

## Getting started with the Coupa Supplier Portal

### What is the Coupa Supplier Portal?

The CSP is a portal which enables Zurich's suppliers to receive purchase orders and create invoices electronically. If requested to by Zurich, suppliers can also create and update catalogues through the CSP.

### What are the key benefits to me joining the CSP?

Key benefits include:

- A simpler and easier e-invoicing process
- Greater visibility of your invoice statuses
- Enhanced control of your transactions with Zurich through the use of an intuitive multi-user portal platform

### Will we need additional software to use the CSP?

Coupa is a cloud based technology and therefore you will only need an e-mail account to register to use the supplier portal and an internet connection to access the portal to transact.

### How much does it cost to transact with Zurich via the CSP?

There is no cost for suppliers.

### How do I register for the Coupa Supplier Portal?

You will be sent an invitation to join the CSP. We will be sending the invitation to the training and communications contact e-mail address you provided within your response to the supplier survey contained within the first communication sent to you in May.

If you do not receive an invitation and expect to, then please check your junk/spam folder. If the invite is not within your junk folder, then please contact [suppliers-coupa@uk.zurich.com](mailto:suppliers-coupa@uk.zurich.com)

### I already use the CSP with another customer. How do I connect with Zurich?

If you provide Zurich with the same email address that you use to connect to your other Coupa customer(s) via the CSP, when your new customer has that email address, they can send you an e-mail invite to join. Once you confirm the new connection request, you are automatically connected to your new customer and your previous customers within the CSP.

If you provide a different e-mail address, you will be sent an e-mail invite to create a new CSP login. If at a later date you wish to merge the separate CSP accounts you hold, then you can do so via the CSP homepage- please watch the CSP training video to find out how.

### Why can't I register for the CSP?

If you received the email invitation with the link and can't register, check the 'I'm not a robot' field. If there are any other issues, write to [supplier@coupa.com](mailto:supplier@coupa.com)

## How long does it take to register for the Coupa Supplier Portal?

The registration process takes less than 5 minutes.

## How do I register if the admin/owner of the CSP account left the company?

Contact your IT department or Zurich.

Your IT department may be able to grant you access to the leavers email so you can log-in to Coupa and refresh the User roles. Alternatively, you can reach out to Zurich at [suppliers-coupa@uk.zurich.com](mailto:suppliers-coupa@uk.zurich.com) to request Zurich to change the contact information for you as a supplier and then "unlink" from the leavers account, then "relink" or invite using your e-mail.

## Where do I sign in to the CSP?

<http://supplier.couphost.com>

## What happens if I forget my login?

Forgotten passwords can be retrieved via the forgotten password link on the CSP.

## Why don't I get the password reset emails?

Check your spam/junk email folder. E-mails sometimes get flagged as spam.

If you still cannot find the email, write to [supplier@coupa.com](mailto:supplier@coupa.com)

## Can I use the same email address for both my CSP registration and for receiving the POs?

Yes, however we recommend you use two different e-mails for security reasons.

## What do I do if I am not the admin/owner of my CSP account but I can't log in or don't have full access?

Contact your admin to activate your account or set your permissions. If this doesn't work, contact [supplier@coupa.com](mailto:supplier@coupa.com)

## Using the Coupa Supplier Portal

### Where can I find out more information on working with Zurich via Coupa?

Zurich has a dedicated supplier website, which hosts additional resources, user guides and videos for your use.

### If I use the Coupa Supplier Portal, who pays me?

Zurich will pay you- Coupa does not pay suppliers on behalf of Zurich.

### What do I do if the price on the purchase order I receive is wrong?

If the PO you receive is incorrect, please respond to the contact in the PO to cancel the PO and ask Zurich to raise another one.

### **Can I part-invoice or invoice against a blanket purchase order?**

Yes. Follow the usual invoice process and instead enter the part amount rather than the full amount. You can repeat this step multiple times until the full amount is invoiced.

### **We have multiple users within our business using our CSP account. How do we split out our customers?**

Within the 'Orders' and 'Invoices' tabs there is a drop down at the top right of the screen where you can select the customer you would like to view. In addition, you can create views within the orders and invoices tabs: Go to the invoices tab. Click on dropdown in the blue ribbon at the top of the table next to 'View' and select 'Create view'. You can give the view a name, and choose who can see it: just yourself or all your users. You can also use the 'Start with view' function to build off of an existing view you have. You can then determine your conditions logic and select which columns you would like included. You can also create a view for your purchase orders within the 'Orders' tab following the same process.

### **How do I edit or delete an invoice?**

You will be unable to edit or delete an invoice that has been submitted to Zurich. However, you can contact Zurich on [suppliers-coupa@uk.zurich.com](mailto:suppliers-coupa@uk.zurich.com) to ask them to reject the invoice or alternatively you can create a credit note to balance the charge and then resubmit a new invoice.

### **Do I need to do anything once the status of the invoice I have submitted has changed to 'approved'?**

No, Zurich will pay you according to agreed/standard payment terms.

### **Won't I miss Purchase Orders if they're just going in to a portal?**

In addition to the portal, you can elect to receive notifications via e-mail, SMS, via the portal; or a combination of the three. So it is unlikely you will miss any purchase orders received if you keep notifications switched on.

### **Will we be able to send you messages through the CSP to chase outstanding invoices?**

The CSP has a comment function where you, the supplier, in addition to Zurich, can add comments to purchase orders, invoices and catalogues. The comment can be found by scrolling down to the bottom of all of these respective pages within the CSP. You can access your notification settings for these comments by selecting your supplier name shown in blue, right and above of the blue ribbon. Once you click on your supplier name, select 'Notification preferences'.

### **We like the sound of CSP as we have a moderate volume of transactions, can we change to cXML if the volume increases?**

If you would like to change transmission method, then please contact [suppliers-coupa@uk.zurich.com](mailto:suppliers-coupa@uk.zurich.com) and the Zurich supplier enablement team will be able to discuss and support this change.

### **Can we have different roles within the CSP?**

Yes. If you go to the 'Admin' tab and then select 'Users' you will be able to manage the settings for each of your users. When you invite a new user you can determine which customers you would like them to view, in addition to which activities you would like them to be able to perform. Once the user has been created you can still edit these settings by selecting the 'Edit' button.

## **How do I create a credit memo?**

Within the 'Orders' tab, choose the PO you'd like to create a credit for and select the red stack of coins icon. You can create a negative invoice with either a negative quantity or a negative amount.

If you don't have a PO and your customer has given you permission to create invoices without a backing document, click on the Invoices tab on the main menu. At the bottom of the page, select the No Contract radio button and click on the Credit note button. This will allow you to free-form an invoice line.

If you don't have a PO and your customer has given you permission to create invoices with a backing document, click on the Invoices tab on the main menu. At the bottom of the page, click on the dropdown for Invoice against Contract to select the contract, and then click on the Credit note button. This will allow you to free-form an invoice line.

## **cXML**

### **Do we also receive POs via e-mail if we select cXML as our transmission method?**

If you select cXML as your transmission method, you will not receive POs via e-mail. The cXML links directly between yours and Zurich's systems.

### **We're going to need an external developer to set up cXML for us. Will Zurich reimburse this?**

Zurich is unable to reimburse costs for cXML. If you do not have the capability to do cXML transmission, then we suggest you use the Coupa Supplier Portal (CSP) instead.

### **We're familiar with EDI, is this the same as cXML?**

EDI and cXML are two separate transmission methods. Zurich is moving from EDI transmissions to cXML transmissions and therefore will no longer support EDI connections.