

Coupa Supplier Portal (CSP) User Guide for Third-Party Suppliers

 The world leader in serving science

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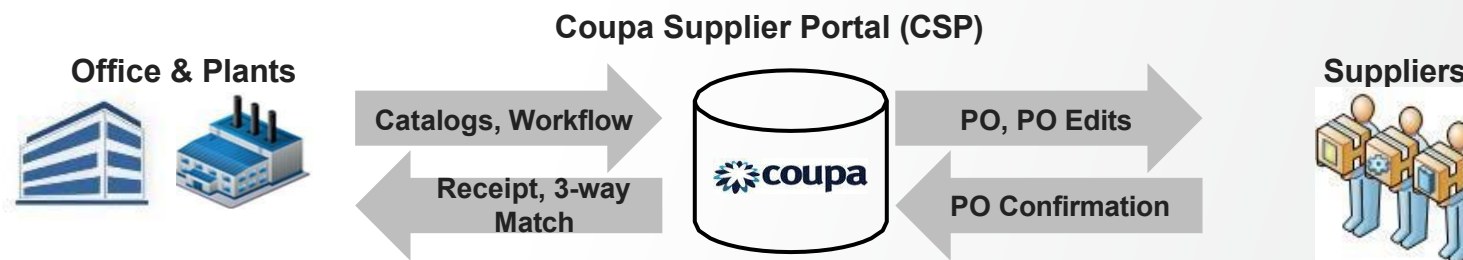
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Coupa Supplier Portal (CSP)

Introduction to Coupa

- Coupa is a cloud-based, user-friendly e-Procurement and supplier collaboration software
- Coupa provides Thermo Fisher with ONE platform, ONE environment that integrates our Sourcing, Procurement, and Invoice workflows
- Coupa is a leading **E-Procurement platform**, connecting buyers with their suppliers
- Coupa is an **internet-based** solution capable of accommodating a variety of different systems
- The **Coupa Supplier Portal (CSP)** is to communicate purchase orders, provide you with ability to create & send invoices, resolve disputes & provide visibility of status ('CP' prefixed PO only)
- The **Coupa Supplier Portal (CSP)** is **FREE**, there is no cost for suppliers



Coupa Supplier Portal (CSP)

What is changing?

PO Transmission

PO Emails
Phone/email for non-PO orders

Email transmission with link to supplier portal

PO Confirmations

PO confirmed via phone /email
Possible lack of acknowledgement

PO confirmation via interface
status command within the tool

Transaction Status

Transaction status not tracked
No communication with supplier

Status tracked via interface
communication with supplier

PO Flips / Invoicing

Supplier submits paper /PDF invoice
Prior to AP for 3-way match
(PO/goods receipt/invoice)

Supplier flips PO (interface)
Automatic 2-way match (PO & invoice) /
payment

Benefits for Suppliers

Coupa is focused on customer success:

- **No charge** to utilize the user-friendly Coupa Supplier Portal (CSP)
- **View your Purchase Orders** ('CP' prefixed PO) and get a summary of POs from Thermo Fisher
- **Create an invoice directly from the PO in the CSP**, by easily completing required fields Invoice # and date on the Create Invoice screen. You can attach a copy of your invoice
- **Resolve disputed invoices** via notifications received, with the reason for dispute and the option to cancel or adjust the invoice. You will be able to track the new status, from dispute to pending

