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Coupa Supplier Portal (CSP) Training

Contents

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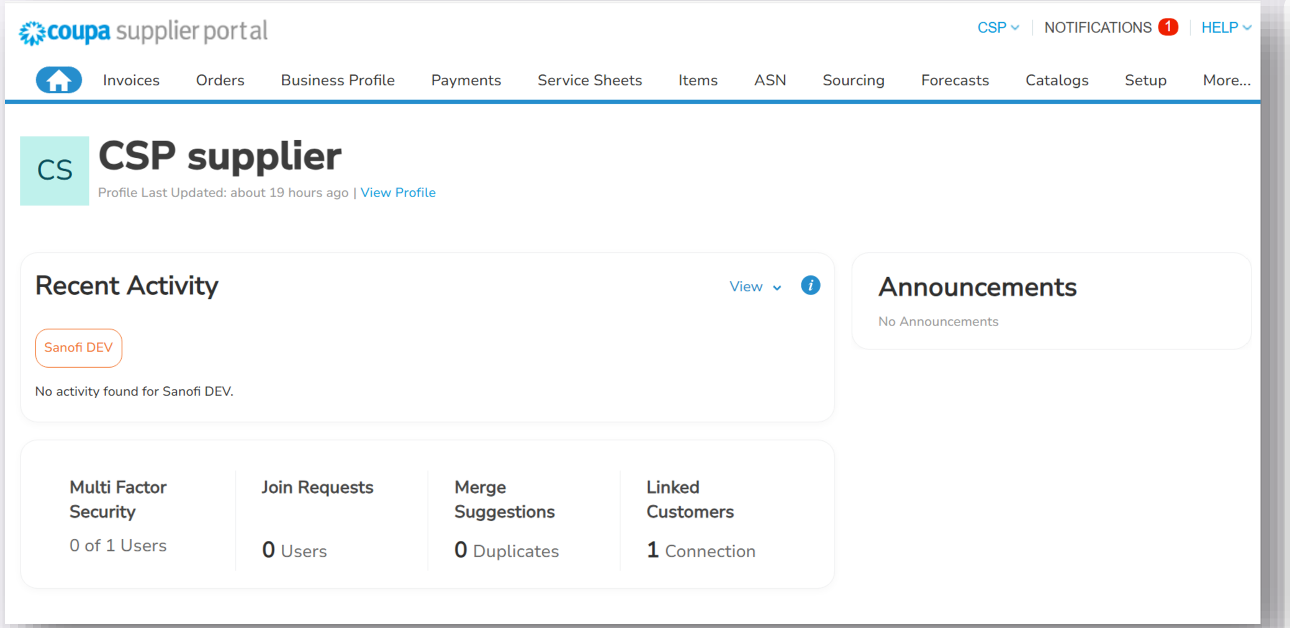
01 Overview of the CSP

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 einvoicing.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.**

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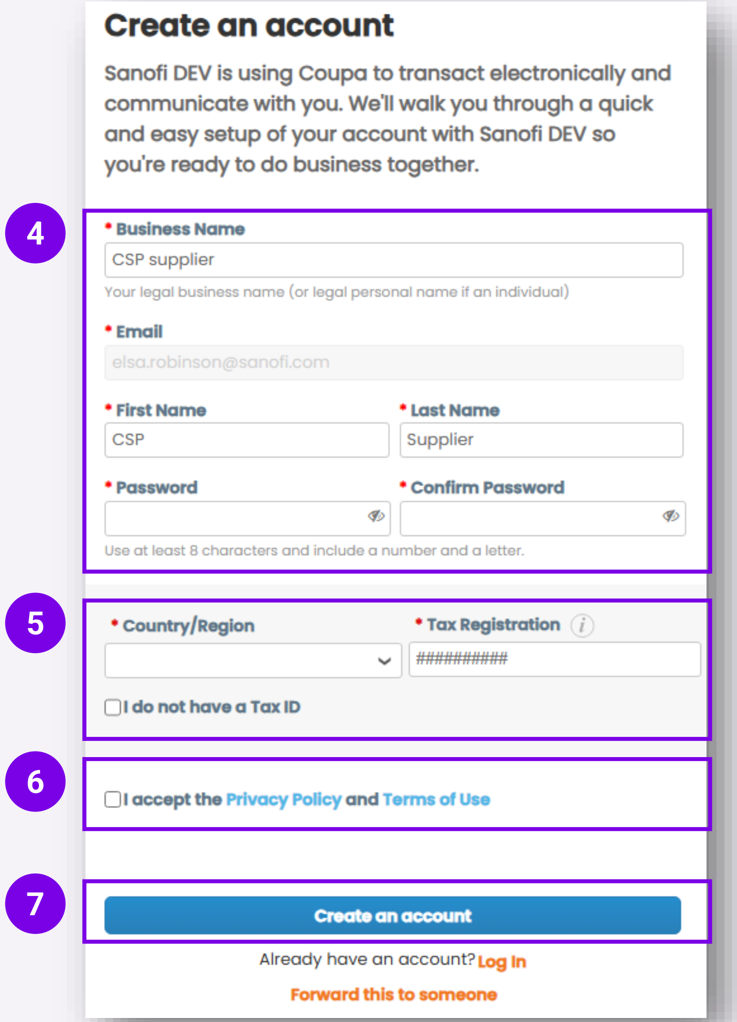
Receive Invitation Email → Complete CSP registration & Accept Terms and Conditions → Complete profile → Ready to receive PO & issue Invoice via CSP

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



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.**

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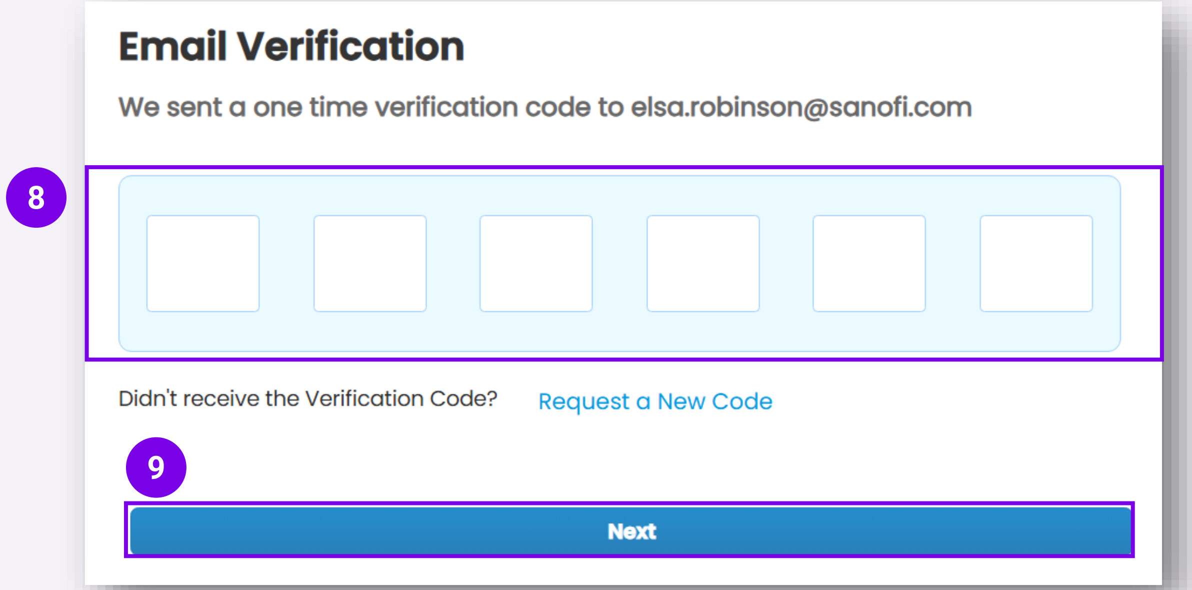
Registration Process: Suppliers Without a CSP Account (3/8)

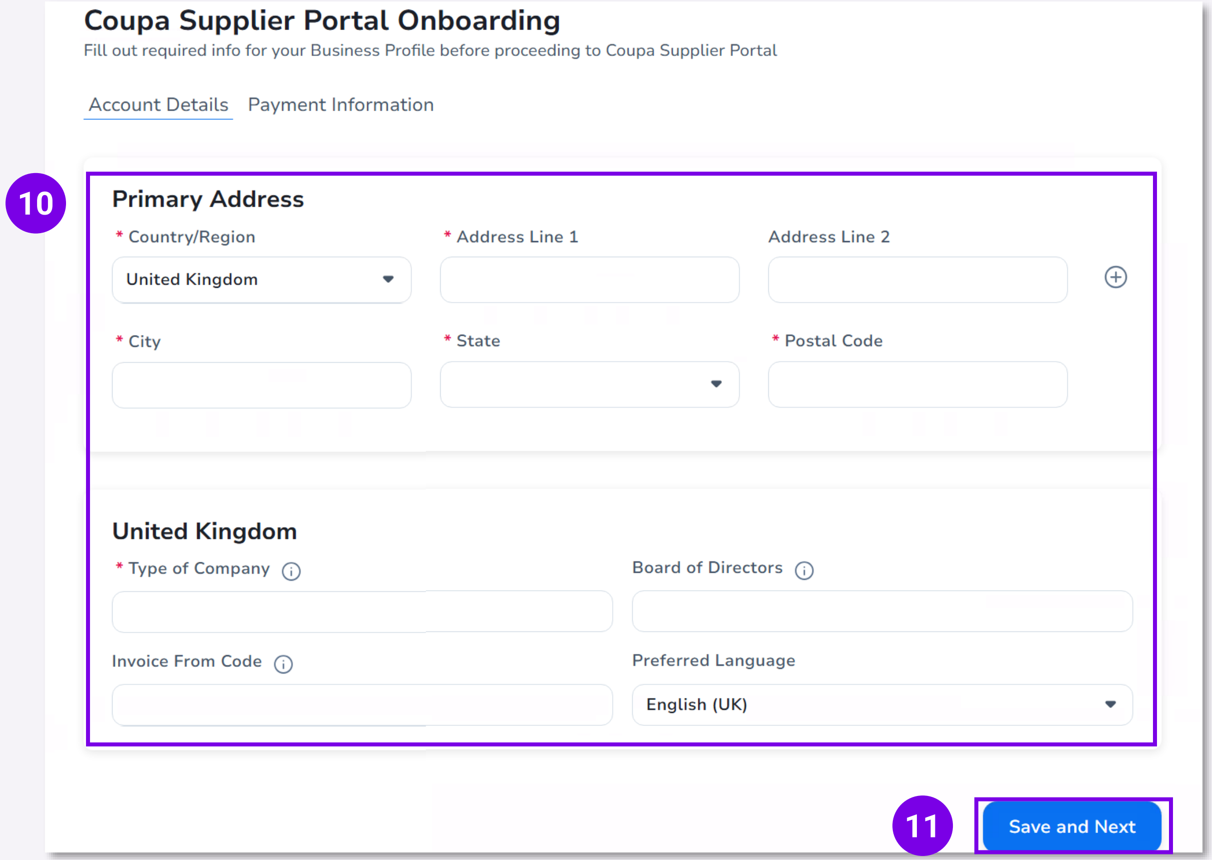


Registration Process: Suppliers Without a CSP Account (3/8)

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)



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.**

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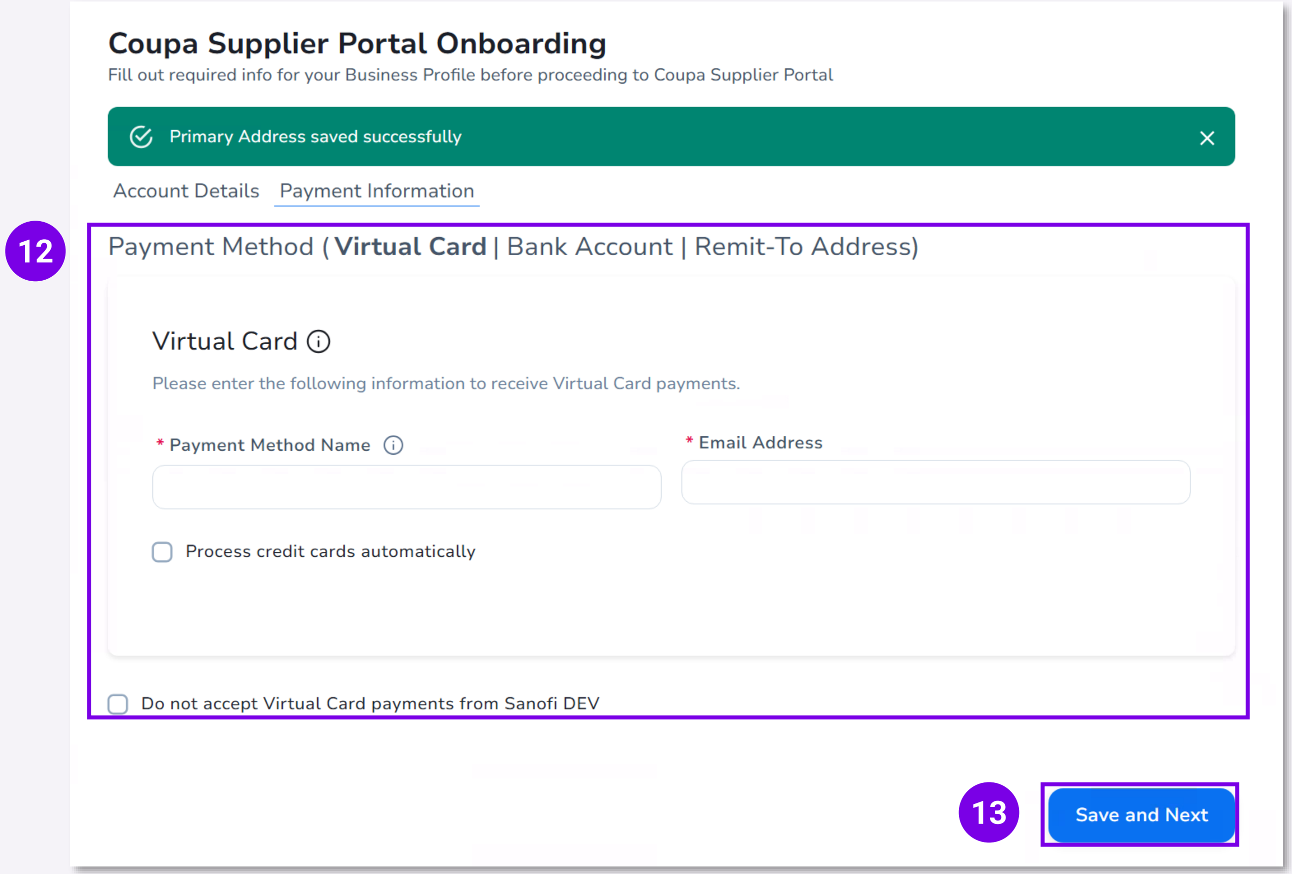
Receive Invitation Email | Complete CSP registration & Accept Terms and Conditions | Complete profile | Ready to receive PO & issue Invoice via CSP

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



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

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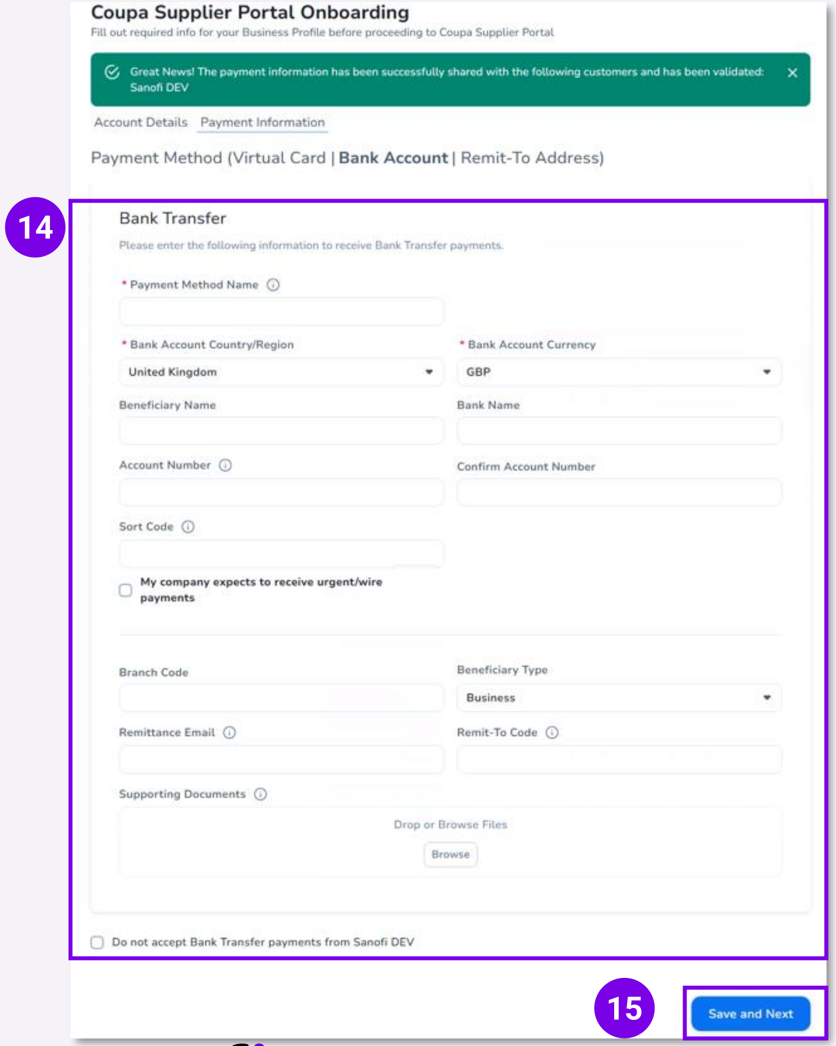
Registration Process: Suppliers Without a CSP Account (6/8)



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**:

