



Coupa

Transforming
the way we buy

Coupa Training Session

September 2021



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



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



1

Key dates for you



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Key dates for your calendar

E-learning completion

CSP invites

Coupa Go-Live

First orders submitted



September
27th

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



w/c
September
20th

*Invites sent to your email
inbox*



October 4th

*Coupa Supplier Portal active
for AstraZeneca Suppliers*



October 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 Oct onwards**. You must invoice via your agreed eInvoicing 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 September submitting a statement to clear open debt, if any exists

Goods and services received prior to October 4th

A

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

Goods and services received from October 4th onwards

C

Goods and services received starting October 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



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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

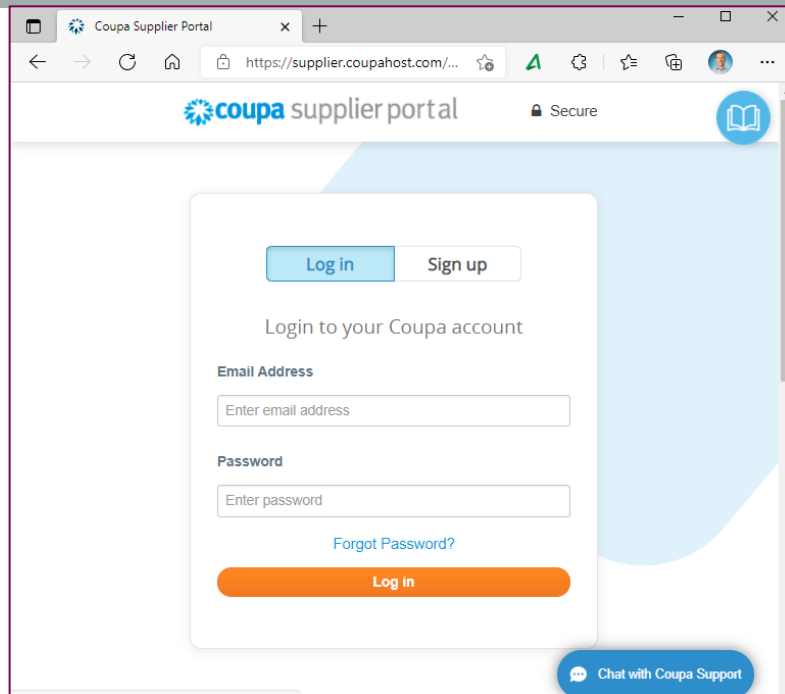
The AstraZeneca CSP invites will be submitted in w/c October 4th 2021 to all suppliers expected to transact with us via Coupa Supplier Portal after Coupa Go-Live



Coupa Supplier Portal

www.supplier.coupahost.com

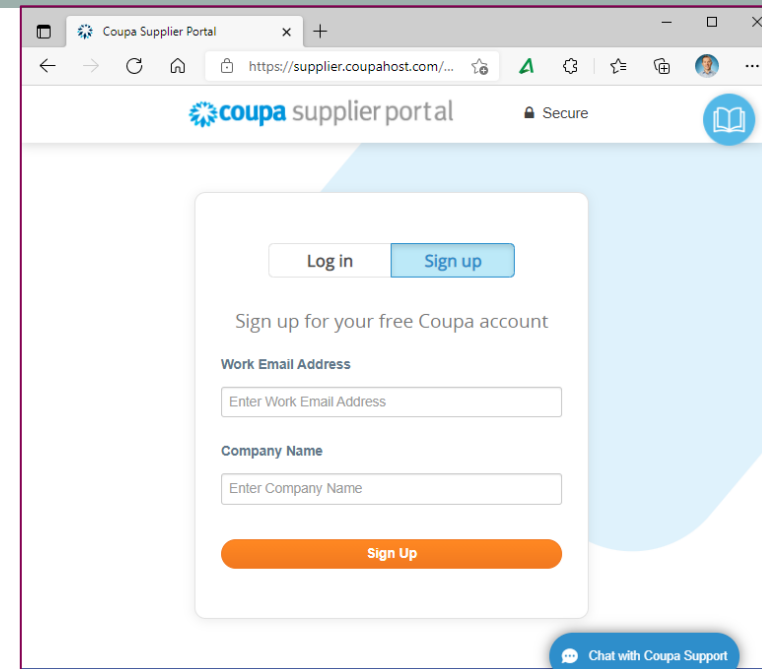
www.supplier-test.coupahost.com



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 and the text "supplier portal". 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 and the text "supplier portal". 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 September 20th



