

The AstraZeneca Coupa Implementation

Coupa Training Session for AZ Suppliers



The session will be recorded

The recording will be published
on AZ Coupa Supplier Hub



Your microphone is muted



Please use Q&A functionality to raise questions



Interpretation

Utilice la función de "Interpretation" en su menú para cambiar y escuchar el contenido de la presentación en su idioma.





Coupa

Transforming
the way we buy

Coupa Training Session

April 2022



CSP Training Agenda

01

What are the
key dates?

02

Where to find
CSP
credentials?

03

Why and how
to set up Legal
Entity?

04

How to
manage day-
to-day
transactions in
the CSP

05

How to get
support

06

Q&A

1

Key dates for you



Recap: Coupa transmission methods

CSP

COUPA SUPPLIER PORTAL IS AN ONLINE TOOL THAT SERVES AS THE INTERFACE BETWEEN THE SUPPLIERS AND ASTRAZENECA TO TRANSACT ORDERS AND INVOICES

- No costs associated
- Multiple users with access to orders and invoices
- Dashboard view of all PO/ invoices
- Ability to create multiple Legal Entities

SAN

SUPPLIER ACTIONABLE NOTIFICATIONS GIVES SUPPLIERS THE ABILITY TO ACT DIRECTLY FROM THEIR EMAIL INBOXES WHEN THEY RECEIVE A PO; SUPPLIERS CAN FLIP AN E-MAILED PO TO AN INVOICE

- No costs associated
- Single email address used for orders submission/ invoice generation
- Option to switch to CSP at any time

cXML

CXML IS A PROTOCOL USED FOR THE COMMUNICATION OF BUSINESS DOCUMENTS BETWEEN PROCUREMENT APPLICATIONS AND SUPPLIERS

- Technical capability to manage cXML transmission required
- Testing required
- Available only for high volume suppliers designated by AZ Coupa SE team



Key dates for your calendar

E-learning completion

CSP invites

Coupa Go-Live

First orders submitted



May 2nd

*E-learning available at
www.astrazeneca.com*



w/c April
25th

*Invites sent to your email
inbox*



May 4th

*Coupa Supplier Portal active
for AstraZeneca Suppliers*



May 4th

*PO sent to your company
account in the CSP*



Invoicing during Transitioning period

- AZ will be closing open POs and then recreating new POs with the **balance** in Coupa - this means you will be issued with **new orders** in Coupa **4th May onwards**. You must invoice via your agreed E-invoicing channel (CSP, SAN, cXML)
- Speak to your AstraZeneca customer/point of contact to ensure you are prepared for the Transition to Coupa and to align on which orders will be recreated
- Contact our Helpdesk team by April submitting a statement to clear open debt, if any exist

Goods and services received prior to May 4th

A

Goods and services received prior to 4th May will be processed in Ariba. All invoices against Ariba POs that have been fulfilled prior to 4th May must be billed/submitted by 31st May

Goods and services received from May 4th onwards

C

Goods and services received starting May 4th will be processed in Coupa. Be aware that your new POs issued from Coupa will reference your old PO (PO number) from Ariba – this will help you reconcile



2

Register for the CSP



Registration options available for you



FOR FIRST TIME USERS OF COUPA

- AstraZeneca – created invite
- Self-registration
- Forwarded invitation from a coworker



IF YOU HAVE CSP ACCOUNT ALREADY

- No need to register
Please watch out for an AstraZeneca–created invite to link your account with AstraZeneca as your new customer in the CSP

The AstraZeneca CSP invites will be submitted in w/c April 25th to all suppliers expected to transact with us via Coupa Supplier Portal after Coupa Go-Live

