked to 'le', and marked as 'Active'. The pencil icon in the 'Actions' column for this method is highlighted with a red circle and the number '2'.

How to Set up and Manage Payment Methods (1/2)

If you are registering for CSP, once you have created a legal entity, a pop-up window will appear prompting you to add a payment method, including your remit-to information. Please follow steps 3-4 on the next page.

By default, a cheque payment method, with the same legal entity address, will be auto-generated in CSP upon legal entity creation.

To edit an existing payment method:

1. Click '**Business Profile**' tab and the '**Payment Methods**' sub-tab
2. Click the **pencil icon** in the '**Actions**' column to view and edit the existing payment method.*



***Note: In the 'Actions' Column, you can also 'Share Payment Method', 'Manage Linked Customers', and 'Deactivate Payment Method'.**

How to Set up and Manage Payment Methods (2/2)

1. Business Profile | Payments | Service Sheets | Items | ASN | Sourcing | Forecasts | Setup | More...

Business Profile | Profile Submissions | Legal Entities | **Payment Methods** | Information Requests | Performance Evaluation

Payment Methods

2. Add Payment Method ▾

Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Check	1, London, L1 233, United Kingdom			le		Active	Edit Settings Delete

Add Payment Method

Payment Method ()

* Associated Legal Entity

CSP supplier

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

* Bank Account Country/Region: United Kingdom

* Bank Account Currency: GBP

Beneficiary Name: le

Account Number ⓘ

Confirm Account Number

4. Save

How to Set up and Manage Payment Methods (2/2)

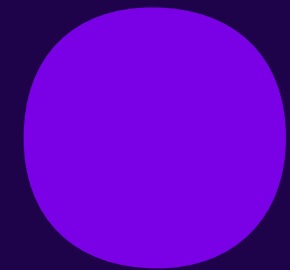
To add a new payment method:

1. Click '**Business Profile**' tab and the '**Payment Methods**' sub-tab
2. Click on the '**Add Payment Method**' dropdown and select the **payment methods**
3. On the '**Add Payment Method**' page, select the '**Associated Legal Entity**' and complete all the **required fields** including payment and remit-to information*
4. Click on the '**Save**' button



***Note: If you are signing up for CSP for the first time, setting up your payment information is not required immediately. However, you must provide this information before you can successfully submit an invoice.**

07 How to View Purchase Orders



How to View Purchase Orders – Email Notification

1

Sanofi DEV Purchase Order #ED00015901

Hello CSP,

This is to inform you Purchase Order ED00015901 from Sanofi DEV has been issued, and this same notification has been sent to your fellow team members with access to the Coupa Supplier Portal.

Submitted By Elsa Robinson
Supplier CSP supplier
Total **500.00** GBP
Items **PO** **500.00** GBP

2

View Order

3

Login

* Email

* Password

Login

4

Purchase Order #ED00015901

Select Customer Sanofi DEV

General Info

Status Issued - Sent via Email
Order Date 08/20/25
Billing Date 08/20/25

Shipping

Ship-To Address 50 Kings Hill Avenue
West Malling
KE - Kent
ME10 2AH

How to View Purchase Orders – Email Notification

1. You will receive an email notification informing you that you have received a PO.
2. The email will contain the POs basic information, to view the PO details in full click on the **"View Order"** button
3. You will then be taken to the CSP sign in page, **log in** using your username and password
4. You will then be automatically taken to the PO page where you can see all the purchase order details*



***Note: You are also able to create an invoice from this page, this is covered in more detail in the 'How to Submit Invoices' section.**

How to View Purchase Orders – Orders Tab (1/2)

1 Orders

3 Select Customer Sanofi DEV

2 Search

4 PO Number

Purchase Orders

Instructions From Customer
Reminder : when you submit an invoice please refer to a PO Click on the golden coin below to initiate PO flip

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

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ED00015834	07/11/25	Issued	None	PO	No	500.00 GBP		

How to View Purchase Orders – Orders Tab (1/2)

To view your PO in CSP, login to your CSP account:

1. Select the **"Orders"** tab
2. Under the **"Orders"** sub-tab, use the **search bar** to search for the PO
3. If you are unable to see your purchase order, make sure you have selected the correct customer from the **"Select Customer"** drop-down in the top right-hand corner
4. To view the purchase order details in full click on the **link** in the **PO Number** column*



***Note:** You are also able to create an invoice using the gold coins icon in the "Actions" column, this is covered in more detail in the "How to submit an invoice" section.

How to View Purchase Orders – Orders Tab (2/2)

Purchase Order #ED00015834

Select Customer: Sanofi DEV - CSP supplier

General Info

Status: Issued - Sent via Email

Order Date: 07/11/25

Revision Date: 07/11/25

Requester: Elsa Robinson

Email: Elsa.Robinson@sanofi.com

Payment Term: None

Attachments: None

5 Acknowledged ☐

Shipping

Ship-To Address: 50 Kings Hill Avenue
West Malling
KE - Kent
ME19 4AH
United Kingdom
Location Code: GBPW
Attn: Elsa Robinson

Terms: SHOWROOM-CIF

Shipment Tracking

6

No shipment tracking.

Create Shipment Tracker

Enter tracking number for entire PO. To ship PO partially, create ASN.

* Tracking Number

* Carrier

Note

Cancel Save

How to View Purchase Orders – Orders Tab (2/2)

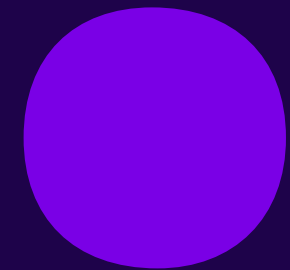
On the PO page, you will be able to:

5. Acknowledge the PO by selecting the **"Acknowledged"** checkbox
6. Add the shipment tracking details (e.g. **"Tracking Number"** and **"Carrier"**) by clicking the green plus button in the **"Shipment Tracking"** section



***Note:** You are also able to create an invoice using the **"Create Invoice"** button at the bottom of the PO page, this is covered in more detail in the **"How to submit an invoice"** section.