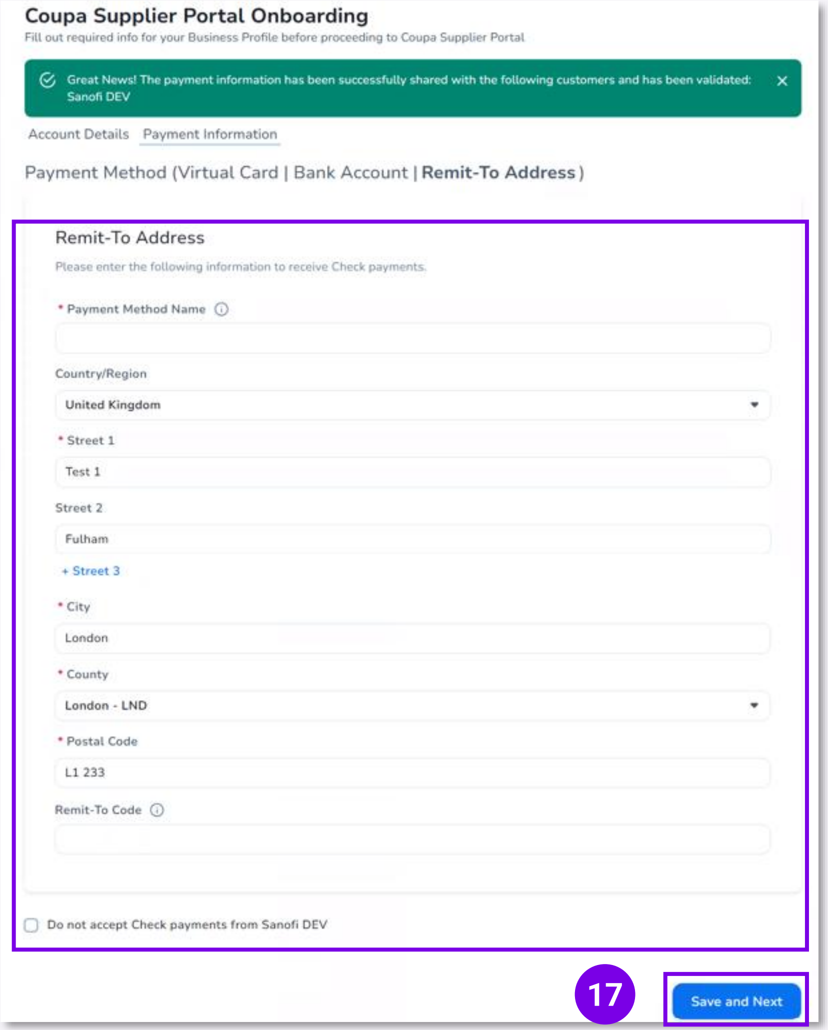
14. Complete all the required fields for **"Bank Transfer"** payment setup

   - **"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)

16



17

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 Adress"** 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

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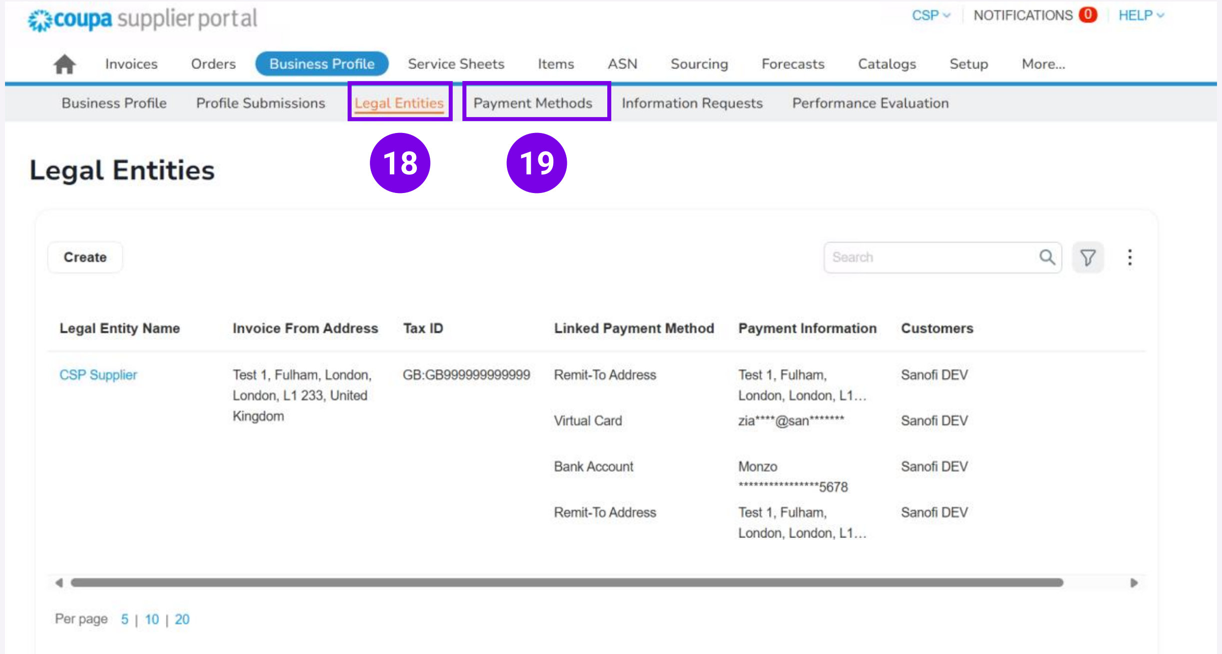
Registration Process: Suppliers Without a CSP Account (8/8)



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.

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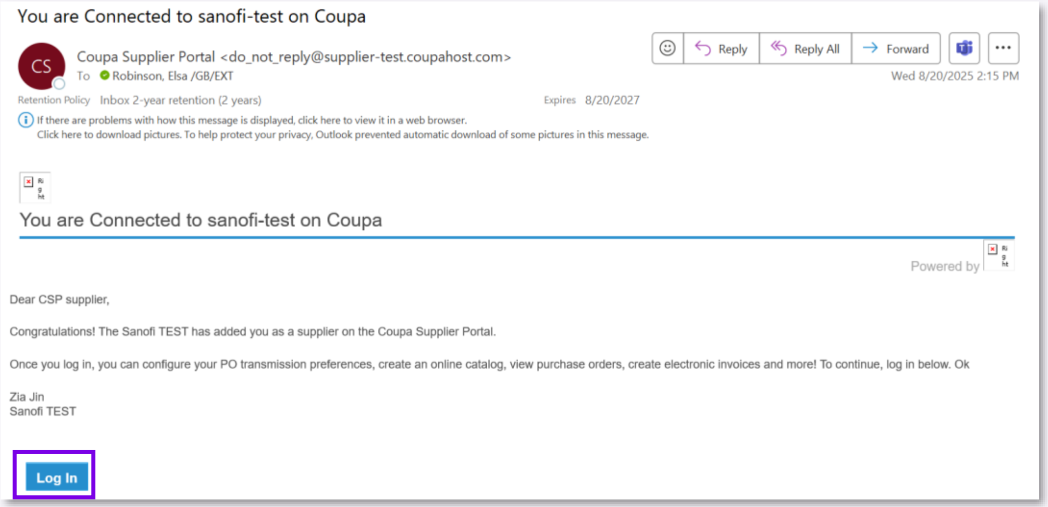
03 CSP Registration for Suppliers With an Existing CSP Account

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

1



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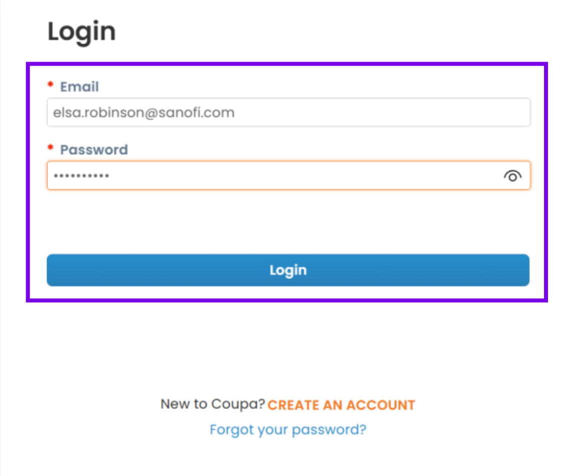

Registration Process: Suppliers With an Existing CSP Account (1/6)

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.**

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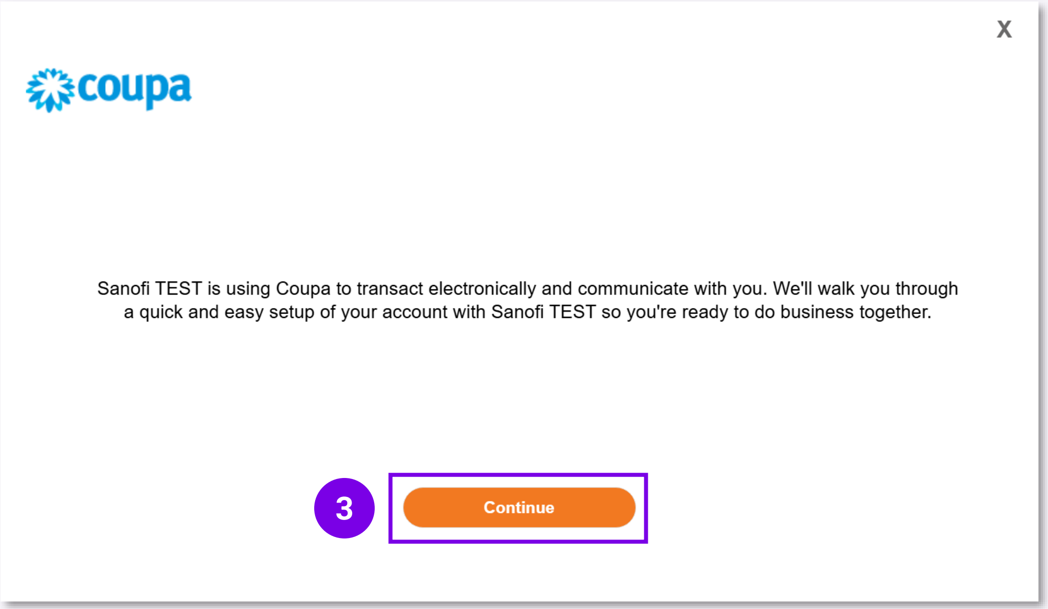
Registration Process: Suppliers With an Existing CSP Account (2/6)



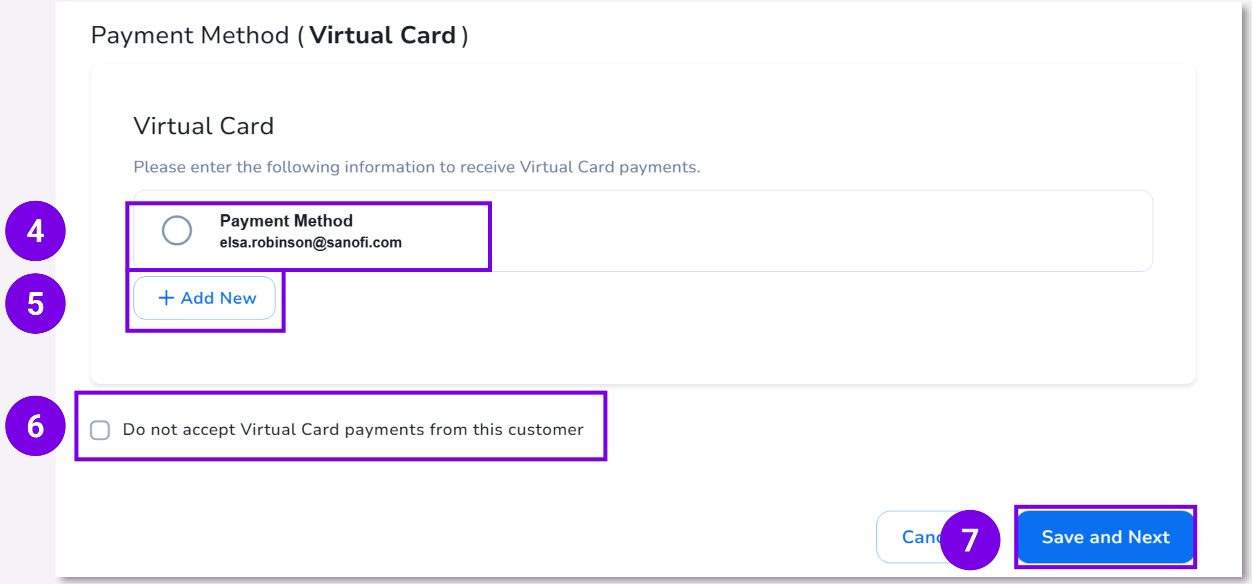
Registration Process: Suppliers With an Existing CSP Account (2/6)

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)

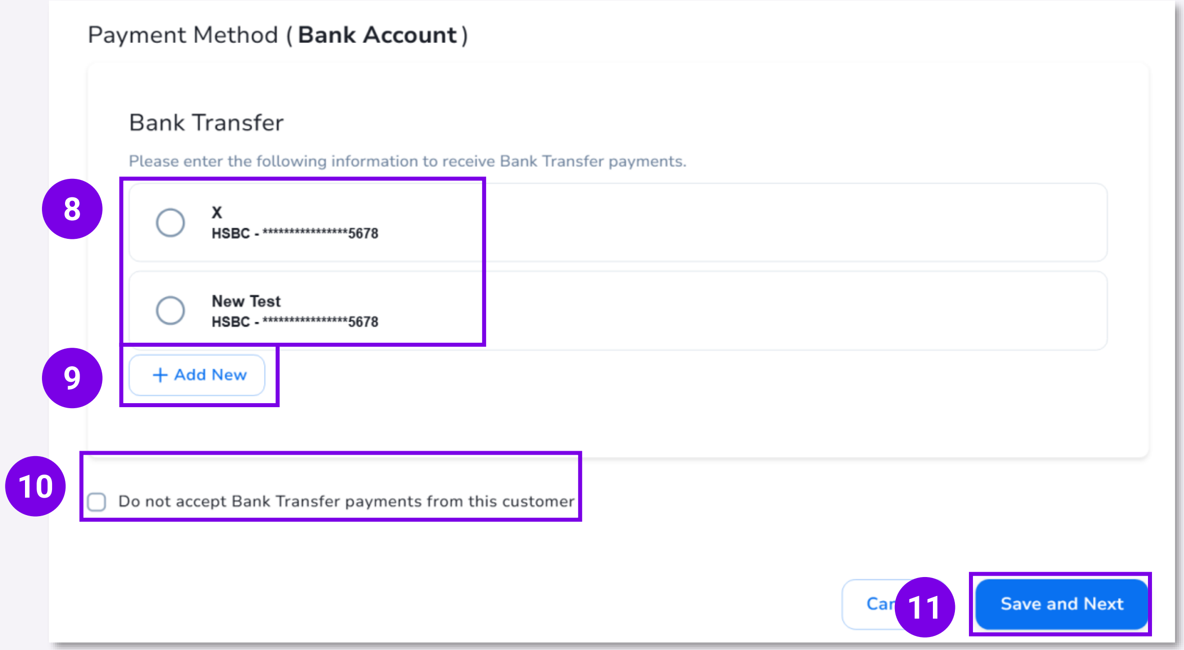


Registration Process: Suppliers With an Existing CSP Account (3/6)

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)

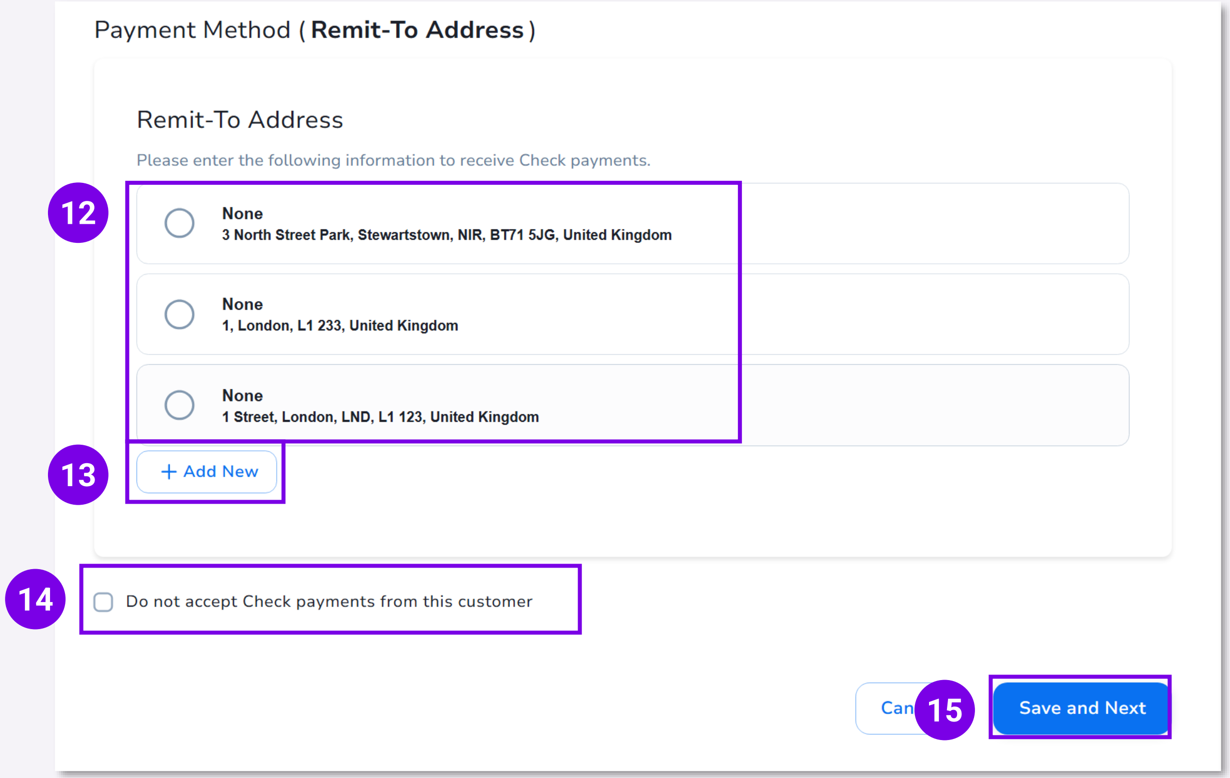


Registration Process: Suppliers With an Existing CSP Account (4/6)

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)