POs

Network
cXML
Email/HTML

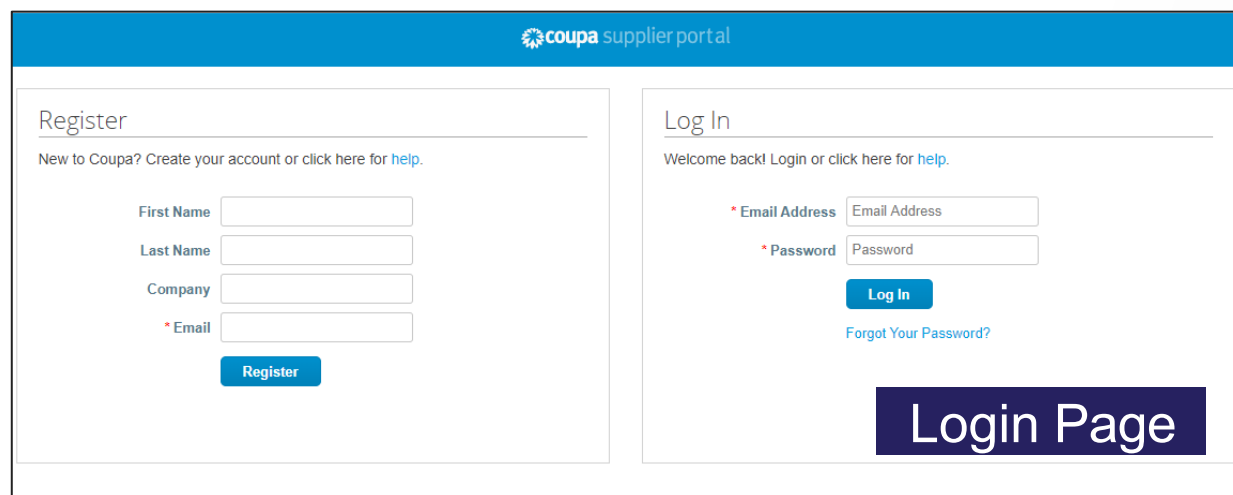
Invoices

Network
Supplier Actionable Notification (SAN)
cXML

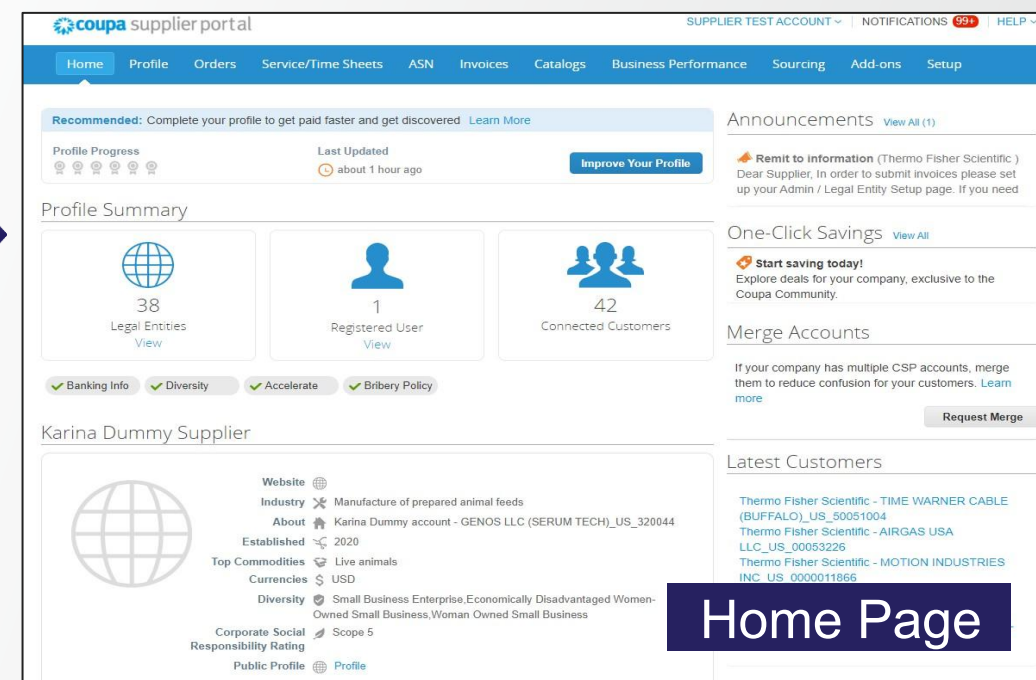
Coupa Supplier Portal (CSP)

Introduction to Coupa Supplier Portal (CSP)

- The Coupa Supplier Portal (CSP) is an online tool that serves as the interface between the suppliers and Thermo Fisher. This will include:
- Exchanging PO and Invoice documents between Thermo Fisher and suppliers
- Provide increased visibility throughout the ordering and invoicing processes



The image shows the login page of the Coupa Supplier Portal. It features a blue header with the 'coupa supplier portal' logo. Below the header, there are two main sections: 'Register' and 'Log In'. The 'Register' section includes fields for First Name, Last Name, Company, and Email, with a 'Register' button. The 'Log In' section includes fields for Email Address and Password, with a 'Log In' button and a 'Forgot Your Password?' link. A large blue box with the text 'Login Page' is overlaid on the bottom right of the login section.



The image shows the home page of the Coupa Supplier Portal. It features a blue header with the 'coupa supplier portal' logo and a navigation menu with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the header, there is a 'Recommended' section with a link to 'Complete your profile to get paid faster and get discovered'. The 'Profile Summary' section displays three cards: '38 Legal Entities', '1 Registered User', and '42 Connected Customers'. Below these cards are links for 'Banking Info', 'Diversity', 'Accelerate', and 'Bribery Policy'. The 'Karina Dummy Supplier' section displays a profile card with various details. The right sidebar contains 'Announcements', 'One-Click Savings', 'Merge Accounts', and 'Latest Customers'.