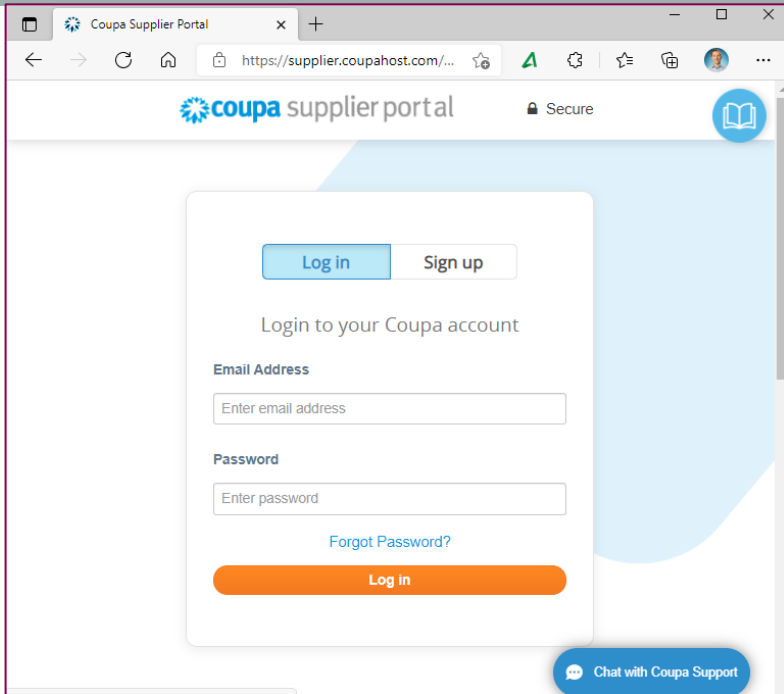
More information in the “Coupa Supplier Portal registration” lesson of the e-learning



Coupa Supplier Portal

www.supplier.coupahost.com

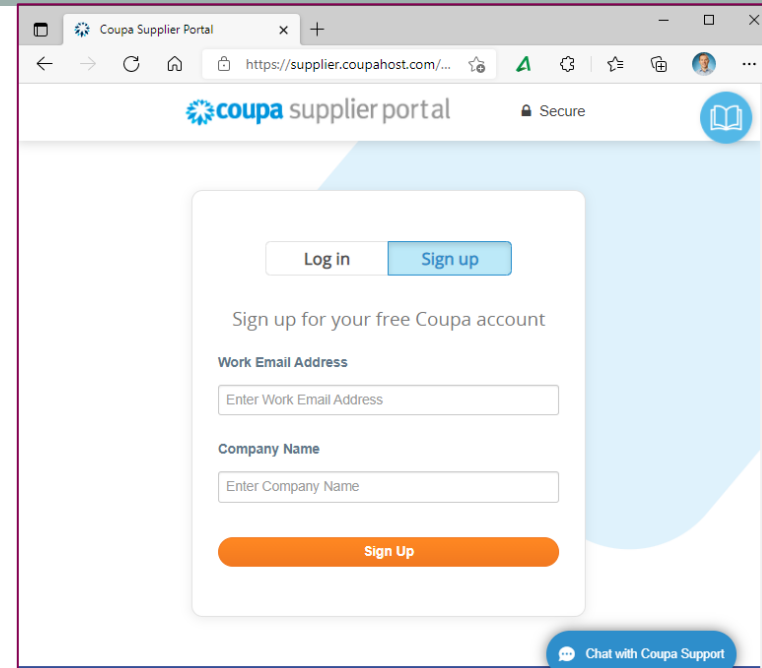
www.supplier-test.coupahost.com



The screenshot shows the login page of the Coupa Supplier Portal. The browser address bar displays <https://supplier.coupahost.com/>. The page header includes the Coupa logo, "supplier portal", and a "Secure" indicator. The main content area features a login form with the following elements:

- Buttons for "Log in" and "Sign up".
- Text: "Login to your Coupa account".
- Field: "Email Address" with a placeholder "Enter email address".
- Field: "Password" with a placeholder "Enter password".
- Link: "Forgot Password?".
- Orange "Log in" button.

A "Chat with Coupa Support" button is located at the bottom right of the page.



The screenshot shows the sign-up page of the Coupa Supplier Portal. The browser address bar displays <https://supplier.coupahost.com/>. The page header includes the Coupa logo, "supplier portal", and a "Secure" indicator. The main content area features a sign-up form with the following elements:

- Buttons for "Log in" and "Sign up".
- Text: "Sign up for your free Coupa account".
- Field: "Work Email Address" with a placeholder "Enter Work Email Address".
- Field: "Company Name" with a placeholder "Enter Company Name".
- Orange "Sign Up" button.

A "Chat with Coupa Support" button is located at the bottom right of the page.



Key takeaways



CSP Credentials are set up by individual users (login: email address & password)

The AZ CSP System invite is submitted to the one email address which we received as a primary contact person. Supplier CSP User Accounts are setup by your company CSP Admin.