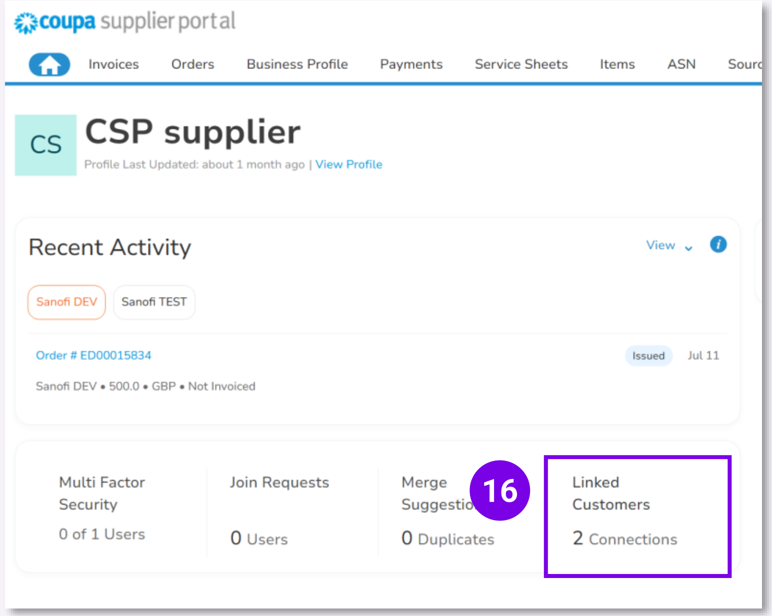


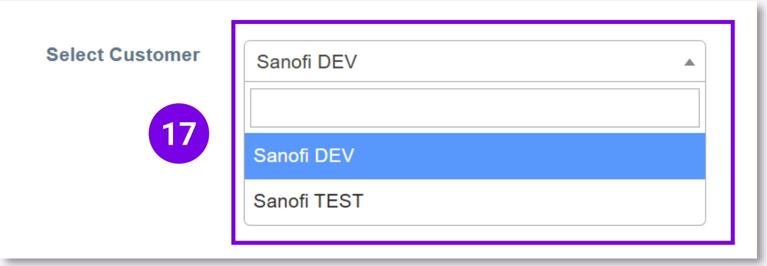
Registration Process: Suppliers With an Existing CSP Account (5/6)

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

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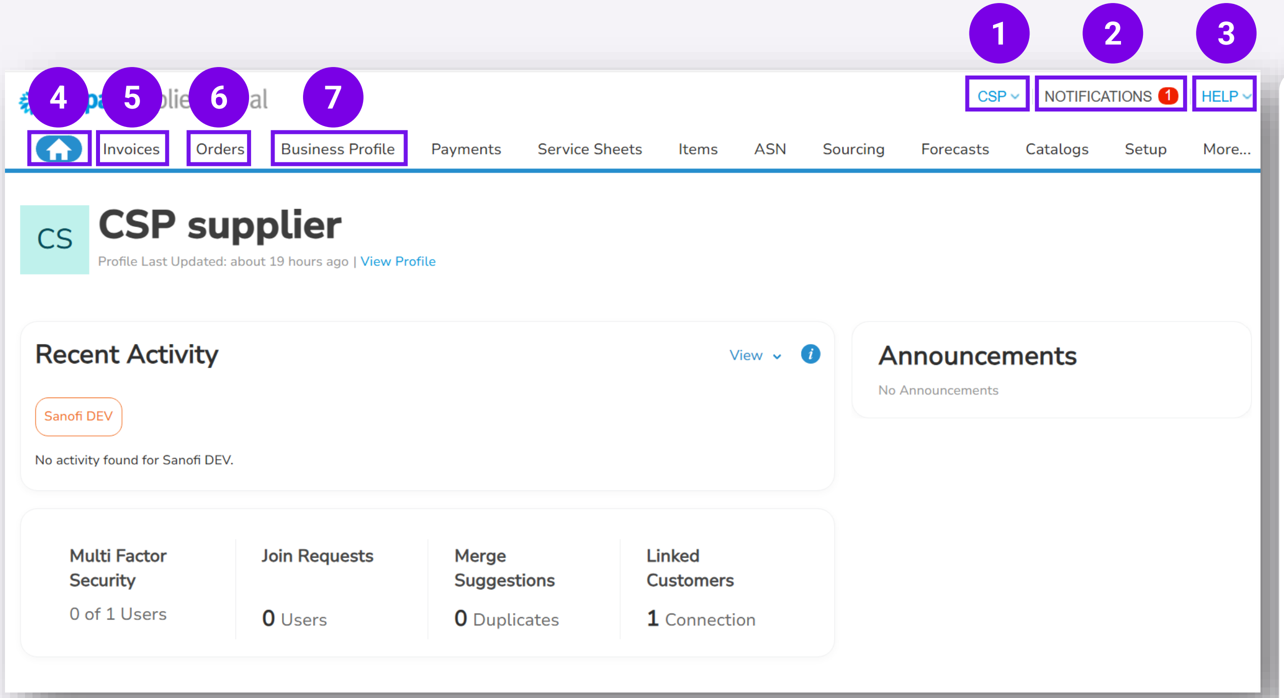
04 How to Navigate Through CSP

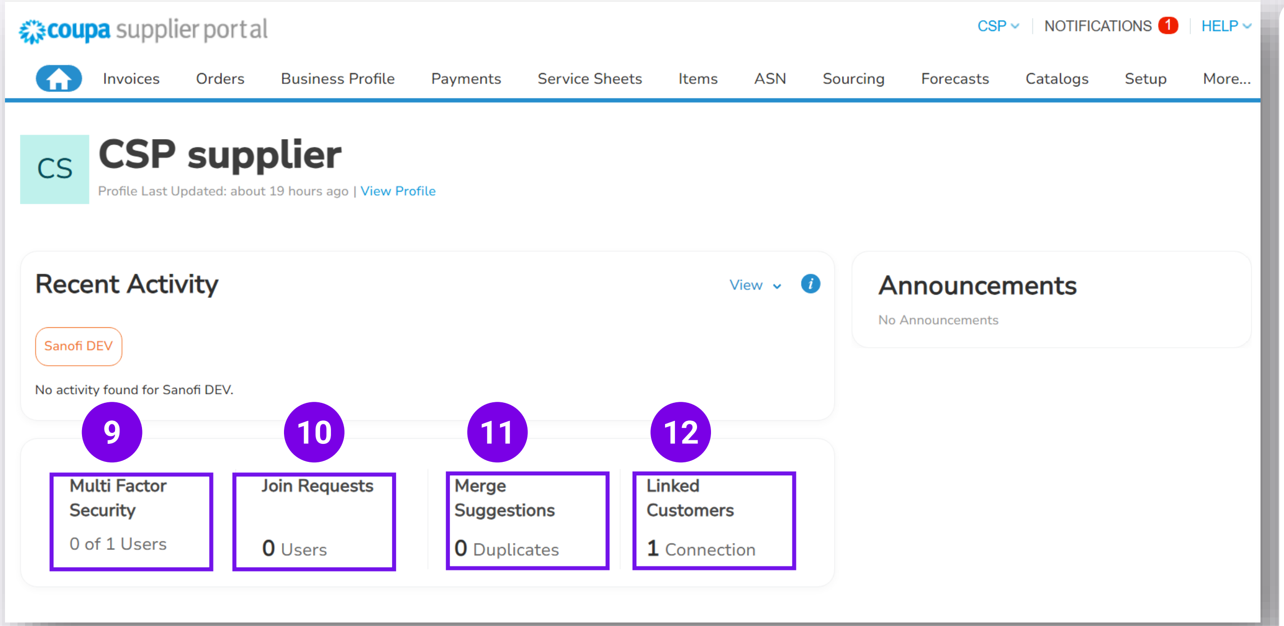
How to Navigate Through CSP (1/2)



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)

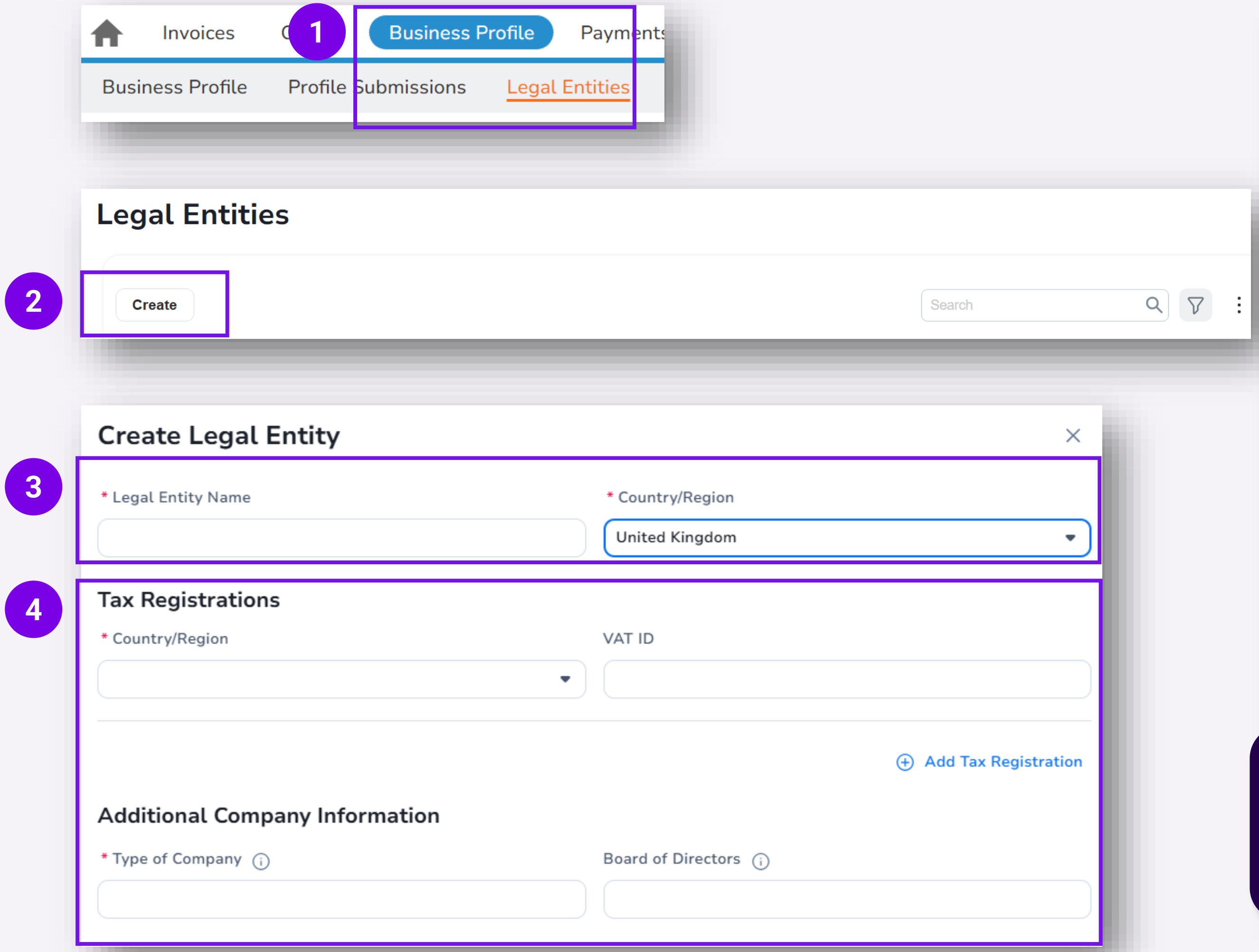


How to Navigate Through CSP (2/2)

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)



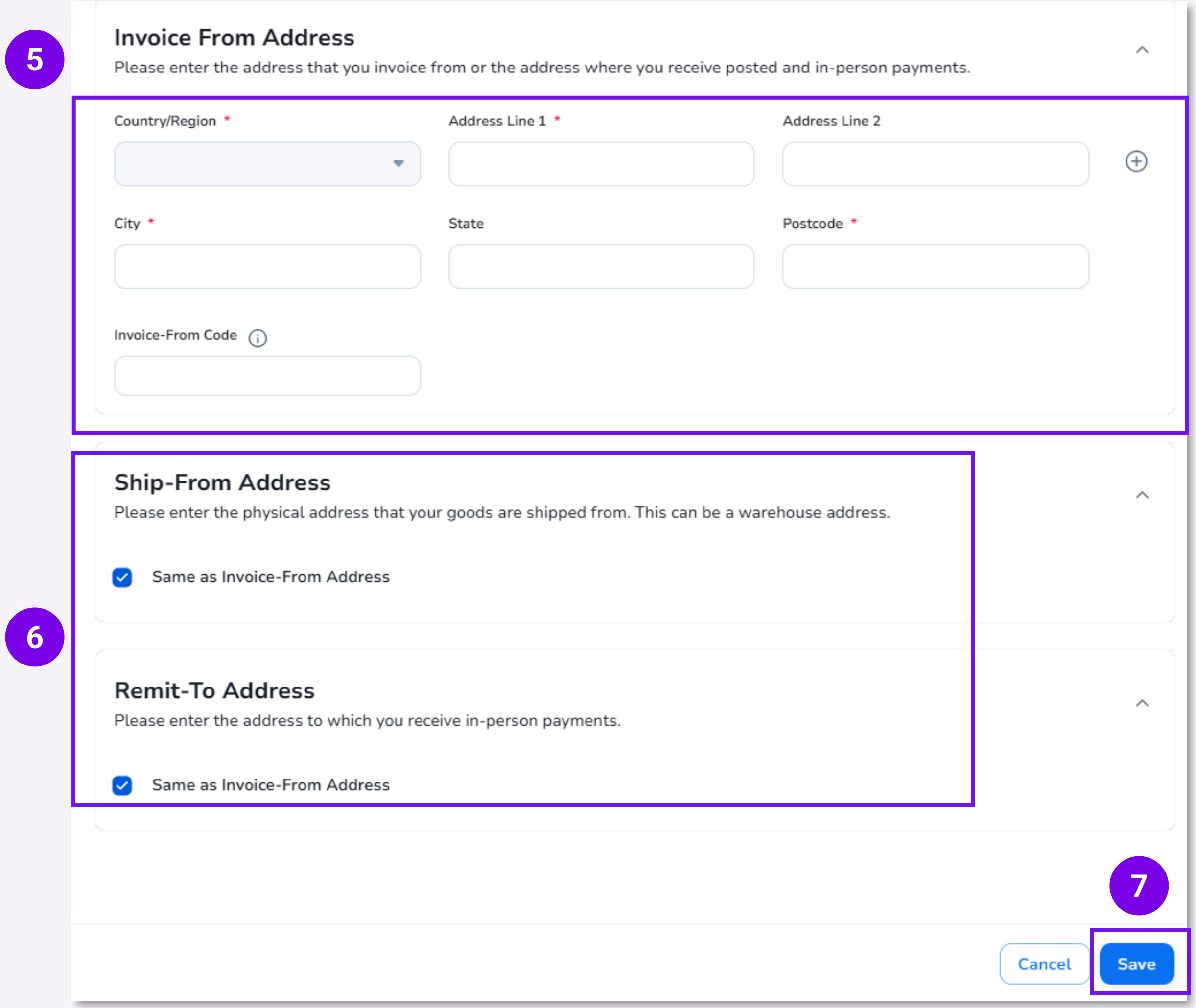
How to Set up Legal Entities (1/3)

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)



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 Adress"**, 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.**

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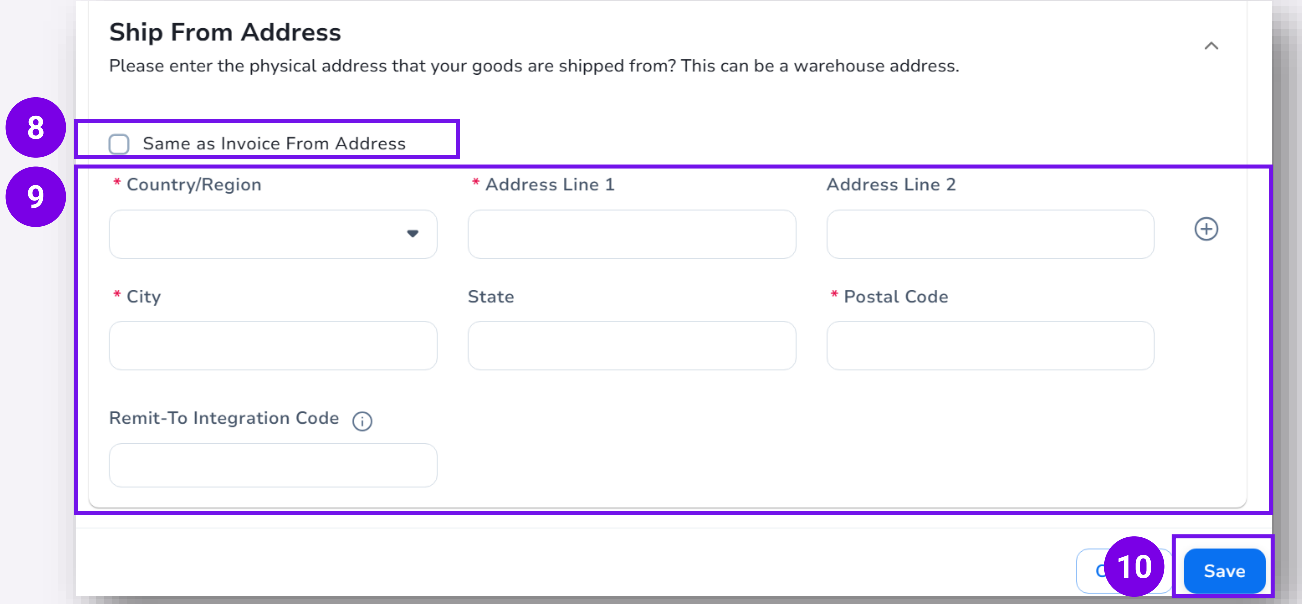
How to Set up Legal Entities (3/3)