08 How to Submit Invoices



How to Submit Invoices (1/6)

Purchase Orders

Instructions From Customer
Reminder : when you submit an invoice please refer to a PO Click on the golden coin below to initiate PO flip

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

Export to View Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ED00015834	07/11/25	Issued	None	PO	No	500.00 GBP		

5 Choose Invoicing Details

* Legal Entity Add New

* Remit-To

* Ship From Address

How to Submit Invoices (1/6)

To flip a PO into an invoice, login to your CSP account:

1. Select the **"Orders"** tab
2. Under the **"Orders"** sub-tab, use the **search bar** to search for the PO
3. If you are unable to see your purchase order, make sure you have selected the correct customer from the **"Select Customer"** drop-down in the top right-hand corner
4. Click on the **yellow coins** icon to create an invoice
5. If this is your first time creating an invoice, a pop-up screen will prompt you to select a **"Legal Entity"**, **"Remit-To"**, and **"Ship-From Address"**



Note: If you are providing a discount, please navigate to "How to Submit Invoices with Discounts" section; if you are correcting unit price, please navigate to "How to Correct Invoices" section.

How to Submit Invoices (2/6)

5

General Info

From

* Invoice #

* Invoice Date

07/11/25

Payment Term

SHOWROOM-0001

* Currency

GBP

Delivery Number

Status

Draft

* Image Scan

Choose File

Screenshot ... 104035.png

Supplier Note

Attachments

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

Cash Accounting Scheme

Margin Scheme

* Supplier

CSP supplier

* Supplier VAT ID

GB999999999

* Invoice From Address

LE

1 Street

London

London

L1 123

United Kingdom

LLP

* Remit-To Address

LE

1 Street

London

London

L1 123

United Kingdom

* Ship From Address

LE

1 Street

London

London

L1 123

United Kingdom

To

Customer

Sanofi DEV

* Bill To Address

1 avenue Henri Martin

75116 Paris

France

* Buyer VAT ID

FR 12345678901

* Ship to Address

50 Kings Hill Avenue

West Malling

KE - Kent

6

How to Submit Invoices (2/6)


On the **invoice creation page** :


- Complete the mandatory fields in the **"General Info"**, **"From"**, and **"To"** sections*
- In **"From"** section, if you want to change the **"Invoice From Address"**, **"Remit-To Address"**, or **"Ship From Address"**, click the **magnifying glass** icon to select the respective addresses




***Note:** the "From" section will pre-populate based on the information on your CSP account and the "To" section pre-populates based on the information on the Purchase Order.


How to Submit Invoices (3/6)

7 **Lines** 9 

Type	Description	8 Price	
	PO	500.00	500.00

PO Line: ED00015834-1  Clear


Service Sheet Line: None

Contract: 

Supplier Part Number:

Billing: 000010000018-0000

Taxes



VAT Rate	VAT Amount	Tax Reference
20.0% 	100.00	<input type="text"/>


How to Submit Invoices (3/6)

7. On the same page, scroll down to the **"Lines" section**, review the pre-populated fields and edit if needed.
8. For partial invoice, if the PO is:
 - Quantity-based (i.e. the **"Category"** is Goods), edit the **"Qty" field**
 - Amount-based (i.e. the **"Category"** is Services), edit the **"Price" field**
9. To delete lines, click on the **"x" icon**

How to Submit Invoices (4/6)

Lines

Type	Description	Price	
	<input type="text" value="PO"/>	<input type="text" value="500.00"/>	500.00 

PO Line: [ED00015834-1](#)  Clear

Service Sheet Line: None

Contract:

Supplier Part Number:

Billing: 000010000018-0000

10 Taxes

VAT Rate	VAT Amount	Tax Reference
<input type="text" value="20.0%"/>	<input type="text" value="100.00"/>	<input type="text"/>

How to Submit Invoices (4/6)

10. In **"Taxes"** subsection, select or populate the **tax rate** for each line item if applicable*

- It is important to ensure the tax details you populate in this subsection match with your tax records – e.g. you will need to select or populate the correct tax rate in terms of the goods/services supplied



***Note:** depending on the country, the "Taxes" subsection may be different and have different required fields.

How to Submit Invoices (5/6)

Net Total 500.00

Gross Total 600.00

11

Delete Cancel Save as Draft Calculate Submit

Portugal: ATCUD code / Brazil:

Are You Ready to Send?

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

12

Continue Editing Send Invoice

How to Submit Invoices (5/6)

11. On the same page, scroll down to the **summary section** here there are **actionable buttons**:

- Click on the **"Save as draft"** button to save the invoice for later
- Click on the **"Calculate"** button to refresh the price calculation
- Click on the **"Submit"** button to submit the invoice

12. After clicking the **"Submit"** button, a pop-up confirmation window will appear – click on the **"Send Invoice"** button when ready*



***Note:** Coupa will create a legal invoice on your behalf so you do not need to attach one.

How to Submit Invoices (6/6)

13

Comments Mute Comments ▾

Enter Comment

13b [@Jason Braganza (u1073480)]

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

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

13a ✎

Add Comment

How to Submit Invoices (6/6)

13. To add comments on the invoice, scroll down and use the **"Comments"** section on the Invoice creation page:

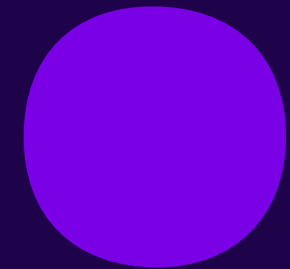
13a. Populate your comments and click **"Add Comment"**, it will be directly sent to Sanofi requester

13b. Use the **@name functionality** to send comments to additional Sanofi users*



***Note: Once the response from Sanofi is available, you will receive a notification and will be able to see responses in this section.**

09 How to Submit Credit Notes



How to Submit Credit Notes (1/6)

