



BOARD OF GOVERNORS OF THE FEDERAL RESERVE SYSTEM
WASHINGTON, DC 20551

COUPA PROCUREMENT TRANSFORMATION

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FREQUENTLY ASKED QUESTIONS

GENERAL QUESTIONS

Q: WHAT IS THE BOARD CHANGING?

The Board is transitioning from our current procurement system to a Software-as-a-Service (SaaS) based solution provided by Coupa.

Starting on July 5, 2023, all transactions with the suppliers of the Board will be managed through the Coupa platform. This configuration will enable an electronic connection and allow procure-to-pay activities to occur completely online.

Q: WHAT IS COUPA?

Coupa is a cloud-based Software-as-a-Service (SaaS) spend management platform that unifies the procure-to-pay business process across a company. Coupa brings e-commerce shopping ease to procurement management processes.

Q: WILL THERE BE ADDITIONAL CHARGES FOR CONNECTING TO THE BOARD THROUGH COUPA?

There are no additional or hidden fees for connecting with the Board's Coupa system through the Supplier Actionable Notifications (SAN) or the Coupa Supplier Portal (CSP).

Q: WHAT DO I DO IF I AM NO LONGER DOING BUSINESS WITH THE BOARD?

If you are no longer doing business with the Board, please email vendor-update@frb.gov.

Q: WHERE CAN I RECEIVE HELP FOR VARIOUS ISSUES?

For any questions about how to use the Coupa Supplier Portal and the Coupa Sourcing Portal, please leverage the Coupa provided resources (<http://supplier.coupa.com/help>).

If you are having issues with your supplier information set up, please email vendor-update@frb.gov.

If you have a procurement question related to an active contract, you can reach out to your Contract Specialist.

If you have a technical question related to an active contract, please reach out to your Technical POC.

Q: WILL INVOICES THAT ARE CURRENTLY UNPAID FROM THE LEGACY SYSTEM MOVE FORWARD TO COUPA?

Please send inquiries on invoices submitted prior to transition to Coupa to mgt-accounts-payable@frb.gov and/or DFM.AP@frb.gov.

Q: WILL THE BOARD BE MIGRATING PAYMENT ACCOUNT INFORMATION?

Yes, the payment account information has been migrated from what is currently utilized in the previous system. If a Supplier would like to make updates on their Board's supplier information, suppliers will need to contact their Contract Specialist or board-vendors@frb.gov to inform the Board that an update is required.

COUPA PLATFORM

Q: WHAT ARE MY OPTIONS FOR CONNECTING TO THE BOARD'S COUPA INSTANCE FOR PURCHASE ORDERS AND INVOICES?

Any of the following options can be used for exchanging Purchase Orders and invoices with the Board:

1. **Coupa Supplier Portal (CSP)**: This is the **preferred enablement method** of the Board. The CSP is a web portal that provides one central location for all procurement activity between the Board and a Supplier as well as the home for supplier information, such as banking details and certifications. You can log in to the CSP to view Purchase Orders, maintain catalogs, and create and send invoices electronically. You can also setup email notifications as desired. To learn more about CSP, please watch this [informative video](#).
2. **Supplier Actionable Notification**: You can receive Purchase Orders and create invoices directly from your email inbox. This enablement method is best for suppliers with low order and invoice volume with the Board. To learn more about SAN enablement, please review [these materials](#). If SAN is selected, you must provide a thorough explanation as to why for review and approval by the Board. You will need to provide justification for selecting this option and not the CSP.
3. **cXML Transmission**: With this option, Suppliers can connect their cXML-capable system directly to Coupa. Purchase Orders and invoices are transmitted in cXML standard format via an HTTP post. This is only for suppliers who already transact with cXML. For more information on cXML enablement with the Board, please review [these materials](#). You will need to provide justification for selecting this option and not the CSP.

Q: WHICH ONE IS RIGHT FOR MY BUSINESS?

1. **Coupa Supplier Portal (CSP)**: All Purchase Orders and Invoices will be managed in the Coupa platform. This is recommended for medium-to large sized businesses that have a moderate number of transactions with the Board. This is the **preferred enablement method** for the Board.
2. **Supplier Actionable Notification**: With this option, all your Purchase Orders and Invoicing will be done through email. This is recommended for small businesses or medium businesses who have a low volume of transactions with the Board. If selected, you must provide a thorough explanation as to why for review and approval by the Board.
3. **cXML Transmission**: This is a technical connection. This is recommended only for suppliers who already transact with cXML. The business that needs to select this option will already be familiar with this type of connection. cXML may not allow invoice attachments. If backup invoice documentation is required for your business, then cXML is not the appropriate option. If selected, you must provide a thorough explanation as to why for review and approval by the Board.