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.**

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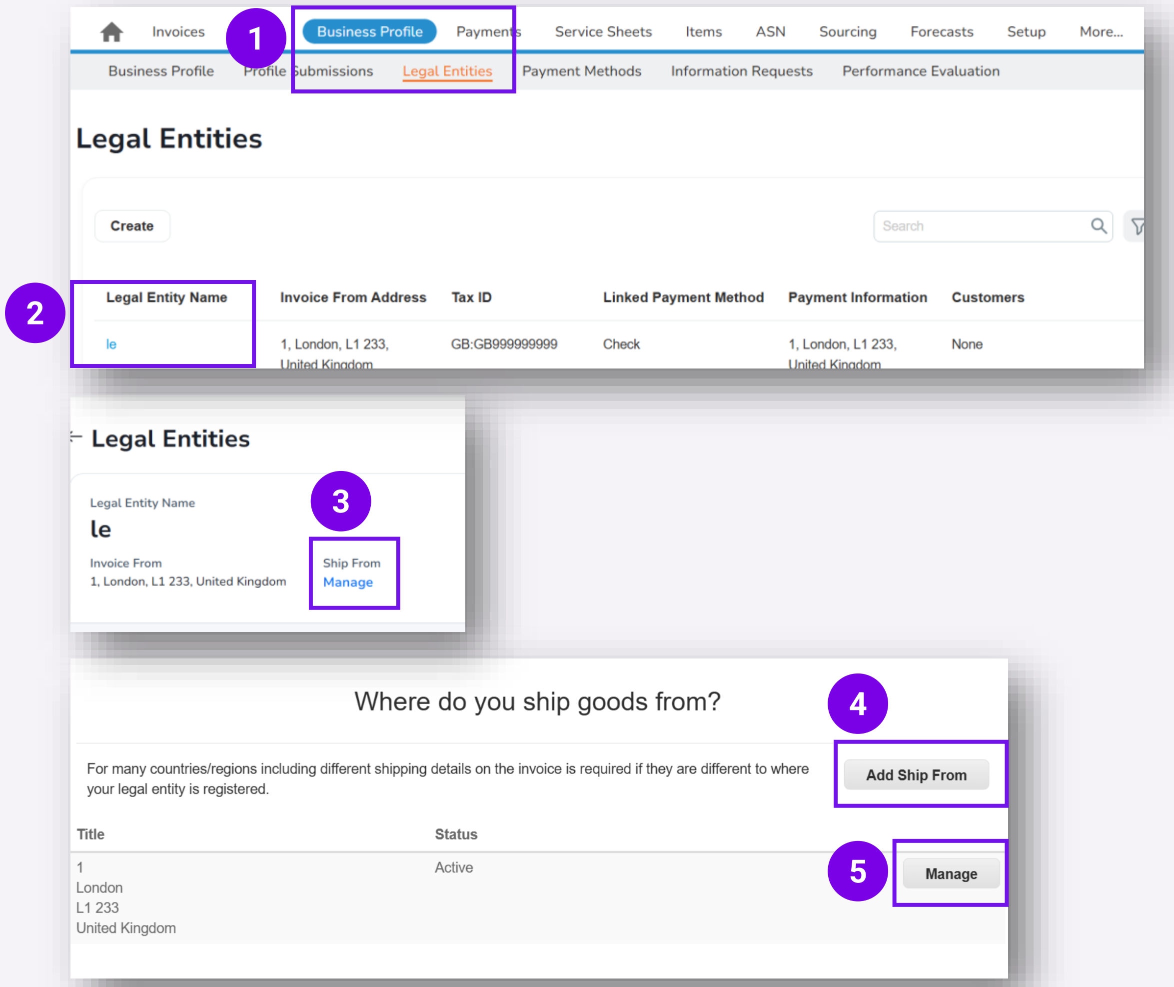
How to Manage Legal Entity Information



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.**

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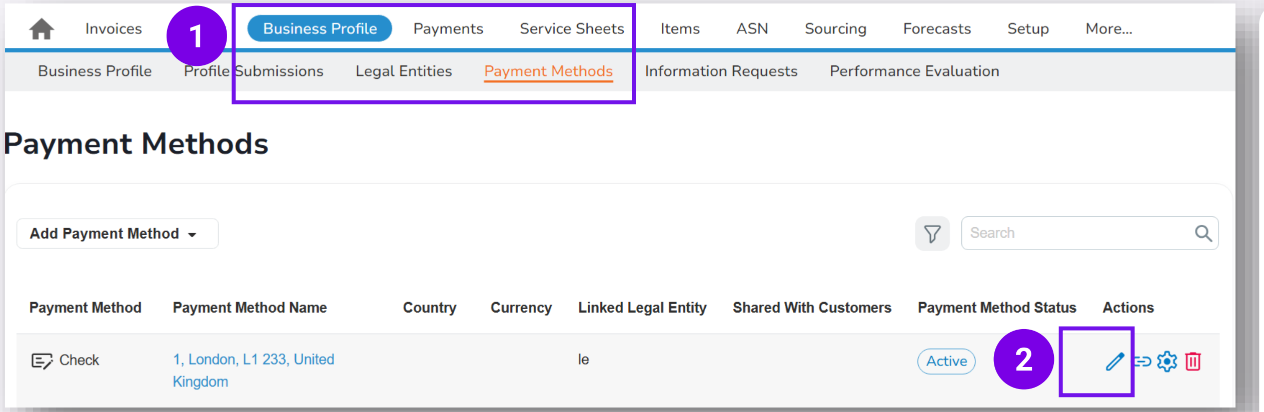
06 How to Set up and Manage Payment Methods

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



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 exiting 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'.**

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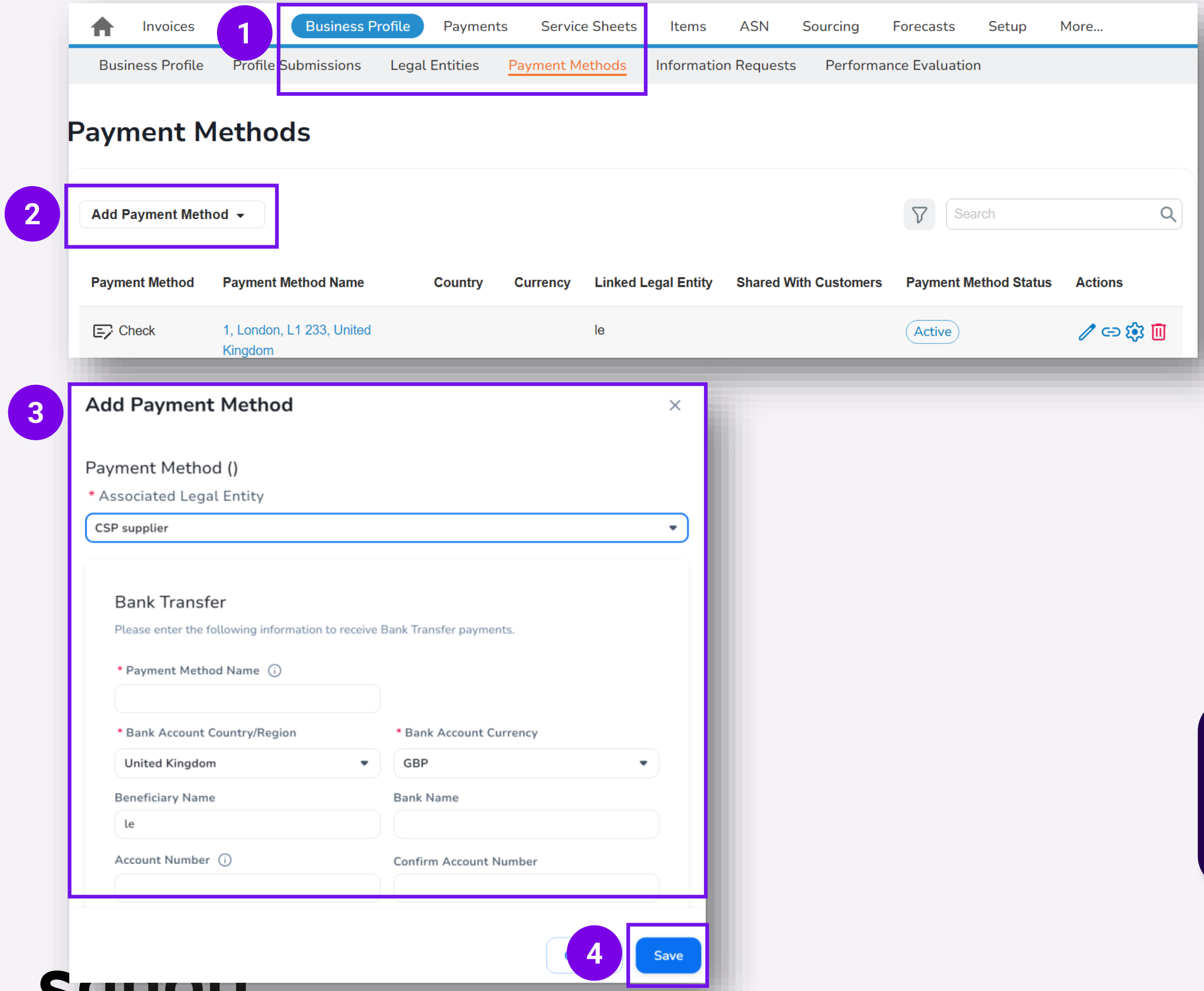
How to Set up and Manage Payment Methods (2/2)



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

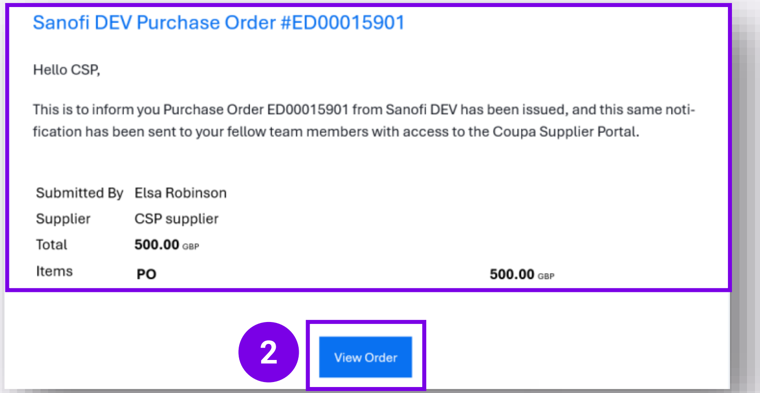
To add a new payment method:

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


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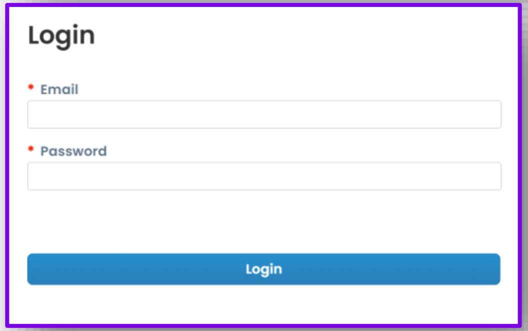

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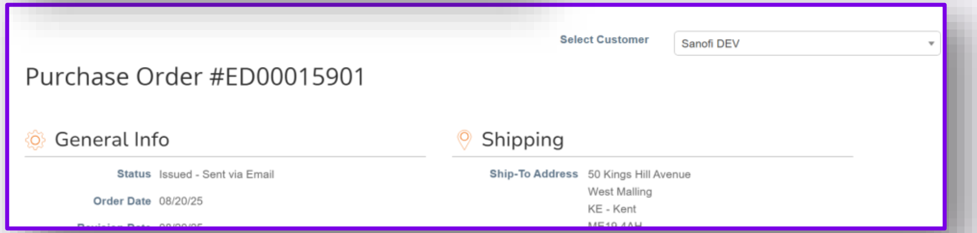
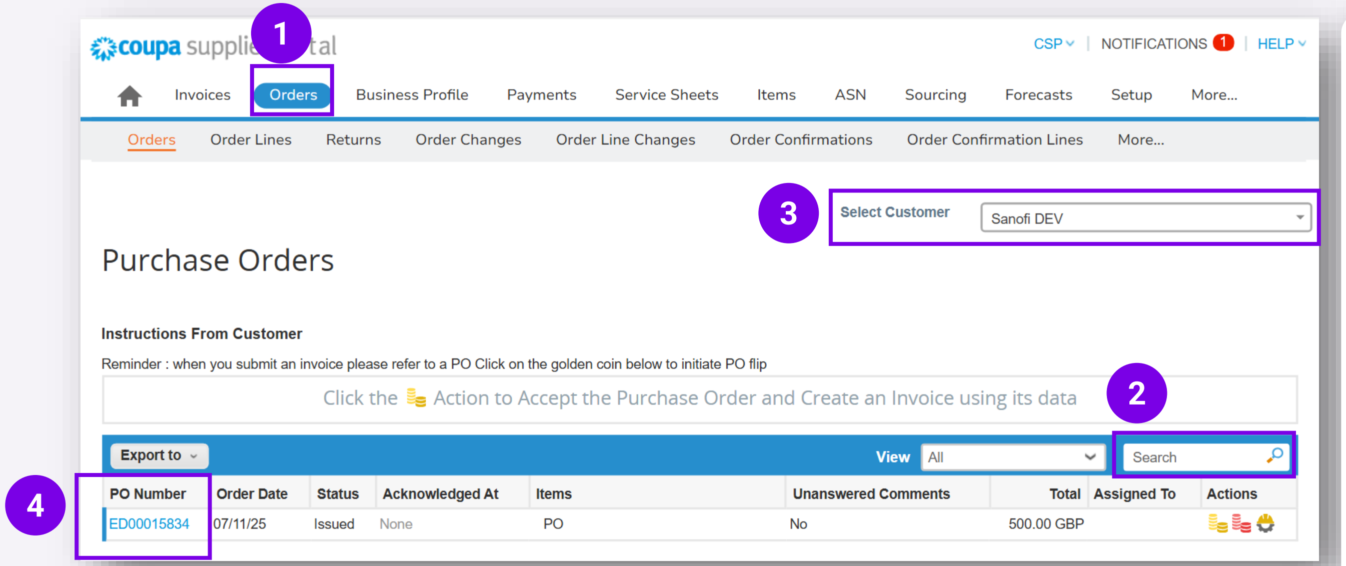


How to View Purchase Orders – Email Notification

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)



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.**

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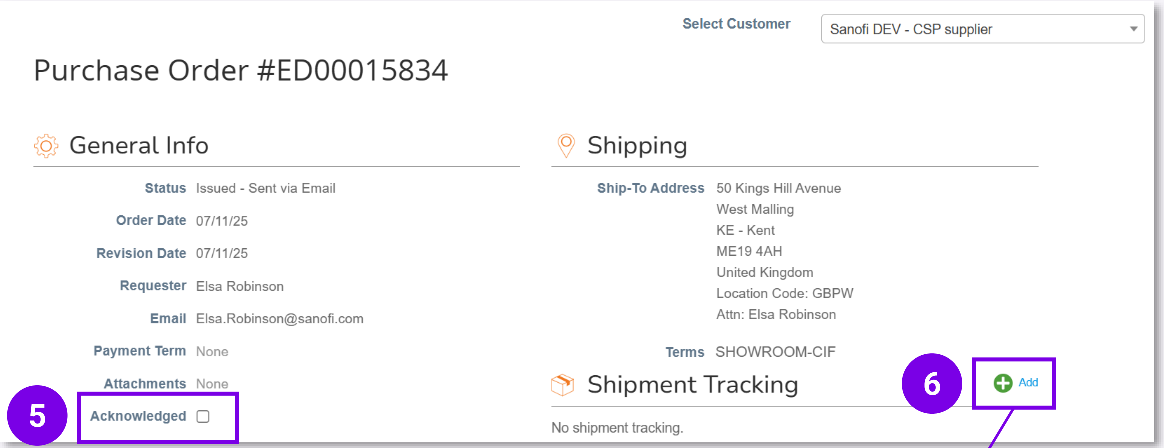
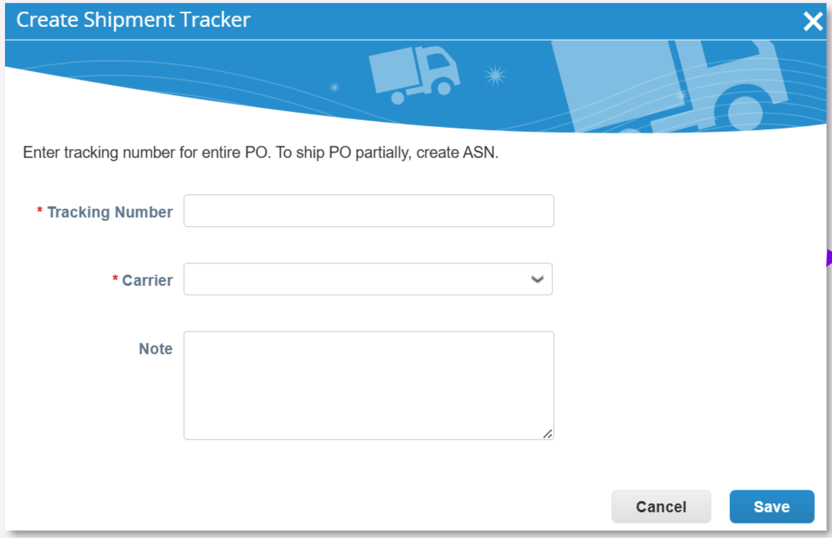
How to View Purchase Orders – Orders Tab (2/2)





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

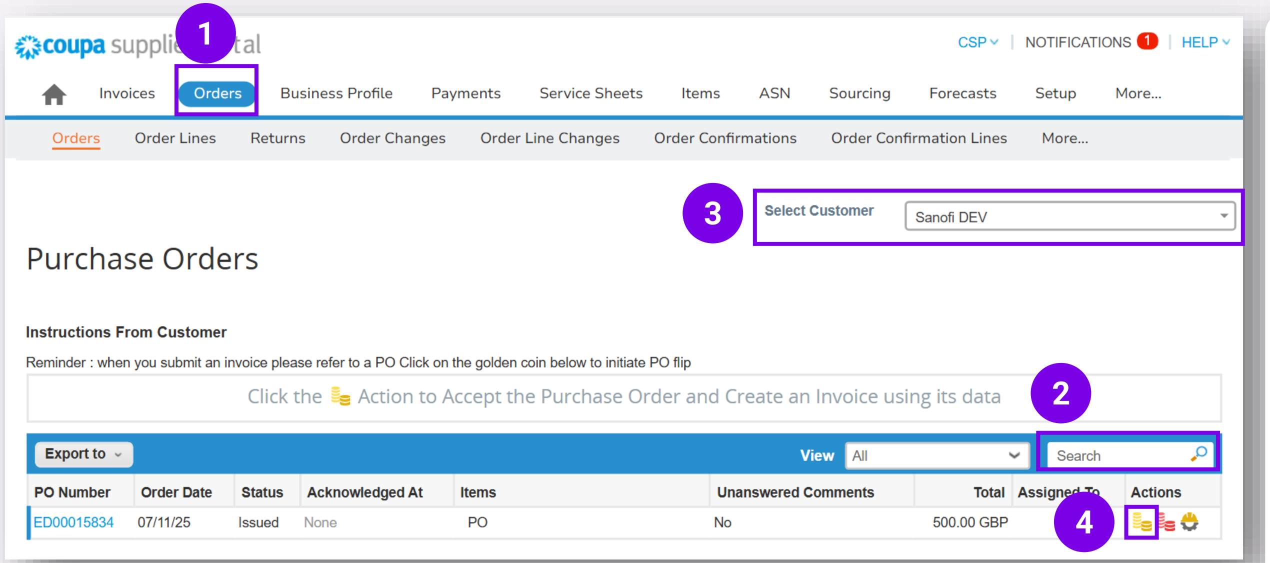
On the PO page, you will be able to:

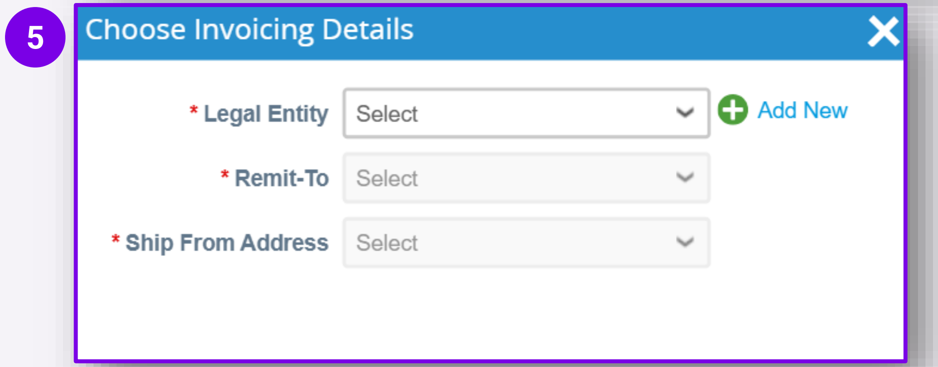
5. Acknowledge the PO by selecting the **"Acknowledged"** checkbox
6. Add the shipment tracking details (e.g. **"Tracking Number"** and **"Carrier"**) by clicking the green plus button in the **"Shipment Tracking"** section

***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)





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.

