Supplier Training

Coupa Supplier Portal

AGENDA

About Sanofi Coupa supplier Portal

- Sanofi has implemented **Coupa** as its platform to standardize business processes and improve quality and speed of operations.

- Sanofi is requiring electronic invoicing through Coupa, allowing suppliers to use the **Sanofi Coupa Supplier Portal** and **Supplier Actionable Notifications** to simplify the receipt and acknowledgement of purchase orders and invoice submission to Sanofi.

ABOUT eBuy

eBuy is an **end to end digital Source 2 Pay (S2P) platform** connecting Sanofi with supplier partners,

- **Scope** : suppliers who provide indirect materials or services will receive PO and can send invoices through the CSP. This is not applicable to suppliers of raw materials etc which go directly into the product.
- It’s an additionnal electronic solutions that were being used prior to eBuy for PO and Non PO management and invoicing.

The Coupa Supplier Portal

The Coupa Supplier Portal is a **free tool** for suppliers to easily do business with customers who use Coupa.

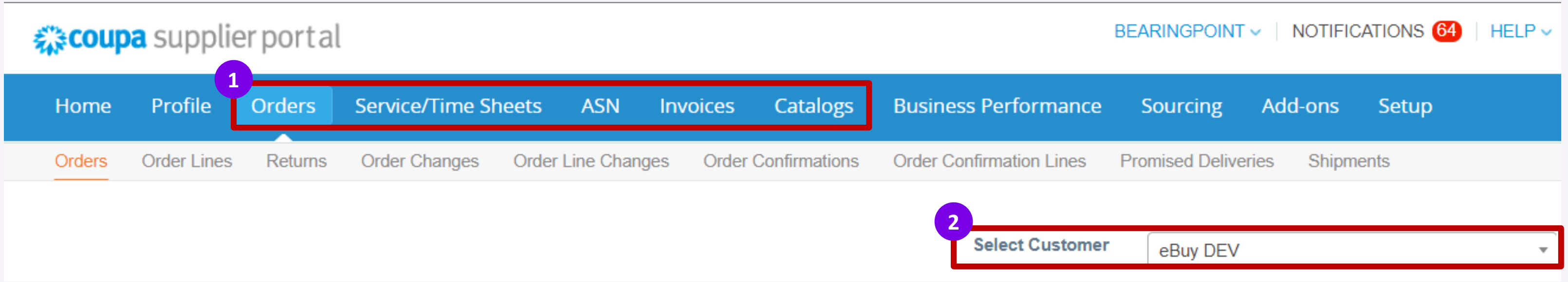
Once the supplier registers into the portal, there are various ways of interaction, such as:

- manage items in a catalog / uploading catalogs
- send invoices directly through Coupa`s platform
- see the POs received
- choose to participate in public sourcing events…

A supplier can have various customers on the same account in CSP :

1 Choose on of the following pages **: <orders>, <service/time sheets>, <ASN> <invoices>** and **<catalogs>.**

2 click on the field next to <**Select Customer**> to select the customer you need to display



Key Benefits Of Coupa Supplier Portal

Process Quality

- Quicker way to manage the purchase orders
- Better quality & faster invoice-to-pay process with convenient visibility your invoices status
- One unique portal from onboarding to invoicing

Transaction Efficiency

- Enhance visibility on all transactional documents (PO, invoices etc)
- Ability for all suppliers to create electronic invoices, improving efficiency of transactions
- Ability to easily resolve disputes

Easy To Use

- No installation of hardware or software required
- Web applications that are quick to set up
- Dedicated help desk support to answer questions and ease the transition process

Zero Costs

- It’s **free of charge** for suppliers of Sanofi Pharma
- Making the technology available for all vendors

Supplier Training Learning Goals

After reviewing this training documentation, you will have gained a basic understanding of Coupa and its introduction at **Sanofi**. You will be able to:

01
Register & Set up
Register and setup your profile on the Coupa Supplier Portal (CSP).

02
General functionalities
Perform basic navigation of Coupa Supplier Portal (CSP).

03
Invoicing & Payment
View/manage invoices and payment method and Use Coupa Compliant I nvoicing.

04
Dispute & Credit note mgt
View/Manage disputes and associated credit notes.

05
Support contact
Refer to FAQ and Contact help desk to get the support you need

Suppliers Help desk & Support

Help desk support

Coupa.vendors.support@sanofi.com

AGENDA

1. Introduction

2. Coupa Supplier Portal

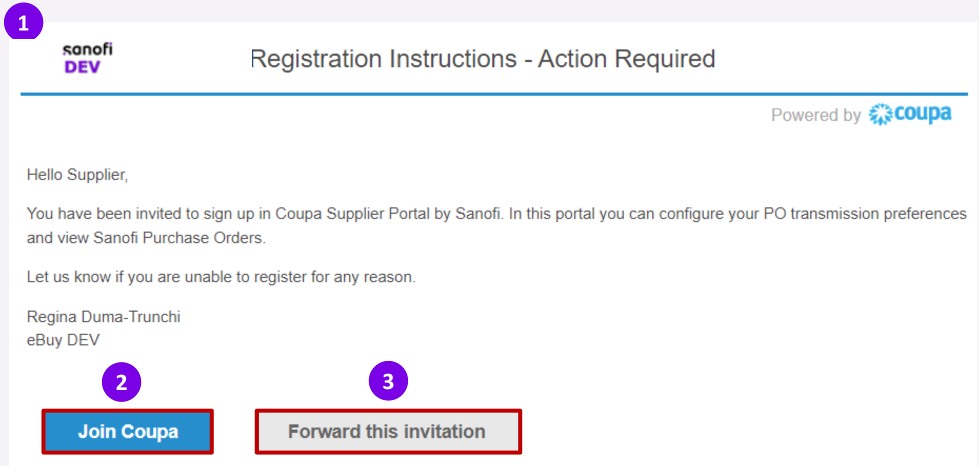
- **Registration and Profile Setting**
- Profile Merge and User management
- Orders management
- Creating views
- Invoice creation and submission
- Invoice management
- Resolve Disputed Invoices
- Payment Information
- Change the language

Registration to Coupa Supplier Portal 1/5

1. You receive an invitation email to the **Coupa Supplier Portal** from Sanofi with the subject line: **"Registration Instructions - Action Required".**

2. Once you receive the email invitation from Sanofi, click the **"Join Coupa"** button. This will take you to the registration screens where you will complete your profile.

3. If you're not the right person or you'd like someone else to register instead, you can forward the invitation to register by clicking the "Forward This invitation" button and entering the recipient's e-mail.



Registration to Coupa Supplier Portal 2/5

4 Some information is already pre-filled, but **you can modify** :

- Business Name
- First Name
- Last Name

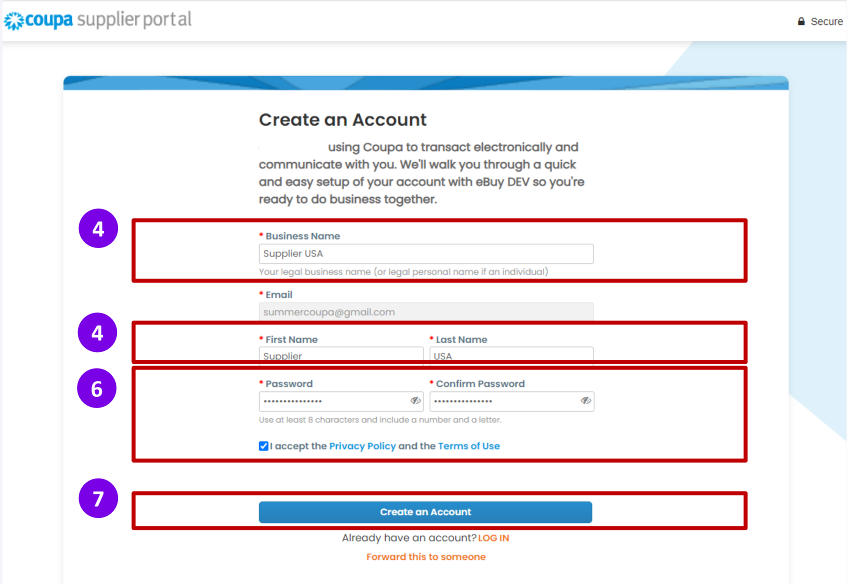
5 Some information are already filled-in and **you cannot modify it** :

- The email address (it can be updated later)

6 Some information **must be filled-in** :

- The Password and Confirm Password
- Accept the **Privacy Policy** and the **Terms of Use**

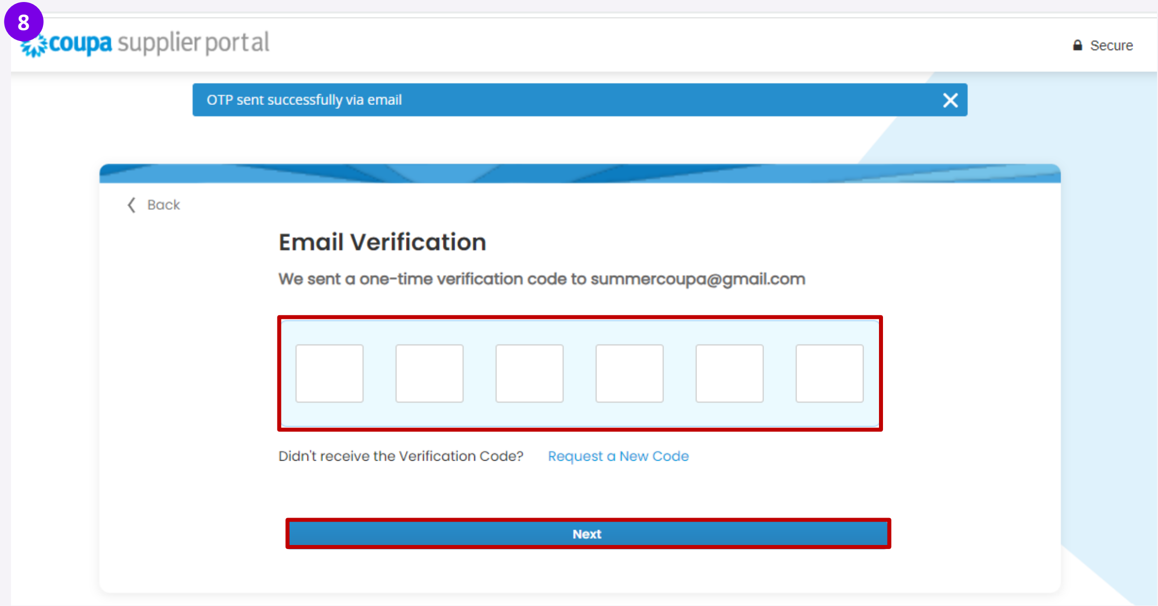
7 Once completed, click on « **Create an Account** »



Please note that all the information entered here will remain in CSP. If you will need to modify it, the request must be sent to your customer in order for them to have your updated information.

Registration to Coupa Supplier Portal 3/5

8 A one-time verification code will be sent to your email address, fill in the code and click on Next :



Registration to Coupa Supplier Portal 4/5

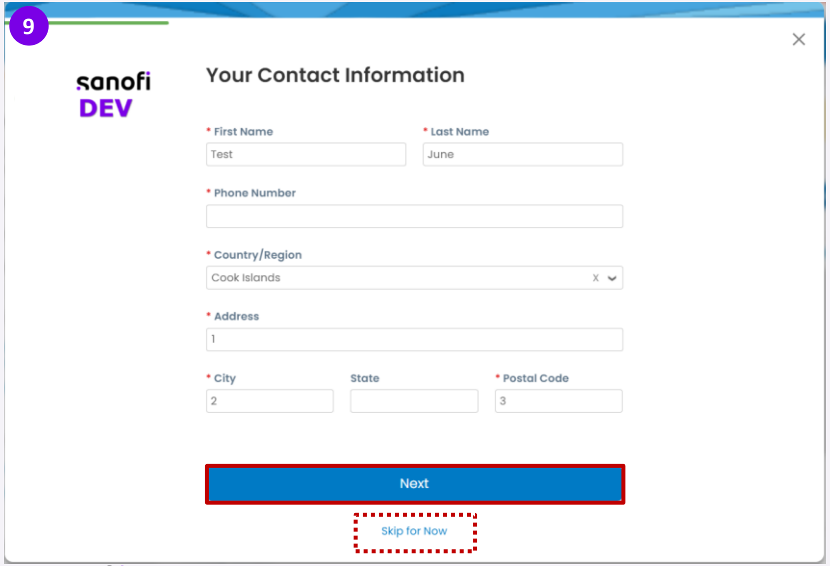
9 Fill out your Contact information

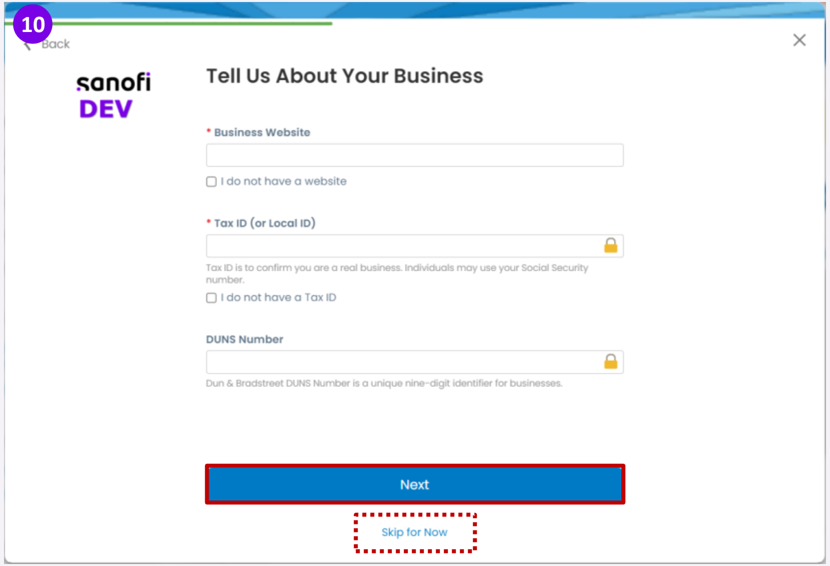
- Once completed, click on <**Next**>

10 Fill out your Business information

- Once completed, click on <**Next**>

You also have the option to <**Skip for Now**> , you will be able to add the information later on your profile





Registration to Coupa Supplier Portal 5/5

Non mandatory information

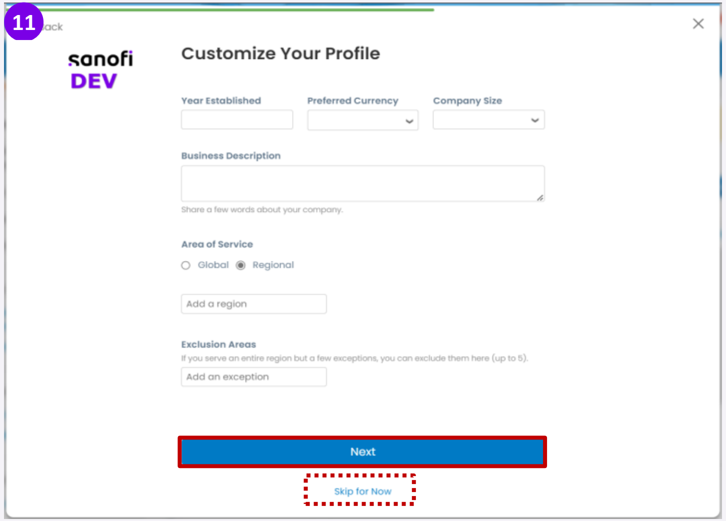
11 Next, you can customize your profile

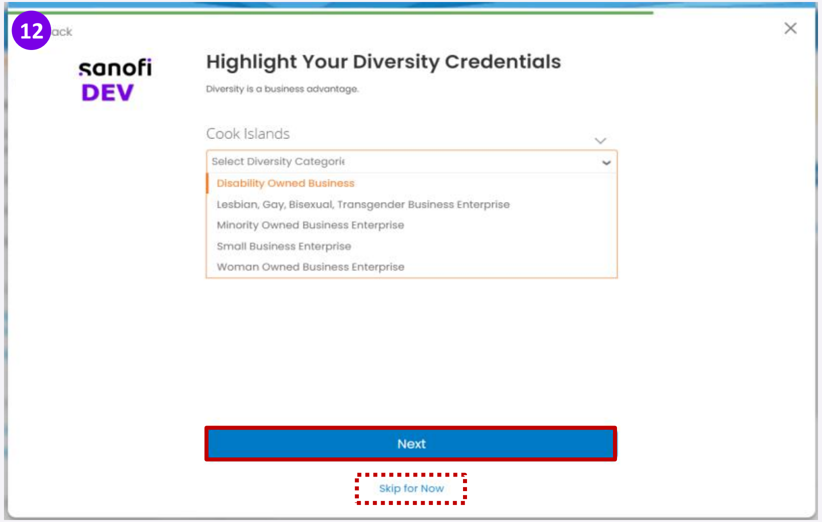
- Once completed, click on <**Next**>

12 Highlight your Diversity Credentials - You can choose from the list shown below. The list might differ according to your country

- Once completed, click on <**Next**>

You also have the option to <**Skip for Now**> , you will be able to add the information later on your profile





Registration to Coupa Supplier Portal – Diversity 1/3

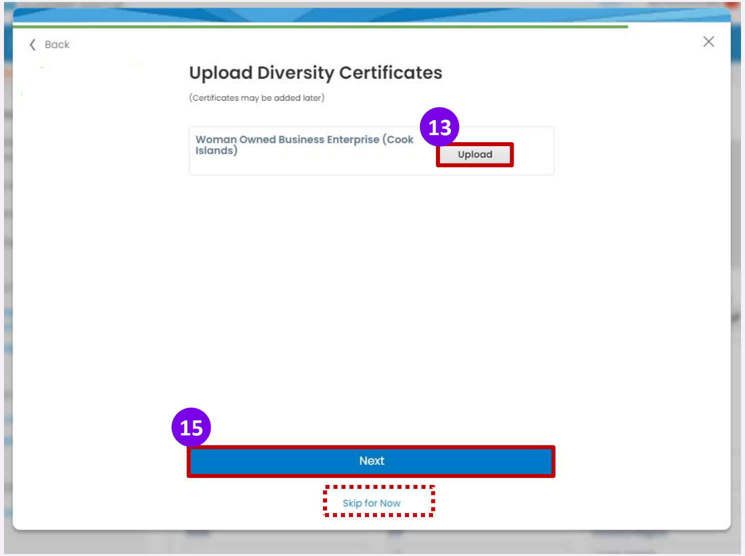
Non mandatory information

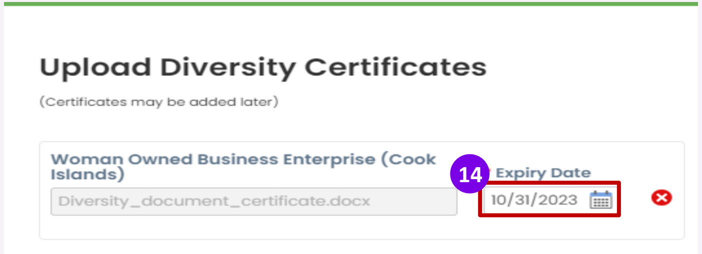
After choosing a diversity credential from the list, you will then be asked to upload a certificate proving your diversity.