AZ CSP system invite will be submitted in w/c April 25th



An individual who received CSP system invite from AZ automatically becomes a CSP Account Admin. Admin has the rights to assign different account admins through User Management/ Settings



AZ Coupa Supplier Enablement Team can support in submitting additional CSP invite to relevant email address. **Credentials reset must be supported by Coupa Technical Support** (chat window in the login page)



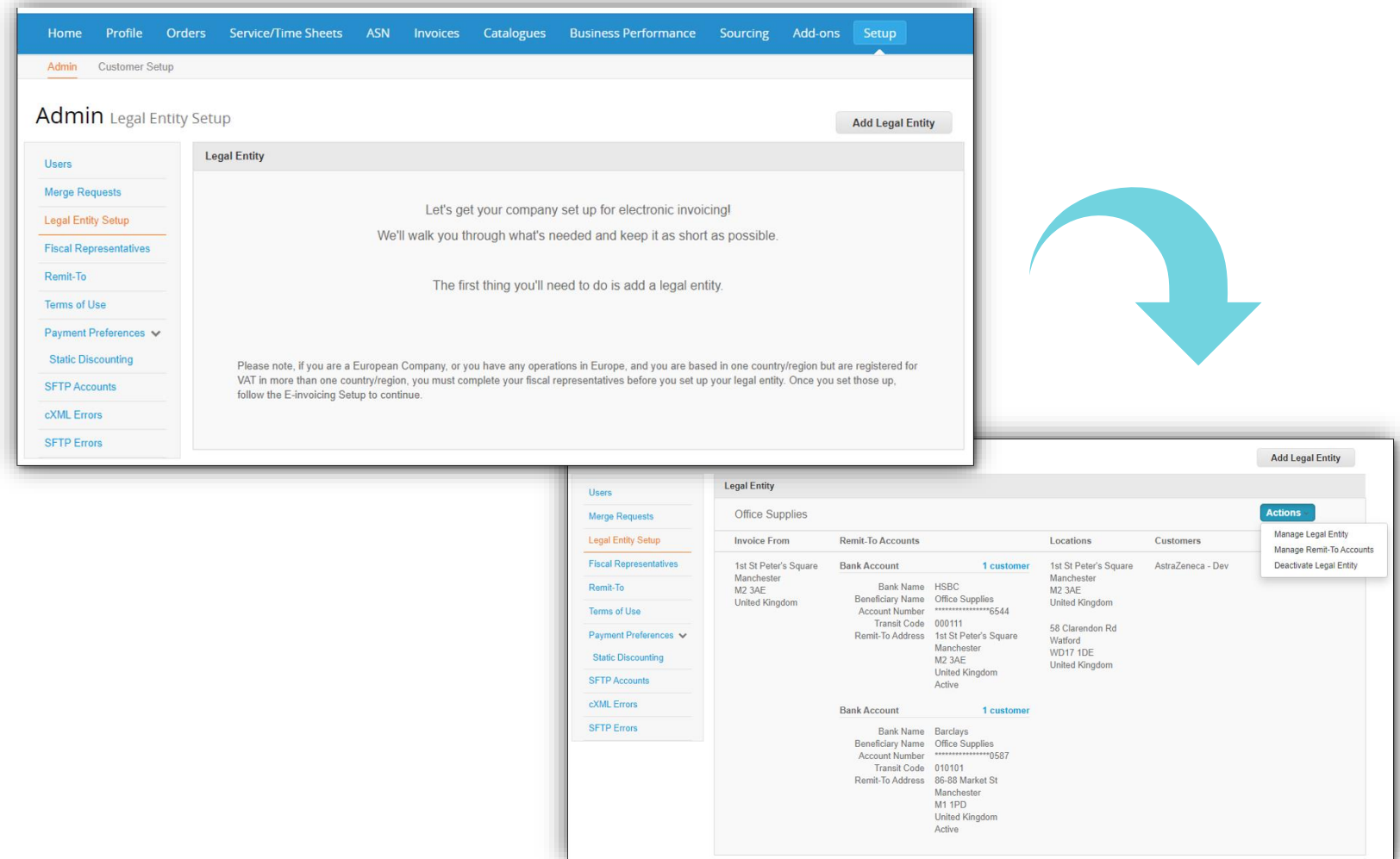
3

Set up your Legal Entity & Remit To



Set up your Legal Entity

All data listed in the Legal Entity structure goes on to the legal invoice that Coupa creates on your behalf



The screenshot displays the Coupa Legal Entity Setup interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The left sidebar lists various administrative options: Users, Merge Requests, Legal Entity Setup (highlighted), Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences, Static Discounting, SFTP Accounts, cXML Errors, and SFTP Errors. The main content area is titled 'Admin Legal Entity Setup' and features an 'Add Legal Entity' button. It contains instructional text: 'Let's get your company set up for electronic invoicing! We'll walk you through what's needed and keep it as short as possible. The first thing you'll need to do is add a legal entity.' A note mentions that European companies must complete fiscal representatives before setup. A large blue arrow points from this initial screen to a second screenshot below it, which shows the 'Legal Entity' setup page with a table of data.