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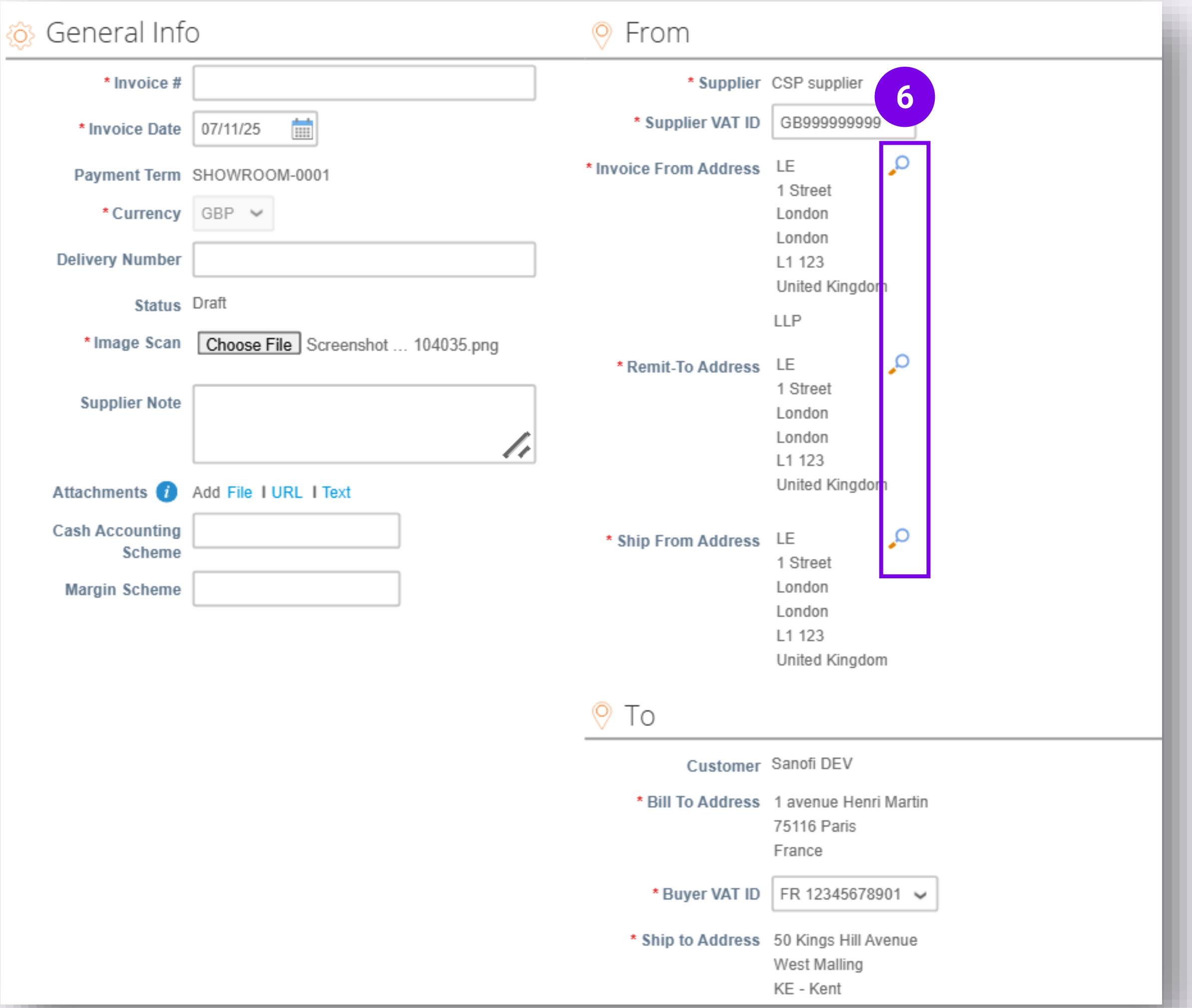
How to Submit Invoices (2/6)

5



6

How to Submit Invoices (2/6)

On the **invoice creation page** :

5. Complete the mandatory fields in the "**General Info", "From", and "To" sections***
6. 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.**

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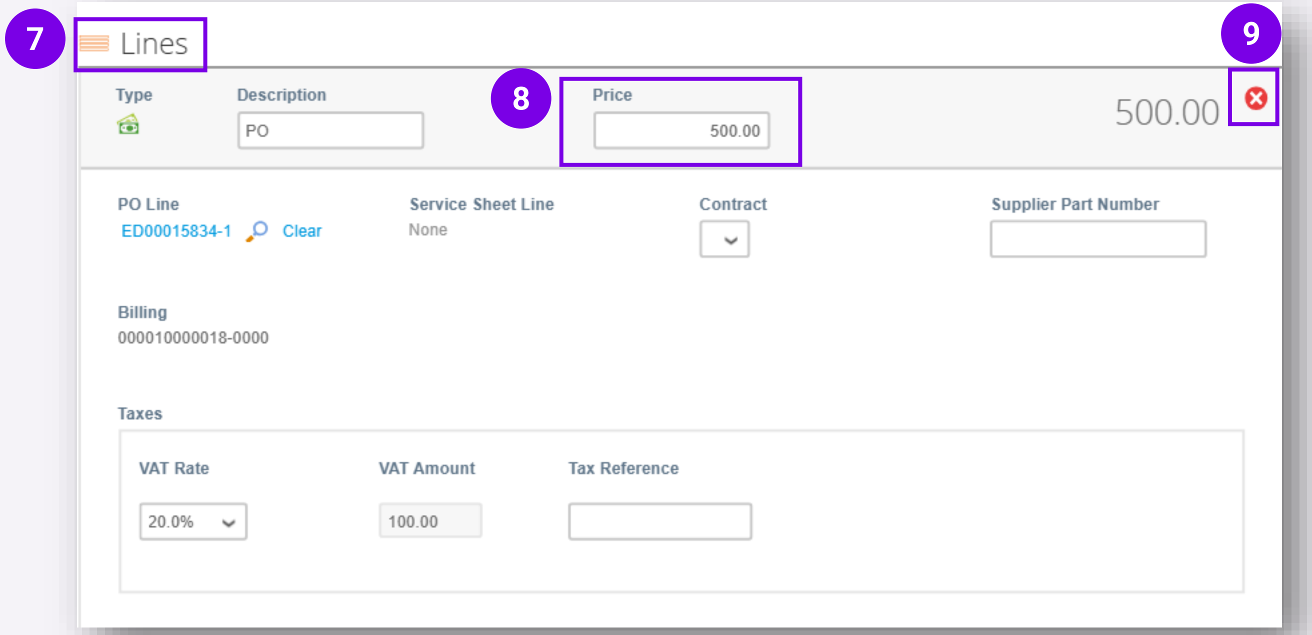
How to Submit Invoices (3/6)



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

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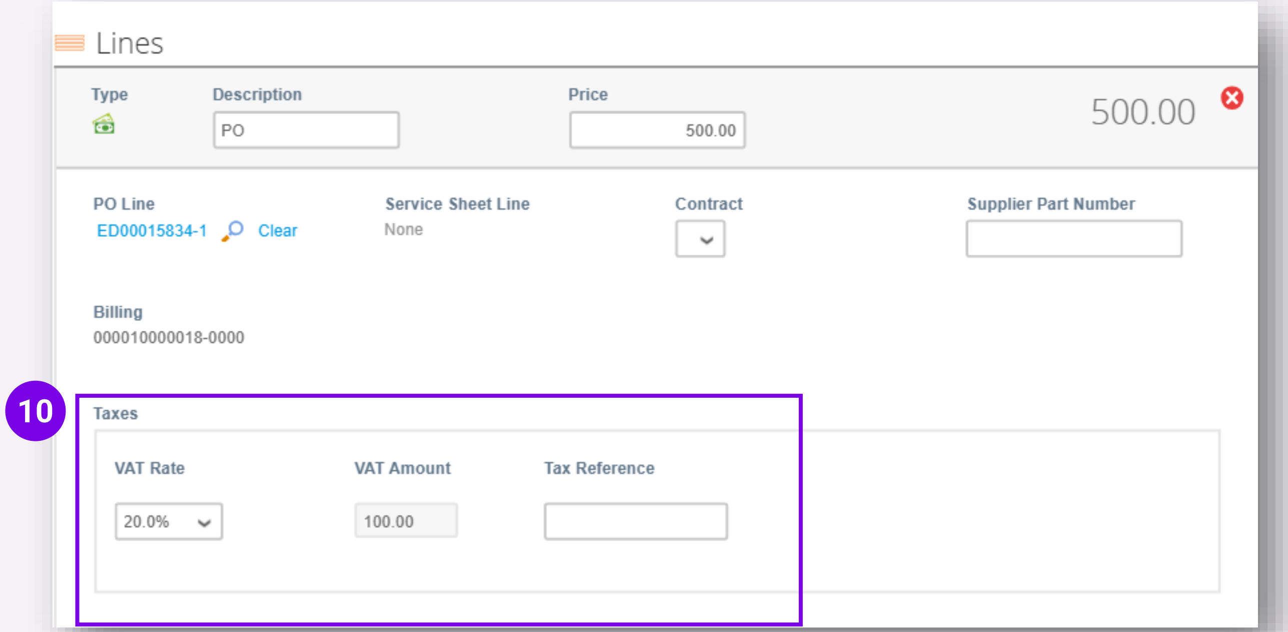
How to Submit Invoices (4/6)



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.**

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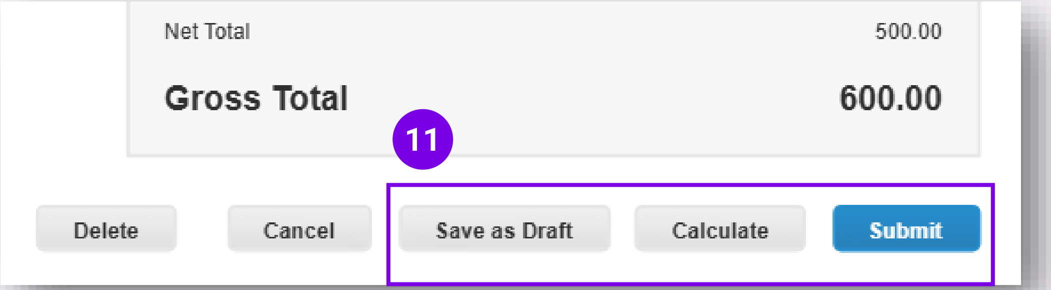
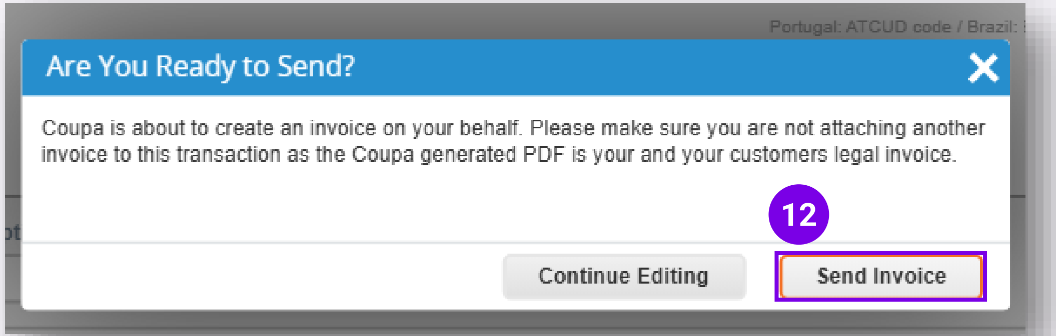
How to Submit Invoices (5/6)



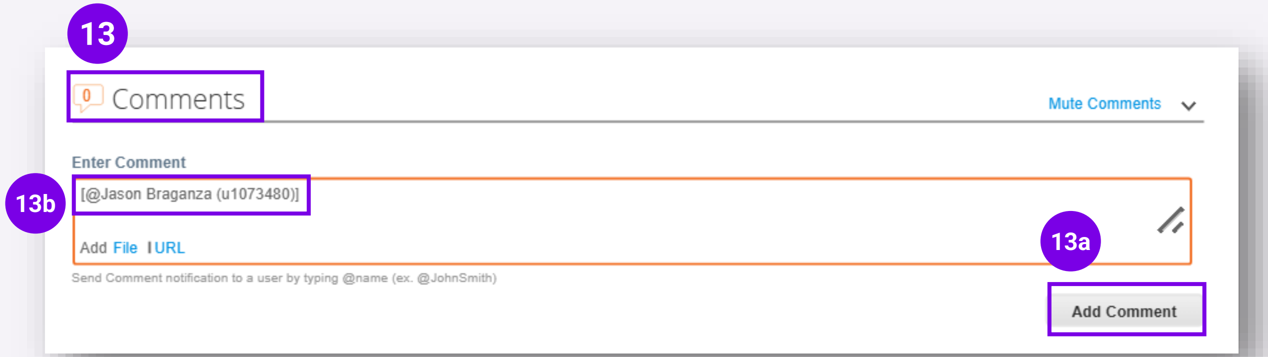


How to Submit Invoices (5/6)

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)



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

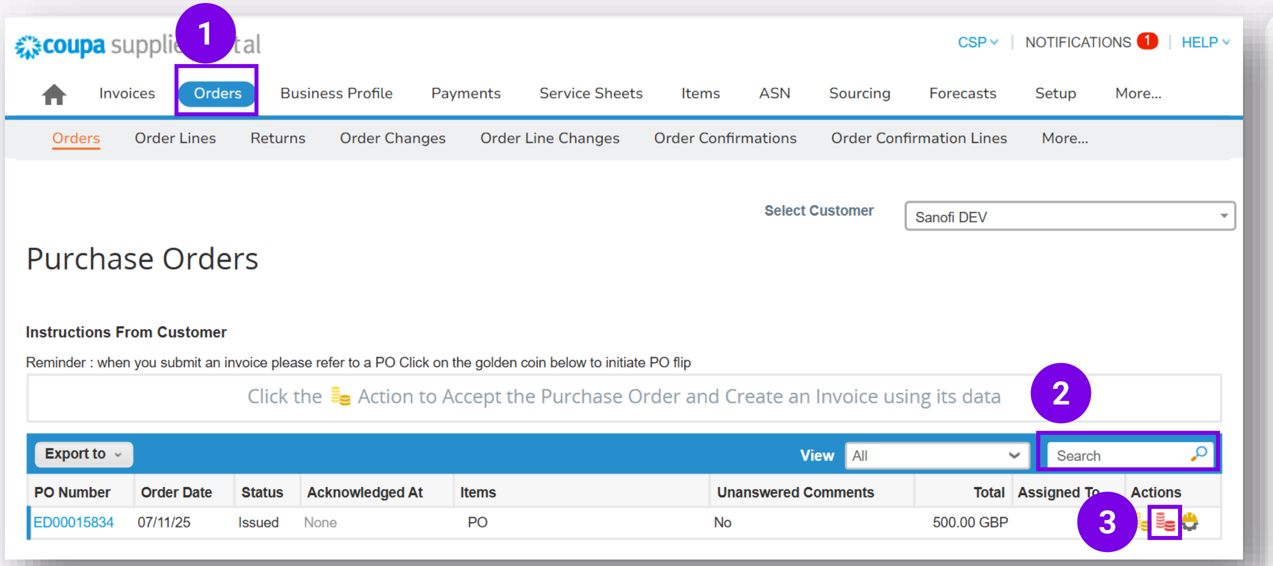
    13b. Use the **@name functionality** to send comments to additional Sanofi users*

***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

EXAMPLE

How to Submit Credit Notes (1/6)



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.