Home Page

Coupa Supplier Portal (CSP)

Registering your Coupa Supplier Portal (CSP) Account

- You may receive an email invitation from Thermo Fisher inviting you to join the Coupa Supplier Portal
- To register, use one of the following methods:
 - Follow the instructions within the email invitation
 - Register directly at <https://supplier.coupahost.com>
 - Log-in with your existing Coupa access:
Setup > Connectivity Links > Select 'Thermo Fisher Scientific' in search field > Provide Thermo Fisher contract name/e-mail you work with > Submit
- For queries, please refer to [Support Slide](#)

The screenshot displays the 'coupa suppliers' portal interface. On the left, the 'Get Started' section includes a 'Request an Invite' button, which is pointed to by a red arrow from a 'Register Here' label. On the right, the 'Log In' section features a 'Log In' button, pointed to by a red arrow from a 'Login Here' label, and a 'Forgot your password?' link, pointed to by a red arrow from a 'Forgot password?' label. The registration form on the left includes fields for First Name, Last Name, Company, and Email, each preceded by an asterisk. The login form on the right includes fields for Email Address and Password, each preceded by an asterisk.

Coupa Supplier Portal (CSP)

Managing your Coupa Supplier Portal (CSP) Account

STEP 1: Setup Company / Legal Entity profile (8 sub-steps)

- 1 From the Main Menu, click the **Setup** Tab
- 2 Click **Legal Entity Setup** option
- 3 Click **Add Legal Entity**

The screenshot displays the Coupa Supplier Portal (CSP) interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The Setup tab is highlighted with a red box and a circled '1'. Below the navigation bar, the 'Admin' section is visible, with 'Legal Entity Setup' highlighted in the left sidebar with a red box and a circled '2'. In the main content area, the 'Add Legal Entity' button is highlighted with a red box and a circled '3'. The 'Legal Entity' table lists several entities, including 'Karina Dummy Supplier', 'AIRGAS DRY ICE LLC', 'Karina Dummy Supplier', 'abbott laboratories', and 'Sonoco_US_0000064122', each with an 'Actions' button. The bottom of the table shows pagination: '← Previous 1 2 3 4 5 6 7 8 Next →'.

Managing your Coupa Supplier Portal (CSP) Account

STEP 1: Setup Company / Legal Entity profile

4 Enter Legal Entity name and select the Country, and Continue

Where's your business located?

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

* Legal Entity Name

Test INC

Country/Region

United States

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

Cancel

Continue

5 Enter your company Invoice address and Tax ID number

What address do you invoice from?

* Address Line 1

1234 Street Test

Address Line 2

* City

Austin

State

Texas - TX

* Postal Code

1234

Country/Region

United States

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. [i](#)

☒ Use this address for Remit-To [i](#)

☒ Use this for Ship From address [i](#)

What is your Tax ID? [i](#)

Country/Region

United States

Tax ID

11-1111111

☐ I don't have Tax ID Number

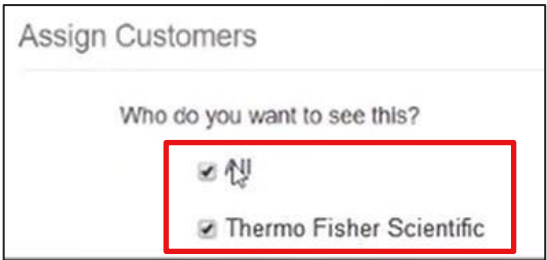
Managing your Coupa Supplier Portal (CSP) Account

STEP 1: Setup Company / Legal Entity profile

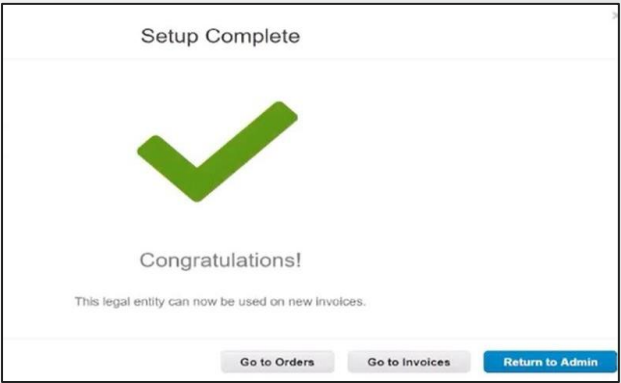
6 At the base of the screen, click: Bank Info and Assign Customers