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'Orders' tab is highlighted with a purple box and a callout '1'. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'Sanofi DEV'. The main section is titled 'Purchase Orders'. Below this, there is a reminder: 'Reminder : when you submit an invoice please refer to a PO Click on the golden coin below to initiate PO flip'. A button with a golden coin icon and the text 'Click the Action to Accept the Purchase Order and Create an Invoice using its data' is highlighted with a purple box and a callout '2'. Below this, there is a table of purchase orders. The table has columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The first row shows PO Number 'ED00015834', Order Date '07/11/25', Status 'Issued', Acknowledged At 'None', Items 'PO', Unanswered Comments 'No', Total '500.00 GBP', and Actions. The 'Actions' column contains a 'red coins' icon, which is highlighted with a purple box and a callout '3'.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ED00015834	07/11/25	Issued	None	PO	No	500.00 GBP		

How to Submit Credit Notes (1/6)

To flip a PO into a Credit Note, login to your CSP account:

1. Select the **"Orders"** tab
2. Under the **"Orders"** sub-tab, use the **search bar** to search for the PO
3. Click on the **red coins** icon to create a credit note



Note: Credit note creation is also applicable for providing discount and correcting unit price. Please navigate to "How to Submit Invoices with Discounts" OR "How to Correct Invoices" section for detailed steps.

How to Submit Credit Notes (2/6)

4

Create Credit Note [Create](#)

Creating your first invoice? Just enter in your invoice number. Check the status. Once you are ready, click Submit. You'll be notified if the invoice is approved.

General Info

* Credit Note #

* Credit Note Date

Payment Term SHOWROOM-0001

* Currency

Delivery Number

Status

* Original Invoice #

* Original Invoice Date

* Image Scan No file chosen

Supplier Note

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

Cash Accounting Scheme

* Credit Reason

Margin Scheme

How to Submit Credit Notes (2/6)

On the **create credit note** page:

4. Complete the required fields in the **"General Info"** section

How to Submit Credit Notes (3/6)

Lines

Adjustment Type Price

Type Description Price -500.00

PO PO

PO Line ED00015834-1 Clear

Service Sheet Line None

Contract

Supplier Part Number

Billing 000010000018-0000

Taxes


VAT Rate VAT Amount 0.00 Tax Reference

How to Submit Credit Notes (3/6)


On the same page, scroll down to the **"Lines"** section:

5. Ensure the value in the **"Price"** or **"Qty"** field is negative, if the PO is:
 - Quantity-based (i.e. the **"Category"** is Goods), edit the **"Qty"** field;
 - Amount-based (i.e. the **"Category"** is Services), edit the **"Price"** field.
6. To delete lines, click on the **"x"** icon.

How to Submit Credit Notes (4/6)

 Lines

Adjustment Type Price

Type	Description	Price
	PO	-500.00

PO Line: ED00015834-1 [Clear](#) Service Sheet Line: None Contract: ▼ Supplier Part Number:

Billing: 000010000018-0000

7 Taxes

VAT Rate	VAT Amount	Tax Reference
▼	0.00	<input type="text"/>

How to Submit Credit Notes (4/6)

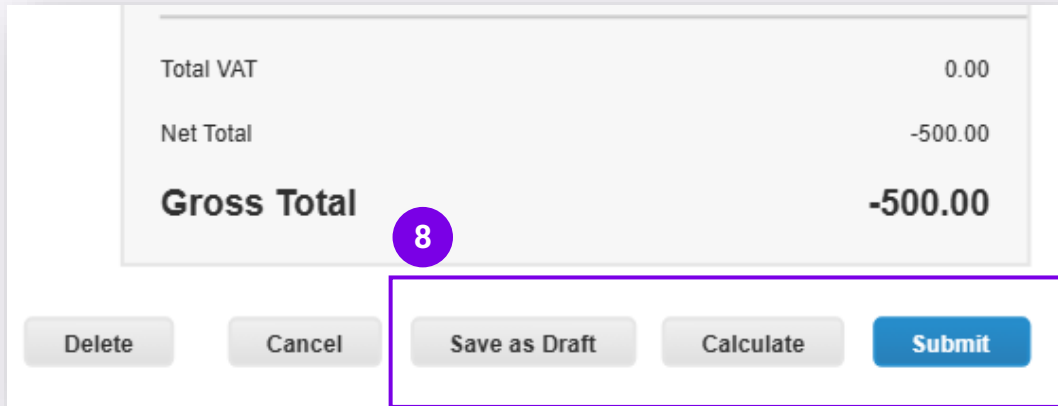
In the **"Lines"** section and **"Taxes"** subsection:

7. Select or populate the tax rate for each line item if applicable.
 - It is important to ensure the tax details you populate in this subsection match with your tax records – e.g. you will need to select or populate the correct tax rate in terms of the goods/services supplied.



***Note:** depending on the country, the "Taxes" subsection may be different and have different required fields.

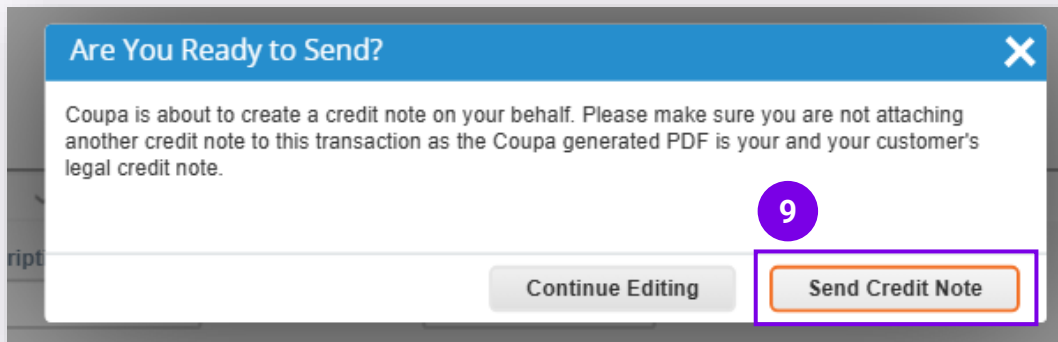
How to Submit Credit Notes (5/6)



Total VAT	0.00
Net Total	-500.00
Gross Total	-500.00

8

Delete Cancel Save as Draft Calculate Submit



Are You Ready to Send?