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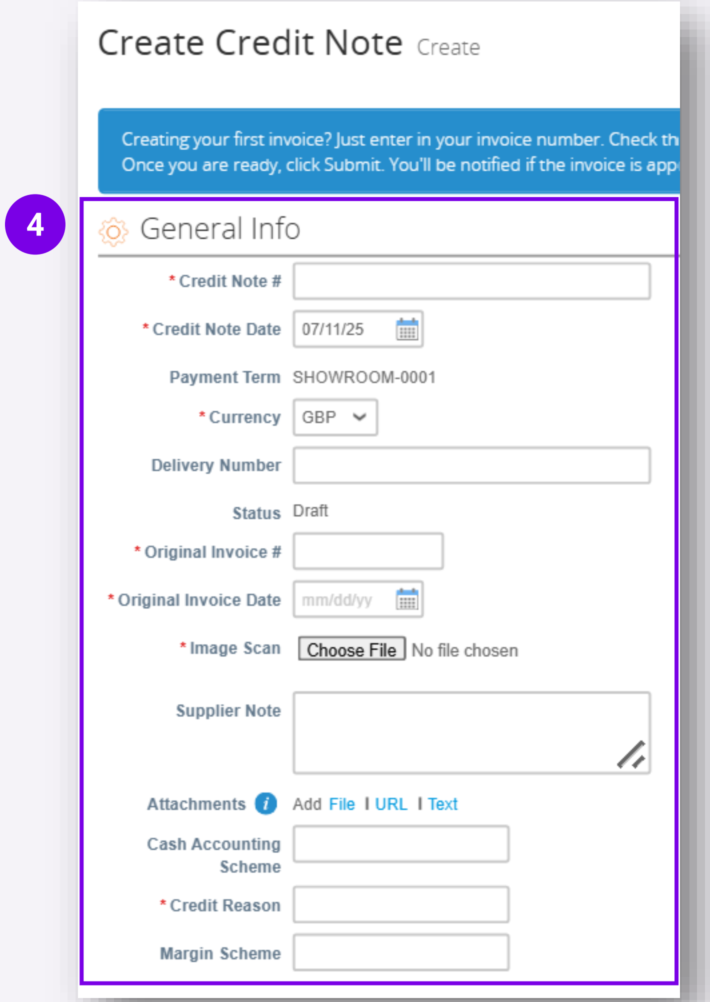
How to Submit Credit Notes (2/6)

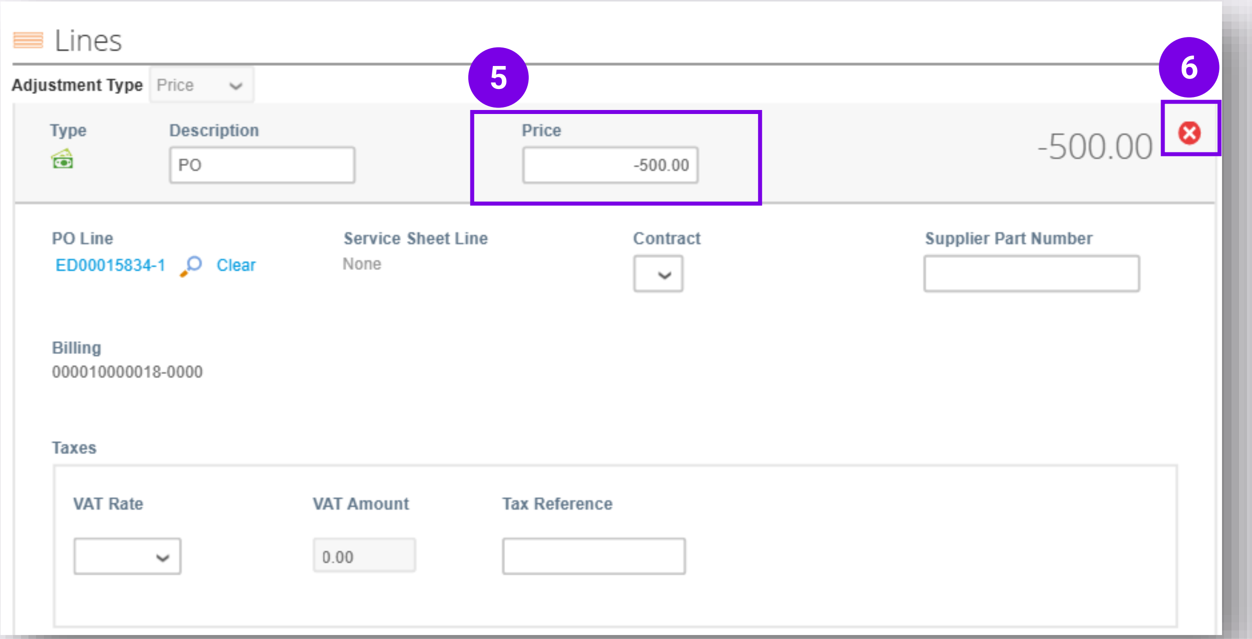


How to Submit Credit Notes (2/6)

On the **create credit note** page:

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

How to Submit Credit Notes (3/6)

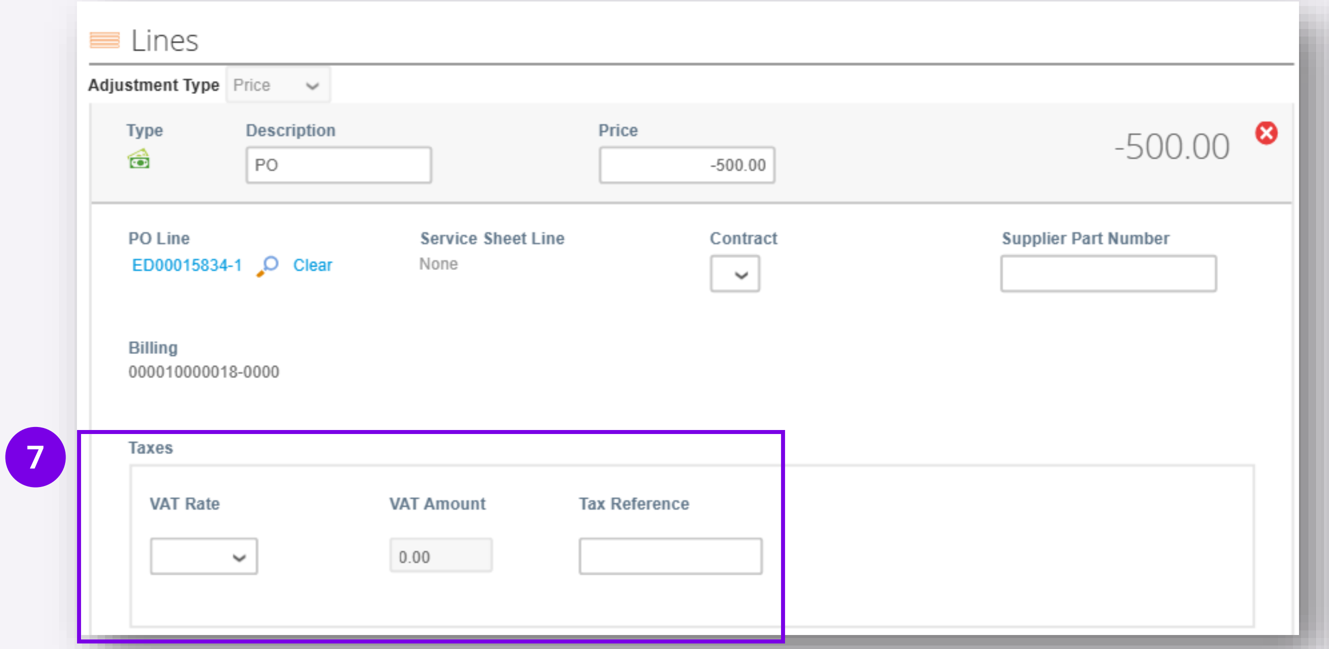


How to Submit Credit Notes (3/6)

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)



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.**

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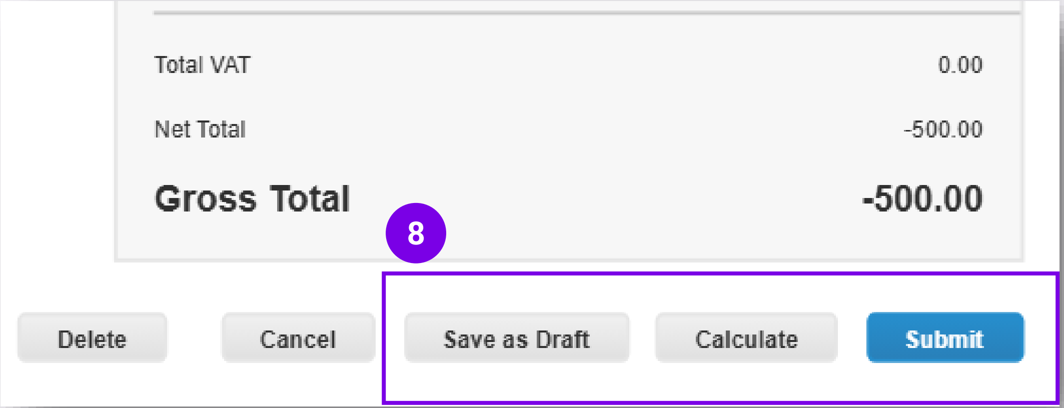
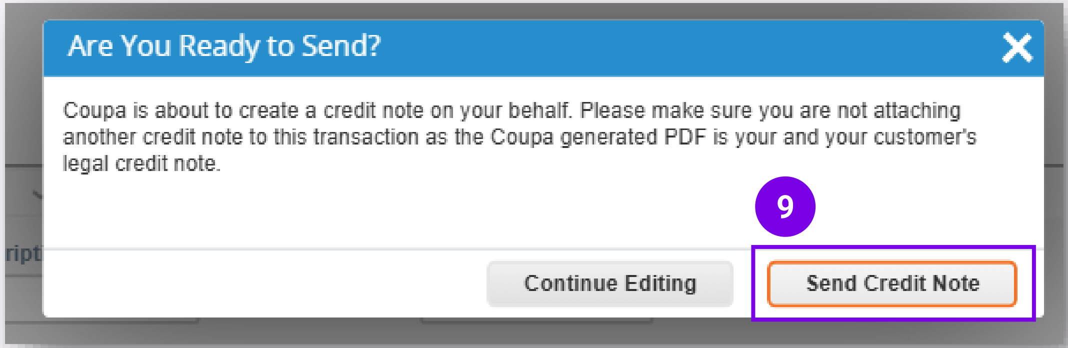
How to Submit Credit Notes (5/6)





How to Submit Credit Notes (5/6)

8. 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
9. 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.**

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How to Submit Credit Notes (6/6)

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:

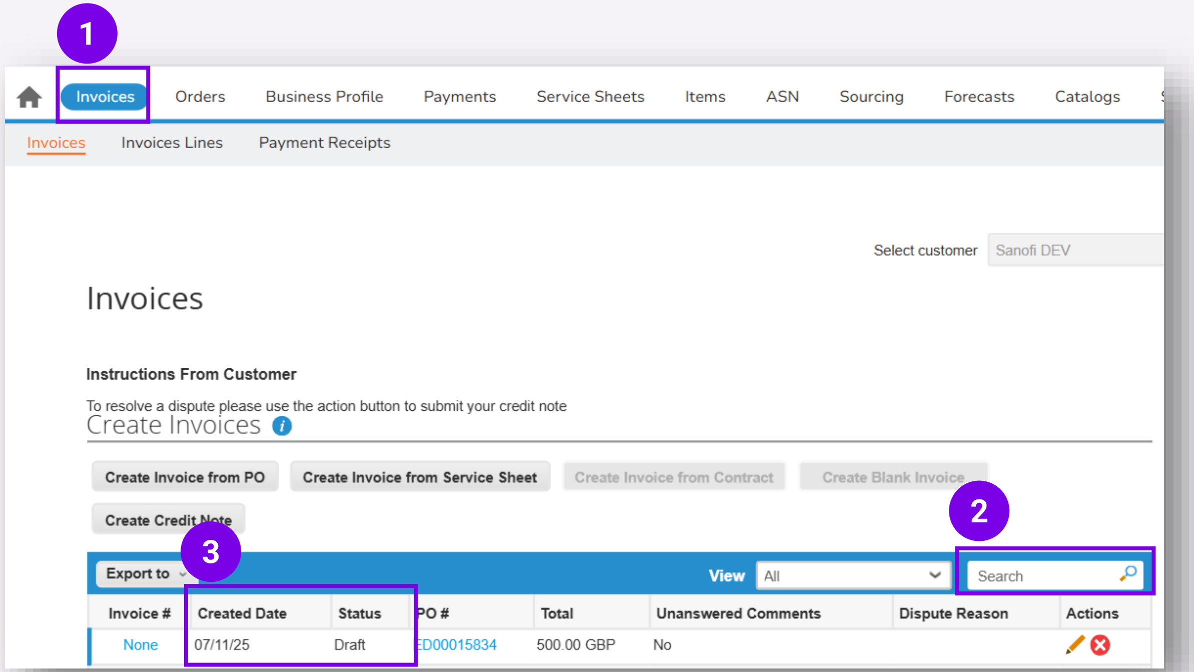
    10a. Populate your comments and click **"Add Comment"**, it will be directly sent to Sanofi requester

    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)



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.**

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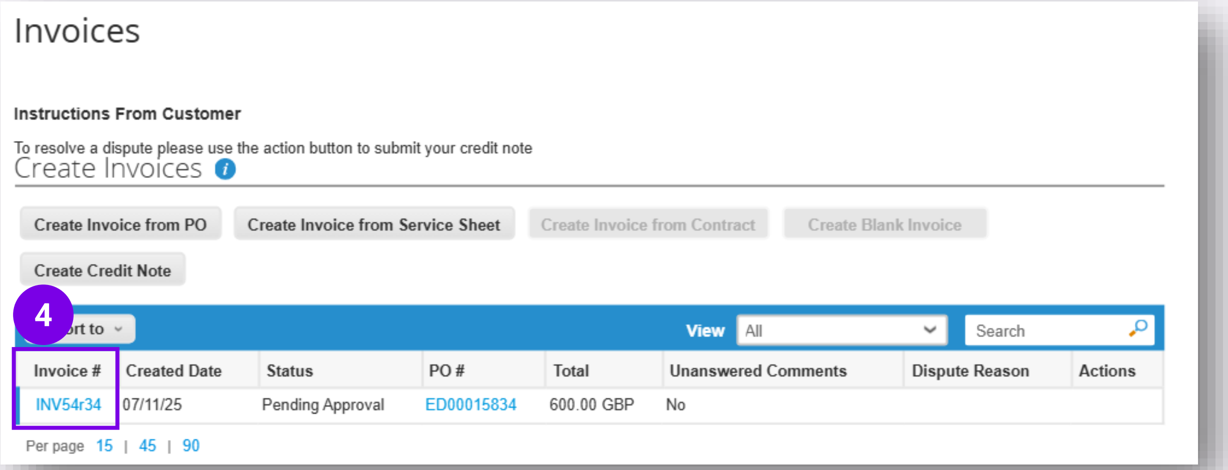
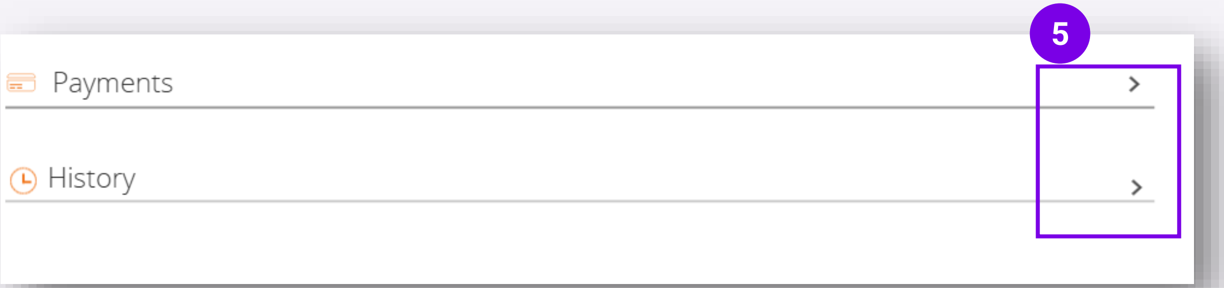
How to View Invoices and Credit Notes (2/2)





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

4. To view the payment details and the history of the invoice/credit note, click into to the **invoice/credit note #**
5. 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

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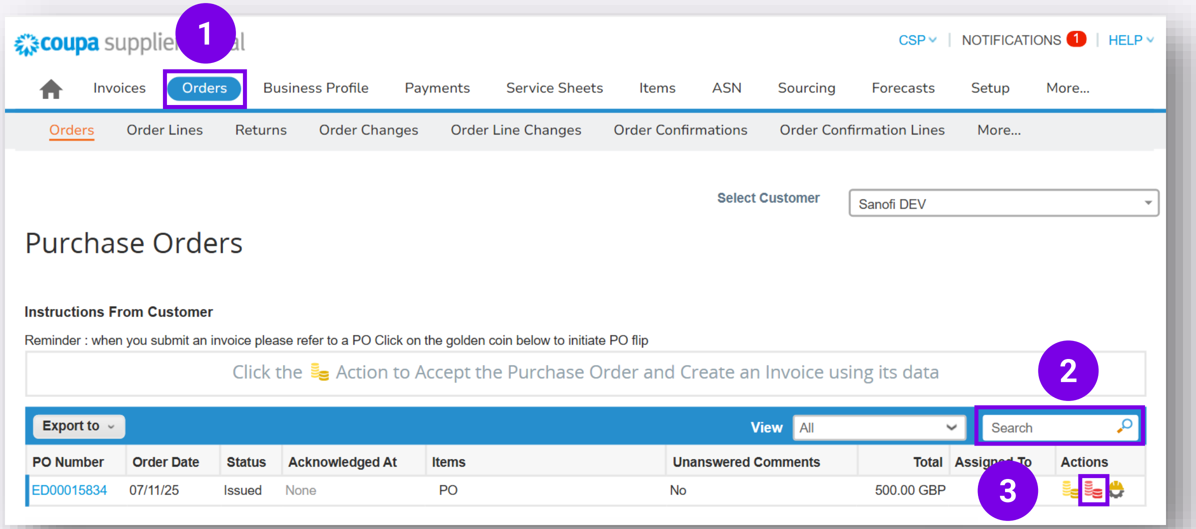
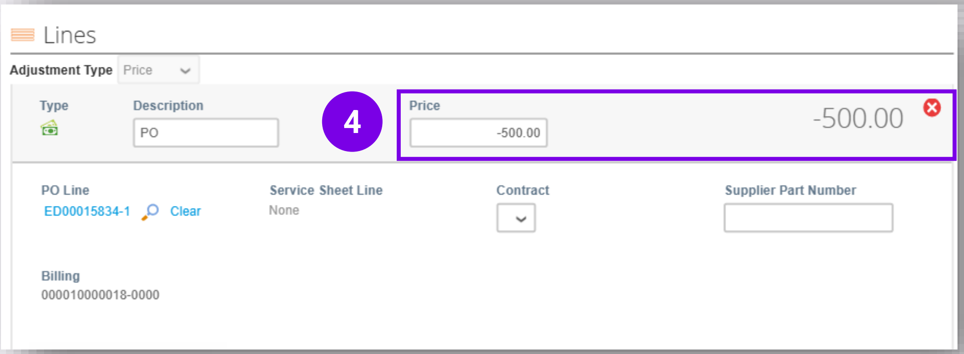
11 How to Correct Invoices

How to Correct Invoices (1/2)