13 Click on upload to **upload** the document showing the needed information

14 Set the expiry date

15 Once completed, click on <**Next**>





Registration to Coupa Supplier Portal- Diversity 2/3

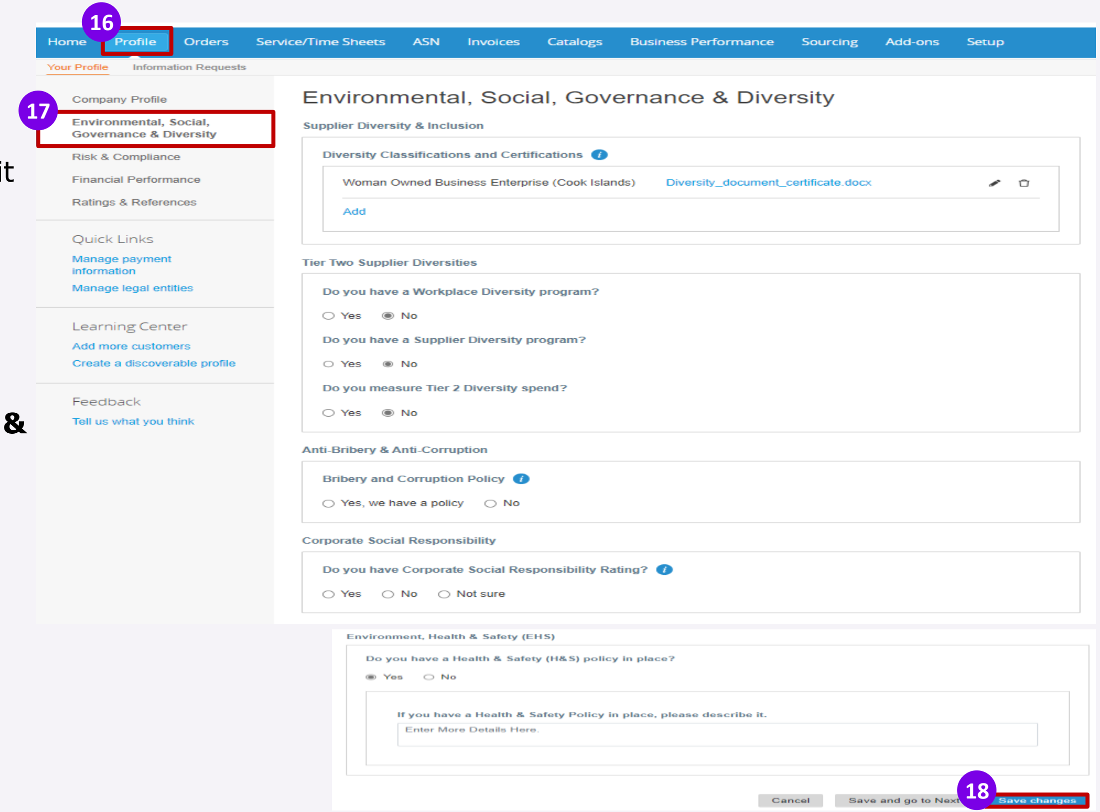
Non mandatory information

If you skip this step, you will have the option to add it later from your profile :

16 Click on < **Your Profile >**

17 Click on <**Environmental, Social Governance & Diversity>**

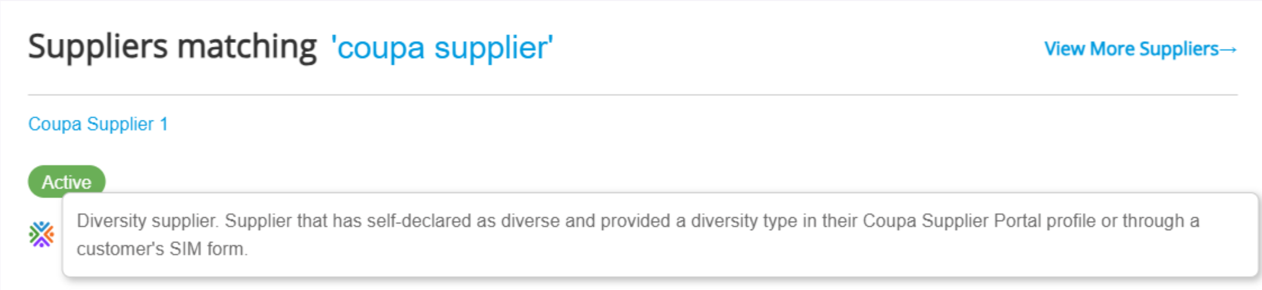
18 Complete the information and click on < **Save changes>**



Registration to Coupa Supplier Portal – Diversity 3/3

Non mandatory information

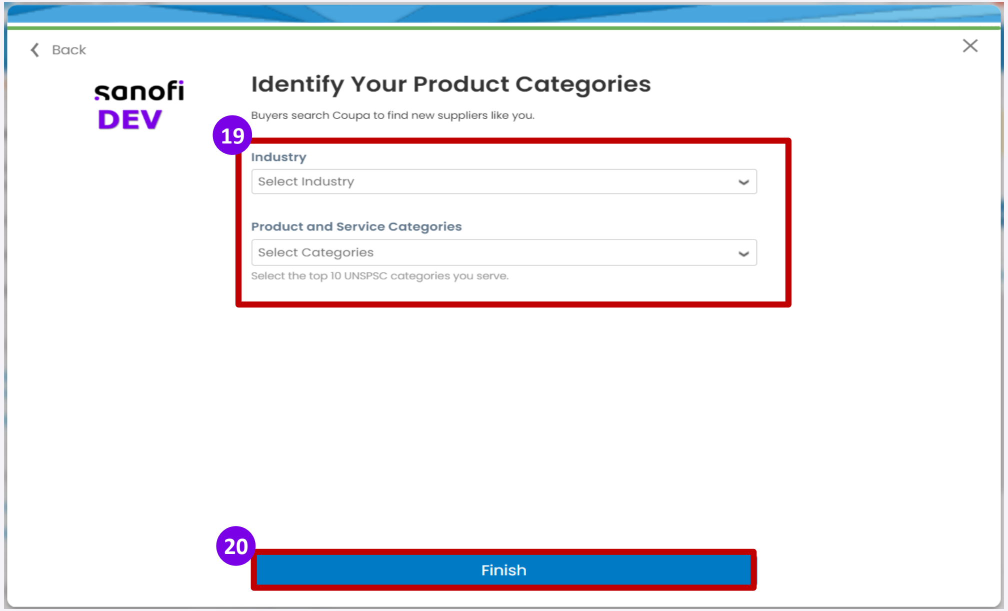
For example, your customer will then be able to see the diversity icon in the research:



Registration to Coupa Supplier Portal - Product Categories

19 identify your industry type, product and service categories

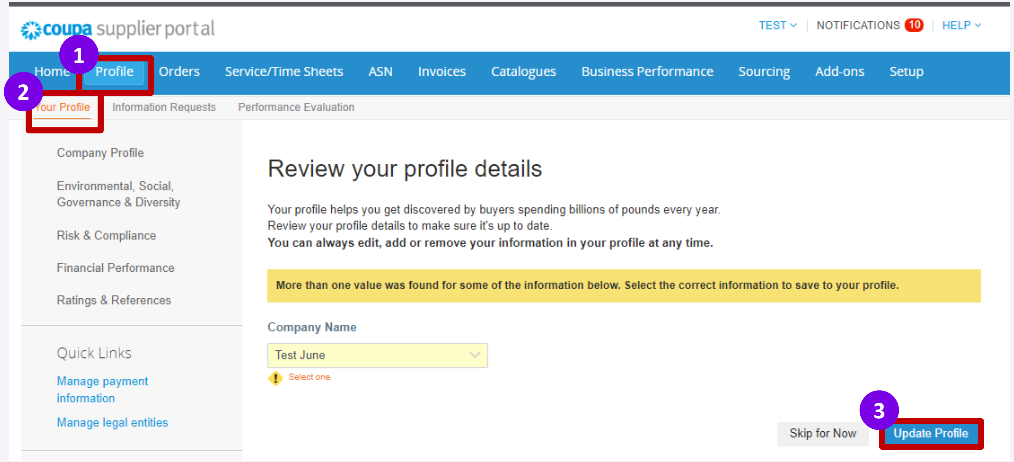
20 Click on **<Finish>**

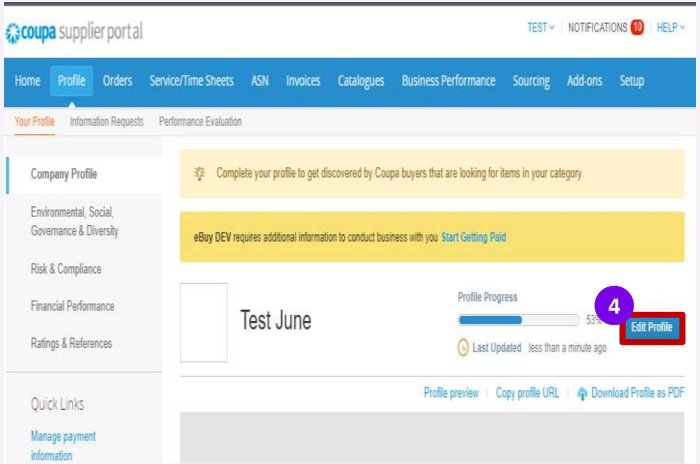


CSP Profile Settings – Update your Profile 1/2

Once you've completed the registration process, you are redirected to your profile page. If you previously skipped completing your profile, you can complete it by simply by following the next step :

1. Click on **<Profile>**
2. Open **<your Profile>**
3. Click on **<Update your Profile>**
4. Click on **<Edit profile>**



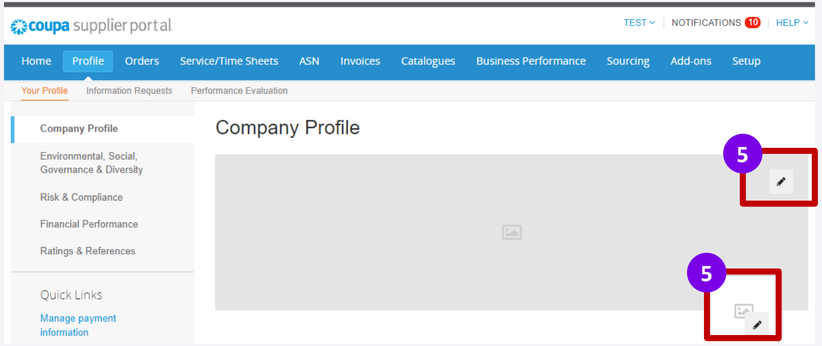


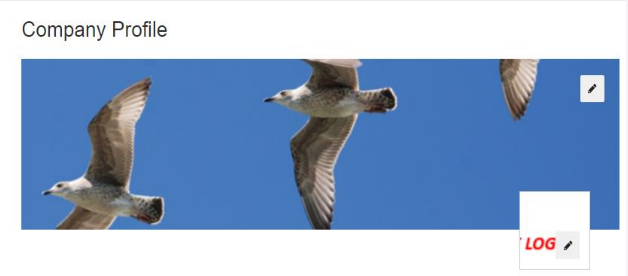
CSP Profile Settings – Update your Profile 2/2

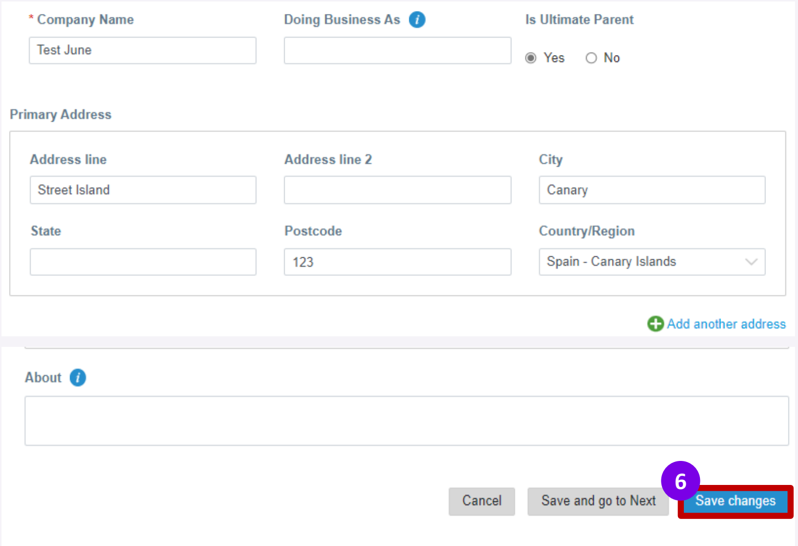
On the following page you will have the option to add a company **background** & **logo.**

5 Click on the pens from right top corner to update the background and logo

6 After filling in the information, click on <**Save changes**> button.



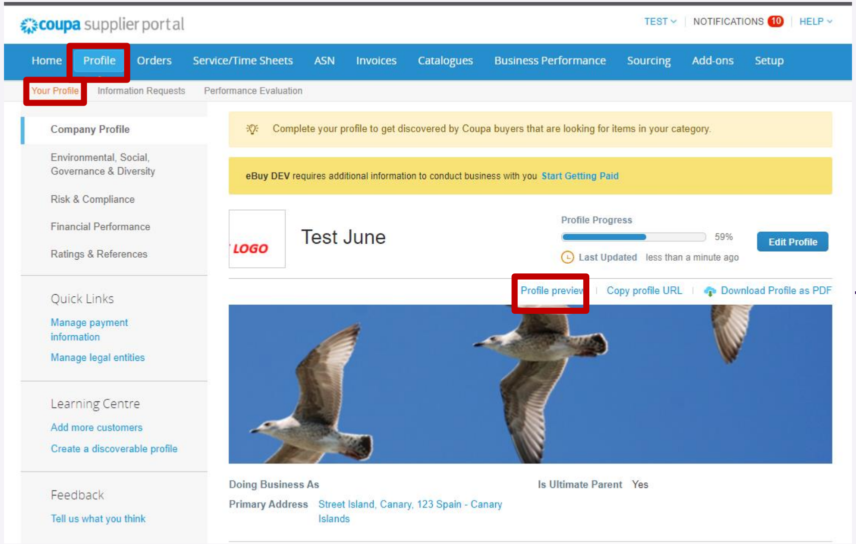


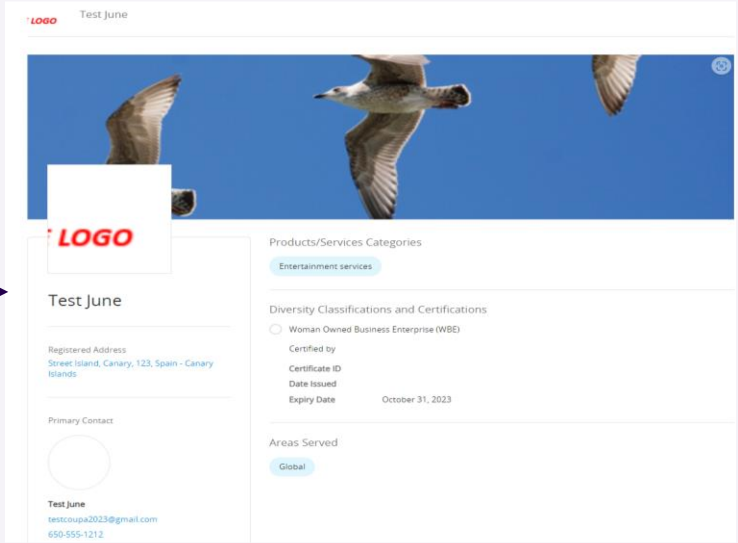


CSP Profile Settings - Public Profile

In the CSP, you have a **public profile** that is visible in the Coupa Supplier Portal Directory and allows potential customers to find your profile. Having a complete profile gives your customers the information they need to determine whether they want to do business with your organization.

- To access your profile, go to <**Profile**> - < **Your Profile** > page and click on <**Profile preview**> :

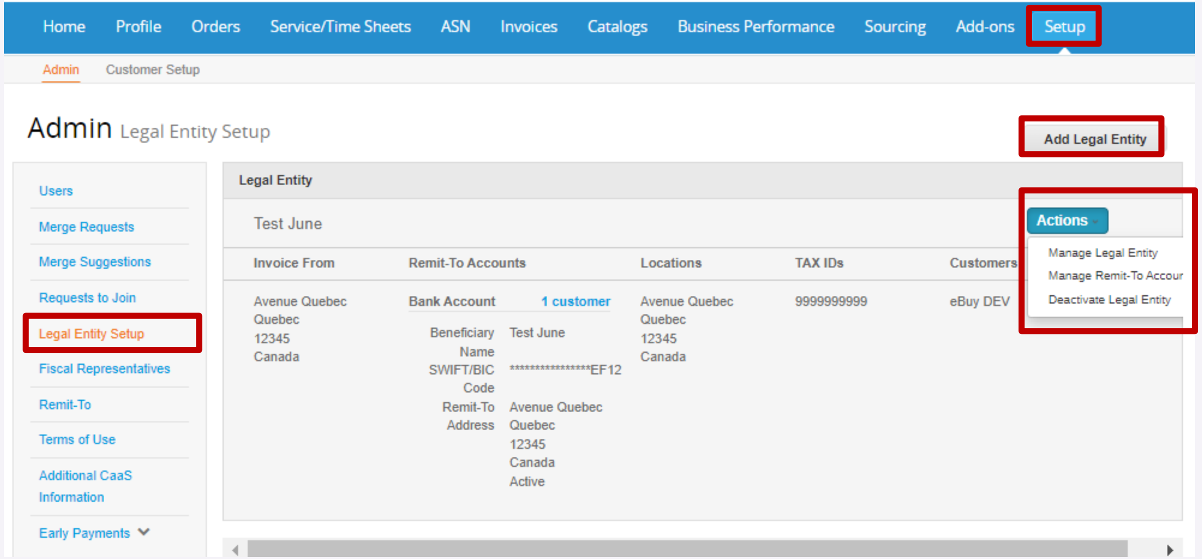




CSP Profile Settings - E-invoicing setup

If you added your remit-to address when registering, you may not need to visit this page. If you have updates to make or additional addresses, you can make the changes in the **Setup tab** :

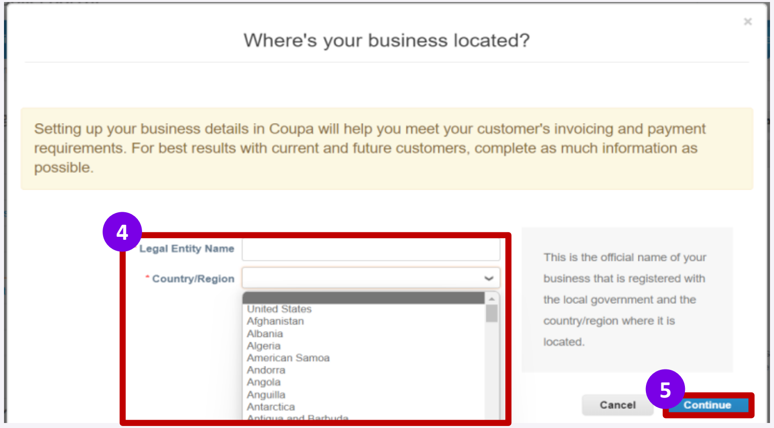
- Click **Add Legal Entity** and fill out the legal entity name and country fields to add a new address.
- Click the blue **Actions** button to edit an existing address.



CSP Profile Settings - Legal Entity 2/3

4 Fill out the mandatory information : **Legal Entity Name** and **Country/Region**

5 After filling in the information, click on <**Continue**>



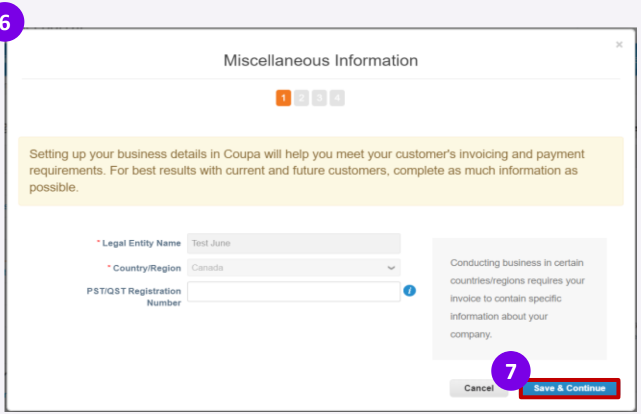
CSP Profile Settings - Legal Entity 3/3

6 Fill in the **Miscellaneous Information**

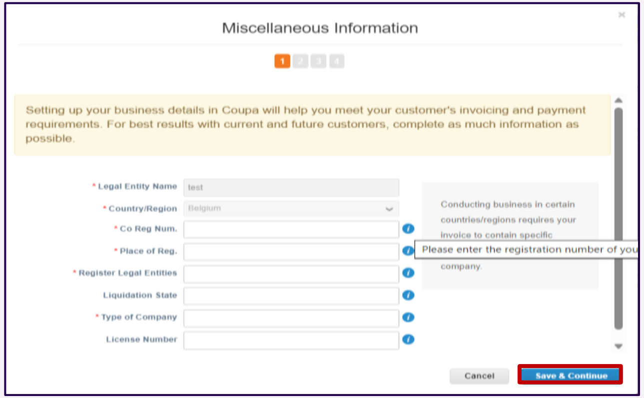
7 Once completed, click on <**Save & Continue**>

- The information to be filled in **differs according to the country selected**.
- Use the small blue icon next to each field to show more information about what is required

Example for Canada



Example for Belgium

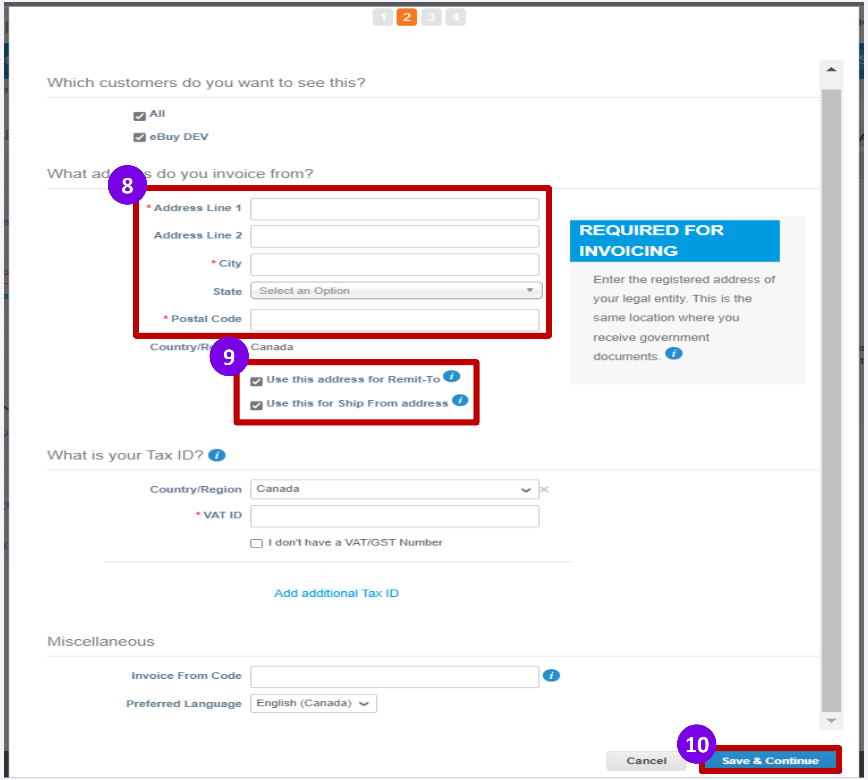


CSP Profile Settings – Invoice Form

8 Next, fill out your "**Invoice From**" address details

9 If your Remit-To and Ship From addresses are different, please uncheck the respective boxes and enter the information as needed

10 Once completed, click on <**Save & Continue>**



If you have more than one address for Invoice From, Remit-to or Ship From, you can add these in the "Setup" tab of the portal by clicking the "Add Legal Entity" button.