Coupa is about to create a credit note on your behalf. Please make sure you are not attaching another credit note to this transaction as the Coupa generated PDF is your and your customer's legal credit note.

9

Continue Editing Send Credit Note

How to Submit Credit Notes (5/6)

- On the same page, scroll down to the **summary section** here there are **actionable buttons**:
 - Click on the **"Save as draft"** button to save the credit note for later
 - Click on the **"Calculate"** button to refresh the price calculation
 - Click on the **"Submit"** button to submit the credit note
- After clicking the **"Submit"**, button a pop-up confirmation window will appear – click on the **"Send Credit Note"** button when ready*



***Note: Coupa will create a legal credit note on your behalf, so you do not need to attach one.**

How to Submit Credit Notes (6/6)

10

Comments Mute Comments

Enter Comment

10b

Add File | URL

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

10a

How to Submit Credit Notes (6/6)

10. To add comments on the Credit Note, scroll down and use the **"Comments"** section on the Credit Note creation page:

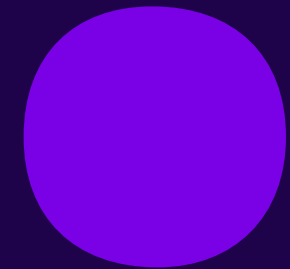
10a. Populate your comments and click **"Add Comment"**, it will be directly sent to Sanofi requester

10b. Use the **@name functionality** to send comments to additional Sanofi users*



***Note:** Once the response from Sanofi is available, you will receive a notification and will be able to see responses in this section.

10 How to View Invoices and Credit Notes



How to View Invoices and Credit Notes (1/2)

The screenshot shows the Sanofi Invoices interface. At the top, a navigation bar includes 'Invoices' (highlighted with a purple box and a purple circle with the number 1), 'Orders', 'Business Profile', 'Payments', 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', and 'Catalogs'. Below this, a sub-navigation bar shows 'Invoices' (underlined), 'Invoices Lines', and 'Payment Receipts'. On the right, there is a 'Select customer' dropdown menu with 'Sanofi DEV' selected. The main heading is 'Invoices'. Below it, there is a section 'Instructions From Customer' with a note: 'To resolve a dispute please use the action button to submit your credit note'. A link 'Create Invoices' with an information icon is present. Below this, there are buttons: 'Create Invoice from PO', 'Create Invoice from Service Sheet', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A purple circle with the number 2 is next to the 'Create Credit Note' button. Below the buttons, there is a table with a header row: 'Invoice #', 'Created Date', 'Status', 'PO #', 'Total', 'Unanswered Comments', 'Dispute Reason', and 'Actions'. A purple circle with the number 3 is next to the 'Created Date' column. The table has one row with the following data: 'None', '07/11/25', 'Draft', 'ED00015834', '500.00 GBP', 'No', and an 'Actions' column with edit and delete icons. A search bar is located to the right of the table, with a purple circle with the number 2 next to it.

Status	Definition
Approved	This status indicates the invoice/credit note has been accepted for payment by Sanofi.
Disputed	This status indicates the invoice/credit note has been disputed by Sanofi. You will need to review comments and action to resolve the dispute.
Draft	This status indicates the invoice/credit note is saved in draft and has not been submitted yet.
Invalid	This status is specific for compliant e-invoices for clearance countries. It indicates the compliant invoices submitted have incorrect or incomplete information and therefore have been moved to a permanent Invalid state.
Pending Approval	This status indicates the invoice/credit note is currently under review by Sanofi.
Processing	This status indicates the invoice/credit note is being processed by Sanofi's Accounts Payable department.

How to View Invoices and Credit Notes (1/2)

To view the general info of the invoice/credit note, login to your CSP account:

1. Select the **"Invoices"** or "Credit Note" tab
2. Under the, use the **search bar** to search for the invoice/credit note
3. You will see general info of the invoice/credit note, e.g. **"Created Date"** and **"Status"***



***Note: The "Status" can be any of those cited in the table.**

How to View Invoices and Credit Notes (2/2)

Invoices

Instructions From Customer
To resolve a dispute please use the action button to submit your credit note

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Service Sheet Create Invoice from Contract Create Blank Invoice

Create Credit Note

4

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
INV54r34	07/11/25	Pending Approval	ED00015834	600.00 GBP	No		

Per page 15 | 45 | 90

5

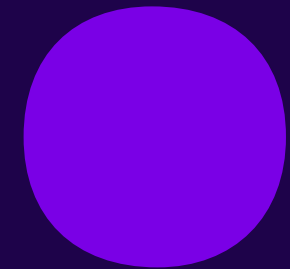
Payments >

History >

How to View Invoices and Credit Notes (2/2)

- To view the payment details and the history of the invoice/credit note, click into to the **invoice/credit note #**
- Scroll down to the bottom of the page:
 - Unfold the **"Payments"** section to view payment details
 - Unfold the **"History"** section to view the audit trail of all changes applied to the invoice/credit note

11 How to Correct Invoices



How to Correct Invoices (1/2)

coupa supplier portal

CSP | NOTIFICATIONS 1 | HELP

Home Invoices **Orders** Business Profile Payments Service Sheets Items ASN Sourcing Forecasts Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer Sanofi DEV

Purchase Orders

Instructions From Customer

Reminder : when you submit an invoice please refer to a PO Click on the golden coin below to initiate PO flip

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

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ED00015834	07/11/25	Issued	None	PO	No	500.00 GBP		

Lines

Adjustment Type Price

Type	Description	Price
	PO	-500.00

PO Line ED00015834-1 Clear Service Sheet Line None Contract Supplier Part Number

Billing 000010000018-0000

5

Submit

How to Correct Invoices (1/2)

If you have already submitted an invoice with the wrong unit price, you must issue a credit note for the invoiced amount to cancel it. Then, submit a new invoice with the correct unit price.