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.**

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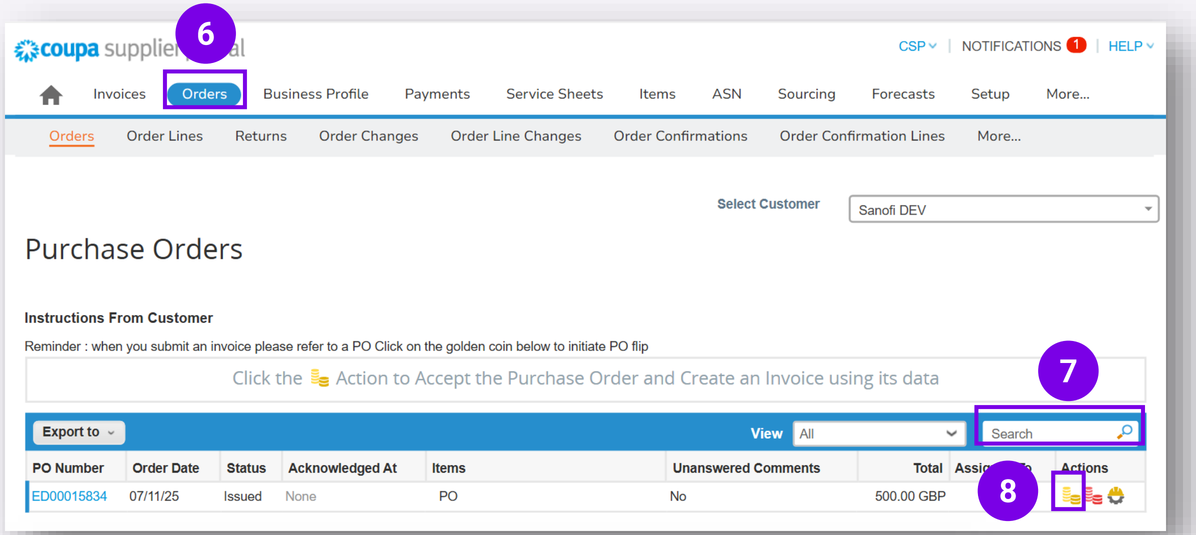
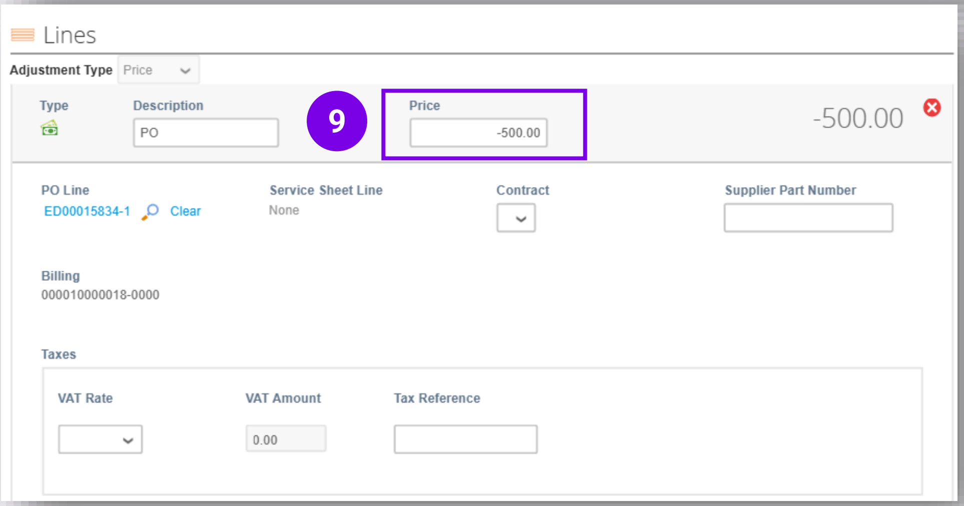
How to Correct Invoices (2/2)





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.

<u>Step 2: Submit an invoice with the correct amount</u>:

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.**

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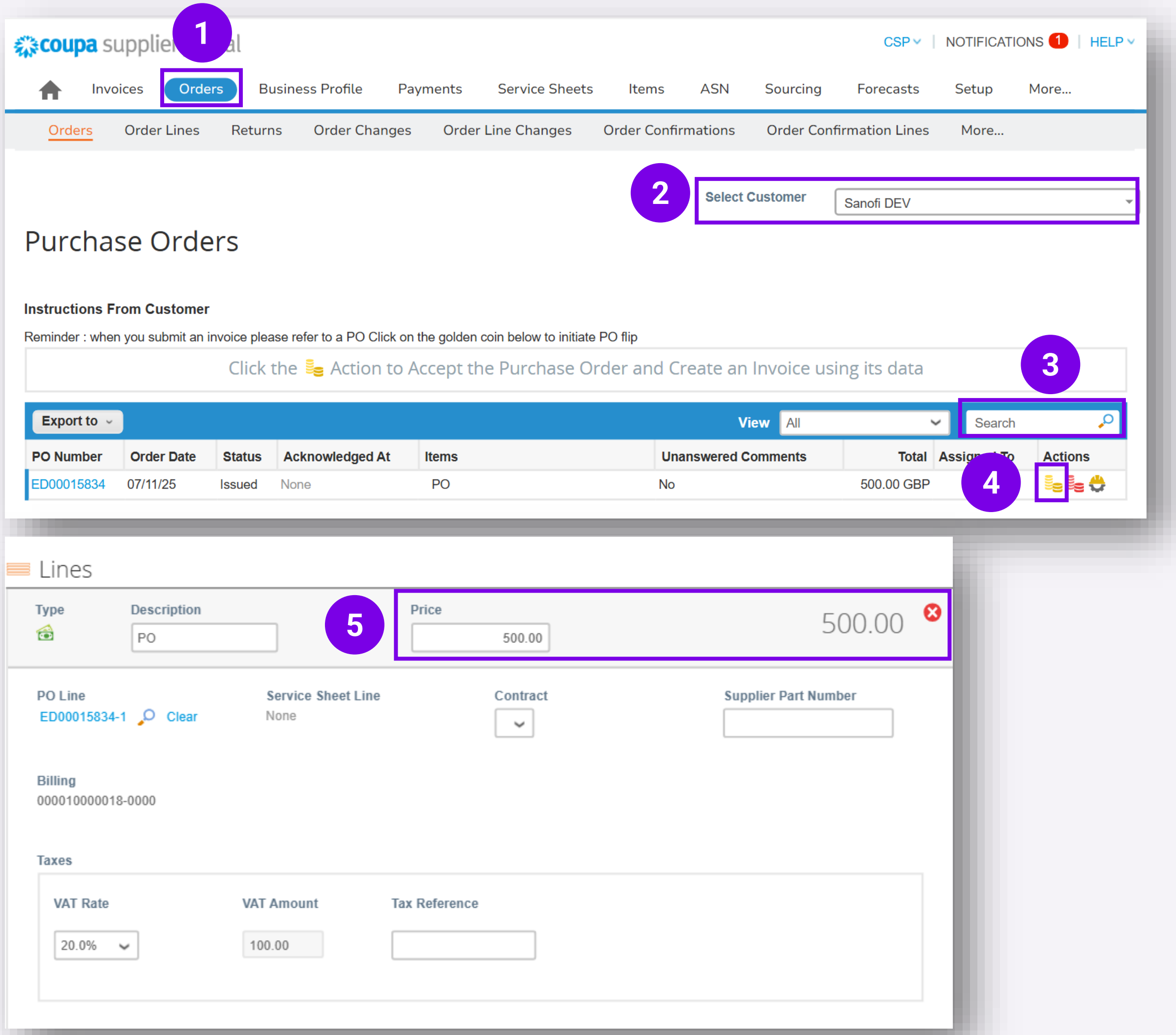
12 How to Submit Invoices with Discounts

How to Submit Invoices with Discounts (1/2)



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.**

EXAMPLE

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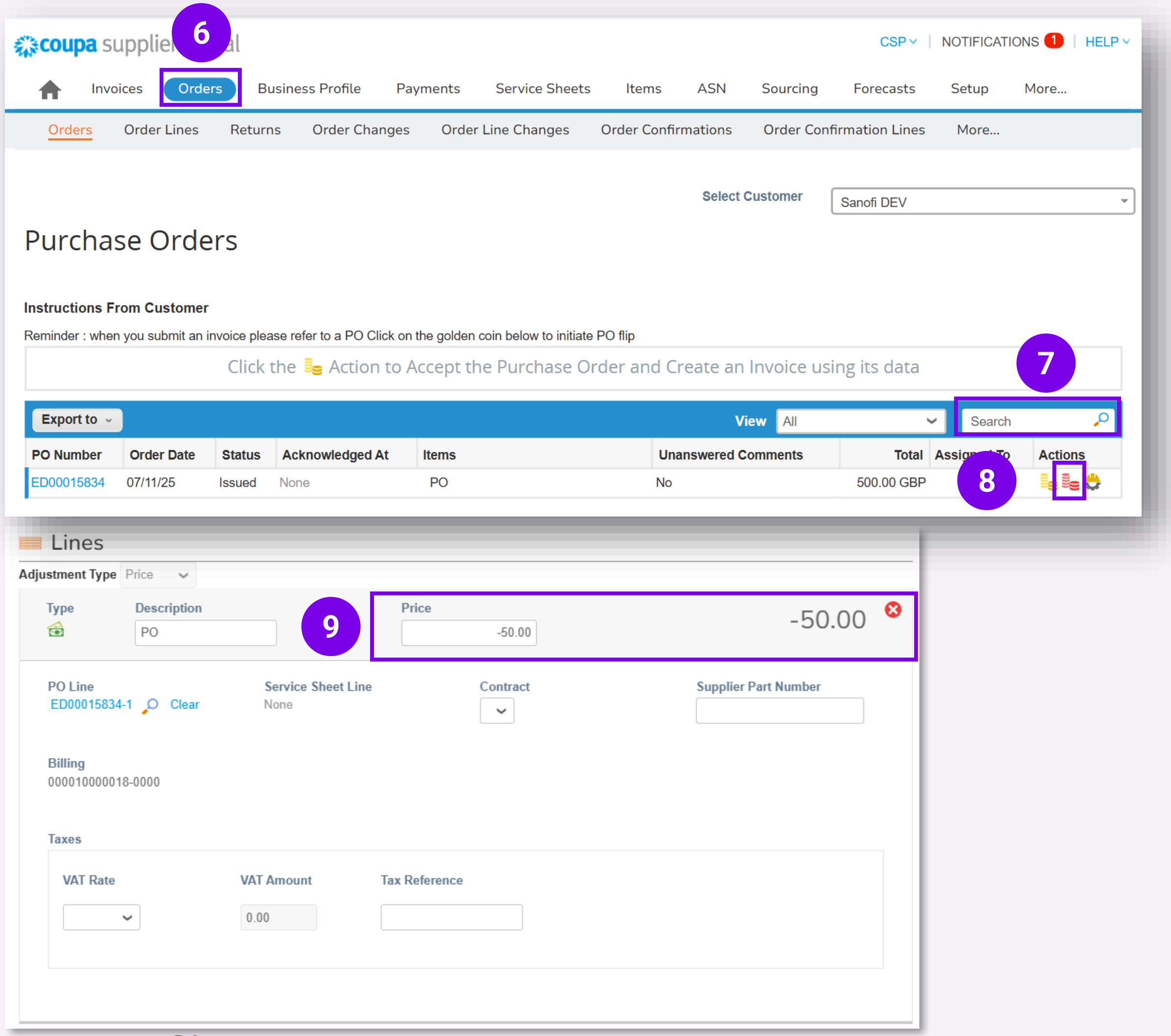
How to Submit Invoices with Discounts (2/2)



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.**

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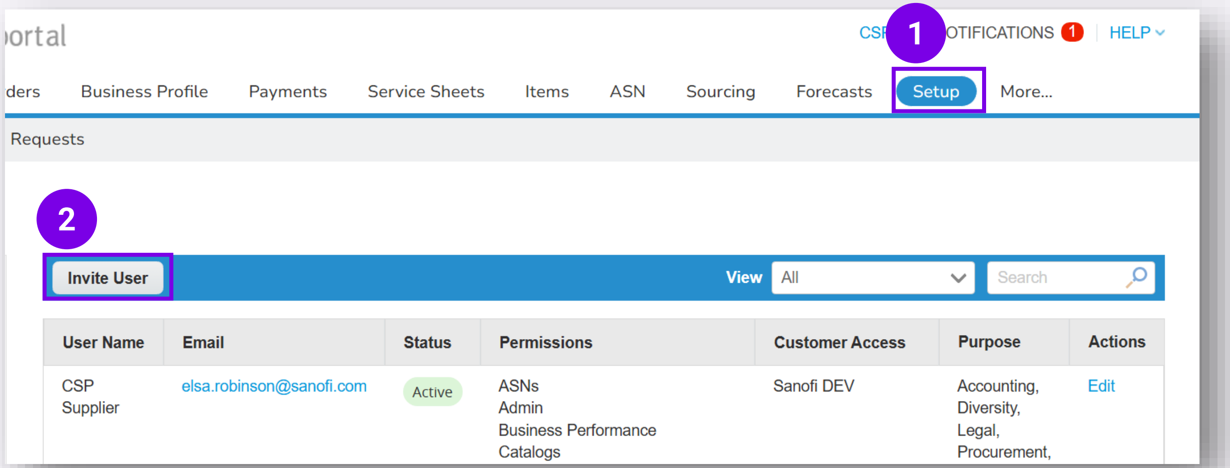
13 How to Add Additional Team Members

How to Add Additional Team Members (1/2)



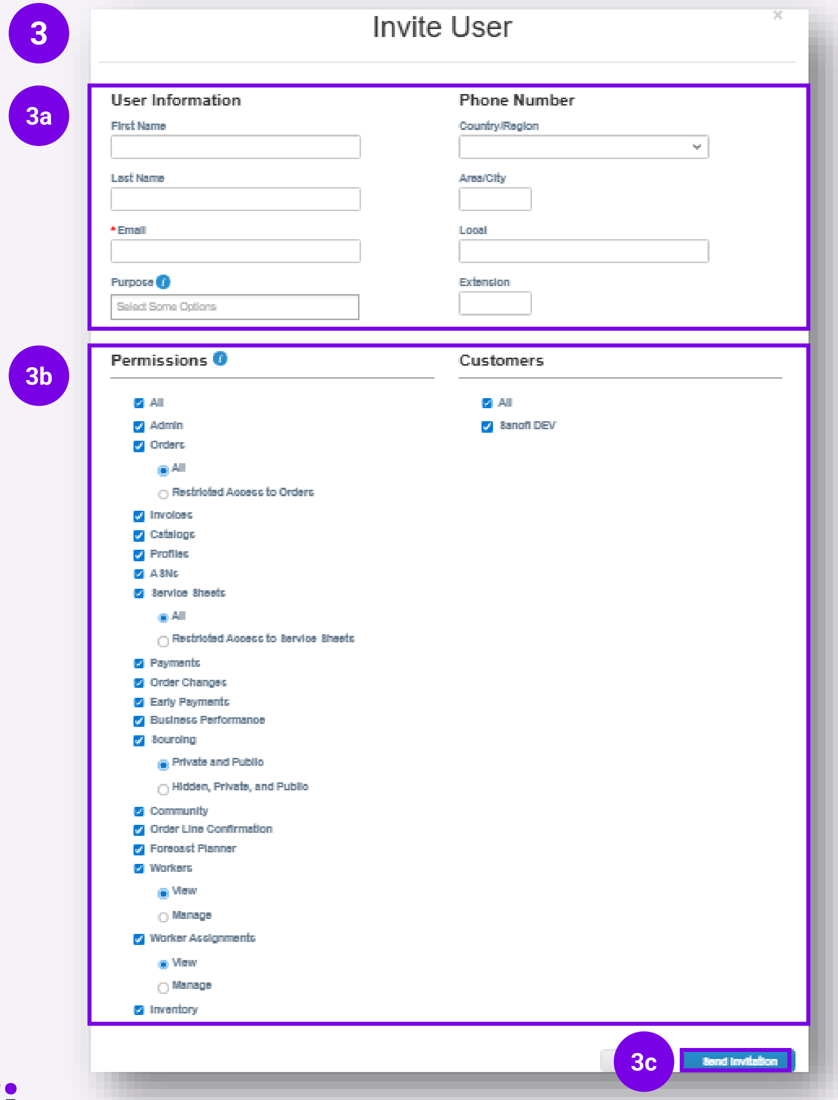
Inviting Additional Team Members (1/2)

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)



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

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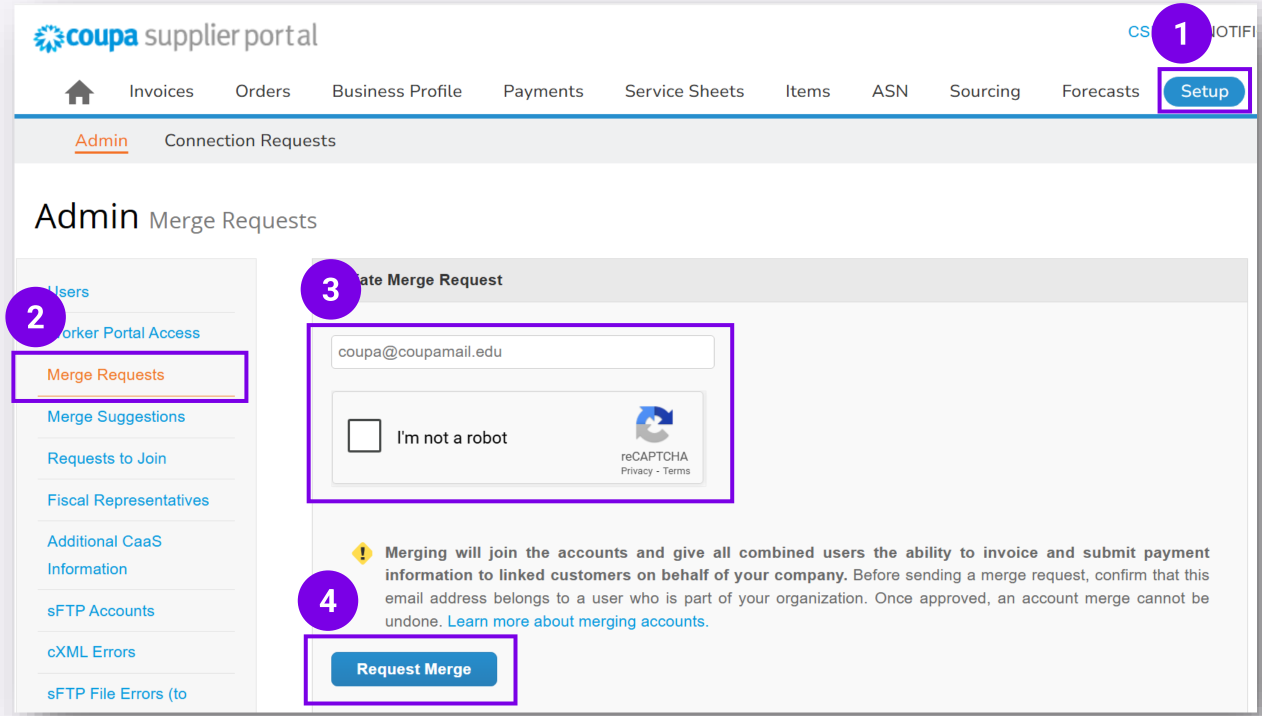
14 How to Merge Accounts