7 Select the customers to be included and click Done



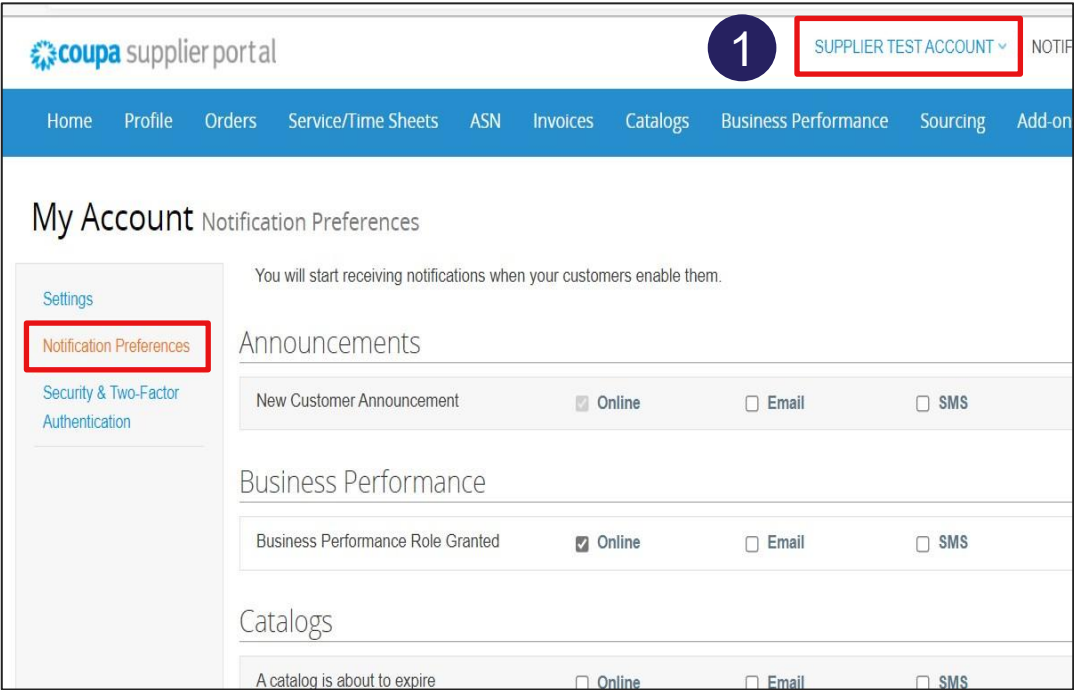
8 Coupa Will confirm the setup is complete



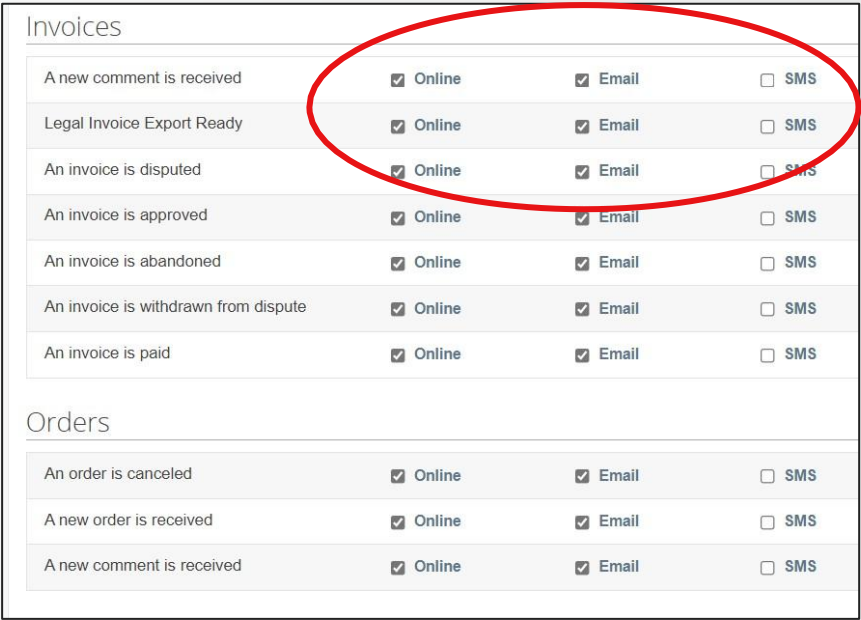
Managing your Coupa Supplier Portal (CSP) Account

STEP 2: Notification Preferences (3 sub-steps)

- 1
- From the **Main Menu**, click the **Supplier Test Account** Tab
- 2
- Click the **Notification preferences** button

