General Frequently Asked Questions (FAQs)

Q: Which locations and countries can place orders through Coupa?
As of today the following countries transact through Coupa: Australia, Belgium, Colombia, Greece, Hong Kong, India, Indonesia, Ireland, Israel, Japan, Kenya, Nigeria, Philippines, Portugal, Romania, Singapore, South Africa, Sweden, Switzerland, Turkey, United Arab Emirates (UAE), United Kingdom (UK), United States (US).
By May 2027 all other countries should be onboarded in Coupa.

Q: Who is responsible for generating the PO, is it supplier or Finastra contact?
Finastra users will issue Purchase Orders which will then be visible on your Coupa Supplier Portal account or email.

Q: How does Coupa integrate with my own invoicing system?
There is no integration between Coupa and your existing ERP system.

Q: As we invoice in more than one currency do we need to set up a separate legal entity for each currency?
No, you only need one legal entity – you have the option to change the invoice currency if required.

Q: How can we see/search and download the PO copies on Coupa?
The orders tab on Coupa will display a list of all your POs. You can extract this list into excel by clicking 'export'. You can also download a PDF of the order by clicking into the order and clicking 'print'.

Q: Will POs still be raised in different currencies?
Yes, Finastra users can raise POs in different currencies if required. However, we do not expect users to raise POs differently to what they do today.

Q: Is there an API for Coupa to integrate with customers ERP?
No, but it may be possible to use cXML to send invoices for large invoice volume suppliers.

Q: If we have previously registered on Coupa for Finastra, do we need to take any new action when we receive CSP invite to register?
Yes, you do. You will not have to create a new CSP account, but you will have to click on our invite link to add Finastra as a customer to your Coupa account as this will not happen automatically.

Q: I am already set up with Coupa for other clients. Will I already be set up?
You will still need to accept Finastra's invitation. You will not be asked to set a password, but simply log in. You will then need to either add Finastra to your already set up legal entities or create a new legal entity for Finastra.

Q: I did not receive Finastra invitation, what can I do?
Please follow instructions for setting up your account on our Coupa enrollment page in Coupa Supplier training materials section.
If you have any follow-up questions, please send us an email at: supplierenablement@finastra.com.

Q: Can I set up more than one legal entity for my company in Coupa, as we have multiple entities that work with Finastra?
Yes, you will be able to create multiple legal entities in Coupa Supplier Portal.

Q: What if we are not invoicing the full amount of the purchase order, i.e. we bill monthly by days used?
Coupa allows partial invoicing so you may invoice the due amount for that month against the same PO. Simply enter the amount you wish to bill when creating the invoice.

Q: All our invoices are created in our ERP system with our unique Invoice number. Does that mean there will be two invoice numbers, yours and ours?

When you create the invoice in Coupa, you should use the ERP invoice number as your Coupa invoice number.

Q: Currently suppliers have been asked for a single contact name. More than one area of the business will require access for different tasks, e.g. acknowledging a PO and invoicing are separate jobs. Will it be possible to get multiple contact roles for our company?
Yes, you will be able to invite other users to your Coupa Supplier Portal account and manage their permissions and access.

Q: Is it necessary to upload my invoice to Coupa?
Uploading your invoice is not required, the Coupa invoice itself acts as the legal invoice.

Q: Does the supplier need to set up multiple Finastra legal entities in Coupa or manually select the correct Finastra company when invoicing against a PO?
No. Suppliers do not need to set up multiple Finastra entities in Coupa or manually select the correct Finastra company when creating an invoice. Each PO contains the relevant Finastra legal entity details, and when you click Create Invoice, this information is automatically populated on the invoice. This ensures the invoice is billed to the correct Finastra entity associated with the PO.

Q: What happens when the amount on the PO does not match the one shown on the supplier's final invoice?
If the invoice amount exceeds the PO amount, the invoice will be placed on hold for manual review in Coupa. Please contact your Finastra representative to explain the discrepancy and, if needed this will facilitate a PO amendment.

Q: Some suppliers issue invoices quarterly. The volumes of each line item will change for each invoice based on usage calculations. Will Finastra create the PO based on the volumes we provide before the invoice is issued? How is this process handled?
The invoicing process may vary depending on the type of PO agreed with your Finastra business contract. In some cases, Finastra may issue a blanket PO, which allows invoices to be submitted for varying amounts over time based on actual usage.
If an invoice exceeds the available PO value, the invoice will be placed on hold and routed for manual review and approval in Coupa.

Q: Are suppliers required to sign up with Coupa?
Yes. By signing up to transact with us via Coupa, you strengthen your relationship with us and benefit from transparency in transaction processes and seamless, and in some cases, automated interaction with us, therefore improving efficiency in your operations.