Q: HOW DO I LET THE BOARD KNOW THAT I WANT TO CONNECT THROUGH cXML?

If you are interested in connecting with the Board's Coupa platform via cXML, please reach out vendor-update@frb.gov.

Q: HOW DO I LET THE BOARD KNOW THAT I WANT TO CONNECT THROUGH THE COUPA SUPPLIER PORTAL (CSP)?

Becoming a member of the CSP requires an invitation from the Board. If you are interested in connecting with the Board's Coupa platform through the CSP and have not received an invitation, please reach out to vendor-update@frb.gov.

COUPA SUPPLIER PORTAL (CSP)

Q: WHAT IS THE COUPA SUPPLIER PORTAL?

The Coupa Supplier Portal (CSP) is a free online portal that provides suppliers one location to centrally manage their Board catalogs as well as their Purchase Orders and invoice activity with the Board. This is the preferred method of enablement with the Board.

The CSP will directly connect the registered suppliers to the Board's Coupa platform, making catalog updates and document transfer immediately available for both the supplier and customer.

Q: WHERE CAN I GET MORE INFORMATION ON THE COUPA SUPPLIER PORTAL?

Coupa offers a robust online help site for suppliers wishing to be part of the CSP. Coupa's [online help website](#) provides a variety of written references and video demonstrations on an array of topics – “What is the CSP?”, “How do I receive purchase orders and send invoices?” and more.

Q: HOW MUCH DOES IT COST TO JOIN THE CSP?

There is **no charge** to use the Coupa Supplier Portal.

Q: IF I USE THE CSP, WHO PAYS ME?

The Board, who uses Coupa, is still responsible for paying you directly. Coupa will not pay suppliers on behalf of the Board.

Q: CAN I REGISTER MORE THAN ONE PERSON TO A COUPA SUPPLIER PORTAL PROFILE?

Yes, you can set up multiple user accounts associate to the same company. In the CSP, select the Setup tab, and under the Admin subtab, you can find the Invite User button. A popup will appear where you need to fill in the contact information of the user that will be added. From there, identify what permissions and customers that user will have access to.

Q: WHAT IS THE RELATIONSHIP BETWEEN A TASK ORDER AND A PURCHASE ORDER (PO) IN THE COUPA SUPPLIER PORTAL?

For each Task Order you are awarded, you will have a distinct PO in the CSP. Your PO number is what you will link directly to your Invoice. Any legacy POs/Contract Numbers will be referenceable in the “Note to External Supplier” field. If you had an open PO (uninvoiced amount) prior to our move to Coupa, an order was created in Coupa with that uninvoiced amount. This order will be available for invoicing once you click the link in the registration email and create an account with the CSP/merge your existing account.

Q: DOES A SUPPLIER NEED TO ENTER A NEW INVOICE NUMBER WHEN CORRECTING A DISPUTED INVOICE?

Suppliers can reuse the invoice number or void the invoice and resubmit with a new number.

SUPPLIER ACTIONABLE NOTIFICATIONS

Q: WHAT ARE SUPPLIER ACTIONABLE NOTIFICATIONS?

Supplier Actionable Notifications (SAN) give suppliers the ability to act on a Purchase Order from the Board directly from their email inbox. Suppliers do not need to register or log into the Coupa Supplier Portal (CSP). If you are already registered on the CSP, you can still take advantage of actionable notifications.

Q: WHAT DOES SAN ALLOW ME TO DO?

Upon receiving a Purchase Order from the Board, a supplier can create an invoice directly from the Purchase Order, acknowledge receipt of the Purchase Order, or add comments to the Purchase Order.

Additionally, suppliers will get a notification after they submit an invoice or when the Board performs an action on the invoice. This improves transparency and further reduces the need for suppliers to track down the status of their invoices—no more calls and emails that take up valuable time on both sides.

Q: ARE THERE FEES ASSOCIATED WITH USING SAN?

No. SAN integration will not incur any additional fees from Coupa nor the Board. However, any fees normally attributed to your email or internet service provider provided will still apply.