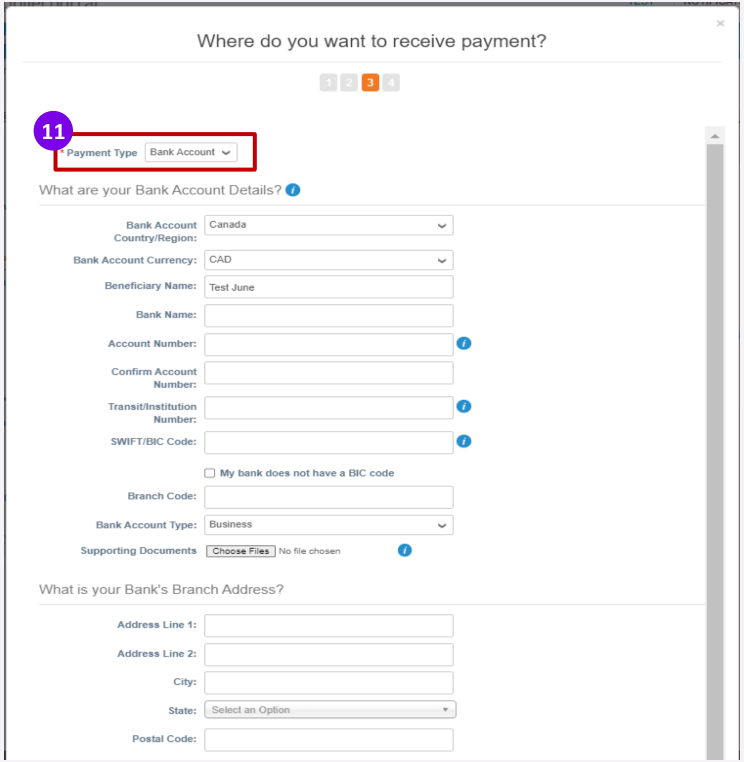
CSP Profile Settings – Bank Information

11 Choose your **Payment Type** at the top left corner of the page**.** For **Bank Account** option, please fill out as much information as possible.

- All the information provided here will be used to auto-fill all your future invoices.
- You can change the information any time later from **Setup - Legal Entity Setup** and click on <**Actions**> button next to the one you want to change.

12 Click on **Save & Continue** at the bottom of the page

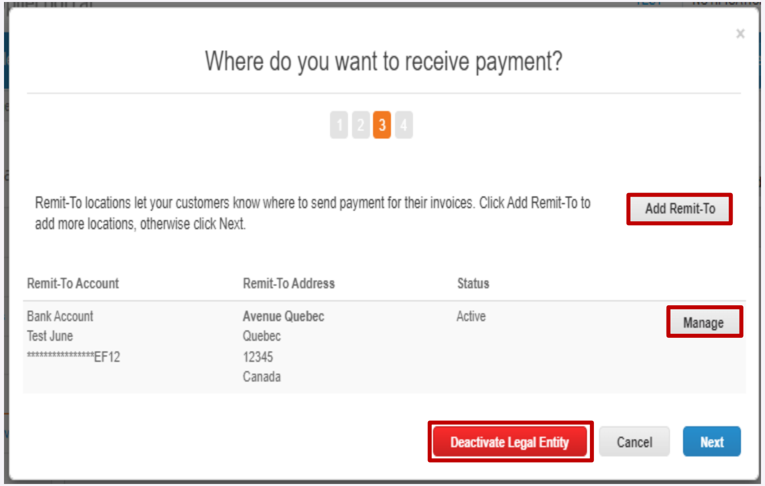
Banking information provided here is used exclusively to generate the invoice. For the actual payment, the current process remains in place.



CSP Profile Settings – Remit-To 1/7

Next, you have the option to fill in The Remit-to contact information. A new page opens “Where do you want to receive payment?”. If you want to :

- Add a new Remit-to, click on <**Add Remit-to**>
- Modify the existing one, click on <**Manage**>
- Deactivate the existing, click on <**Deactivate Legal Entity**>



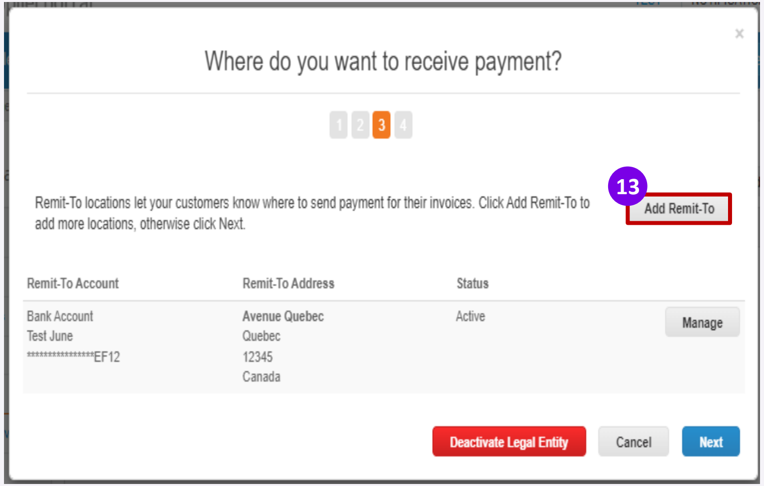
CSP Profile Settings – Remit-To 2/7

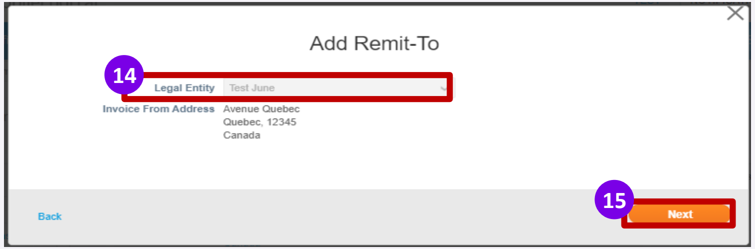
Add Remit- to

13 To add a Remit-to Add adress, click on <**Add Remit-to**>

14 Chose the legal entity you want a remit-to address

15 Click on <**Next**>





Please note that if there is no Remit-To address stored, Coupa will ask you to create one when submitting the 1st invoice.
After the address is selected/entered, you can begin submitting invoices.

CSP Profile Settings – Remit-To 3/7

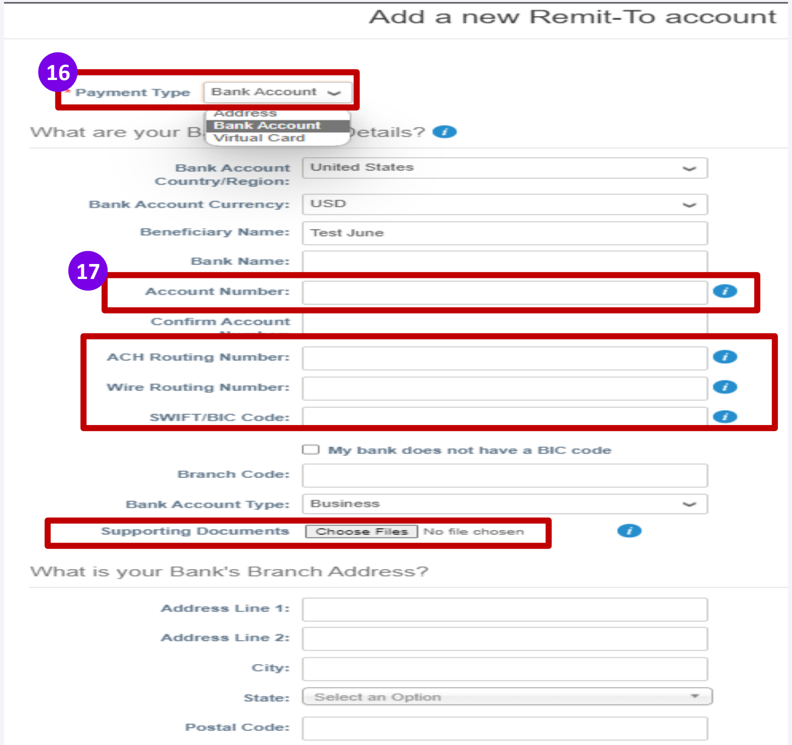
Add Remit- to

16 Chose the Payment Type **<Bank Account>**

17 Fill in the information regarding your bank account :

- The **Account Number**
- The **ACH Routing Number**
- The **Wire Routing Number** is needed to receive funds via a US wire transfer
- The **SWIFT/BIC Code** is needed to receive funds internationally
- Please upload **Supporting Documents** : a voided check, bank statement or a letter from your company to show account ownership

Please note that the requested Bank Account details might differ according to your Country/Region.



CSP Profile Settings – Remit-To 4/7

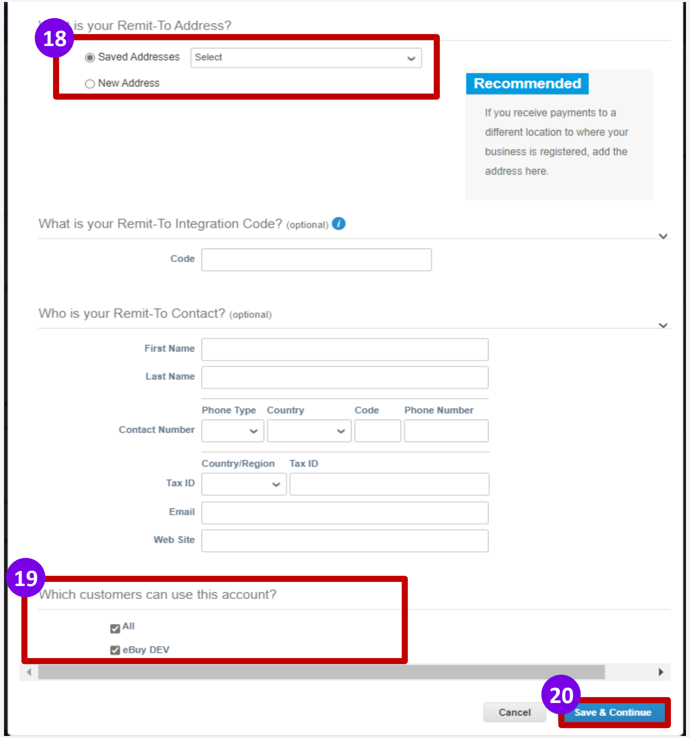
Add Remit- to

18 Add your remit-to information (optional)

- **The Remit-to Address** – you can choose a saved one or add a new address
- If you receive payments to a different location to where your business is registered, add the address here.
- The Remit-to Integration Code is used to tie your CSP Remit-to address with the corresponding address in your ERP
- **The Remit-To Contact** – fill in the contact and the Tax ID

19 Select the customer who can use the account

20 Click on **<Save & Continue>**



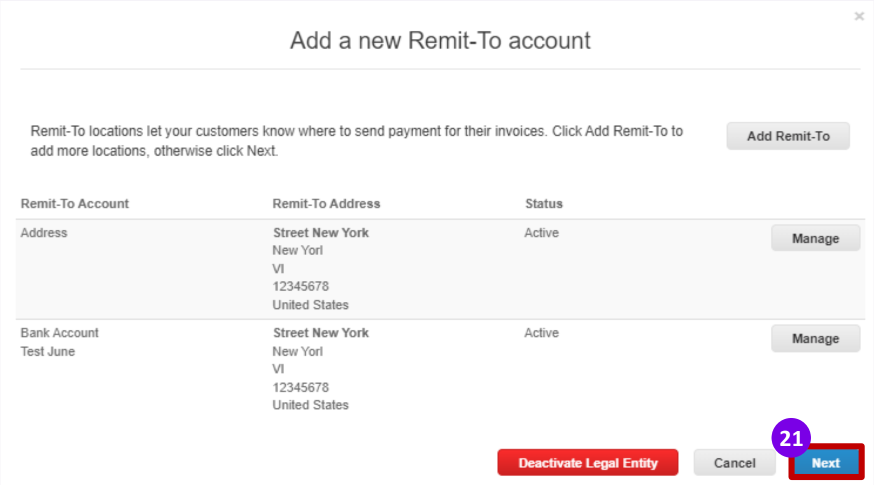
CSP Profile Settings – Remit-To 5/7

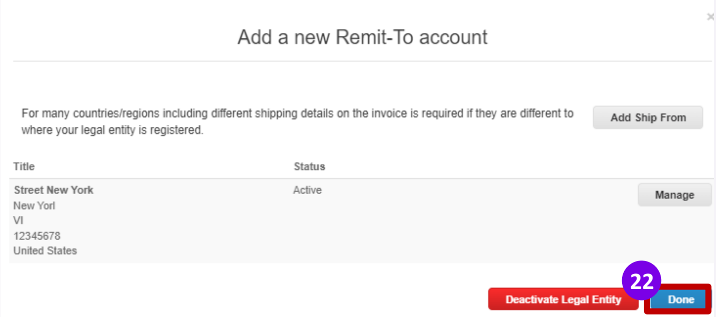
Add Remit- to

On the next page you will be able to manage or add a new remit-to depending on your need

21 Click on **<Next>**

22 Click on **<Done>**



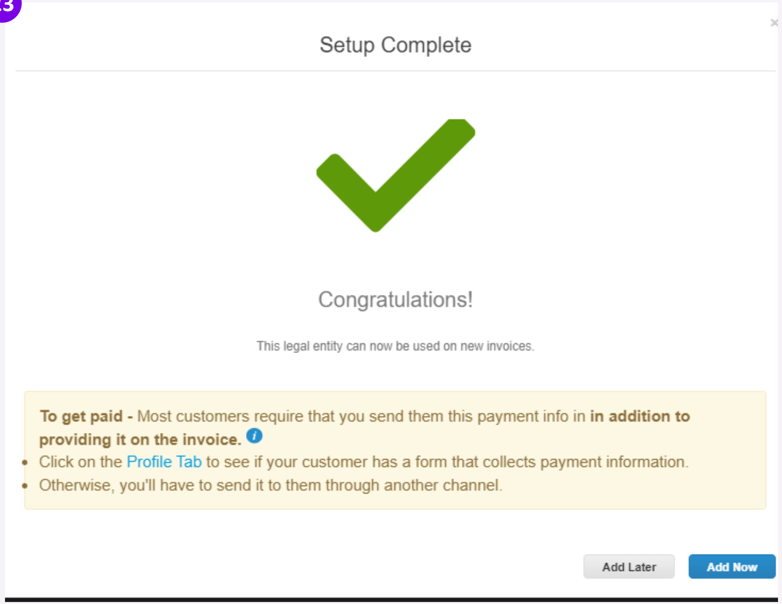


CSP Profile Settings – Remit-To 6/7

23 Next, you will receive a confirmation message

- If you have not completed your payment information, you are again asked to do so, otherwise you will have to send it to them through another channel

23

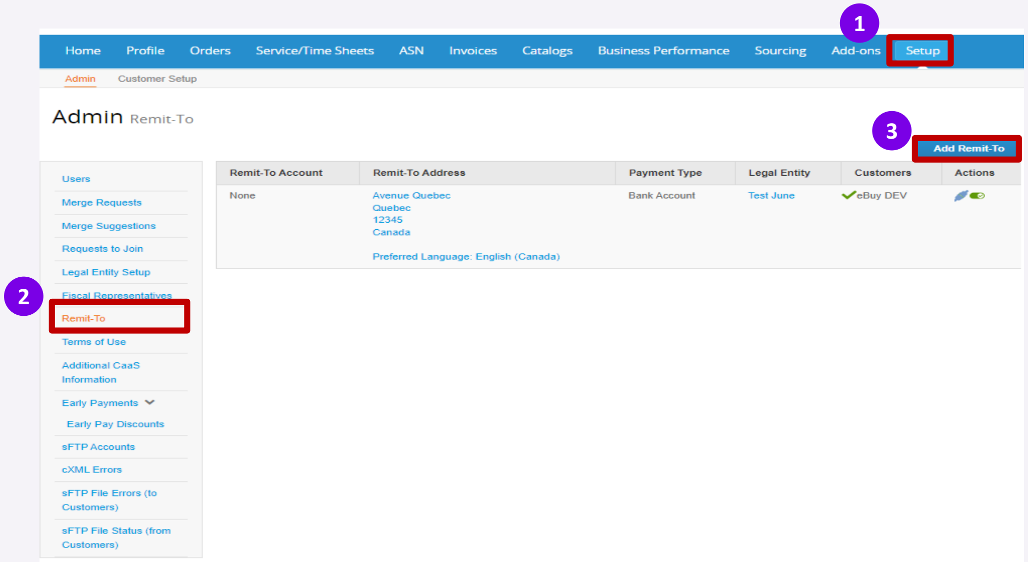


CSP Profile Settings – Remit-To 7/7

If you skipped adding the remit-to when registering to CSP, you will have the option to add it later too.

When on the setup tab => Admin tab, there is the option to fill in remit-to addresses.

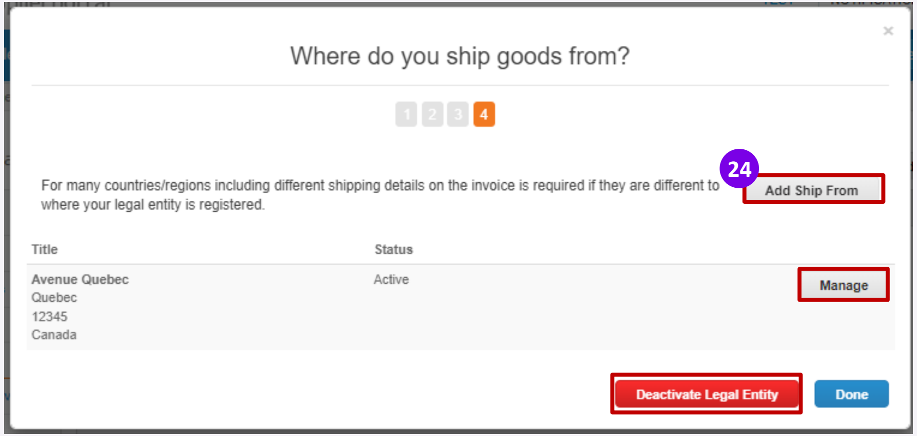
1. Go to the Setup tab
2. Go to the Remit-To tab
3. Click **Add Remit-To**



CSP Profile Settings – Shipping 1/3

24 Next, the last page appears, <Where do you ship goods from?> A new page opens “Where do you want to receive payment?”. If you want to :

- Add a new ship goods from, click on <**Add Ship From**>
- Modify the existing one, click on <**Manage**>
- Deactivate the existing, click on <**Deactivate Legal Entity**>

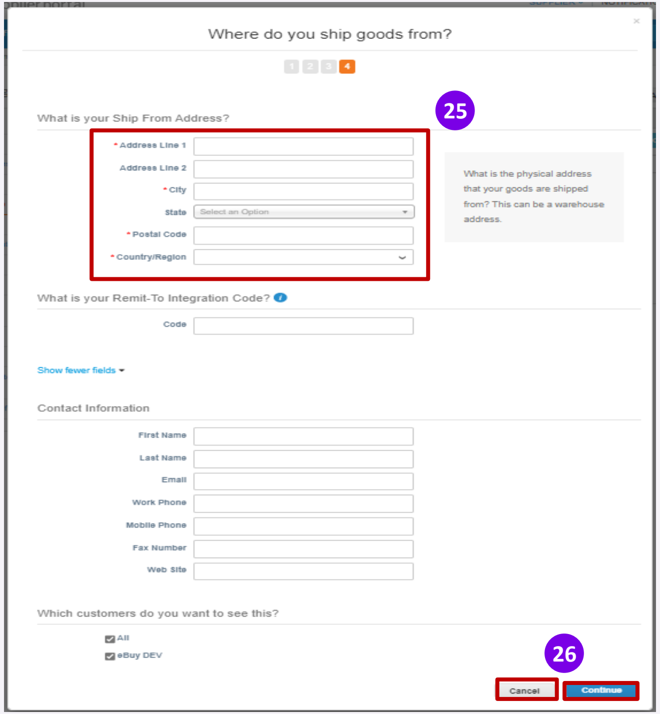


CSP Profile Settings – Shipping 2/3

25 If you click on <**Add Ship From**>, the next page will appear where you will have to add the physical address that your goods are shipped from. This can be a warehouse.