Q: If we will need any clarification on payment terms or other questions regarding invoices, is there an ability to contact the person responsible via Coupa or we have to use email? If the latter, whom to contact?
The best way to do it is to use the comment section in Coupa Supplier Portal. If you have a question on the PO that you've just received, you can just comment on it and that comment will go to the user who created that order; if you are creating an invoice and you have a question on the open invoice you've just sent, then you can add a comment to that invoice and that comment would go to the finance team.

Q: Can we submit multiple invoices for goods and services on a purchase order?
Yes, you can. When the purchase order is created it can either be set up with multiple line items or allow multiple invoices by way of quantity or value which can be invoiced in stages. For example, a PO could be raised for services over a 6-month period and invoiced each month. Similarly, a PO could be raised for a quantity and partially invoiced as goods are delivered by the supplier.

Q: We bill on a T&M basis where our billing amount is different every month based on the hours worked. Is there a place for number of hours and rate in Coupa?
No, there is not a specific field that relates to hours and amount in Coupa. But if you've been tracking this on

an Excel, you can use the attachment field on the invoice page and add that to your invoice. So, you can attach that Excel sheet onto the Coupa invoice itself on the monthly basis. After submission, it will reach AP, and they'll be able to view the cost breakdown.

Q: How can we invoice against a blanket purchase order in Coupa?
The typical process is one invoice for each purchase order, however, if you have agreed an approach of raising a blanket purchase order with your business contact, the PO can be raised in Coupa, and you will be able to raise multiple invoices against it. The PO may cover any fixed duration agreed with your business contact, such as monthly, quarterly, or for a specified time, and the PO will remain open until fully invoiced, or the PO is closed by the business, when the job is complete.

Q: How does this change my existing ordering and payment process?
Once the Coupa S2P portal has been fully deployed it will be the only way for you to receive orders and process invoice payments with Finastra so please make sure you complete the supplier survey to ensure we have your correct contact and billing details on our system.

Q: What's the AP email address?
General email address is finastra.ap@finastra.com. Each country of operations also has its assigned AP email. You can country-specific email in PO document.

Q: Is Coupa applicable to CSR activities or donations in terms of corporate responsibilities?
Coupa will only be used for PO and invoicing for now. But in future waves, we may consider expanding the use of the CSR.

If you have any follow-up questions, please send us an email at: supplierenablement@finastra.com.

Coupa Supplier Portal (CSP) Questions

Q: What is the Coupa Supplier Portal (CSP)?
A portal which enables suppliers to receive purchase orders and create invoices electronically.

Q: What are the key benefits of joining the CSP?
Key benefits include:
- **Receive purchase orders and create invoices and credit notes electronically**
- **Free to use cloud-based system. No installation of hardware or software required**
- **Increased visibility – see the status of transactions, payment status and related documents in one place in real time**
- **Improve process efficiencies and decrease paperwork – no longer need to print, mail or fax invoices**
- **Standard process = faster authorisations**
- **Update profiles and contact information**

Q: Will we need additional software to use the CSP?
No additional software is required. Coupa is cloud-based technology. All you will need is an active email account and web browser to access the portal and transact with Finastra.

Q: How much does it cost to transact with Finastra via the CSP?
There is no cost for suppliers to use SAN and CSP. However, cXML options may have an initial set-up or integration cost.

Q: How do I register for the CSP?
Follow instructions for setting up your account on our Coupa enrollment page in Coupa Supplier training materials section.
If you have any follow-up questions, please send us an email at: supplierenablement@finastra.com.

Q: How long does it take to register for the CSP?
The registration process takes less than 15 minutes upon receiving the invitation email.

Q: Do I need to set up a CSP account, or will this be done for me?
Finastra can't set up the CSP account on your behalf, but the registration process takes less than 15 minutes. See the training materials provided to go through the process.
You'll receive an email invitation to join the CSP. If you didn't receive invitation, contact supplierenablement@finastra.com and we will send you new invitation.
Once connected with us, you will see Finastra Coupa as the 'latest customer' on your home page.

Q: Can I set up other users from my company in Coupa, and what functionality will they have?
When your supplier profile is first created in Finastra Coupa, we assign a primary contact based on the responses from your survey and this will be the person who receives the invitation to register on the CSP. The primary contact can update your supplier profile in Coupa and they can invite other users from your organization and assign permissions so that they can view and action certain tasks, such as viewing and managing orders, creating and sending invoices, and viewing payment.
Q: Can we have 2 different bank account details entered in Coupa from different countries, and is there any effect on currency?
Suppliers can set up multiple bank accounts, with remit-to addresses based in different countries via the CSP.