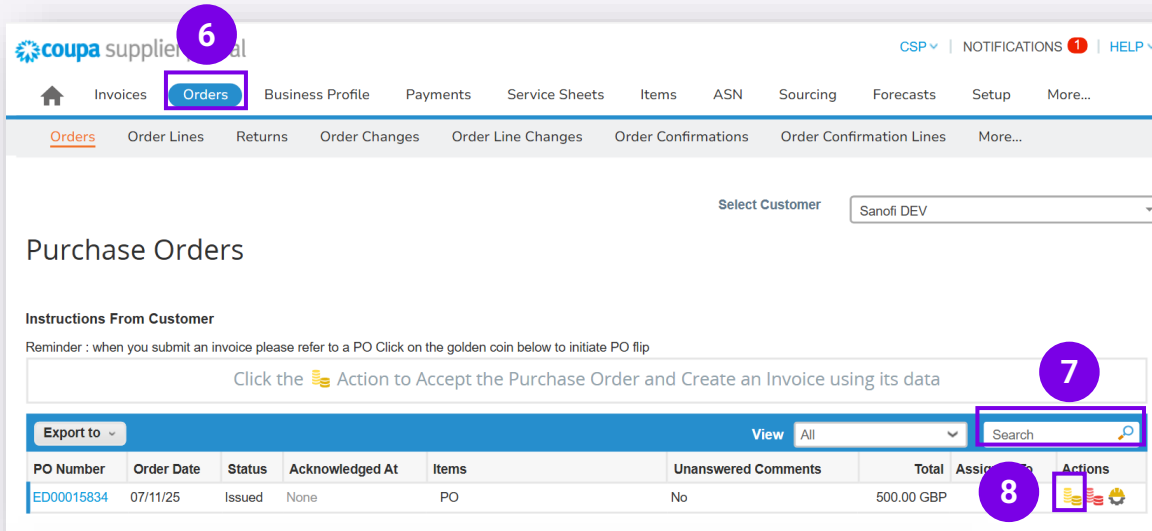
Step 1: Create a credit note with the same amount:

1. Select the **"Orders"** tab
2. Under the **"Orders"** sub-tab, use the **search bar** to search for the PO
3. Click on the **red coins** icon to create a credit note
4. On the credit note creation page, edit the **"Price"** or **"Qty"** field and ensure value is negative and can fully balance out the invoice value as submitted in **Step 1**
5. Once ready, scroll down and **submit** the credit note*



***Note: To find detailed instructions on Credit Note creation, please navigate to "How to Submit Credit Notes" section.**

How to Correct Invoices (2/2)



coupa supplier portal CSP | NOTIFICATIONS 1 | HELP

Home Invoices **Orders** Business Profile Payments Service Sheets Items ASN Sourcing Forecasts Setup More...

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer Sanofi DEV

Purchase Orders

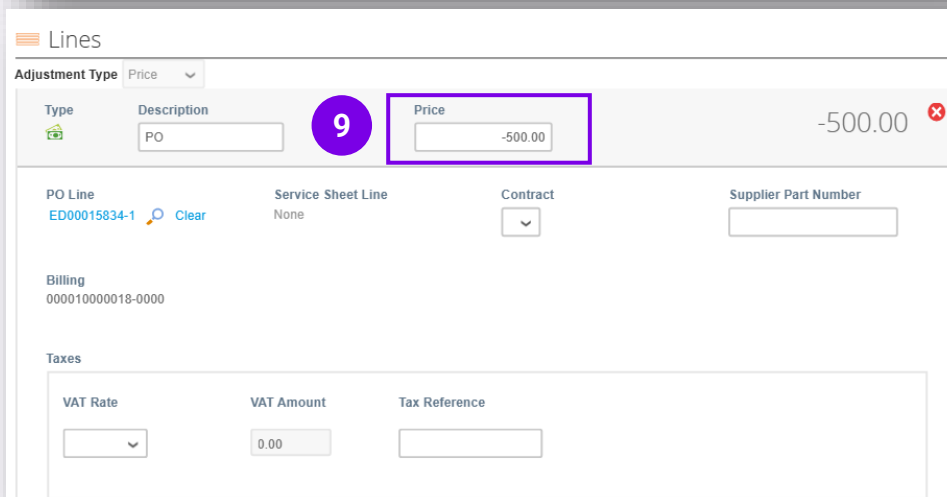
Instructions From Customer

Reminder : when you submit an invoice please refer to a PO Click on the golden coin below to initiate PO flip

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

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
ED00015834	07/11/25	Issued	None	PO	No	500.00 GBP		



Lines

Adjustment Type Price

Type Description Price -500.00

PO Line ED00015834-1 Clear Service Sheet Line None Contract Supplier Part Number

Billing 000010000018-0000

Taxes

VAT Rate	VAT Amount	Tax Reference
	0.00	

How to Correct Invoices (2/2)

Once the credit note has been approved, go back to the **"Orders"** tab and submit a new invoice with the correct amount.

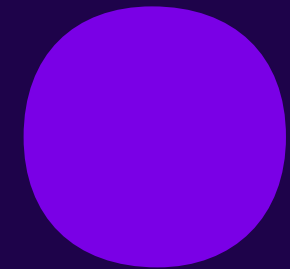
Step 2: Submit an invoice with the correct amount:

6. Select the **"Orders"** tab
7. Under the **"Orders"** sub-tab, use the **search bar** to search for the PO
8. Click on the **yellow coins** icon to create an invoice
9. On the invoice creation page, ensure to edit and **submit** the invoice with the accurate amount*



***Note: To find detailed instructions on Credit Note creation, please navigate to "How to Submit Invoices" section.**

12 How to Submit Invoices with Discounts



How to Submit Invoices with Discounts (1/2)

1 Orders

2 Select Customer: Sanofi DEV

3 Search

4 Actions

5 Price: 500.00

Lines

Type	Description	Price
PO		500.00

PO Line: ED00015834-1

Service Sheet Line: None

Contract: [Dropdown]

Supplier Part Number: [Text Box]

Billing: 000010000018-0000

Taxes

VAT Rate	VAT Amount	Tax Reference
20.0%	100.00	

How to Submit Invoices with Discounts (1/2)

To apply a discount to an invoice, you must first submit the full invoice, then issue a separate credit note for the discounted amount.