- The fields marked with asterisk are mandatory

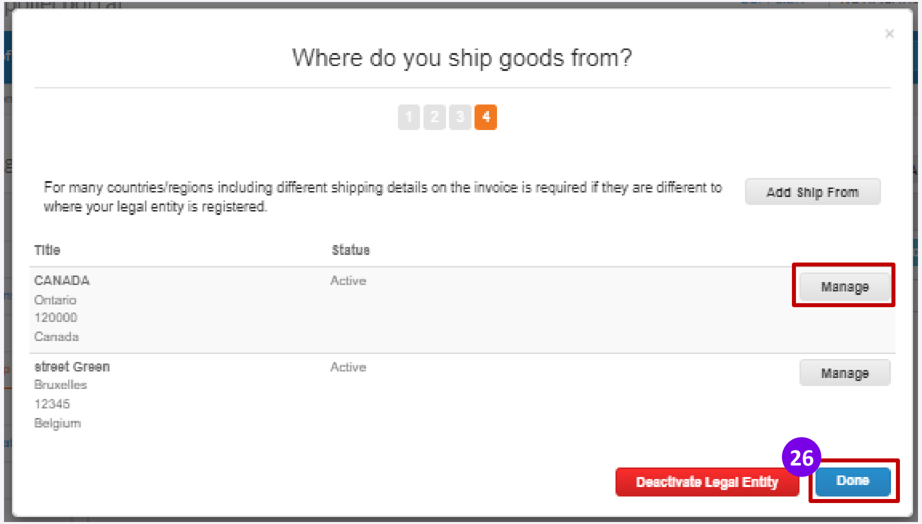
25 Click on <**Continue**> once done or on <**Cancel**> if you changed your mind



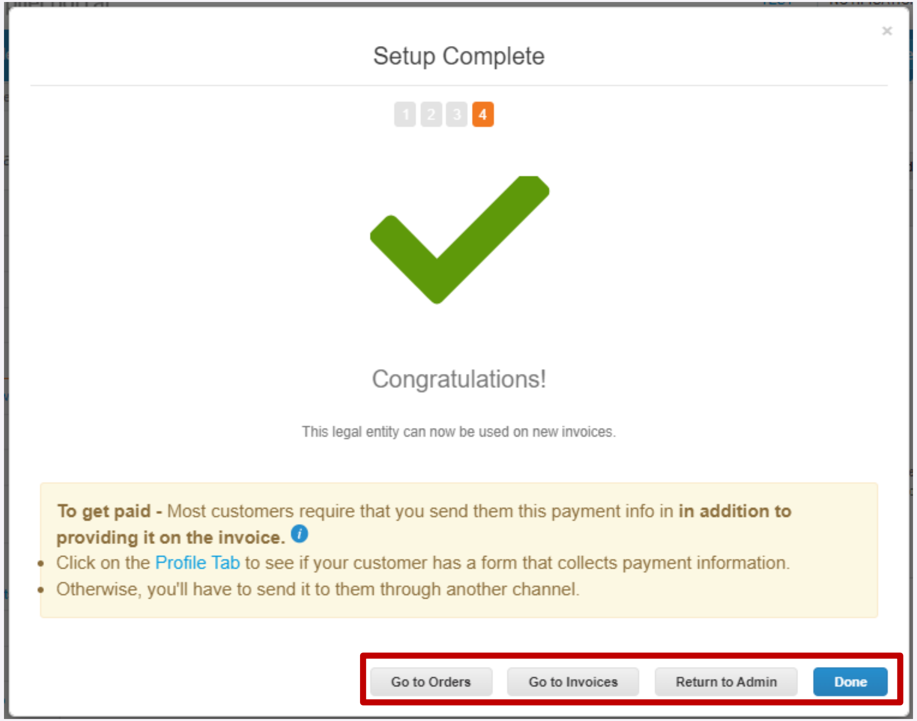
CSP Profile Settings – Shipping 3/3

26 Once you click on <**Done**>, you are redirected again on <Where do you ship goods from?> page where you will see the list of addresses previously added.

- You can modify them by clicking on <**Manage**> or click on <**Done**> button if not necessary



CSP Profile Settings



Once you've completed the legal entity setup process you can:

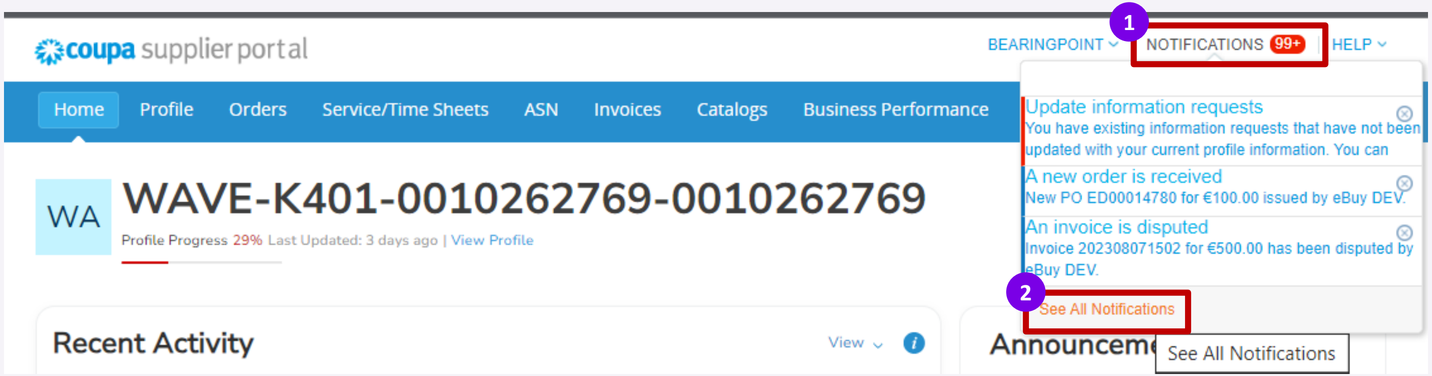
- **Go to the Orders** tab to see your POs and/or create invoices.
- **Go to the Invoice** tab to see previously submitted invoices and their status.
- **Return to the Admin** tab.
- Click on **Done** to close the window

Manage the notifications

Coupa initiates email notifications to suppliers based on customer actions taken.

1. After registering to Coupa, you will see the notifications option at the top right corner of the home page.

2. Hover over the notifications to see an overview or click on <**See All Notifications**> to access them:

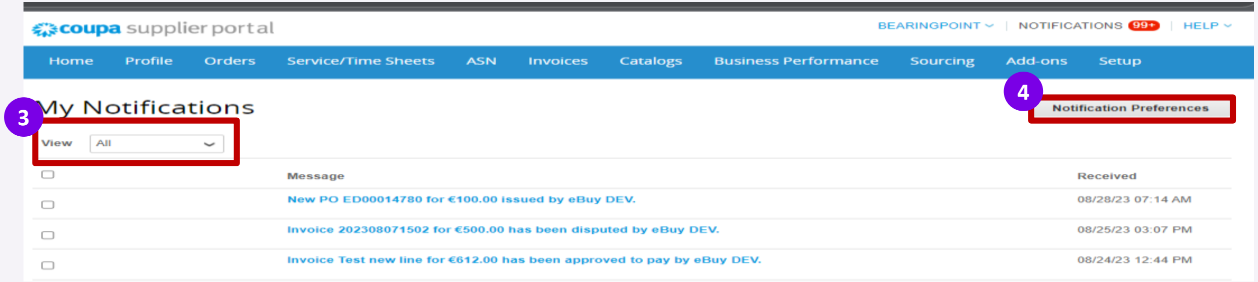


Manage the notifications

After clicking on <See All Notifications>, the list will appear with all your notifications.

3 Click on <**View**> to filter the notification

4 You can also set the notification preferences by clicking on the button <**Notification Preferences**>:



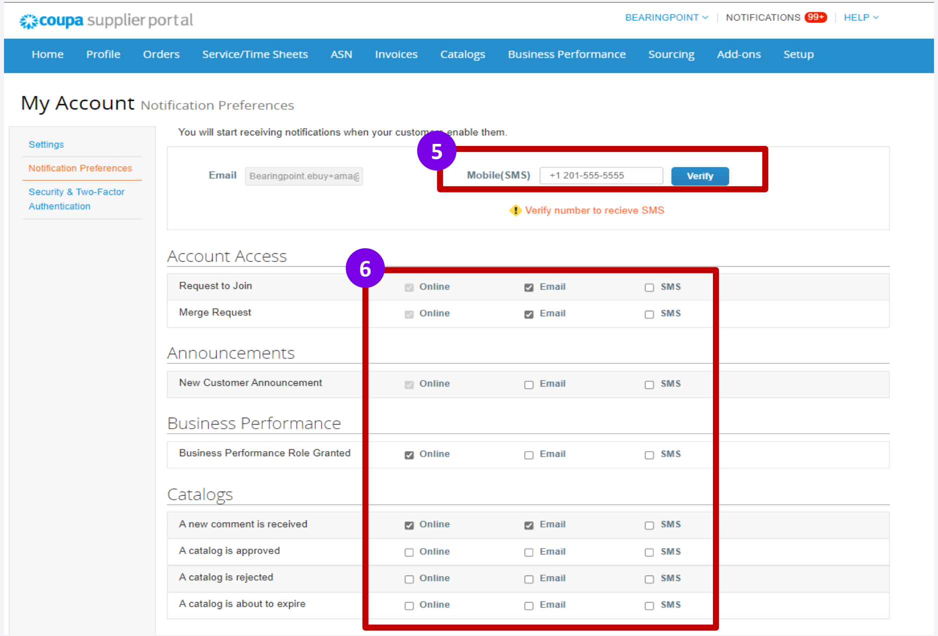
Manage the notifications

On the **Notification Preferences** page, you have several option :

5 Set a cell phone number

6 Activate/ deactivate notifications by ticking/unticking boxes next to <Online>, <Email>, <SMS> options

7 Once done, click on <**Save**> at the bottom of the page



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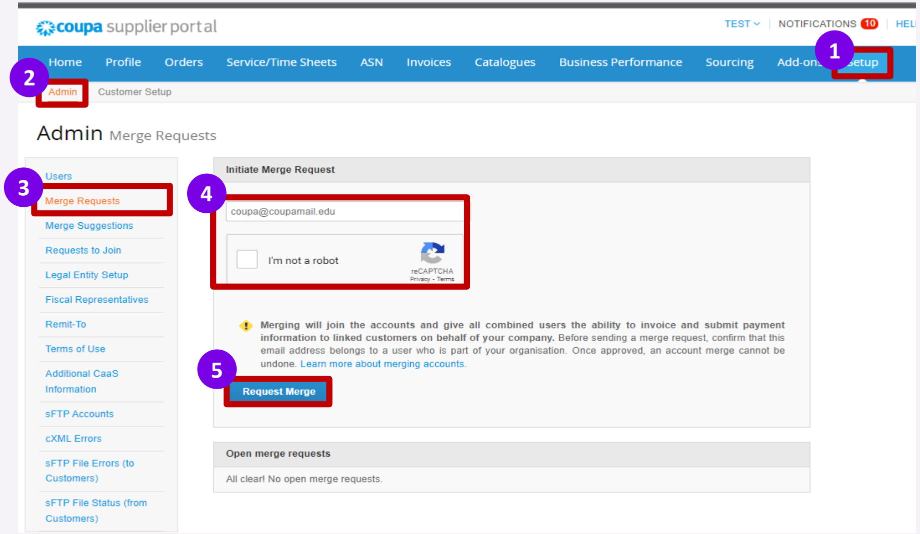
sanofi

CSP Supplier Merge 1/3

Your company may have more than one account/profile in the CSP. This can happen when several users from the same company register or are invited to the CSP through different email addresses.

Follow the step to merge your different account:

1. Click first on **Setup** tab
2. Then on **Admin**
3. Click on Merge Request
4. Add the email address of the recipient and Tick the CAPTCHA box
5. Click on the<**Request Merge**>button



Note: Accounts with the same email address are merged automatically (regardless of which invite message you use to create your account, since both invites are sent to the same email address).

CSP Supplier Merge 2/3

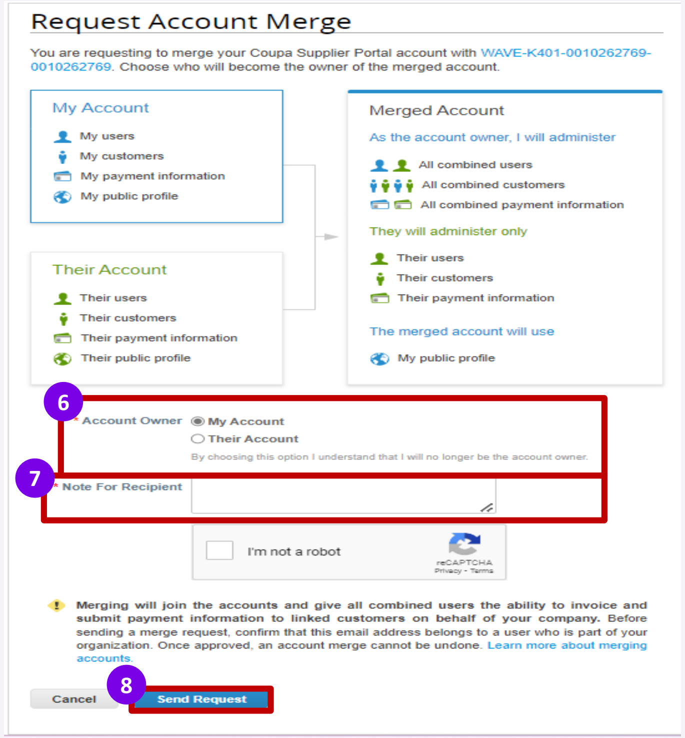
6 After clicking on <**Request Merge**>, select the Account Owner of the record:

- **My Account** means that you are retaining ownership, and the merged user will be under your administration.
- **Their Account** means that they are retaining ownership, and you will be under their administration.

7 Add a note about your request to help avoid any confusion and then

8 Click on <**Send Request**> button.

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. Once approved, an account merge cannot be undone.



CSP Supplier Merge 3/3

9 Once the request is sent you will receive a confirmation.

Merge request submitted successfully. [LEHIGH VALLEY SAFETY SUPPLY CO (US-PA-ALLEN-01)-89], or the account owner, will only be notified if they have an active account. ✕

The person requested to Merge will receive a notification on their CSP account to accept or reject the merger request.

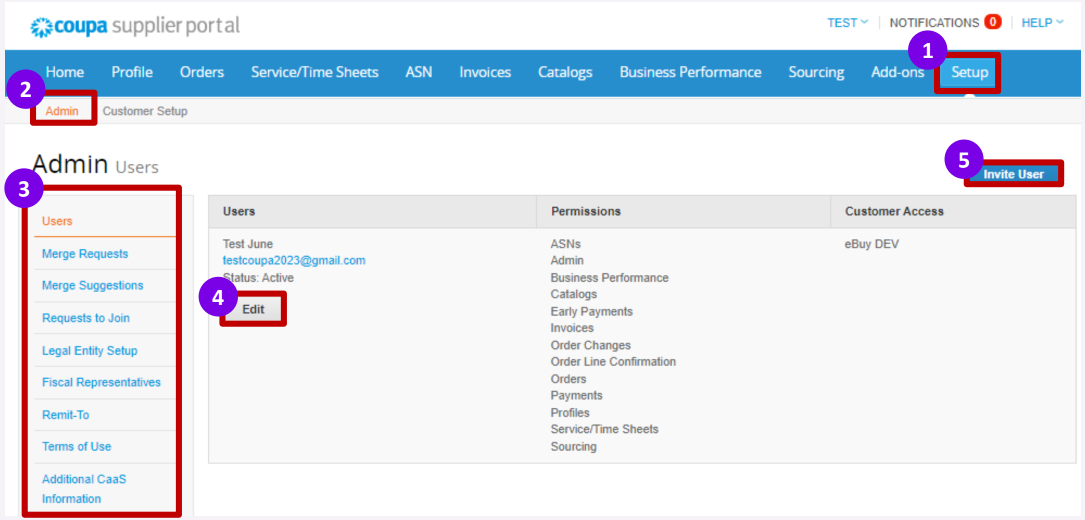
Once accepted the merge will be complete.

- You can see purchase orders and create invoices for both supplier records after selecting a customer from the Select Customer drop-down.

Managing Users in CSP 1/3

Using the supplier portal, you can invite additional users in your company to access the CSP.

1. Click first on **Setup** tab
2. Then on **Admin** tab at the top of the home page
3. On the left, you will see a list of actions you can perform:
4. Click on **Edit** button if you would like to edit the existing user
5. Click on **Invite User** button to add a new user



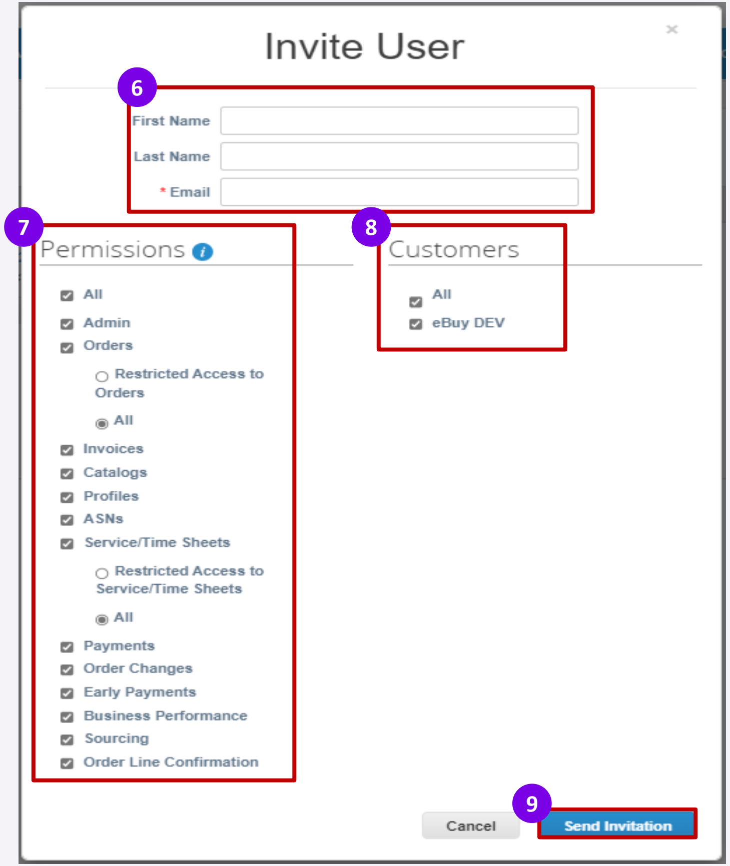
Managing Users in CSP 3/3

6 Enter the user’s information.

7 Select the user’s **permissions**

8 Select which **customer(s)** the user can access.

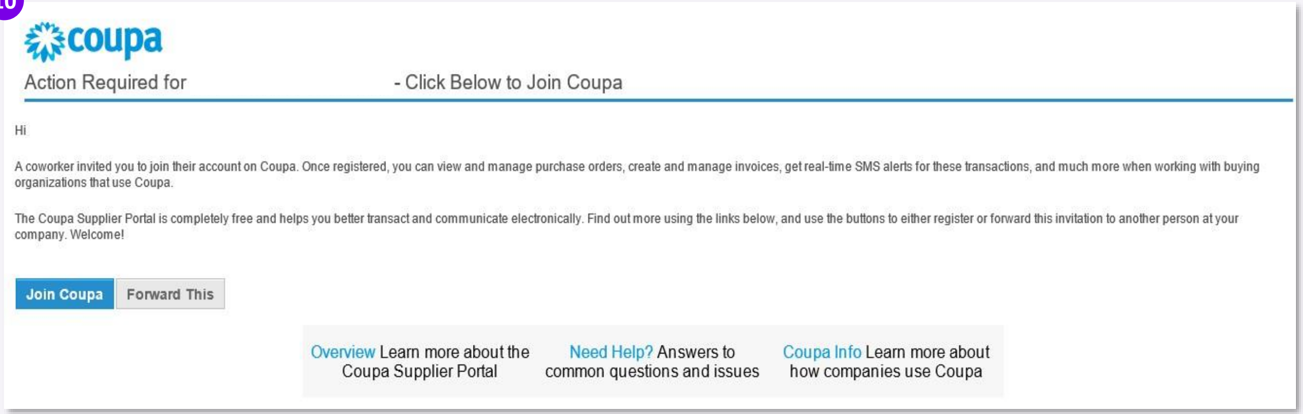
9 Click on **Send Invitation**.