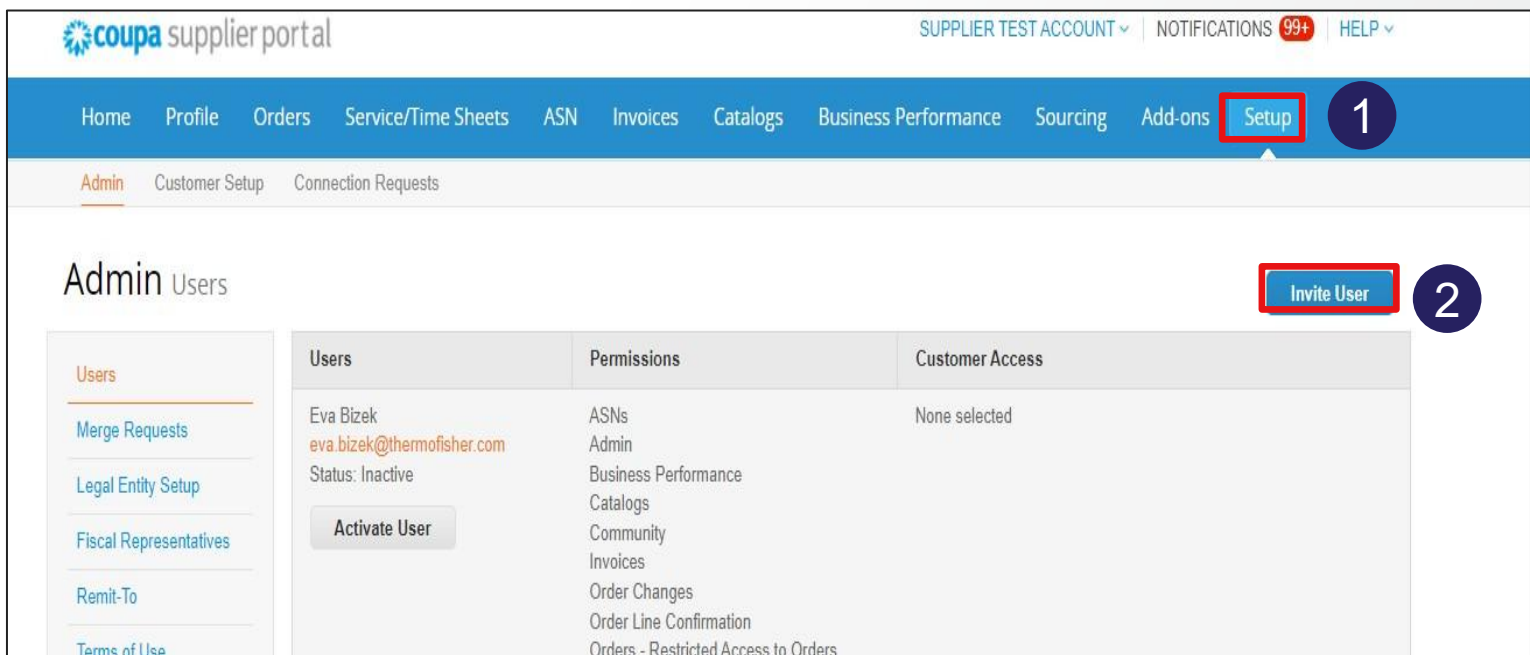


- 3
- Select preferences. Coupa will confirm the setup is complete



STEP 3: Add a New User (5 sub-steps)

- 1 From the **Main Menu**, click the **Setup** Tab
- 2 Click the **Invite User** button



Managing your Coupa Supplier Portal (CSP) Account

STEP 3: Add a New User (5 sub-steps)

- 3
- Enter the user’s information
- 4
- Select which permissions the user should have access to

Invite User3

First Name

Last Name

* Email

Permissions4

Customers

☒ All

☒ Admin

☒ Orders

☐ Restricted Access to Orders

☒ All

☒ Invoices

☒ Catalogs

☒ Profiles

☒ ASNs

☒ Service/Time Sheets

☐ Restricted Access to Service/Time Sheets

☒ All

☒ Payments

☒ Order Changes

☒ Pay Me Now

☒ Business Performance

☒ Sourcing

☒ Order Line Confirmation

☒ All

☒ Thermo Fisher Scientific - TIME WARNER CABLE (BUFFALO)_US_50051004

☒ Thermo Fisher Scientific - AIRGAS USA LLC_US_00053226

☒ Thermo Fisher Scientific - MOTION INDUSTRIES INC_US_0000011866

☒ Thermo Fisher Scientific - TRANSPERFECT TRANSLATION INTL INC_US_0000716083

☒ Thermo Fisher Scientific - ABELL PEST CONTROL INC_CA_0000721849

☒ Thermo Fisher Scientific - STAPLES BUSINESS ADVANTAGE_US_00080039

☒ Thermo Fisher Scientific - TRANSPERFECT TRANSLATIONS INTERNATIONAL_US_0013635

7

- 5
- Click
- Save**
- to send invitation
-
- Your colleague will receive an email notification with a link to register