Step 1: Submit a PO-backed invoice in full:

1. Select the **"Orders"** tab
2. Ensure to select Sanofi in the **"Select Customer"** field
3. Under the **"Orders"** sub-tab, use the **search bar** to search for the PO
4. Click on the **yellow coins** icon to create an invoice
5. On the invoice creation page, ensure to **submit** the invoice with the full amount*



***Note:** To find detailed instructions on Invoice creation, please navigate to "How to Submit Invoices" section.

How to Submit Invoices with Discounts (2/2)

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'Orders' tab is selected and highlighted with a purple circle labeled '6'. Below the navigation bar, the 'Purchase Orders' section is visible. A search bar is present, and a table lists purchase orders. The first row is highlighted, and the 'Actions' column contains a red coins icon, which is circled with a purple circle labeled '8'. Below the table, the 'Lines' section is open, showing the 'Adjustment Type' as 'Price'. The 'Price' field is set to '-50.00' and is circled with a purple circle labeled '9'. The 'Description' field is set to 'PO'. The 'PO Line' field shows 'ED00015834-1'. The 'Billing' field shows '000010000018-0000'. The 'Taxes' section is also visible, with 'VAT Rate' set to '0.00'.

How to Submit Invoices with Discounts (2/2)

After successfully submitting the invoice, navigate back to the **"Orders"** tab and create a credit note against the same purchase order to apply the discount.

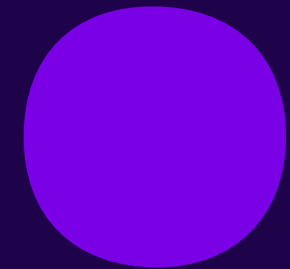
Step 2: Create a credit note for the discount amount:

6. Select the **"Orders"** tab
7. Under the **"Orders"** sub-tab, use the **search bar** to search for the PO
8. Click on the **red coins** icon to create a credit note
9. On the credit note creation page, edit the value in the **"Price"** field and ensure value is negative
10. Once ready, **submit** the credit note*



***Note: To find detailed instructions on Credit Note creation, please navigate to "How to Submit Credit Notes" section.**

13 How to Add Additional Team Members



How to Add Additional Team Members (1/2)

The screenshot shows the Sanofi portal interface. At the top, there is a navigation bar with tabs: Orders, Business Profile, Payments, Service Sheets, Items, ASN, Sourcing, Forecasts, **Setup** (highlighted with a red circle and labeled '1'), and More... Below the navigation bar, there is a section titled 'Requests'. In this section, there is a blue bar with the 'Invite User' button (highlighted with a red circle and labeled '2'), a 'View' dropdown menu set to 'All', and a search bar. Below this bar is a table with the following data:

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
CSP Supplier	elsa.robinson@sanofi.com	Active	ASNs Admin Business Performance Catalogs	Sanofi DEV	Accounting, Diversity, Legal, Procurement,	Edit

Inviting Additional Team Members (1/2)

To invite an additional user:

1. Click the **"Setup"** tab
2. You will be taken to the **Admin setup page**, click on the **"Invite User"** button in the **Users section***



***Note: Only CSP users with an Admin role will have permission to invite users.**

How to Add Additional Team Members (2/2)

3

3a

3b

The screenshot shows the 'Invite User' form with the following sections and annotations:

- User Information:** Contains fields for First Name, Last Name, Email, and Purpose. A purple box labeled '3a' highlights the First Name, Last Name, and Email fields.
- Phone Number:** Contains fields for Country/Region, Area/City, Local, and Extension.
- Permissions:** A section with a purple box labeled '3b' highlighting various checkboxes including All, Admin, Orders, Invoices, Catalogs, Profiles, A BNC, Service Sheets, Payments, Order Changes, Early Payments, Business Performance, Sourcing, Private and Public, Community, Order Line Confirmation, Forecast Planner, Workers, Worker Assignments, and Inventory.
- Customers:** A section with checkboxes for All and Sanofi DEV.
- Bottom:** A purple box labeled '3c' highlights the 'Send Invitation' button.

Inviting Additional Team Members (2/2)

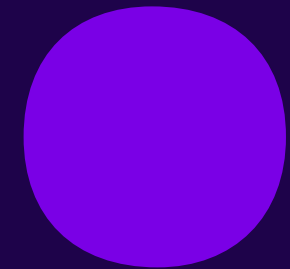
3. On the pop-up **"Invite User"** screen, input the required information

3a. Input the user's name and email address

3b. Check/uncheck appropriately the fields in the **"Permissions"** and **"Customers"** sections to control the new user's permissions and access

3c. Once complete, click **"Send Invitation"**, which will issue an email invitation to the new user. The new user will need to go through the same registration and log-in process, as previously described, in order to access the CSP

14 How to Merge Accounts



How to Merge Accounts (1/4)

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'Setup' tab is highlighted with a purple circle and the number 1. On the left sidebar, the 'Merge Requests' link is highlighted with a purple circle and the number 2. The main content area is titled 'Admin Merge Requests'. A form titled 'Create Merge Request' is shown, with the email address 'coupa@coupamail.edu' entered in the first field, highlighted with a purple circle and the number 3. Below the email field is a reCAPTCHA box with the text 'I'm not a robot' and a checkbox, also highlighted with a purple circle and the number 3. At the bottom of the form, a warning message is displayed, and the 'Request Merge' button is highlighted with a purple circle and the number 4.