Managing Users in CSP 3/3

10 After you have sent the invitation, the employee will receive an email notification, with a link to register.

10



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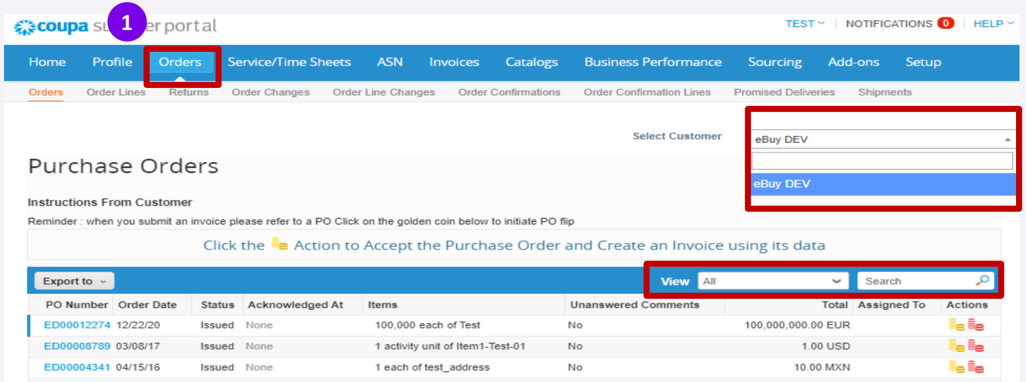
Viewing Orders in the CSP 1/3

1 The **Orders** tab at the top of the home page will display all **Purchase Orders (PO)** sent by your customer.

- You can Use the **Search** functionality to find purchase orders by number. You can sort by column, by clicking on any of the column headers (**PO Number, Status, Acknowledged At, Items, Unanswered Comments, Total,** and **Actions**). **View** functionality should be set to “All”.
- All purchase orders on this screen are hyperlinked and you can view additional information about the purchase order by clicking on the blue PO# hyperlink.

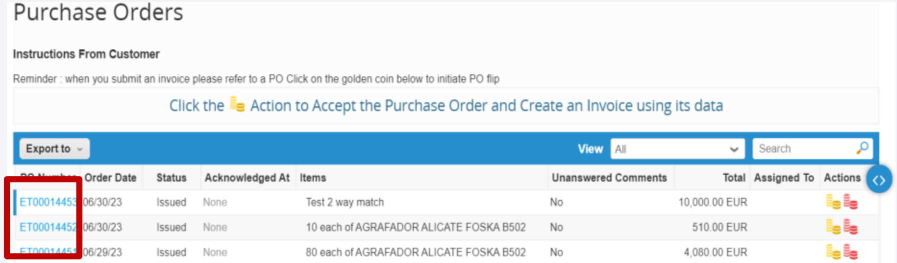
If you’re not seeing a particular PO you may need to select one of the other customer records using the **Select Customer** dropdown.



Viewing Orders in the CSP 2/3

2

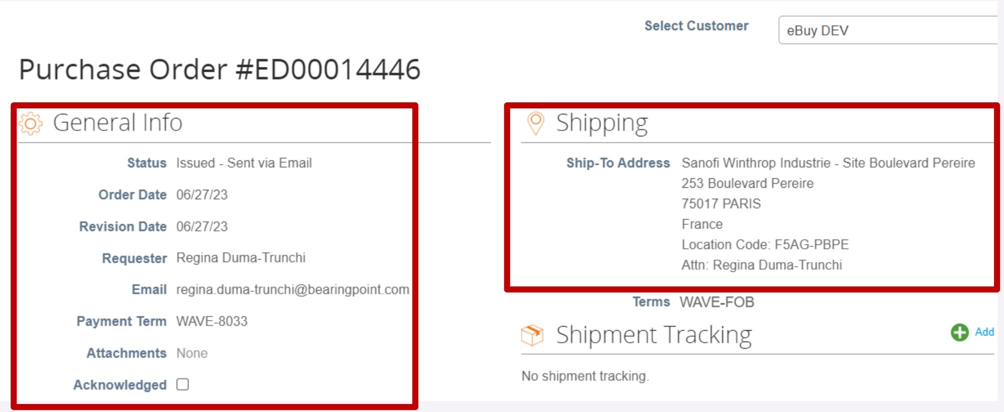
When you click on a purchase order blue hyperlink, the purchase order opens.



2

At the top it will show you:

- Status,
- Order Date
- Revision Date
- The Original Requester
- The Requester's Email
- The Payment Terms you've negotiated
- Attachments



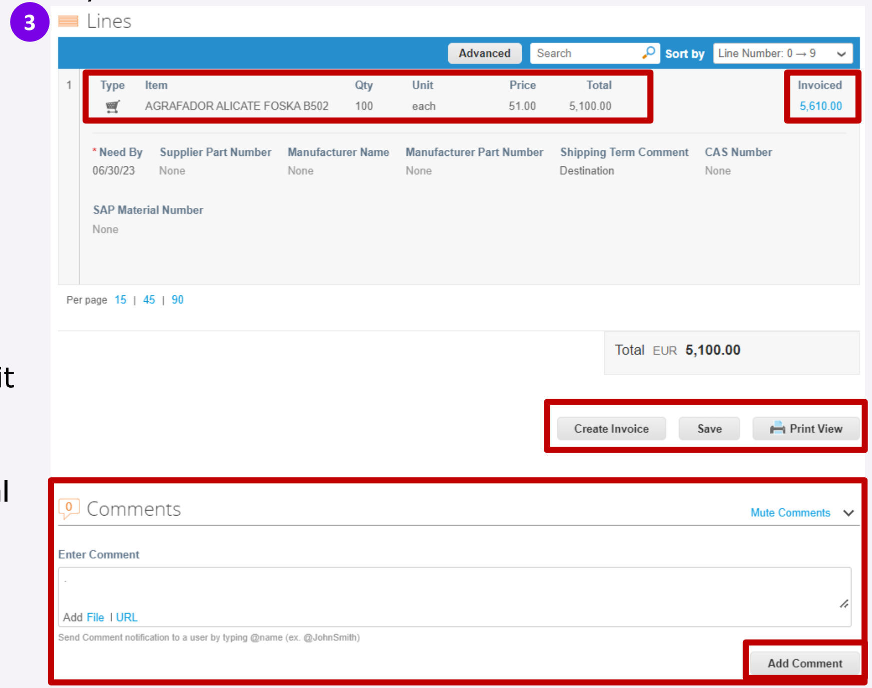
In the upper right-hand corner, you can see the shipping address.

Viewing Orders in the CSP 3/3

3 Scrolling down you can see the Lines on the purchase order. Here you can see:

- The type of order **QTY** or **AMT**
- A **Description** of what has been ordered.
- **Quantity** Ordered and **Price**
- How much has been **Invoiced** against the PO

- **Create Invoice** will take all the PO information and turn it into an invoice.
- **Print View** will open another window displaying additional information, such as currency, contact information and Sanofi Terms & Conditions.
- In **The Comments** section you can add comments/ attachments to the PO which will be sent to the customer.



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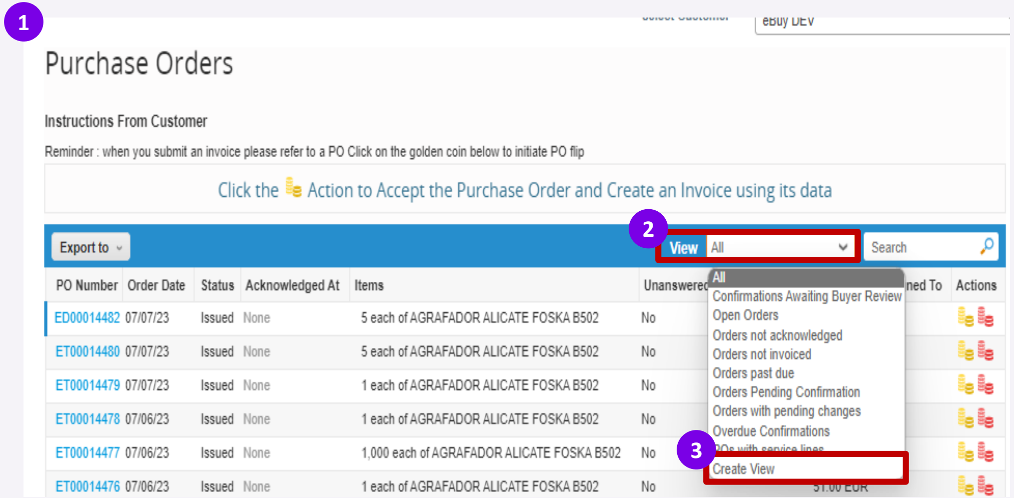
Views - Create Custom Views (1/2)

Custom views and reports can be created from any Coupa Table:

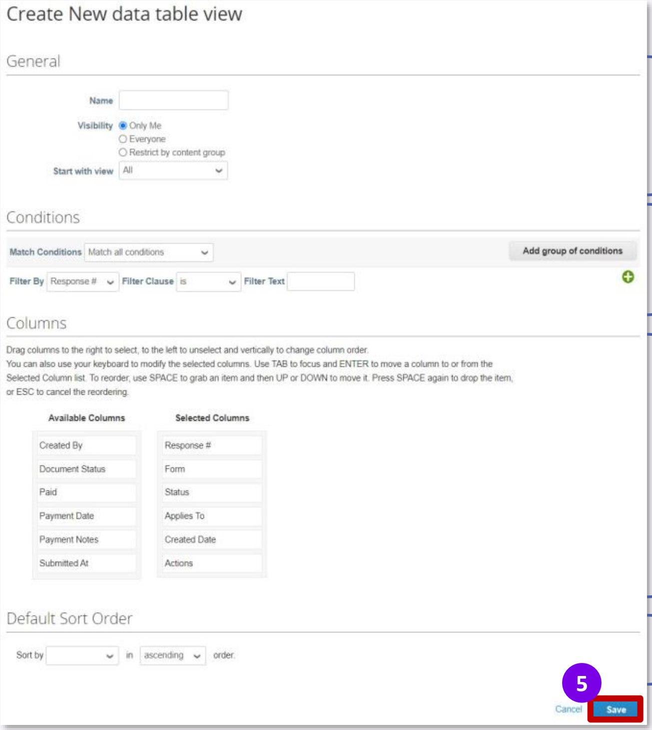
1. Go to any Coupa table you wish to create a view
2. Click on the **View** dropdown
3. Click on **Create View**



Views - Create Custom Views (2/2)

4 Fill Out the information

5 Click on **Save**



4

General
- Name
- Visibility
- Start with view

Conditions
- On fields depending on the table

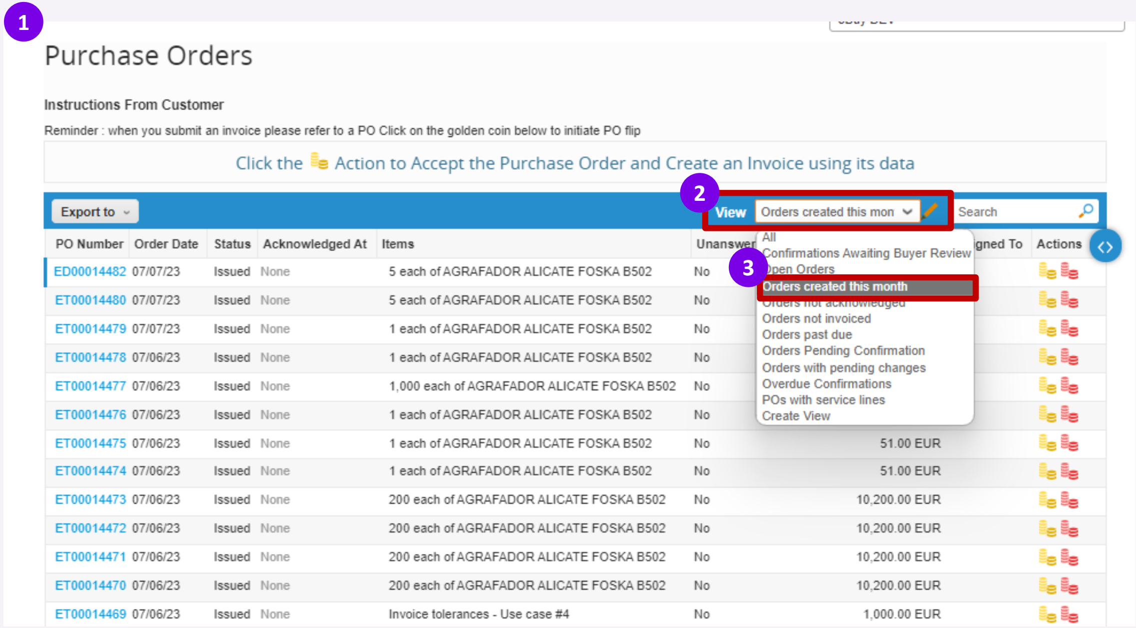
Columns
- Drag and drop columns you wish to dispay

Default Sort Order

Views - Apply Custom Views

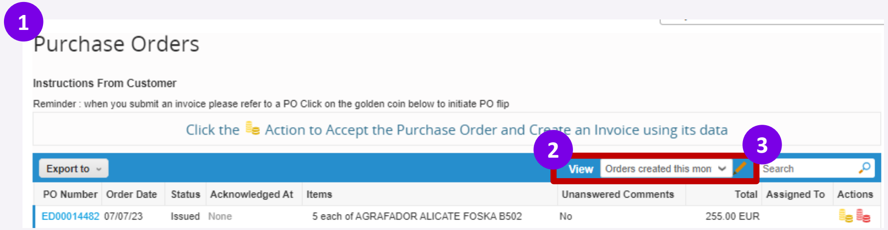
1. Go to the Coupa table you have created a view for
2. Click on the **View** dropdown
3. Select the view you have created

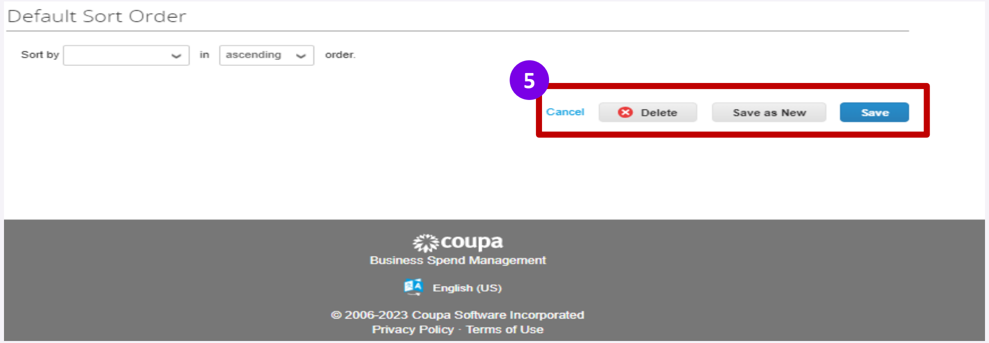
Created view is applied to the table



Views - Edit Custom Views

1. Go to the Coupa table you have created a view for
2. Select the view you have created using the View dropdown
3. Click on the pencil icon to edit the view
4. Edit the view as explain on Create Custom Views process
5. Scroll down to perform the following actions:
   - Click on **Delete** to delete the view
   - Click on **Save as New** to create a new view
   - Click on **Save to save** the changes





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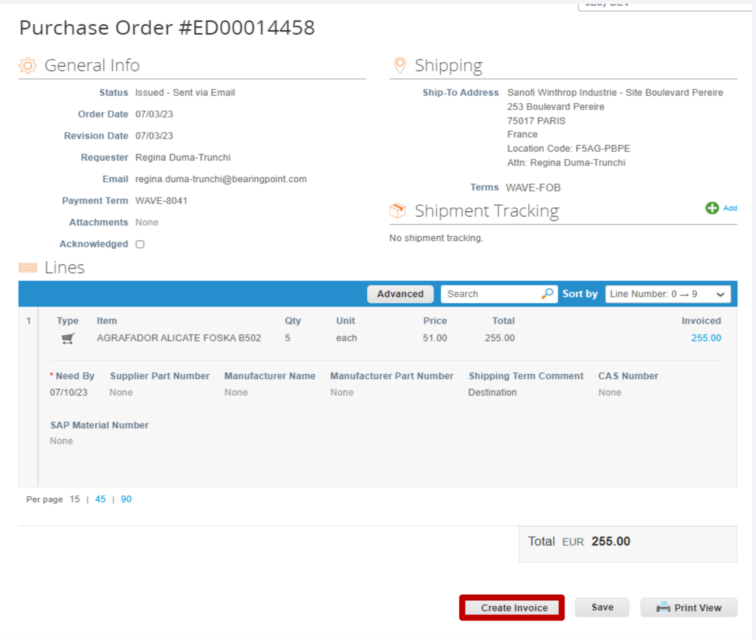
Creating an invoice from CSP

You have several way to create an invoice :

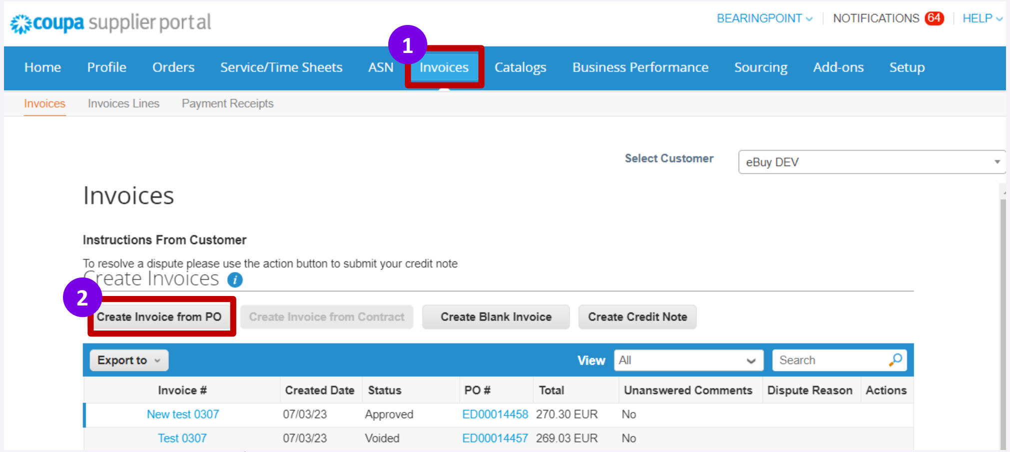
Option 1

By clicking on the <**create invoice**> button when you review your PO.



Option 2

You can also create an invoice from the Invoice tab and by clinking on <**create Invoice from PO**>

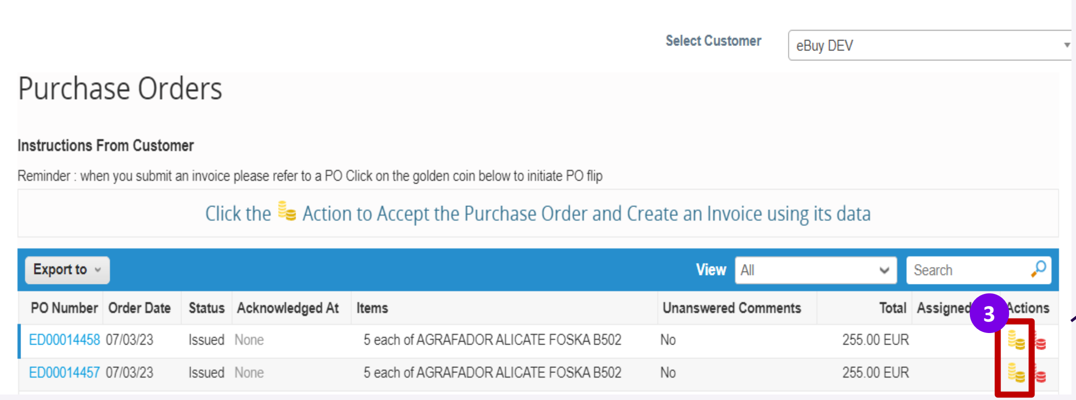


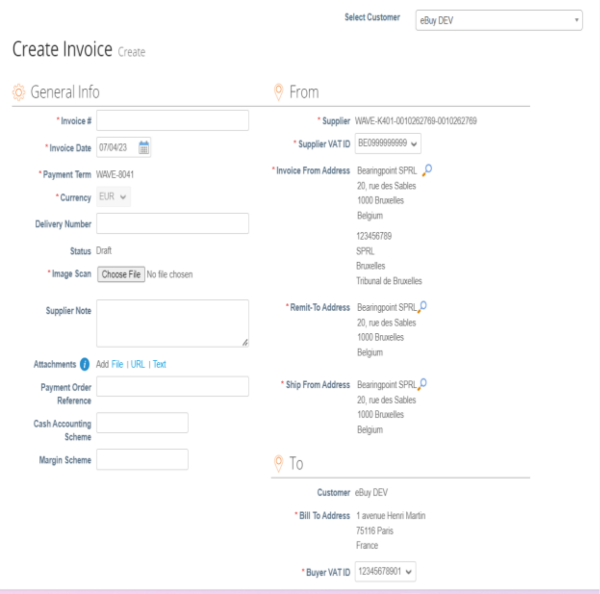
Buttons are active only for the actions that you can do. For example, if your customer did not enable you to create invoices without a backing document, the Create Blank Invoice button is inactive.