How to Merge Accounts (1/4)



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.**

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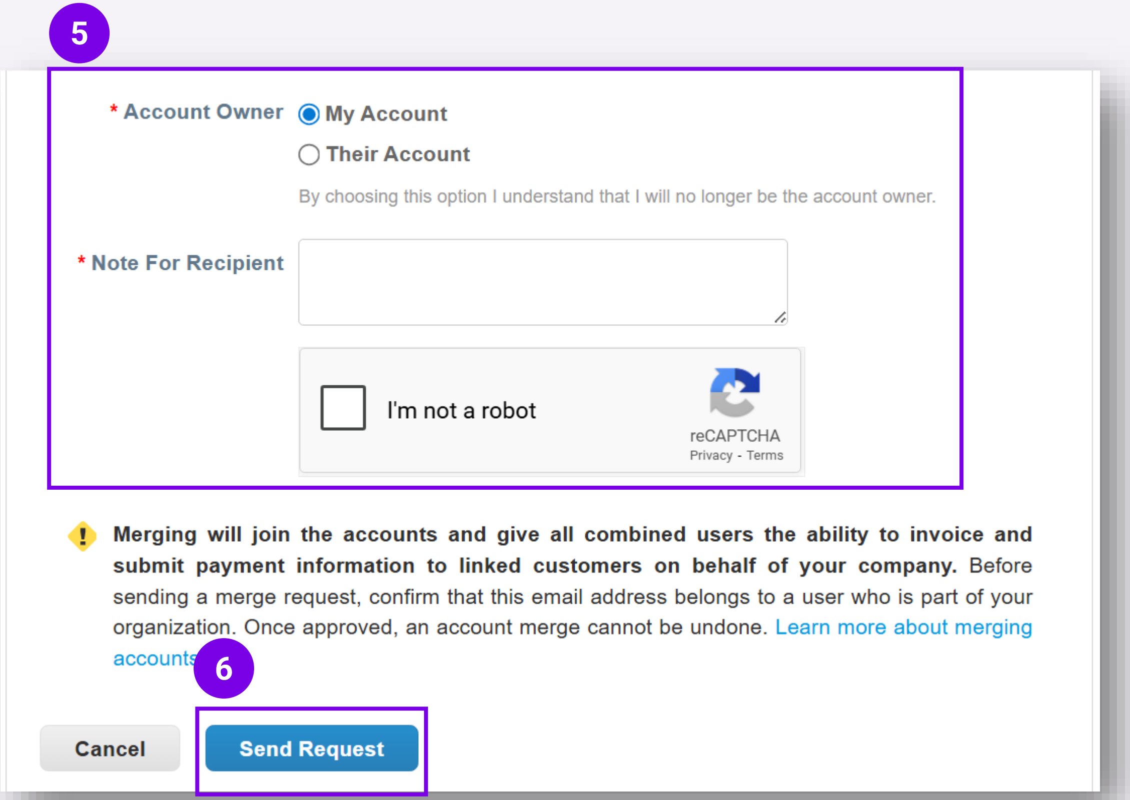
How to Merge Accounts (2/4)

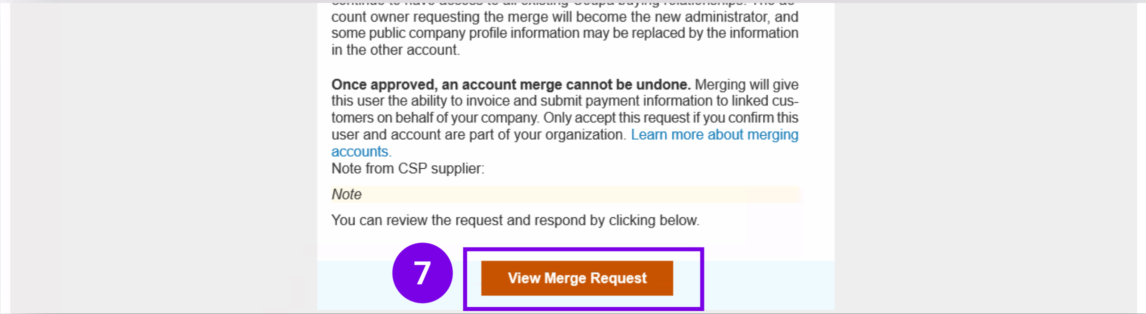


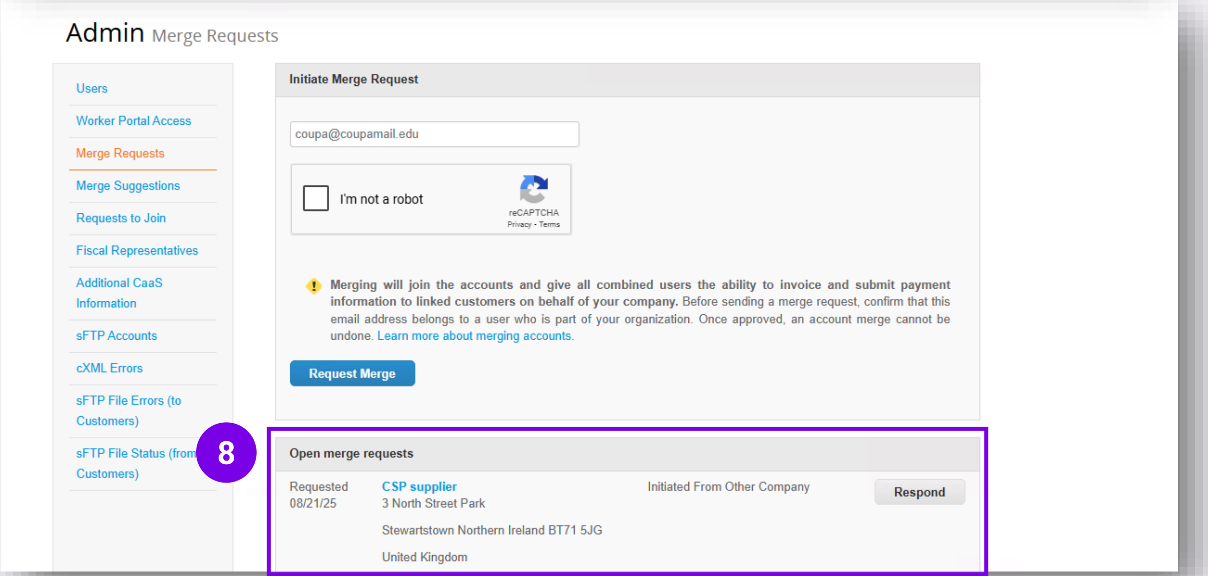
How to Merge Accounts (2/4)

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)

7. 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
8. The recipient will then be taken to the CSP and will see an **Open merge request** under the **Merge Request** section of their account, the must click on the **"Respond Button"** to accept the merge request

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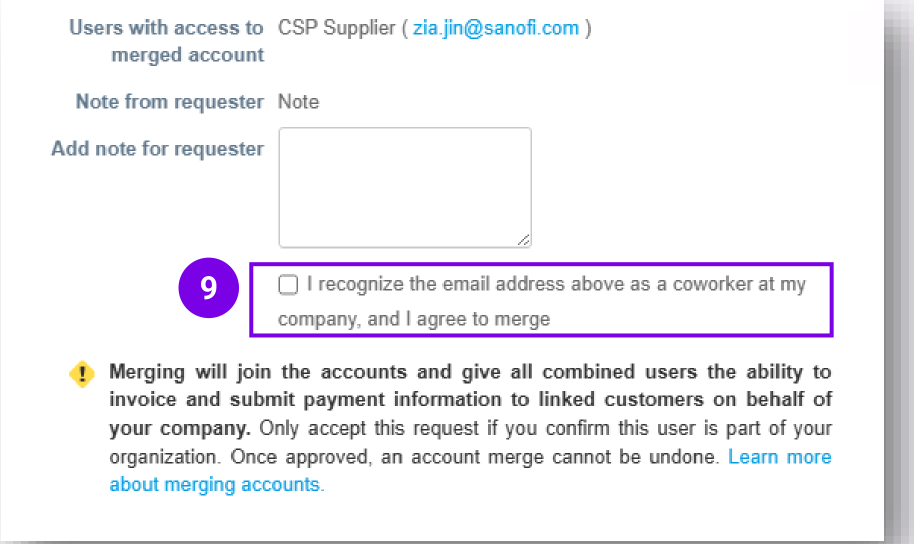
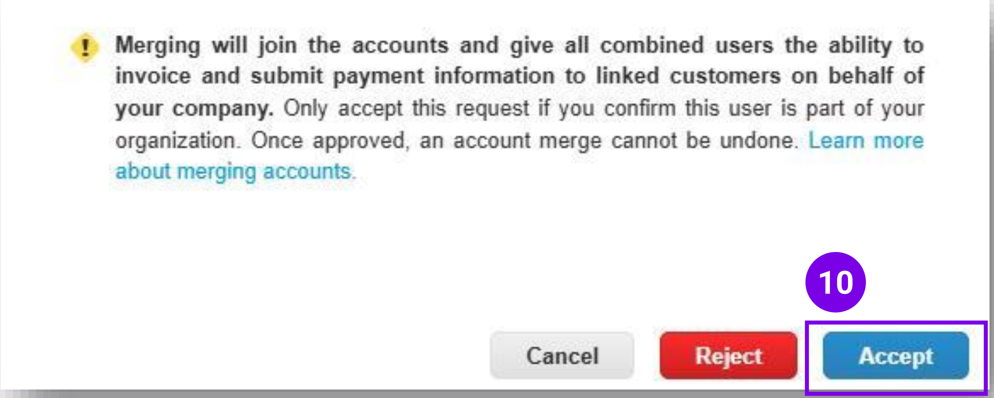
How to Merge Accounts (4/4)





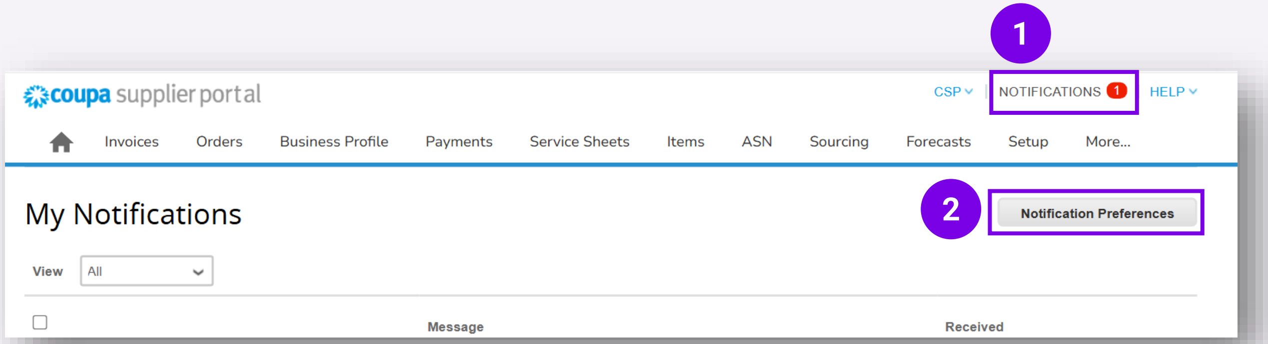
How to Merge Accounts (4/4)

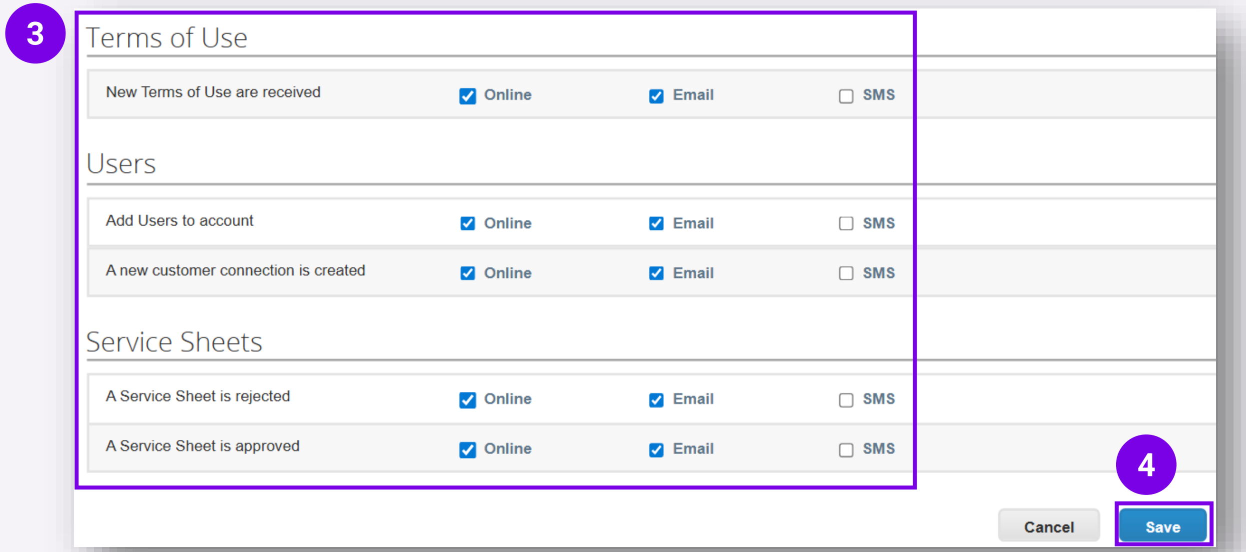
9. The recipient will need to check the **"I recognise the email address above as a coworker at my company, and agree to merge"** check box*
10. Once, this check box has been ticked they will then be able to accept the request by clicking on the **"Accept"** button – now both users will have the ability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

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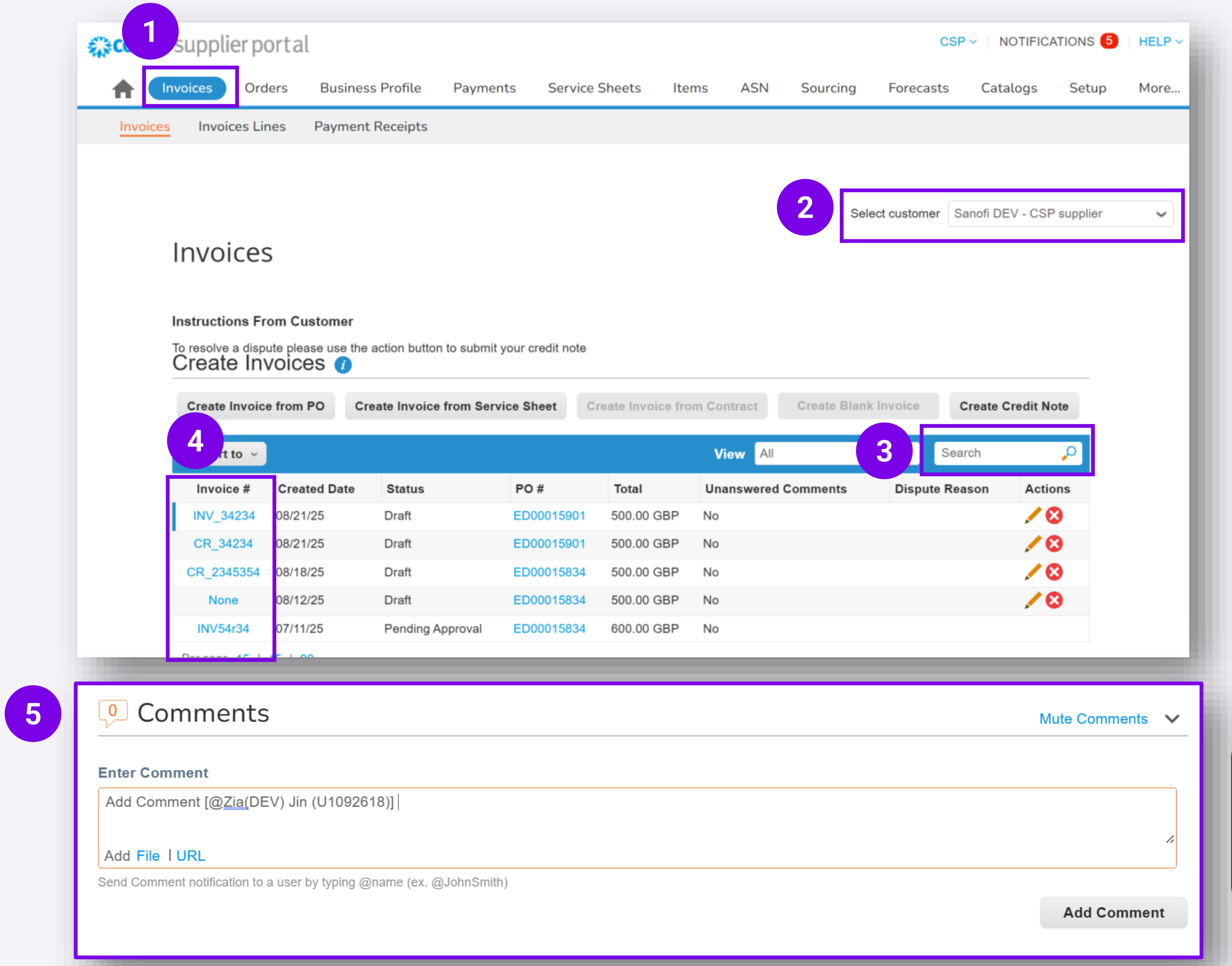
16 How to Add Comments to Invoices and Credit Notes

How to Add Comments to Invoices and Credit Notes



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*

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

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