How to Merge Accounts (1/4)

To merge accounts:

1. Click the **"Setup"** tab*
2. You will be taken to the **Admin setup page**, click on the **"Merge Requests"** link in the **Users section***
3. Enter the **email address** of the account you wish to merge with and tick the **"I'm not a robot"** check box
4. Click on the **"Request Merge"** button




***Note: Only CSP users with an Admin role will have permission to merge CSP accounts.**

How to Merge Accounts (2/4)

5

* **Account Owner** ☒ **My Account**
☐ **Their Account**
By choosing this option I understand that I will no longer be the account owner.

* **Note For Recipient**

☐ I'm not a robot 
reCAPTCHA
[Privacy - Terms](#)

! Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts](#)

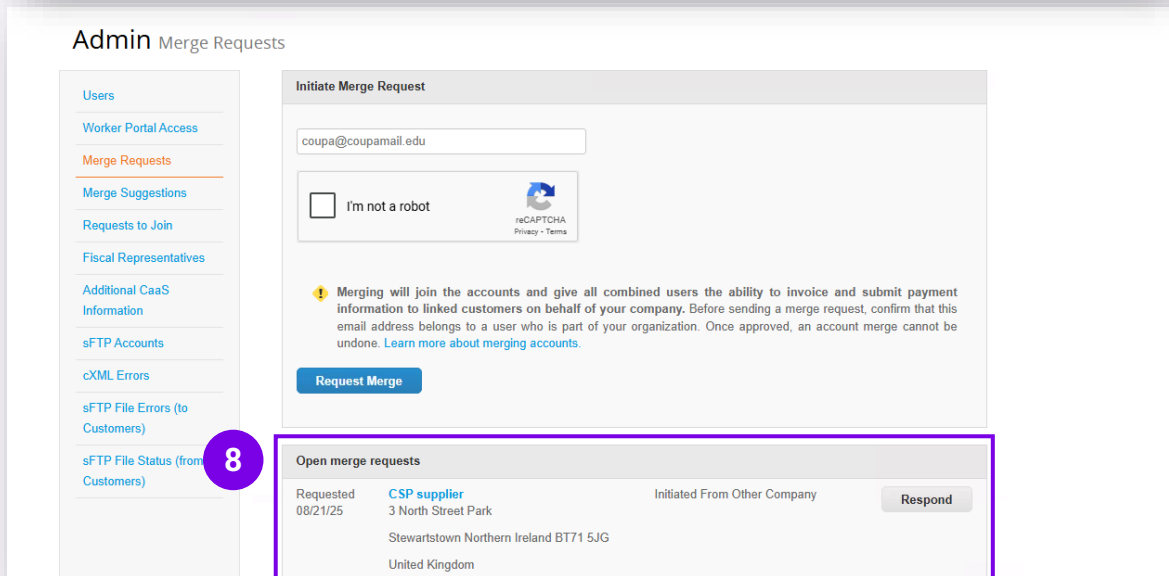
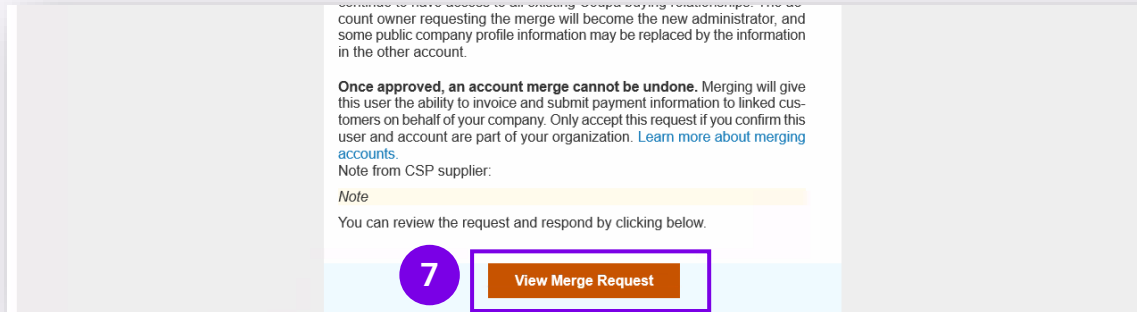
How to Merge Accounts (2/4)

5. Select which account you wish to be the **account owner** using the "**Account Owner**" radio buttons and add a "**Note For the Recipient**" if required* and click on the "**I'm not a robot**" check box
6. Click on the "**Send Request**" button to send the Merge request



***Note: you will still be able to log into the account with both login details.**

How to Merge Accounts (3/4)



How to Merge Accounts (3/4)

- The email address you inputted during the merge request process will receive an email notification; they will need to press the **"View Merge Request"** button
- The recipient will then be taken to the CSP and will see an **Open merge request** under the **Merge Request** section of their account, they must click on the **"Respond Button"** to accept the merge request

How to Merge Accounts (4/4)

Users with access to merged account CSP Supplier (zia.jin@sanofi.com)

Note from requester Note

Add note for requester

9 ☐ I recognize the email address above as a coworker at my company, and I agree to merge

! Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Only accept this request if you confirm this user is part of your organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

10

Cancel Reject Accept

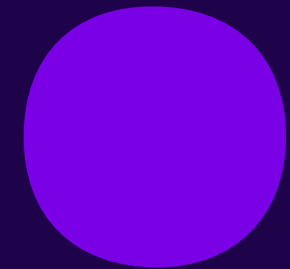
How to Merge Accounts (4/4)

9. The recipient will need to check the **"I recognise the email address above as a coworker at my company, and agree to merge"** check box*
10. Once, this check box has been ticked they will then be able to accept the request by clicking on the **"Accept"** button – now both users will have the ability to invoice and submit payment information to linked customers on behalf of Sanofi