Creating an invoice from CSP

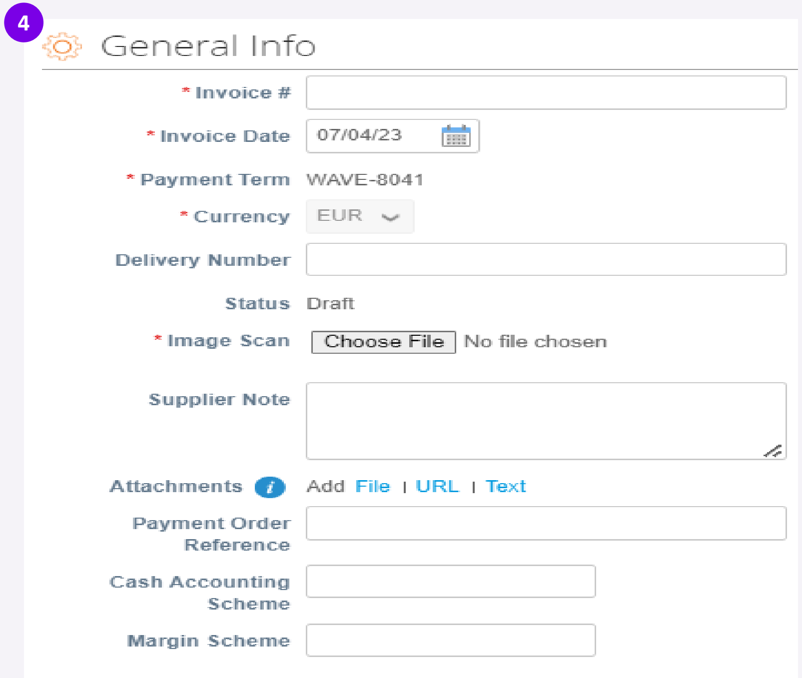
Clicking on the first button from the invoices page, **Create Invoice from PO,** takes you to the purchase orders, where you can see instructions on how to create an invoice from a PO by clicking on the **Golden Coins** icon.

- This action will open a new page where you can create your invoice.





Creating an invoice from CSP



General info

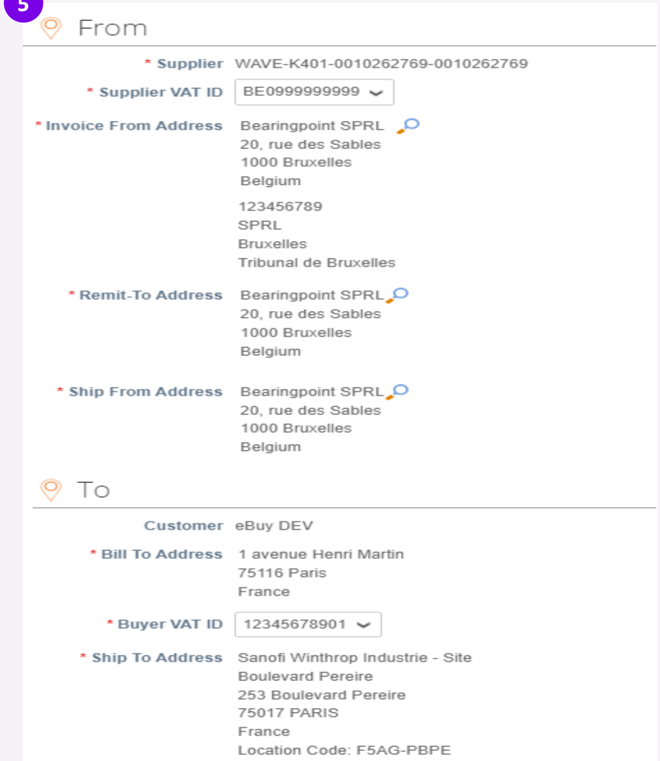
The fields marked with asterisk * are mandatory:

- **Invoice legal number:** should be your unique invoice number - make sure the length of your Invoice # does not exceed 16 characters
- **Invoice date**
- **Payment term:** defaulted from the PO
- **Currency:** defaulted from the PO
- **Image Scan:** Upload the scan of your invoice by clicking on <**Choose File**> button
- **Payment Order Reference** (if required) - not mandatory

Mandatory fields can be different according to each country’s regulation.

Creating an invoice from CSP

5



From

* Supplier WAVE-K401-0010262769-0010262769

* Supplier VAT ID BE0999999999

* Invoice From Address Bearingpoint SPRL
20, rue des Sables
1000 Bruxelles
Belgium

123456789
SPRL
Bruxelles
Tribunal de Bruxelles

* Remit-To Address Bearingpoint SPRL
20, rue des Sables
1000 Bruxelles
Belgium

* Ship From Address Bearingpoint SPRL
20, rue des Sables
1000 Bruxelles
Belgium

To

Customer eBuy DEV

* Bill To Address 1 avenue Henri Martin
75116 Paris
France

* Buyer VAT ID 12345678901

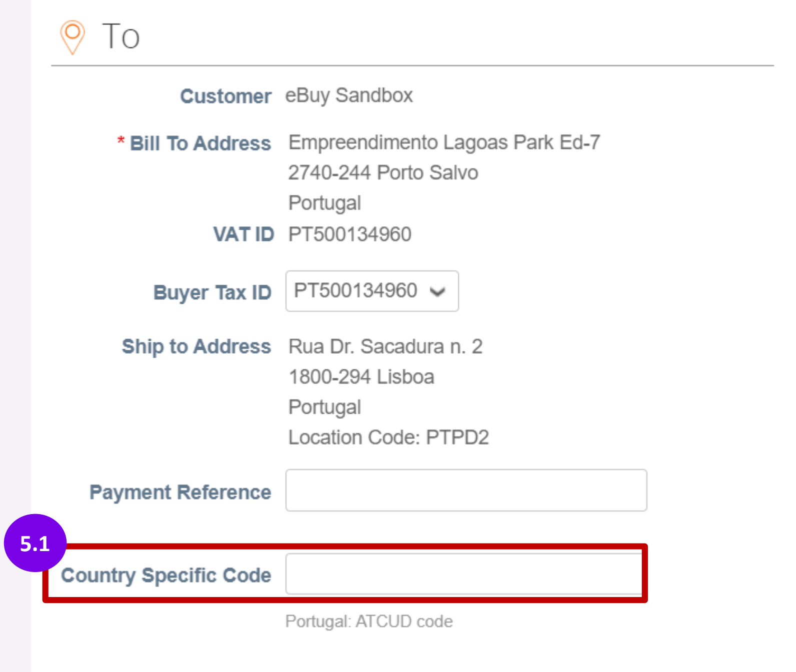
* Ship To Address Sanofi Winthrop Industrie - Site
Boulevard Pereire
253 Boulevard Pereire
75017 PARIS
France
Location Code: F5AG-PBPE

Accounting & Remit-To

- **Supplier** – defaulted from profile
- **Supplier VAT ID** – defaulted from profile
- **Invoice From Address** – defaulted from profile
- **Remit-to Address** – defaulted from profile
- **Ship From Address** – defaulted from profile
- **Bill to Address** – defaulted from PO
- **Buyer VAT ID** – defaulted from PO
- **Ship to Address** – defaulted from PO

If there is only one Remit-To address stored in your profile, then Coupa will default to that address and there will be no pop-up to choose an address. If there is no Remit-To address stored, Coupa will ask you to create one. After the address is selected/entered, you can begin to build the invoice.

Creating an invoice from CSP



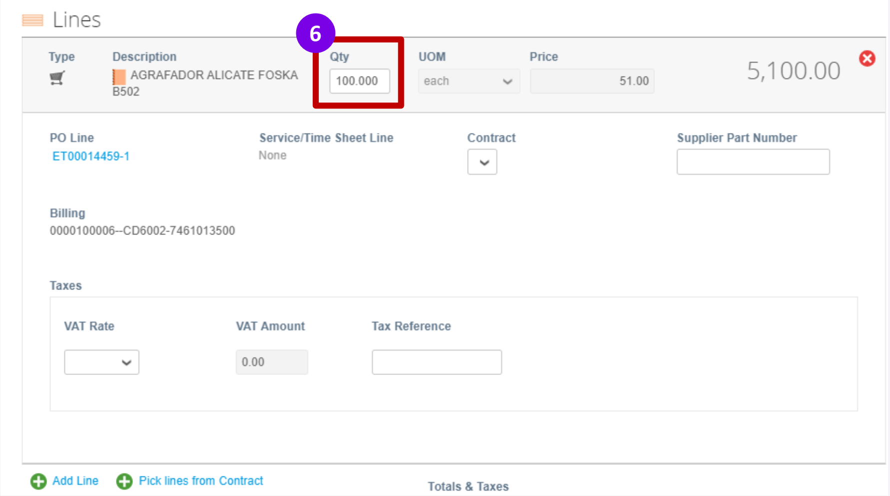
Zoom on Portugal specificity

5.1

- A field will appear with the **Country specific Code** where you will need to add the ATCUD code.
- The ATCUD comprises a validation code and the document number (without the prefix), separated by a minus sign. An example ATCUD can appear as follows: 87654321-210000000001

Creating an invoice from CSP

Go to the “Lines” section of the invoice, where you can review (and update if applicable) the value being invoiced.

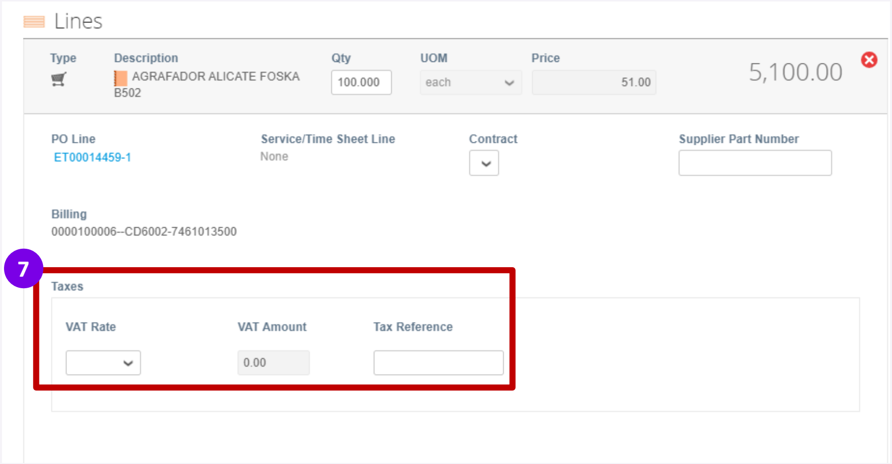


6

If applicable, in case of an **Amount based PO,** update the amount in the “**Price**” field with the amount you are invoicing. Delete the value shown and enter your invoice amount.

If applicable, in case of a **Quantity based PO,** update the quantity in the “**Qty**” field with the quantity you are invoicing.

Creating an invoice from CSP



7 Please select the VAT rate that applies to the respective line item from the drop-down menu.

VAT Amount will be automatically calculated.

Please note that it is a mandatory field.

If applicable, use the Tax Reference section to provide justification on the selected VAT Rate.

Note that if a 0% rate or a tax exemptions is applied, a justification must be provided in the Tax reference Box.

Creating an invoice from CSP

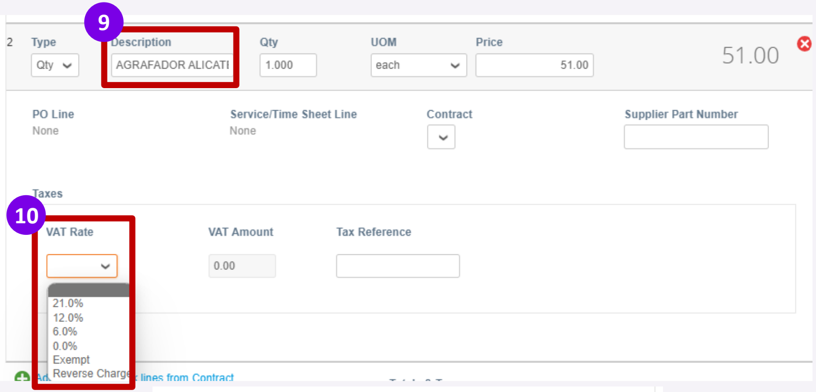
9 For any additional lines, add, in the **Description** box, the type of charges, and fill in the amount in the "**Price**" field.

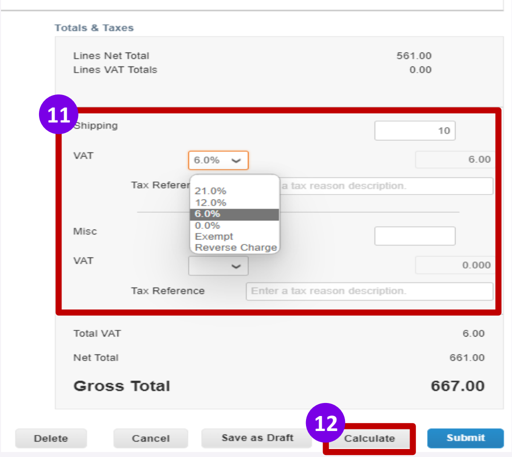
10 Please select the **VAT rate** from the drop-down menu which applies to the respective line item.

VAT Amount will be automatically calculated. **Please note that it is a mandatory field.** If applicable, use the **Tax Reference** section to provide justification on the selected VAT Rate.

11 Under **Totals & Taxes** you can add the additional charges, the **Shipping** and **Misc** amount and their corresponding VAT rates.

12 Click the **<Calculate>** button: This will update the total value being invoiced based on the amount in the "Price" field above and any additional charges entered.

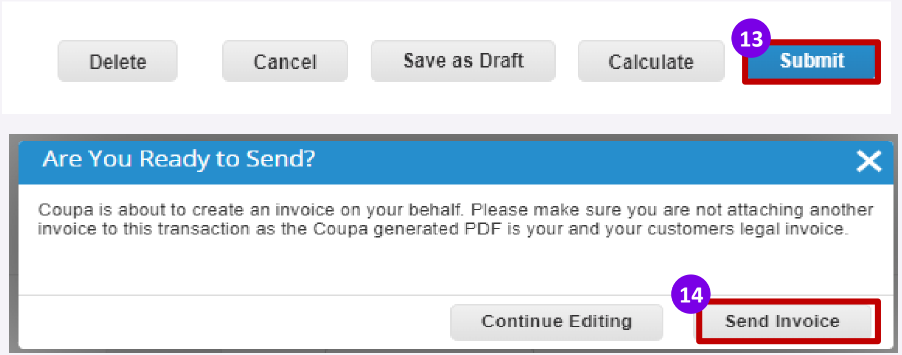




Creating an invoice from CSP

13 Click on the **Submit** button

14 Please acknowledge that Coupa will create an invoice on your behalf and Click the "**Send Invoice**" button in the pop up.



Congratulations, your invoice is now submitted!

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Creating an invoice from CSP – Submission warnings

Please note that the following submission warnings might appear as a pop-up message after you click on <**Submit**>, depending on the information you provided on the invoice.

- You will then need to simply check and confirm that the information is correct/present on the invoice.

Case	Submission warnings
Blank remit-to when vendor submits invoice	Submission warning to make sure the remit-to has been filled in by the vendor.
Withholding tax when creating an invoice	Submission warning for some countries. If WHT: "This country does not allow withholding tax, please remove any withholding tax in order to process the invoice."
Swiss invoice origin when creating an invoice with Switzerland as country of origin	Submission warning if invoice origin country is Switzerland. "If you wish to be paid through QR IBAN, please make sure you provide your QR IBAN in the "Payment Order Number" field and your QR Reference in the "Payment Order Reference" field, as well as your QR bill in attachment."
Portuguese invoice origin when creating an invoice with Portugal as country of origin	Submission warning if invoice origin country is Portugal "Please make sure you provide the ATCUD code in the "ATCUD code" field."
Invoice dates	Submission warning appears when a CSP invoice has an invoice date more than 15 days older than the actual invoice submission date

Creating an invoice from CSP – Submission blockers

Please note that the following submission blockers might appear as a pop-up message after you click on <**Submit**> (depending on the information provided on the invoice).

- You will then need to correct the information and submit again, otherwise the invoice cannot be created/ sent to the customer

Case	Submission blockers
Invoice minimum amount	Minimum amount for an invoice: 0.
Acceptance of Coupa Supplier Portal Invoices	Only legal entities who have deployed Coupa invoicing will accept invoices from suppliers via the CSP. A submission blocker is implemented at CoA level to prevent any wrong invoice submission.

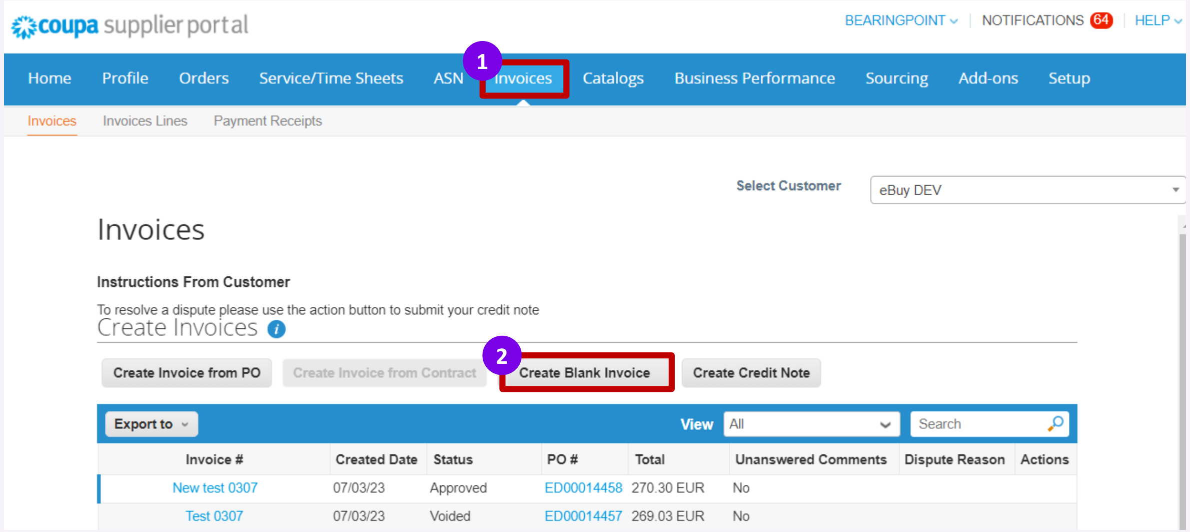
The list of warnings and blockers might be updated in the future according to the customer’s need or other regulations.

Non PO or blank invoice

To invoice costs that are not backed by PO’s, you should create a new invoice with naming convention for the description field.

- This invoice must be a non PO backed invoice.