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



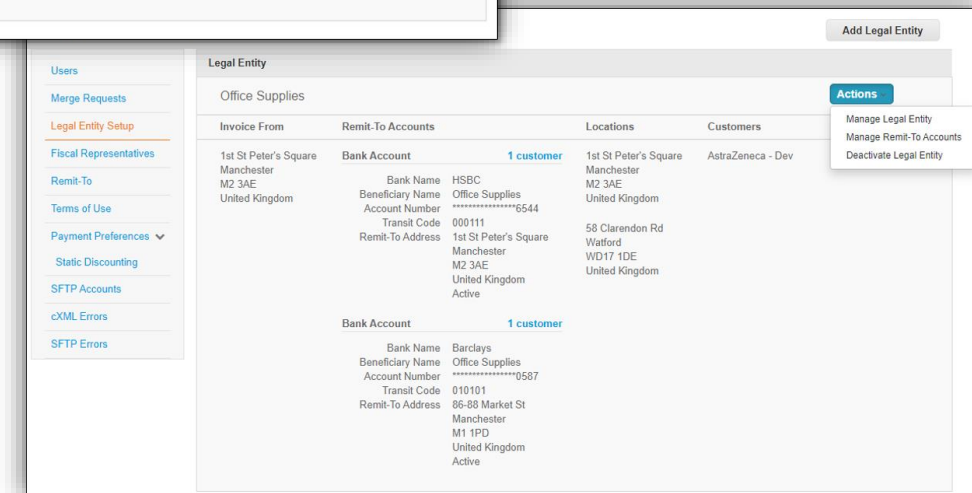
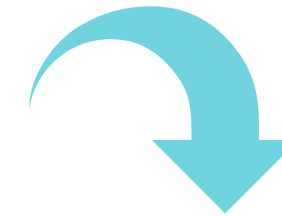
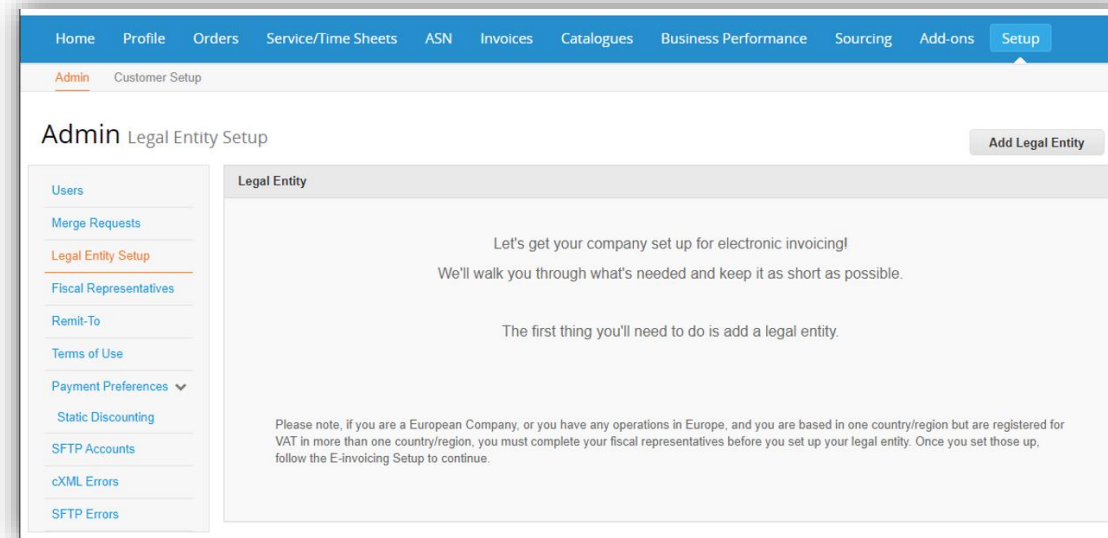
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Set up your Legal Entity

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



Set up your Remit To

Remit-to addresses ensure global electronic invoice compliance

coupa supplier portal

AZCSP | NOTIFICATIONS 1 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Admin Customer Setup

Admin Remit-To

Add Remit-To

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
Barclays Bank Plc ****8528	2021 Francis Crick Avenue Cambridge Biomedical Campus Cambridge CB2 0AA United Kingdom Preferred Language: English (UK)	Bank Account	AZCSP Supplier3 UK	✓ AstraZeneca - Dev	 
None	123 Main Street Wilmington DE 19803 United States	Address	AZCSP Supplier3	✓ AstraZeneca - Dev	 