Note: to deactivate a user, you must edit the user record and select “Deactivate User”

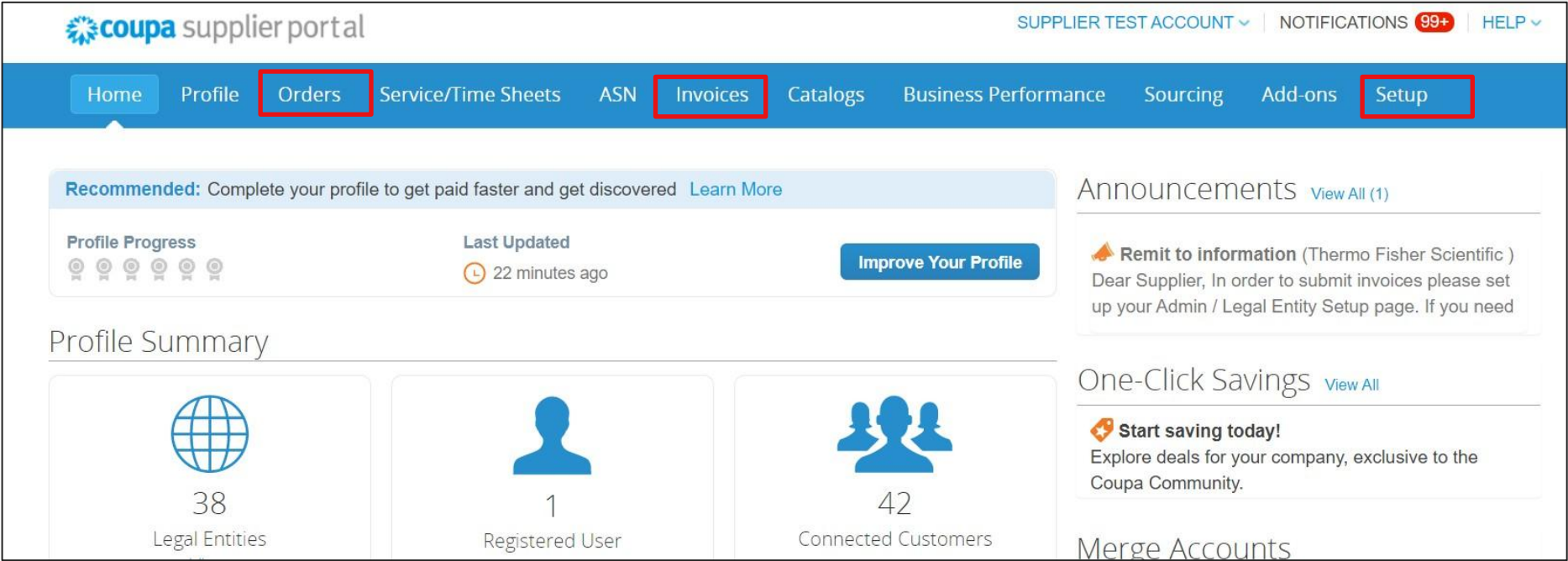
5

Cancel

Deactivate User

Save

Key Features of CSP

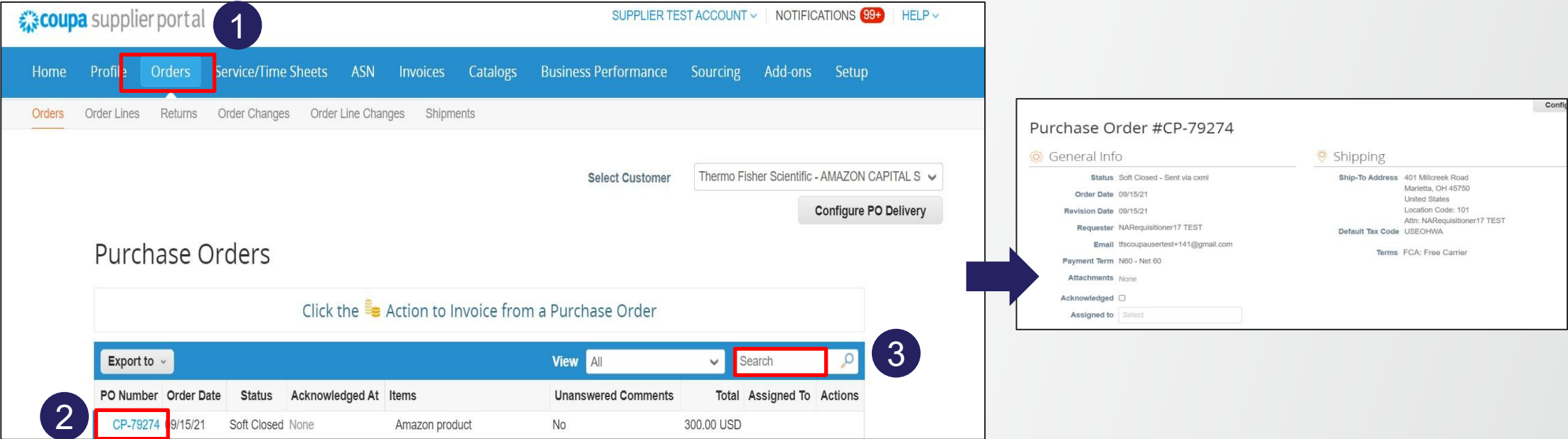


Orders	Review your purchase orders and submit invoices / credit memos
Invoices	Review status of invoices and credit memos
Set Up	Administration of your CPS account

Viewing Your Purchase Orders

You will be able to view your POs in the CSP regardless of your transmission method

- 1 Go to **Orders** tab, this will provide a summary of all PO from Thermo Fisher
- 2 Click on the **PO number hyperlink**, which will open another screen and allow users to view the entire PO
- 3 Alternatively **search** for a specific PO number




1 Go to **Orders** tab

Select Customer: Thermo Fisher Scientific - AMAZON CAPITAL S

Configure PO Delivery

Purchase Orders

Click the  Action to Invoice from a Purchase Order

Export to View All Search **3**

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
2 CP-79274	9/15/21	Soft Closed	None	Amazon product	No	300.00 USD		

Purchase Order #CP-79274

General Info

Status: Soft Closed - Sent via xml
Order Date: 09/15/21
Revision Date: 09/15/21
Requester: NARequisitioner17 TEST
Email: tfscoopuserest+141@gmail.com
Payment Term: N60 - Net 60
Attachments: None
Acknowledged: ☐
Assigned to: Select

Shipping

Ship-To Address: 401 Millcreek Road
Marietta, OH 45750
United States
Location Code: 101
Attn: NARequisitioner17 TEST
Default Tax Code: USEOHWA
Terms: FCA: Free Carrier

Creating an Invoice

You will be able to create an invoice directly from the PO in the CSP, commonly referred to as a 'PO Flip'

- 1 Go to **orders** tab
- 2 Identify **PO you would like to 'flip'**
- 3 Click on the **create invoice icon**




Home Profile **Orders** 1 /Time Sheets ASN Invoices Catalogs Add-ons Admin

Orders Order Lines Returns Order Changes Order Line Changes Shipments


Select Customer Thermo Fisher Scientific - AMAZON CAPITAL

Configure PO Del

Purchase Orders