Go to the **Invoice** tab (1) and click on **Create Blank Invoice** (2) to create a non-PO backed invoice

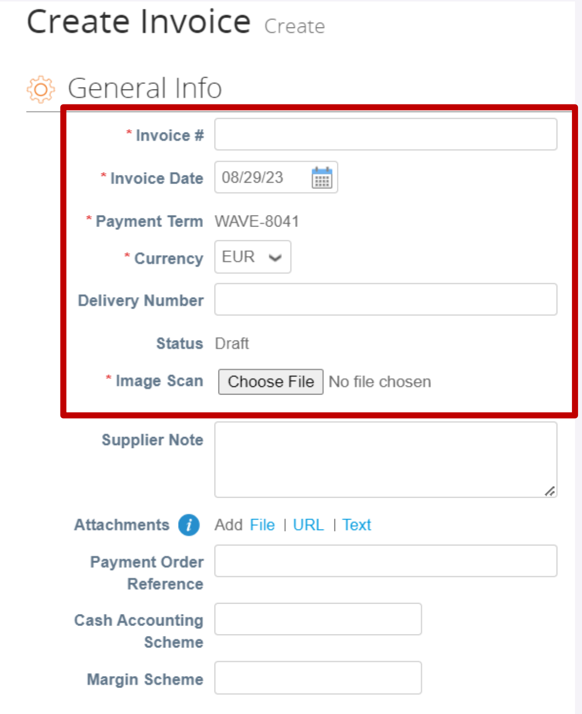


Unbacked invoicing

Header level of this invoice must be filled in as any other invoices, as indicated on the previous slides, except the fields that are normally defaulted from PO. The following fields must be filled in manually:

3 Fill in the information from **General Info** section, on the left side. The fields marked with asterisk * are mandatory:

- **Invoice legal number:** should be your unique invoice number - the length of your Invoice # should not exceed 16 characters
- **Invoice date**
- **Payment term:** defaulted from profile
- **Currency:** choose the currency by clicking on the small arrow
- **Image Scan:** Upload the scan of your invoice by clicking on <**Choose File**> button

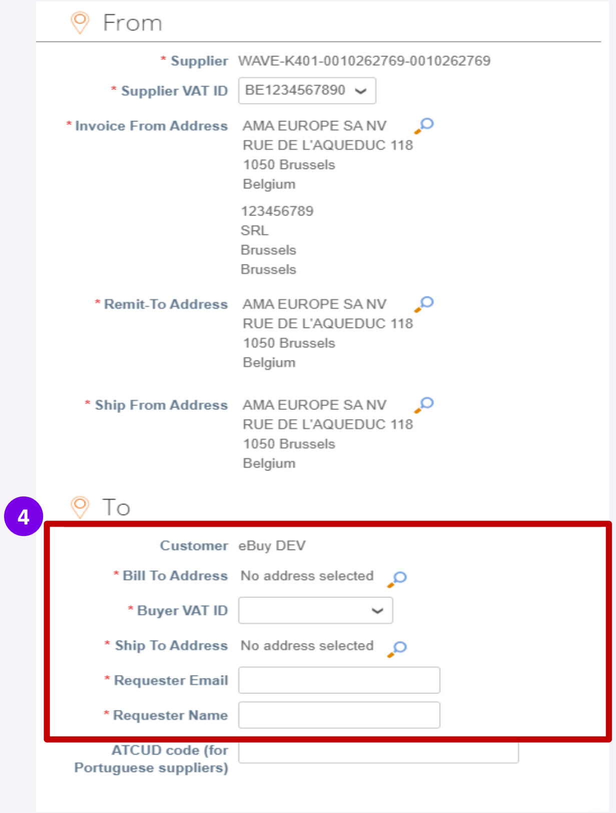


Unbacked invoicing

The <**From**> section is defaulted with information you previously added in your profile. You can choose other addresses (if available on your profile), by clicking on the loops.

4 Fill in the mandatory information from the <**To**> section, on the right side:

- **Bill to Address** – click on the loop to choose it
- **Buyer VAT ID** – click on the field to choose it
- **Ship to Address** – click on the loop to choose it
- **Requester Email** – add the email address of the requester
- **Requester Name** – add the name of the requester

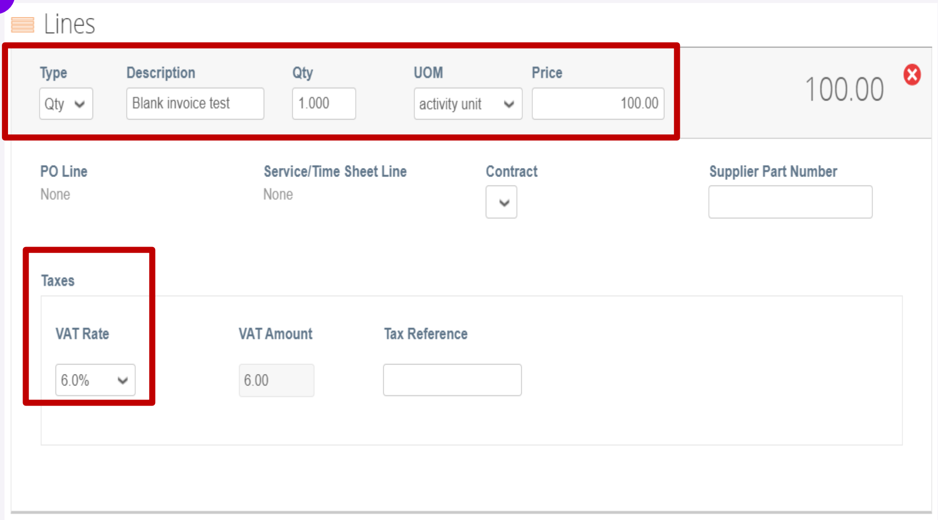


Unbacked invoicing

5 Line level must be filled in manually, as follows:

- Choose the line type: **<Qty>** for quantity (products) or **<Amt>** for amount (services)**.**
- Add the description of your item/service
- Fill in the fields for **quantity** or **price** and choose a unit of measure from the field **<UOM>**
- Select the **VAT rate** from the drop-down menu which applies to the respective line item.
- VAT Amount will be automatically calculated. **Please note that it is a mandatory field.** If applicable, use the **Tax Reference** section to provide justification on the selected VAT Rate.

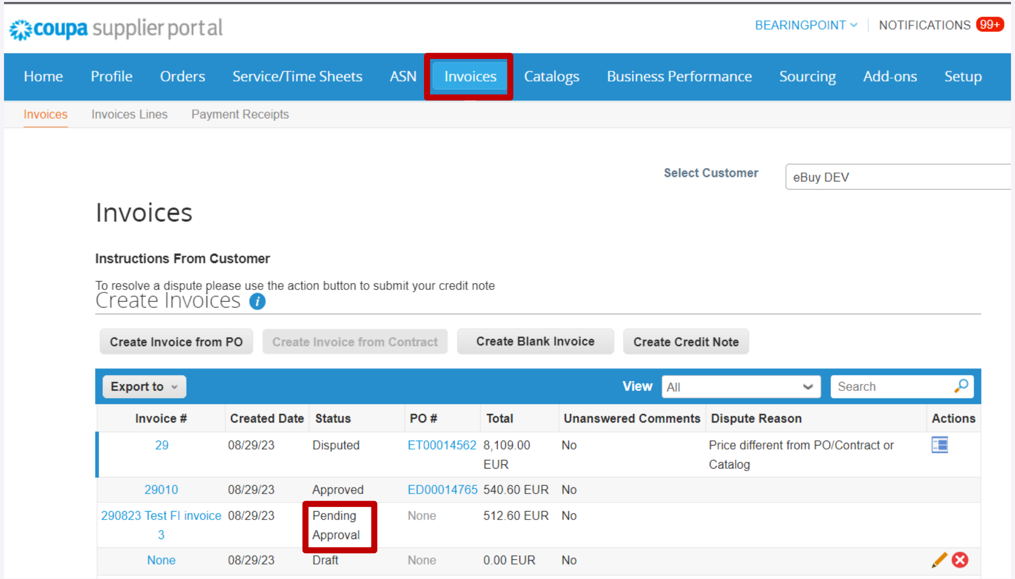
5



The next steps must be followed as in any other invoice, previously indicated in this document. To access them, **CTRL + click** the following arrow: →

Invoice follow up

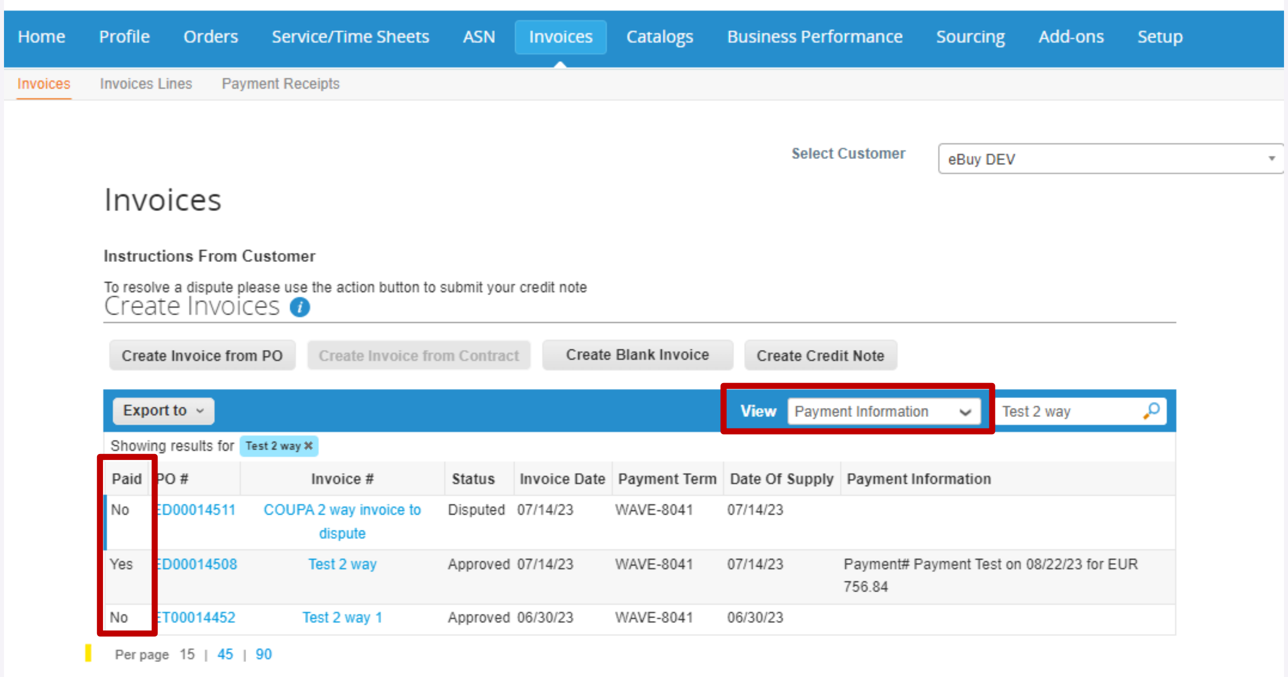
After creating and submitting the invoice, it will appear on Invoices page, with <**Pending Approval**> status



One of the benefits of the Coupa Supplier Portal is that you can follow the invoice status.

Invoice follow up

After the invoice is in **Approved** status, it will be paid according to the payment terms and payment schedule contractually agreed upon between Sanofi and the supplier.



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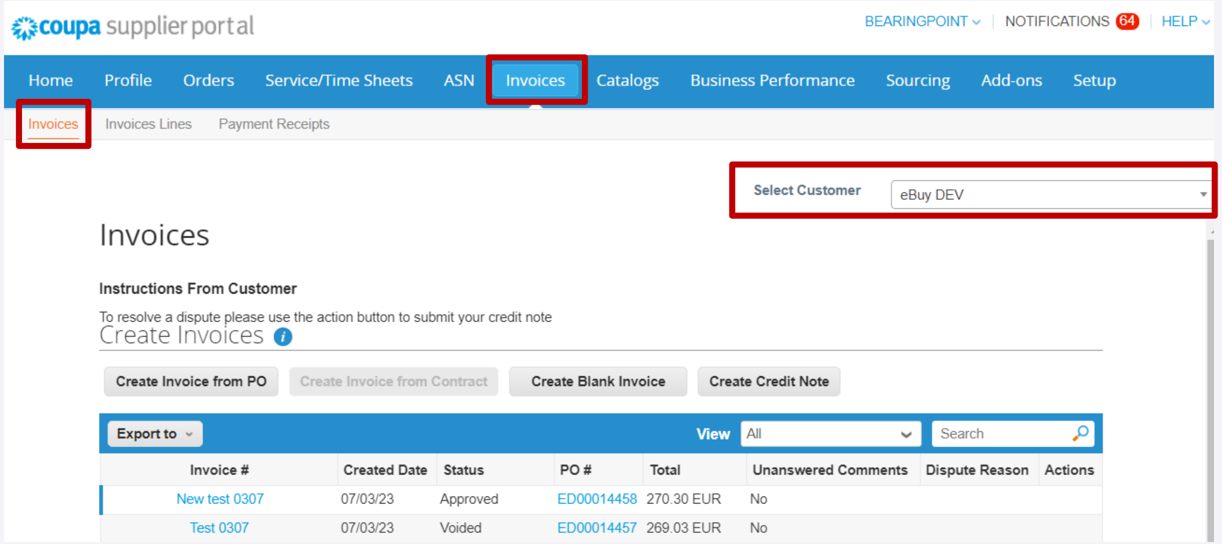
Invoices

Select Invoice tab to access to the list of all your invoice. You can select the customer you wish to see the information for.

The invoices lines table shows the following information for all the invoices:

- Invoice number
- Created date
- Status
- PO number
- Total
- Unanswered Comments
- Dispute Reason (if applicable)
- Available actions



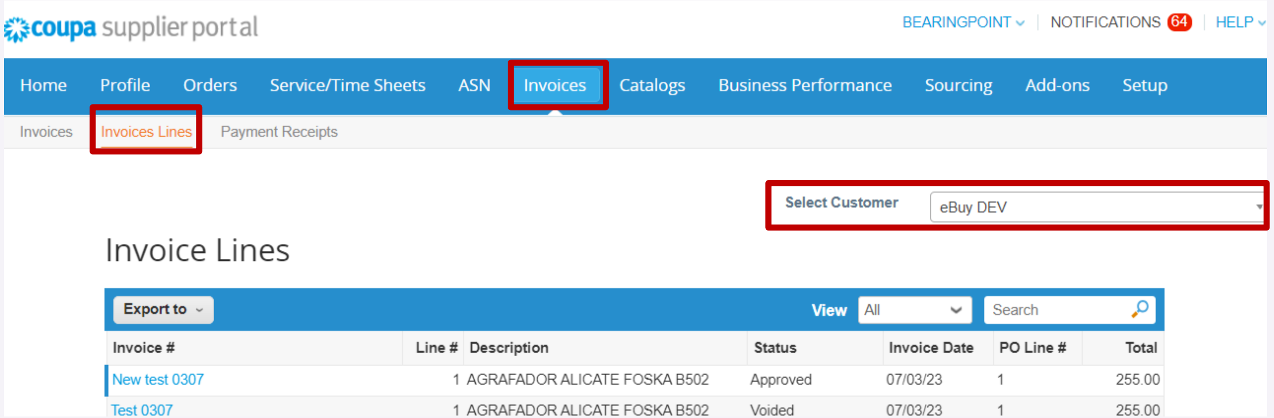
If needed, custom views can be created.

Invoices – Invoice lines

Click on the Invoice Lines tab to see information on the invoice lines for each invoice. You can select the customer you wish to see the information for.

The invoices lines table shows the following information for all the invoices:

- Invoice number
- Line number
- Description
- Status
- Invoice date
- PO line number
- Total



If needed, custom views can be created.

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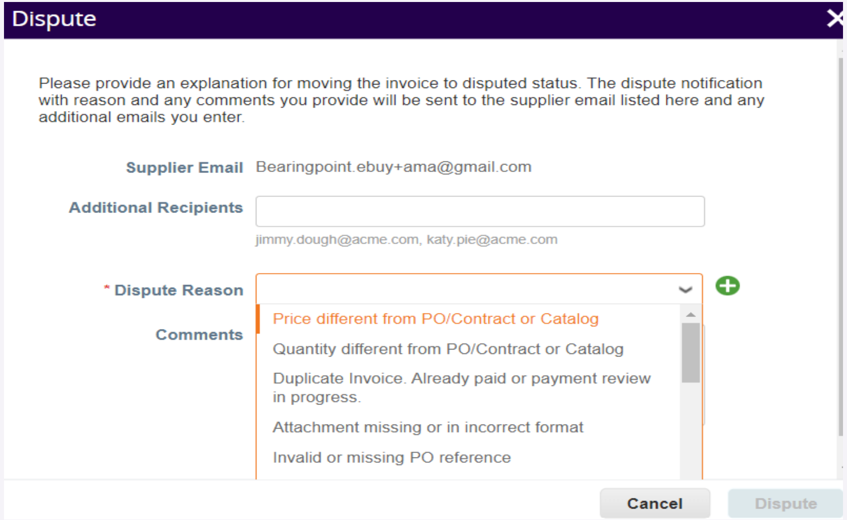
Disputed Invoice: Introduction 1/2

There are several reasons an invoice can be disputed by the PO Owner/requester or Account Payable:

- The invoice does not match what is on the PO. This could be a quantity issue or a price issue.
- Duplicate invoice
- The invoice does not have appropriate tax rate etc.

Below is an example of reasons that the customer can choose when he opens a dispute:

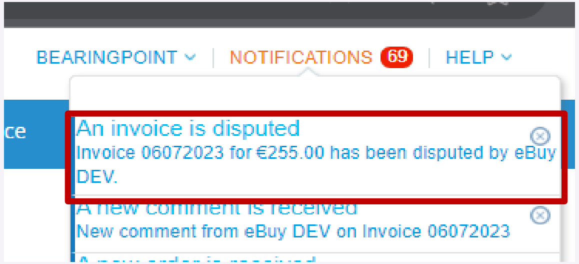


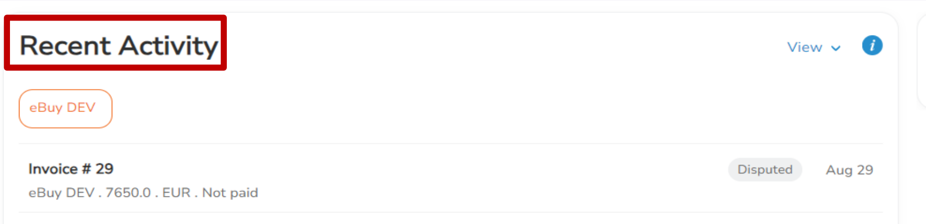
Disputed Invoice: Introduction 2/2

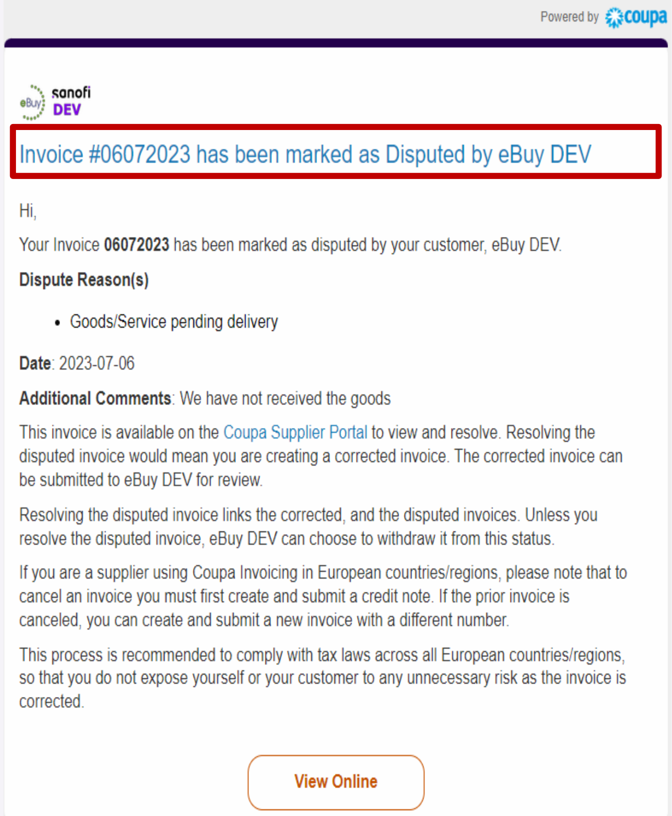
How will I know if the invoice is disputed?

- You will receive an e-mail notification with the invoice number and the dispute reason
- Any disputed invoices will also show in your **Recent Activity** and **Notifications** tab on the Coupa Supplier Portal home page.

Please see below the examples:



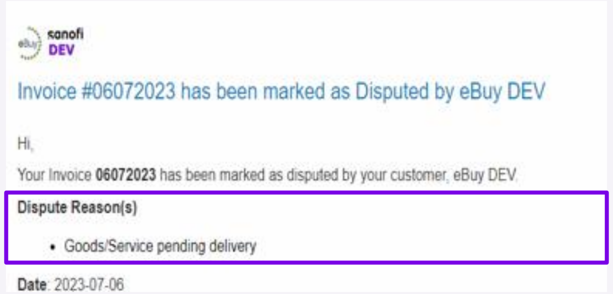




Resolving a Disputed Invoice 1/2

First, you'll need to review the reason for dispute. If it's unclear what the issue is, please reach out directly to the PO requestor for details.

*Example of what the **e-mail notice** will look like:*


sanofi DEV

Invoice #06072023 has been marked as Disputed by eBuy DEV

Hi,

Your Invoice **06072023** has been marked as disputed by your customer, eBuy DEV.