Invoice From	Remit-To Accounts	Locations	Customers
1st St Peter's Square Manchester M2 3AE United Kingdom	Bank Account 1 customer Bank Name HSBC Beneficiary Name Office Supplies Account Number *****6544 Transit Code 000111 Remit-To Address 1st St Peter's Square Manchester M2 3AE United Kingdom Active	1st St Peter's Square Manchester M2 3AE United Kingdom 58 Clarendon Rd Watford WD17 1DE United Kingdom	AstraZeneca - Dev
	Bank Account 1 customer Bank Name Barclays Beneficiary Name Office Supplies Account Number *****0587 Transit Code 010101 Remit-To Address 86-88 Market St Manchester M1 1PD United Kingdom Active		

The second screenshot also shows an 'Actions' menu with options: Manage Legal Entity, Manage Remit-To Accounts, and Deactivate Legal Entity.

More information in the “Legal Entity setup” lesson of the e-learning

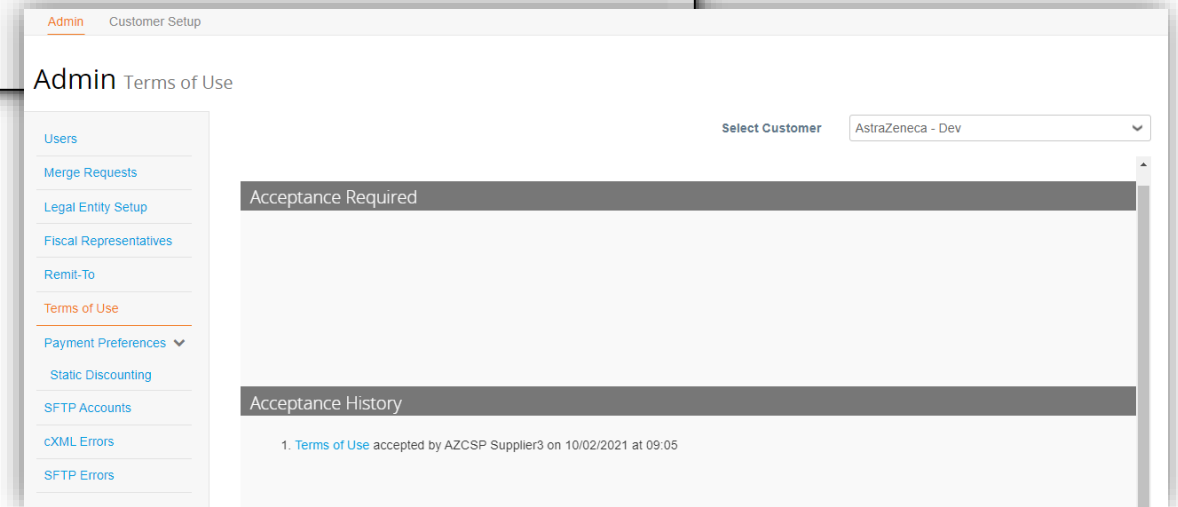
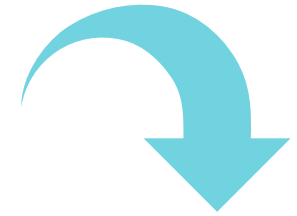
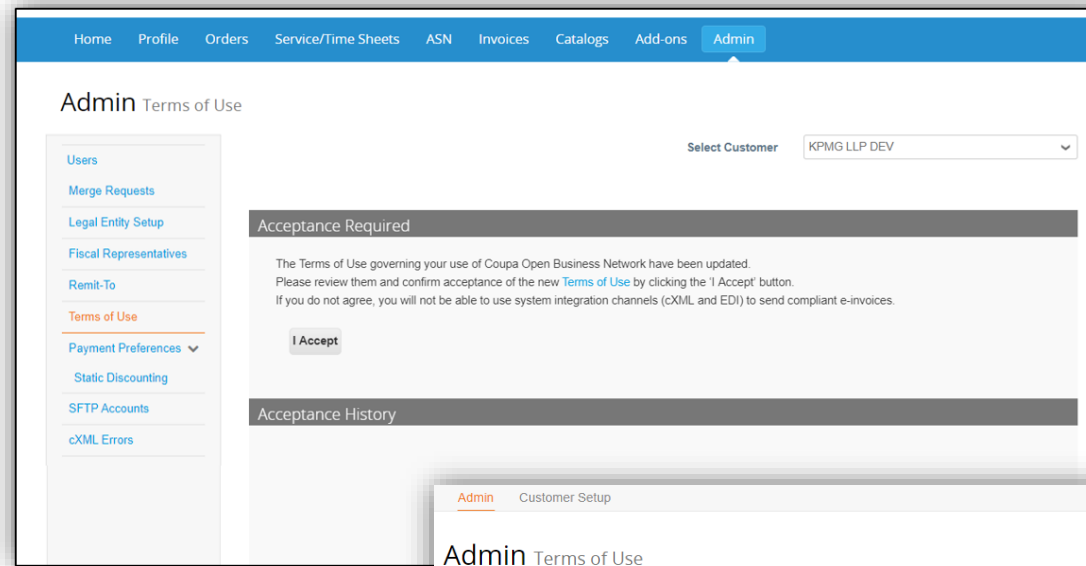