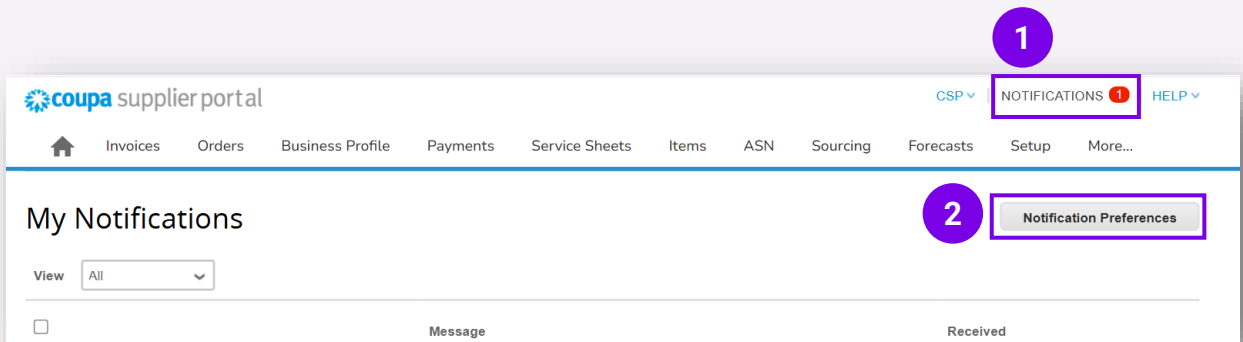


***Note: The user will not be able to accept the request until this check box has been ticked.**

15 How to Manage Notifications



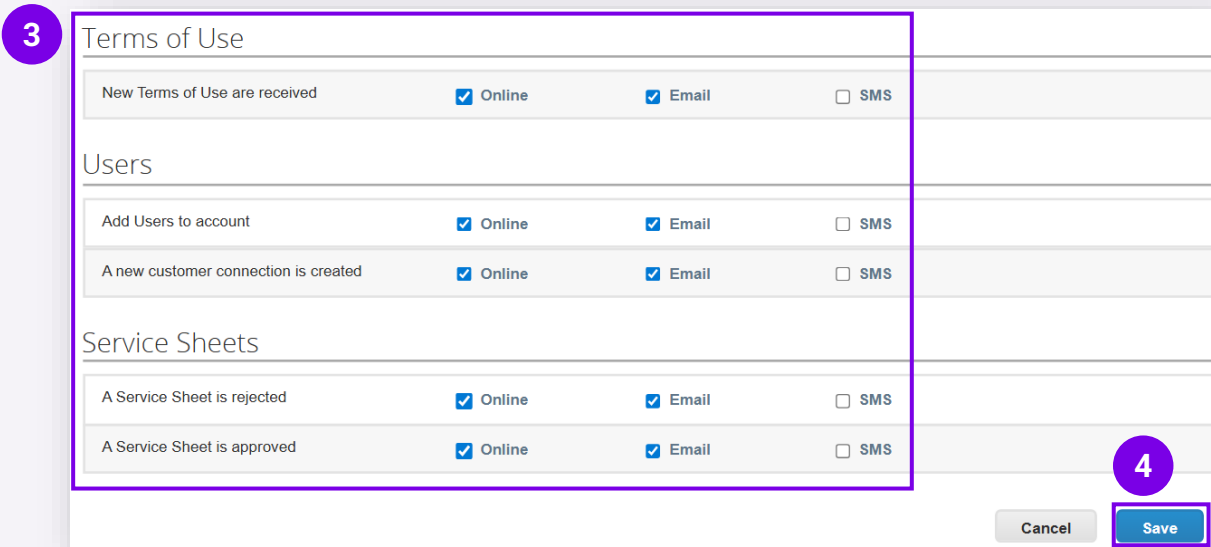
How to Manage Notifications



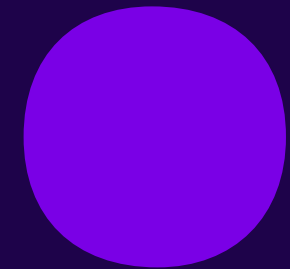
Managing Notifications

To manage CSP notifications, on the CSP **homepage**:

1. Click on **"NOTIFICATIONS"** at the top of your screen
2. Click on the **"Notification Preferences"** button
3. On the **"Notification Preferences"** page, you can enable/disable **"Online"**, **"Email"**, and **"SMS"** notifications as required
4. Once complete, click the **"Save"** button at the bottom of the page to confirm your notification settings



16 How to Add Comments to Invoices and Credit Notes



How to Add Comments to Invoices and Credit Notes

1. Invoices

2. Select customer: Sanofi DEV - CSP supplier

3. Search

4. Invoice #

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
INV_34234	08/21/25	Draft	ED00015901	500.00 GBP	No		
CR_34234	08/21/25	Draft	ED00015901	500.00 GBP	No		
CR_2345354	08/18/25	Draft	ED00015834	500.00 GBP	No		
None	08/12/25	Draft	ED00015834	500.00 GBP	No		
INV54r34	07/11/25	Pending Approval	ED00015834	600.00 GBP	No		

How to Add Comments to Invoices and Credit Notes

To add a comment to an Invoice or Credit Note:

1. Navigate to the **"Invoices"** tab, here you can view all invoices and credit notes
2. Ensure to select Sanofi in the **"Select Customer"** drop-down
3. Use the **search bar** to search for the Invoice or Credit Note you wish to add a comment to
4. Select the Invoice or Credit Note **# Link** under the **Invoice #** column to open the Invoice or Credit Note
5. Scroll to the bottom of the page and enter a comment in the **Enter Comment** box and click the **"Add Comment"** button to submit the comment, You can use the @ functionality to send a notification to a specific Sanofi user*

5. Comments

Mute Comments

Enter Comment

Add Comment [@Zia(DEV) Jin (U1092618)]

Add File | URL

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

Add Comment



***Note: You cannot delete a comment once submitted, you are only able to edit the comment using the pencil icon.**



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