Click the  Action to Invoice from a Purchase Order

Export to View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
CP-79261	09/15/21	Issued	None	Amazon product	No	450.00 USD		

Creating an Invoice

Complete **mandatory fields** Invoice number & date on the Create Invoice screen. You can attach a copy of your invoice (JPEG only)

- 1 Complete required fields
- 2 Edit quantities, reference, shipping, handling as need
- 3 Select **calculate** to update total
- 4 Click **submit**

The screenshot displays the 'Create Invoice' interface with the following components and callouts:

- Callout 1:** Points to the 'General Info' section, specifically highlighting the 'Invoice #' (1200001) and 'Invoice Date' (01/28/20) fields, which are marked as mandatory with an asterisk. It also points to the 'Attachments' section at the bottom of the 'General Info' panel.
- General Info Section:** Includes fields for 'Supplier' (0015128859), 'Supplier Tax ID' (90-7587598), 'Payment Term' (120 Days Due Net From Invoice Date (T812)), 'Currency' (USD), 'Delivery Number', 'Status' (Draft), and 'Supplier Note'.
- From Section:** Includes fields for 'Invoice From Address' and 'Remit-To Address', both with 'Supplier Legal Entity Name' (IFC7598 and RTA7598) and full addresses in Chicago, IL.
- Ship From Address:** Includes a 'Supplier Legal Entity Name' (SFA7598) and a full address in Chicago, IL.
- Callout 2:** Points to the 'Lines' section, specifically the 'Price' field (1,500.00) and the 'Match Reference Key' field (1234567).
- Lines Section:** Includes a table with columns for 'Type', 'Description', 'Price', and 'Match Reference Key'. The first line is 'TMS logistics Service' with a price of 1,500.00.
- Totals & Taxes Section:** Displays 'Lines Net Total' (1,500.00), 'Total Tax' (0.00), 'Net Total' (1,500.00), and 'Total' (1,500.00). It also includes fields for 'Shipping', 'Tax', 'Tax Reference', 'Handling', and 'Misc'.
- Callout 3:** Points to the 'Calculate' button.
- Callout 4:** Points to the 'Submit' button.