Remit-to
addresses
ensure global
electronic
invoice
compliance



Terms of Use

Please make sure that you accept this before the Coupa Go-Live.



More information in the „CSP Admin“ lesson of the e-learning



Home

Profile

Orders

Service/Time Sheets

ASN

Invoices

Catalogs

Business Performance

Add-ons

Setup

Recommended: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress



Last Updated

5 days ago

[Improve Your Profile](#)

Profile Summary



1

Legal Entity
[View](#)

1

Registered User
[View](#)

1

Connected Customer

✓ Banking Info

✓ Diversity

✗ Accelerate

✓ Bribery Policy

USCSP Supplier1

Announcements [View All \(0\)](#)

One-Click Savings [View All](#)

**Start saving today!**

Explore deals for your company, exclusive to the Coupa Community.

Merge Accounts

If your company has multiple CSP accounts, merge them to reduce confusion for your customers. [Learn more](#)[Request Merge](#)

Latest Customers

[AstraZeneca – Coupa \(Dev\)](#)

Key takeaways



The Legal Entity Setup section is available only to the admins. If you are the one who has created the account, you will be granted with the admin permissions.



All data used in the Legal Entity structure goes on to the legal invoice that Coupa creates on your behalf. Please ensure this information is accurate.



Please provide an admin right to anyone in your organisation who is responsible for keeping Legal Entity information up-to-date!



To meet compliance regulations an invoice must include a remit-to address and associated tax information. **The banking details** have to be added when setting up Remit – to.



4

Manage transactions in the CSP



Key takeaways



If you enable email notification for POs, you will receive an email notification for any new order. Notifications are set up on an individual account level.



Invoice Receipt Date is the starting point for calculating payment terms. The invoice date (invoice receipt date) is defaulted to the date you create and successfully submit an invoice in the CSP.



In the "Invoice" tab you can review real-time payment information by choosing the *Payment Information* view.



For Coupa compliant e-invoicing countries, as per the T&Cs, **Coupa will issue the legal invoices on your behalf**, therefore no need to attach or issue a copy of an invoice generated from your system. Please attach any supportive documentation if required.



5

Get support



Support structure after Coupa Go-Live in Spain

The CSP technical queries, issues with registration or set up



Coupa Support – chat feature in the CSP

AZ transactions related queries in your CSP account



AstraZeneca TGPS Supplier Enablement

Questions regarding your invoices & payments



AstraZeneca Helpdesk/ FINANCE DIRECT

Your company details changes



Your AstraZeneca business contact

Coupa Supplier Portal Guide for AstraZeneca Suppliers

<https://www.astrazeneca.com/az-suppliers/az-coupa-supplier/spanish-suppliers.html#!>

Training section on the AstraZeneca Coupa Supplier Hub webpage

Más información sobre Coupa en AstraZeneca



Portal de Proveedores Coupa -
registro y Administración >



Portal de proveedores de Coupa:
configuración de Entidad



Portal de proveedores de Coupa
- Gestión de facturas >



Portal de proveedores de Coupa
- Gestión de pedidos de compra



Soporte para proveedores de AZ
que realizan transacciones a

6

Q&A



Thank you!