Dispute Reason(s)

- Goods/Service pending delivery

Date: 2023-07-06

*Example of what the disputed invoice will look like in **Notifications**:*

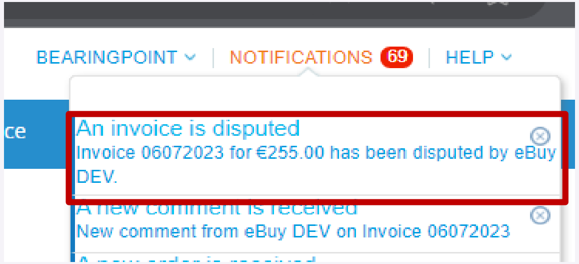
Invoice #	Disputed invoice
Invoice Date	07/07/2021
Payment Term	None
Currency	EUR
Status	Disputed
Dispute Reason(s)	Price different from PO/Contract or Catalog

Next, you'll start the invoice resolution process.

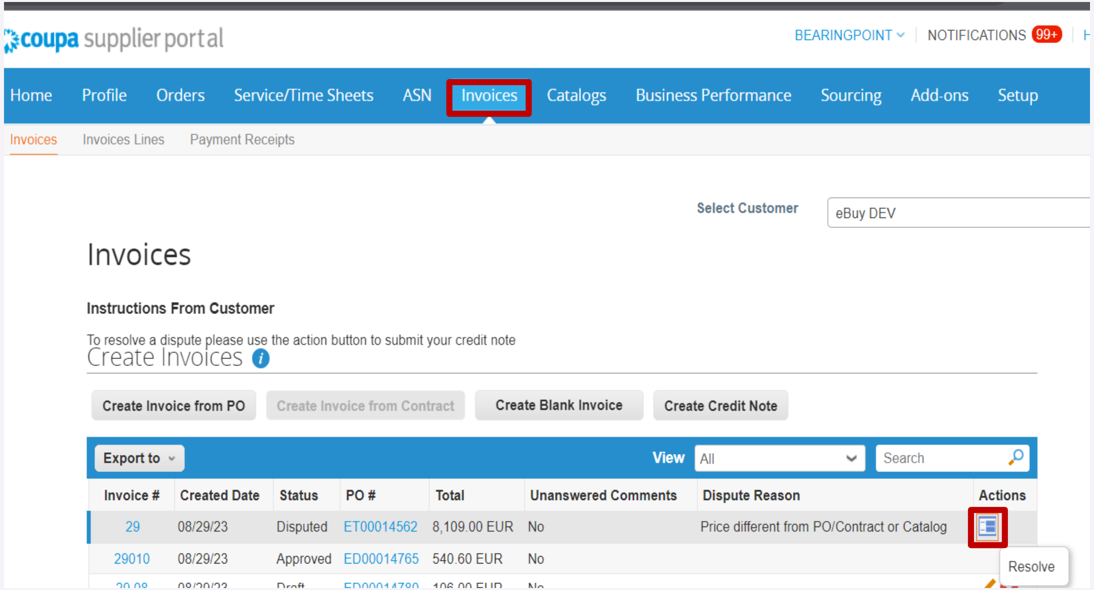
Resolving a Disputed Invoice 2/2

There are two options to access the invoice, either by simply clicking on the **notification,** or from the **Invoices** page, find your disputed invoice and click the <**Resolve>** button in the Actions column:

Option 1



Option 2

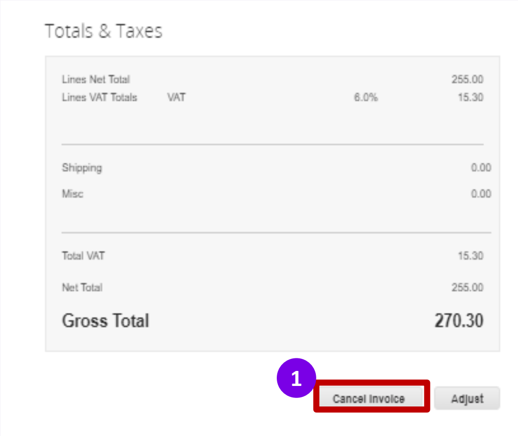


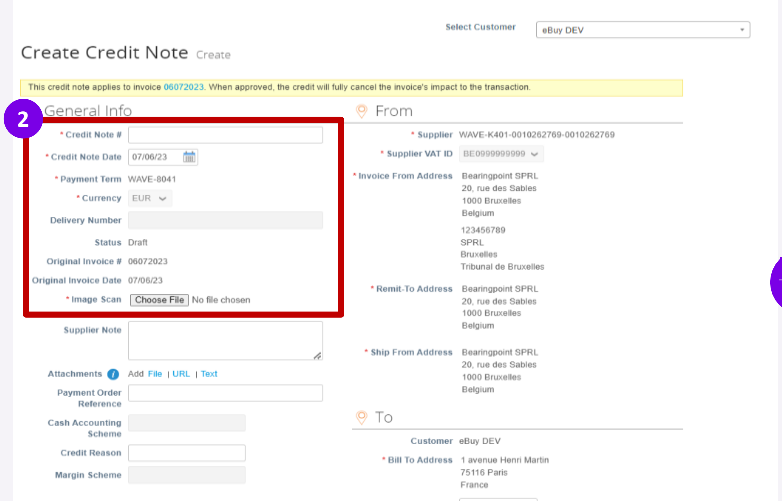
Resolving a Disputed Invoice with full credit note 1/2

A credit note is an official legal document, just like an invoice or a purchase order, that suppliers provide to customers to notify the customer that credit is being applied to their account for any number of reasons. It's a way to issue **full** or **partial** refunds for invoices that have already been issued or paid.

- You can resolve an invoice with a **full credit note** by using the option **Cancel Invoice.**

1. Click on the **Cancel Invoice** button : This button will automatically open a new page where you can create a credit note
2. Fill in the mandatory fields behalf and Click the "**Send Invoice**" button in the pop up.





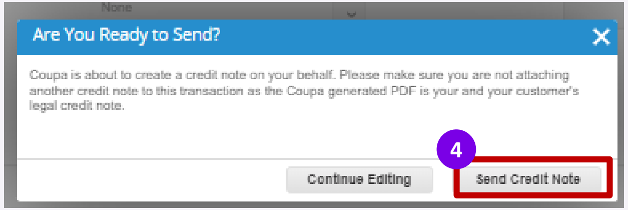
Please make sure to always cancel in full a goods invoice with price issues.

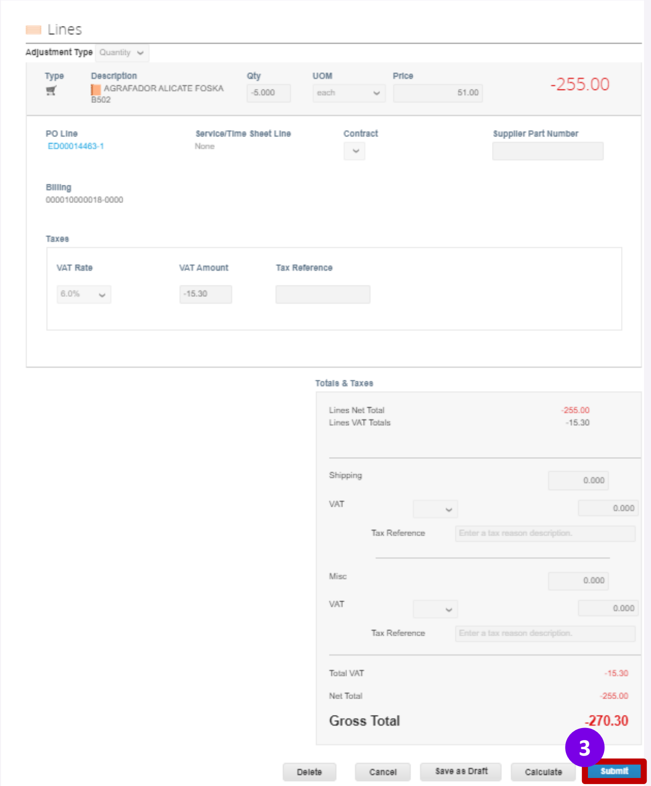
Resolving a Disputed Invoice with full credit note 2/2

- The data related to the invoice lines appears automatically filled in, with the Total in red and minus because it is a credit note.

3 Click on **Submit**. This will generate a pop-up window asking for confirmation.

4 Click on **Send Credit Note.**

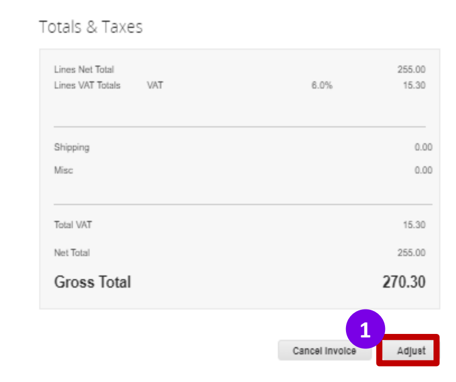


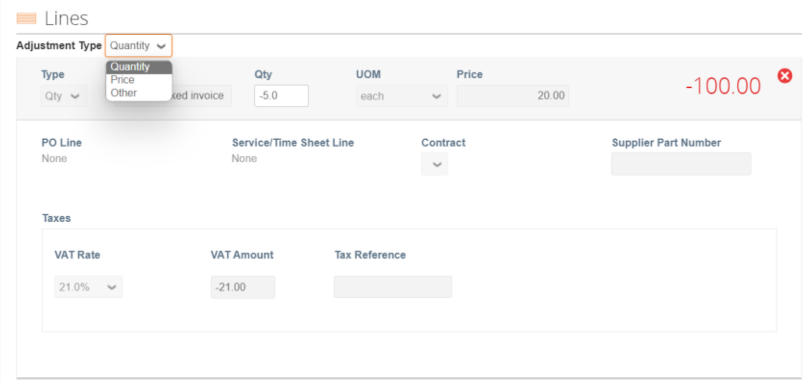


Resolving a Disputed Invoice with partial credit note

The Partial Credit Note provides the ability to designate a proforma as a partial payment against an existing invoice.

- You can resolve an invoice with a **Partial credit note** by using the option **Adjust.**
  1. Click on the **Adjust** button : This button will automatically open a new page where you can create a credit note
  2. Fill in all information just as any invoice/credit note creation The amount of the credit note should be less than the amount of the invoice, this amount should be negative.
     - For **Quantity** based invoice line, adjustment must be performed only on the **quantity**
     - For **Amount** based invoice line, adjustment must be performed only on the **price**





If adjustment for Quantity based invoice cannot be done on qty, please fully cancel.

AGENDA

1. Introduction

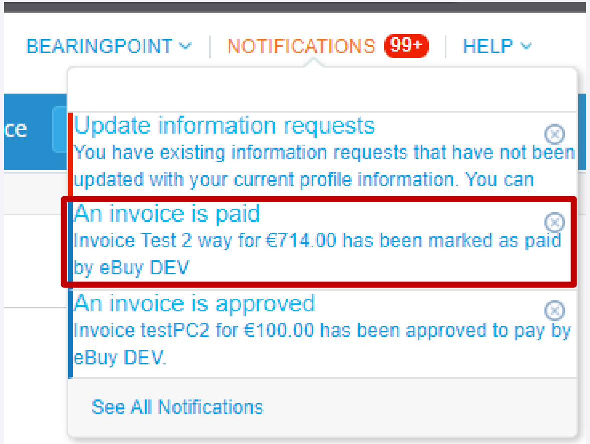
2. Coupa Supplier Portal

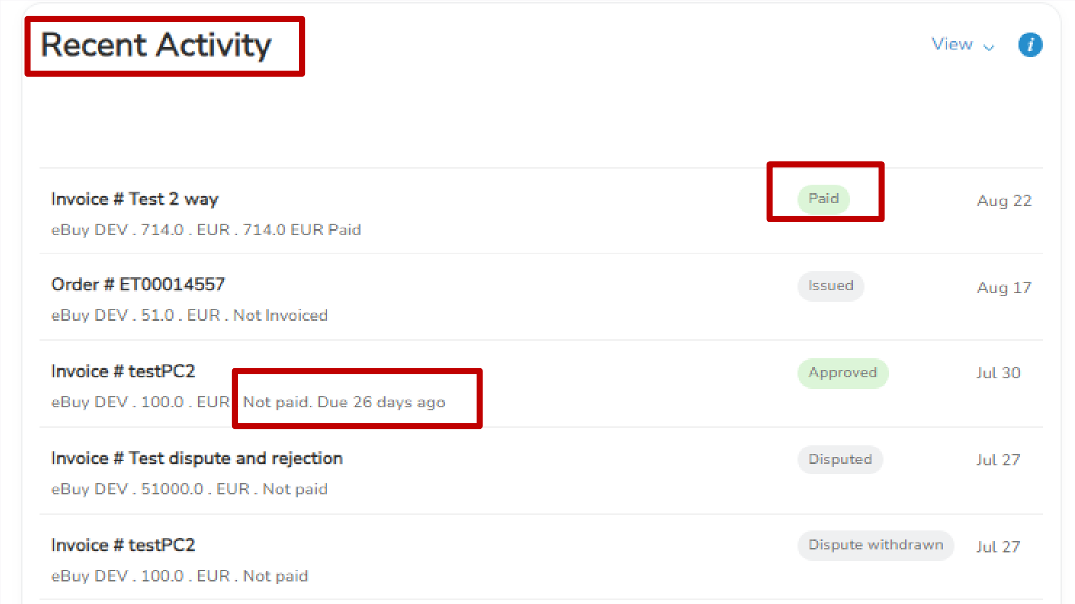
- Registration and Profile Setting
- Profile Merge and User management
- Orders management
- Creating views
- Invoice creation and submission
- Invoice management
- Resolve Disputed Invoices
- **Payment Information**
- Change the language

View the Payment Information 1/3

Once an invoice is paid, you will receive a **notification** related to it.

- The invoice payment status can be observed on the home page too, in **Recent Activity**:

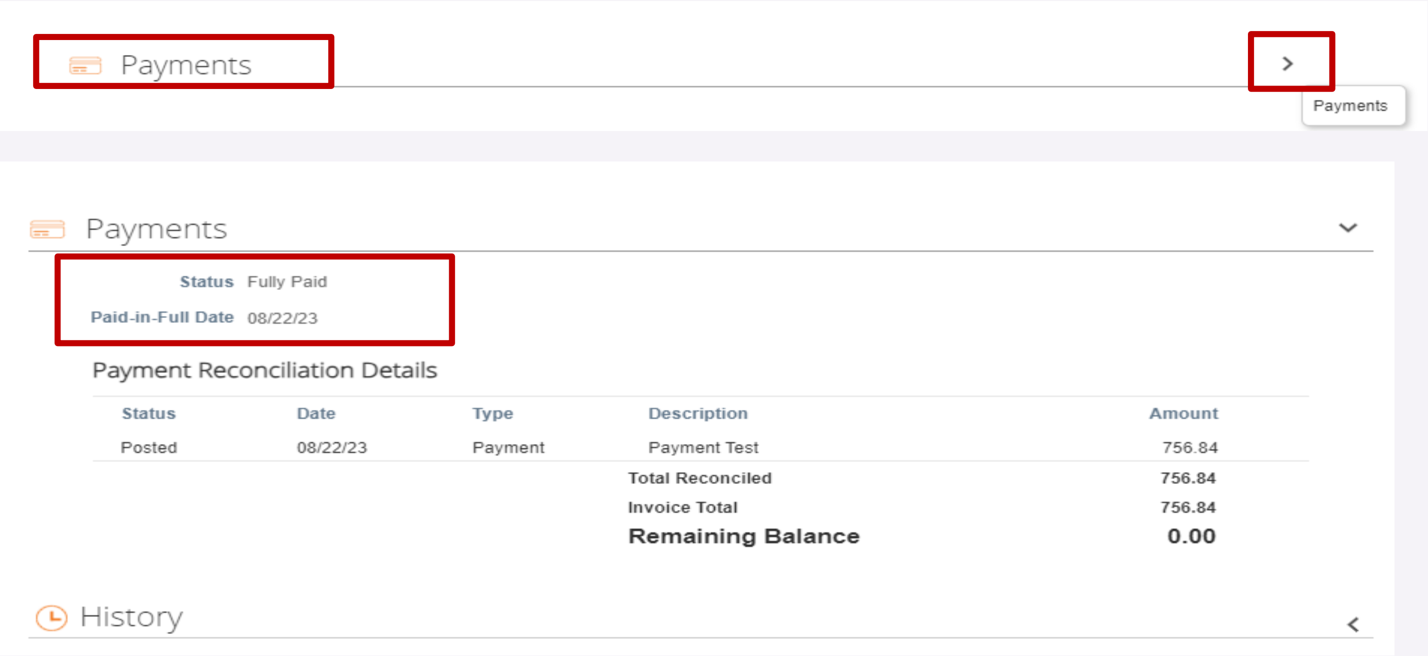




View the Payment Information 3/3

If you click on the notification, or on the invoice number from recent activity, the invoice page will open.

- Scroll down to the bottom of the page to see the information regarding the payment in the **Payments** section
- Click on the small arrow to see more details:



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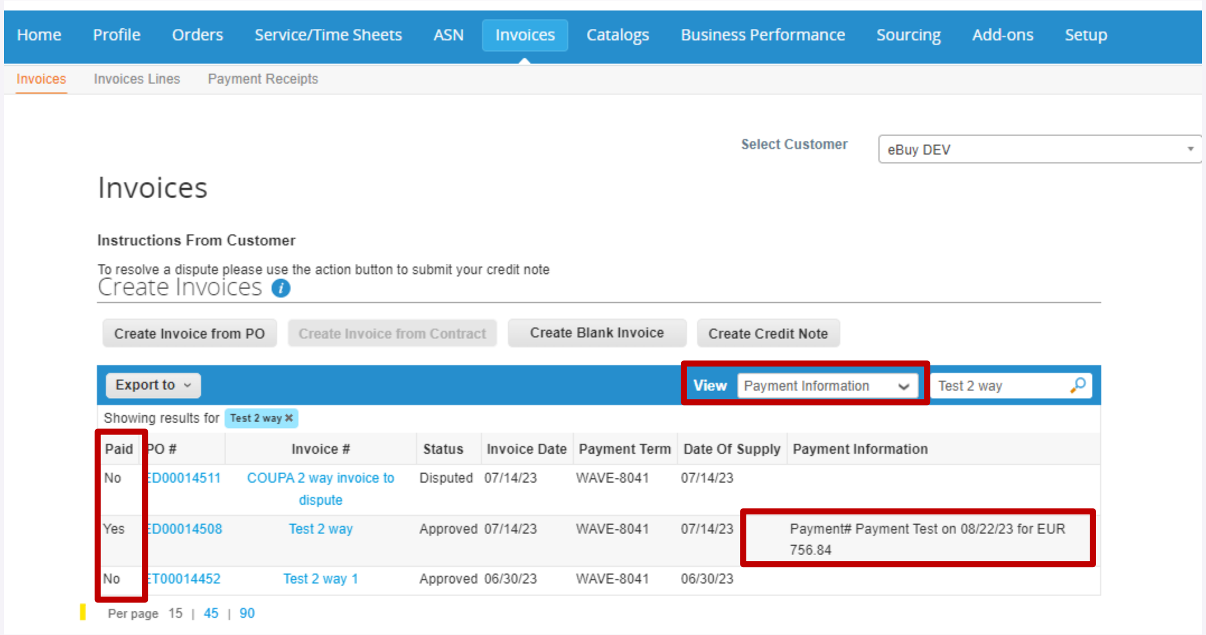
View the Payment Information 3/3

The payment information is also available on the **Invoices** page by selecting the **Payment Information** view

- In the **Paid** column, the invoices will be marked with <Yes> if paid, or <No> if not



AGENDA

1. Introduction

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- Registration and Profile Setting
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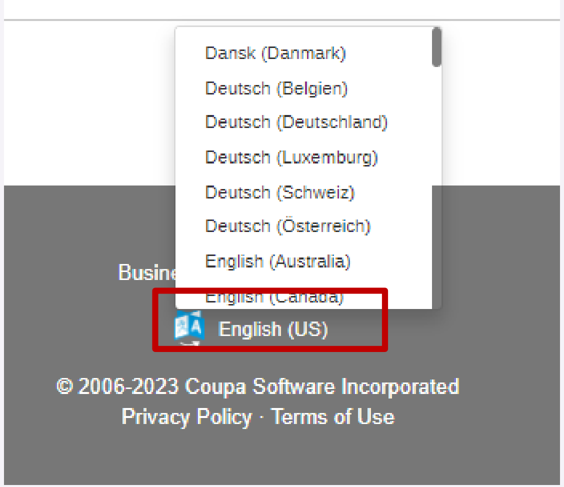
- Payment Information
- **Change the language**

Change the language

To change the CSP language, select the language picker at the bottom of the page and choose your language and region

- This option is available on all CSP pages



Regions share the same base language but can have different region-specific formats for numbers, date, time, currency, calendar, and starting day of week. For example, English for Australia uses the date format dd/mm/yyyy, while English for the US uses mm/dd/yyyy.

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Thank you

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