Creating an Invoice

In this case, a tax part pop up:

Lines Line Level Taxation

Type	Description	Qty	UOM	Price	10,000.00
	US test	100.0000	Each	100.00	

PO Line
CP-324526-1

Service/Time Sheet Line
None

Contract

Supplier Part Number

Billing Note

Billing
UK01-213-Financial Services-175600---100

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
		0.00	

You can choose tax description, but better not touch that part. Just tick the box, this is the only specific request.

If you forget to tick the line level taxation box, the tax part is untouchable for AP, so we can't process the invoice.

Invoice Requirements

- Company Header (name and address)
- Invoice Number
- Invoice Date
- PO Number or Thermo Fisher Requester Name
- Thermo Fisher Bill-To Address
- Remit-to Address
- Item /service description
- Total amount
- Currency
- *Ship-to address, payment terms and banking information, are helpful although not mandatory*

- Invoices must be submitted in CSP up to 7 days after the invoice date
- After 7 days the invoice date must be updated and the invoice resubmitted

If you experience any difficulties, invoices can be submitted via email:

- To mailbox - ***for invoice submission only***; *please do not submit inquiries to this address*)
 - invoices+APAC@thermofisher.coupahost.com : Philippines, Australia, New Zealand, Malaysia, Singapore & Thailand
 - invoices+TW@thermofisher.coupahost.com: Taiwan
 - Invoices+JP@thermofisher.coupahost.com: Japan
 - Invoices+AE@thermofisher.coupahost.com: Dubai
- Invoices must be submitted in **non-editable PDF format**
- Invoices must be submitted to AP Mailbox as soon as they are issued; late submission might cause late payment
- Invoices **must include the PO number**
- PDF files submitted via e-mail must only contain only 1 invoice
- Multiple PDFs (max 5 pdfs) can be attached to a single e-mail

Why Invoice via CSP

There are a number of key benefits for you to invoice via the CSP:

- You can monitor the status of your invoice through to payment
- Invoices are processed, and potentially approved, automatically
- Faster processing than generating your own invoices
- Creating and sending invoices

Thermo Fisher Legal Entities in Scope

The following entities can be transacted with via CSP – page 1:

Legal Entity Name	Address	Country
Thermo Services Philippines Corp	27th Floor GBF Center 1 Bridgetowne Boulevard, E. Rodriguez Jr. Avenue, Barangay Ugong Norte, Quezon City,	Philippines
Thermo Fisher Scientific NZ Limited	TMF Group Level 11, 41 Shortland Street Auckland 1010,	New Zealand
Thermo Fisher Scientific Australia Pty Ltd	C/o TMF Corporate Services (Aust) Pty Ltd, Level 4, 99 William Street, Melbourne, Victoria-3000,	Australia
Thermo Fisher Scientific Middle East	Laboratory Complex, Floor 3 (Suite 307-308), Dubai Science Park, Dubai Science Park, Dubai, 500722,	Emirates
Life Technologies Japan Ltd	Sumitomo Fudosan Mita First Building, 4-2-8 Shibaura, Minato-ku, Tokyo 108-0023	Japan
Fisher Scientific (M) Sdn. Bhd	Hap Seng Business Park, Lot 01-03, 01-04, Aras 1 Unity Square, No 12, Persiaran Perusahaan, Seksyen 23, 40300 Shah Alam, Selangor Darul Ehsan,	Malaysia
Life Technologies Holdings Pte Ltd	33 Marsiling Ind Estate Road 3 #07-06, 739256 Singapore	Singapore
Thermo Fisher Scientific Pte Ltd	33 Marsiling Ind Estate Road 3 #07-06, 739256 Singapore	Singapore
Fisher Scientific Pte Ltd	33 Marsiling Ind Estate Road 3 #07-06, 739256 Singapore	Singapore
Life Technologies Co Ltd	4F-1, No. 508, Sec. 7, Zhongxiao E. Rd., Nangang District, Taipei	Taiwan
Thermo Fisher Scientific (Thailand) Co. Ltd.	Unit #2010 , Singha Complex Building, 20th Floor, 1788 New Petchaburi Road, Bangkok, Huai Kwang, Bangkok 10310	Thailand

Support

Contact Inquiries for:
Philippines, ANZ, Malaysia,
Singapore & Thailand



supplyconnectAPAC@thermofisher.com

Contact Inquiries for:
Japan, Taiwan & Dubai



Taiwan: LSGTWAP@thermofisher.com
Japan (LSG Group): jplsg-ap@thermofisher.com
Japan (AIG Group): jpyok-ap@thermo.com
Dubai: vendorquery.dubai@thermofisher.com

Thank you