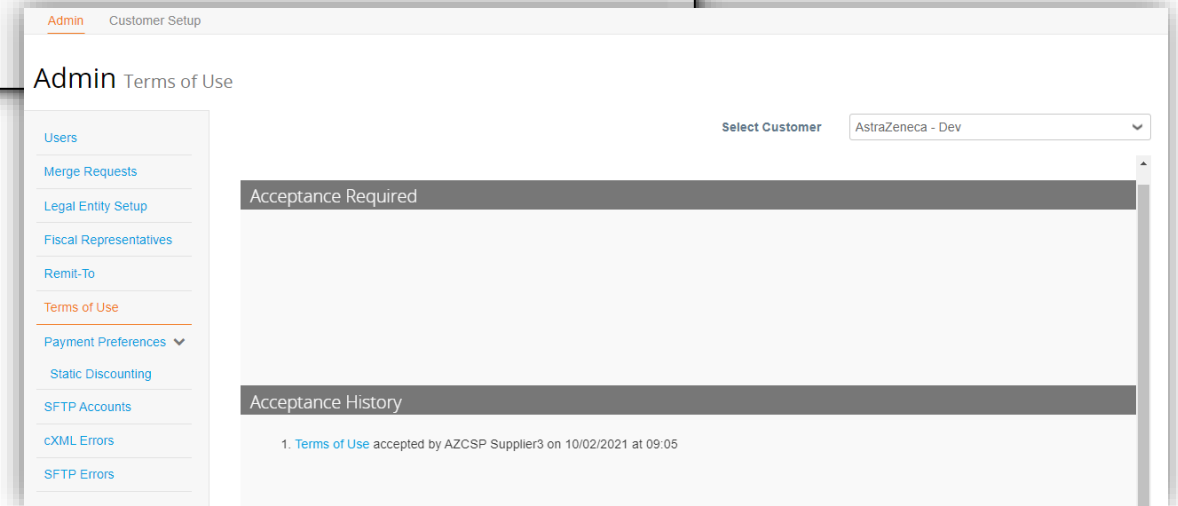
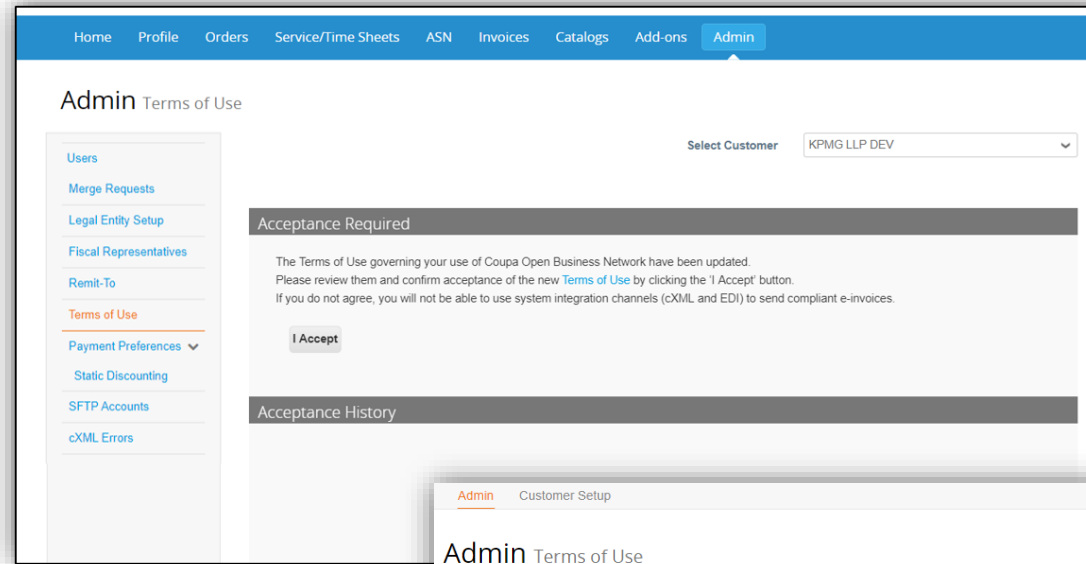
Users

- Merge Requests
- Legal Entity Setup
- Fiscal Representatives
- Remit-To**
- Terms of Use
- Payment Preferences ▾
 - Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors



Terms of Use

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



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 for most countries outside of the US, 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



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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



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Support structure after Coupa Go-Live

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

Your company details changes



Your AstraZeneca business contact

Coupa Supplier Portal Guide for AstraZeneca Suppliers

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

Training section on the AstraZeneca Coupa Supplier Hub webpage

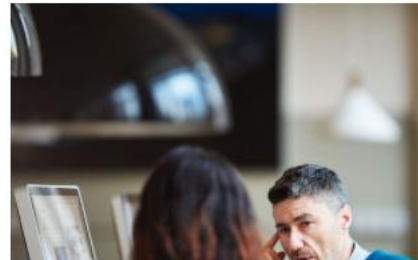
Coupa Guide for AZ Suppliers



CSP Registration and Admin >



CSP Legal Entity & Remit To Address >



CSP PO Management >



Tax Guidelines >



CSP Invoice Management >



Support for AZ Suppliers >

Coupa Supplier Portal Registration and Administration

START COURSE

DETAILS ▾

6

Q&A



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Thank you!



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