

FREQUENTLY ASKED QUESTIONS

Nov 2023 | Suppliers

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BACKGROUND

Q: What is Coupa?

Coupa is a leading, global Procure-to-Pay platform. It allows employees and their suppliers to complete all procurement activities in one place. This includes purchasing, receipting goods or services, invoicing and making payments digitally and in one place easily and efficiently.

Q: Why is Westpac Group transitioning to Coupa?

Coupa will help the Westpac Group and its suppliers streamline the end-to-end procure-to-pay process and build our partnership for the long term – making it strong and sustainable. It's part of Westpac Group's commitment to being easy to do business with, as we become a digital first bank.

Q: What are the benefits of using Coupa?

By using Coupa with Westpac Group, you can expect more from our partnership including:

- More assurance and visibility of transactions and payment: upfront approval of purchase orders, easy creation, and auto-matching of invoices to purchase orders, and real-time visibility of payment status.
- An easier way to connect with our people: being enabled on the Coupa platform makes you easily accessible to our staff buyers, you'll be known as an approved supplier, and easily identified if you're a Diverse supplier.

Importantly, utilising a single platform by our employees will provide you with a consistent experience, regardless of the specific divisions within the Westpac Group that you interact with.

Q: What is the Coupa Supplier Portal (CSP)?

The 'Coupa Supplier Portal' is Coupa's dedicated supplier portal for all your procurement needs. The Coupa Supplier Portal is free, easy to setup and use, and lets you view purchase orders, create invoices, maintain online catalogues, and keep your business information up to date. The CSP can issue notifications regarding your invoice status and payment.



Q: Do I need to be ‘Coupa Verified’ – and pay?

No, Westpac Group doesn't require you to be [Coupa Verified](#), or to pay a subscription.

Q: What is the benefit of ‘Coupa Verified’?

[Coupa Verified is a subscription program](#), which enables a supplier to have their information, data and business documentation verified which then provides greater promotion of the business within the Coupa community, which is a network of millions of users, customers and suppliers.

TRANSITION INFORMATION

Q: How do I complete procurement transactions during the transition?

You'll receive communications throughout the transition to help guide you through each step of the way.

Q: What will I need to do to get ready for the change?

Depending on how we buy from you, you may be asked to:

1. Confirm your primary contact name and email and Purchase Order email address
2. Confirm your new preferred invoice method
3. Register or Login to the Coupa Supplier Portal and accept the Westpac invitation
4. Get ready to receive purchase orders and send invoices electronically via Coupa.

Q: I'm now set up on CSP. What happens next?

Once you're on CSP, you'll start to connect with Westpac buyers over a transition period:

- Stage 1: Coupa P2P pilot (**selected suppliers only**)
 - 27 November 2023 – 31 January 2024
 - You may start to receive requests via Coupa during a 2-month pilot with staff buyers from across the Westpac Group.
- Stage 2: Coupa P2P rollout by Westpac Group division
 - February 2024 – April 2024
 - You may start to receive a higher proportion of requests via Coupa, as the system is rolled out across the Group by division.

Note: All Westpac buyers from the pilot will continue to transact with you via Coupa when the pilot ends.

Q: How should I invoice Westpac during the Coupa transition period?

Here's what you need to know:

1. If you receive a PO via Coupa, please [issue us a corresponding invoice](#) via the CSP.
2. Until all of Westpac business areas are onboard Coupa, you may continue to receive requests for goods and services via the current channels. For these requests, please continue to invoice us via the current channels.

See below for details of Westpac's Coupa rollout approach and timeline.



Q: How will Coupa be rolled out to the Westpac Group?

Coupa will be rolled out progressively across Westpac's divisions from late February 2024. More buyers ('requesters' will start transacting via Coupa from this time.

1. Late-February: Corporate Services, Group Finance.
2. March: Technology, Customer Services, Business Bank & Wealth.
3. April: Consumer Bank, Westpac Institutional Bank, Chief Transformation Office, Legal, Risk, Human Resources, CEO Office.

All Westpac teams are expected to be onboard Coupa from May 2024. From this point, all invoices should be issued via Coupa.

Q: What will happen to Westpac Group's current payment systems and processes?

Coupa is replacing Westpac Group's current manual invoicing processes and associated systems over a period of time.

All suppliers will go through a transition period, moving away from sending us invoices manually to being set up on Coupa where you'll receive purchase orders and submit your invoices electronically.

To enable a smooth transition, Westpac will continue to run existing processes and systems alongside Coupa for a period, after such time invoices must be submitted electronically via Coupa. Timing for this will be confirmed.

GETTING STARTED ON CSP

Q: How do I get started on CSP?

After you've joined the Coupa Supplier Portal, you can start to manage your business information and preferences. [Here's how](#) to get started.

Q: Where can I get help for using the CSP?

For Supplier support, please visit the [Coupa Suppliers site](#), and see the [Supplier Help Center](#) and [frequently asked questions](#).

For any technical or functional support-related questions not answered in the Supplier Help Center, Suppliers can chat with an agent 24x7 through the chat box on the Coupa Supplier Portal (supplier.coupahost.com), or email supplier@coupa.com.

Q: I have not received an invitation to the Coupa Supplier Portal. What do I do?

The invitation will be sent from do_not_reply@westpac.coupahost.com. It is possible your email security settings have sent the email to your spam or junk folders, so check those and update your inbox security settings to allow emails to be received from this address.

The invitation will be sent to the email address used for onboarding your supplier record in Coupa. You can check this address with your Westpac business contact. If the email address is incorrect or needs to be updated, your business contact can make this request on your behalf or you can contact supplier-advocacy@westpac.com.au directly with the request.



Q: I've received the invitation to join the Coupa Supplier Portal. What do I need to do?

In the email, you'll see two buttons:

1. **Join Coupa:** On the tab that opens - create and confirm a password, accept the Privacy Policy and Terms of Use, and click 'Get Started' to sign up for the CSP.
2. **Forward this invitation:** On the tab that opens – you may click the 'Forward this to someone' link. Enter their email and click 'Forward.'

Q: My organisation already uses the Coupa Supplier Portal with other customers. How can we connect our account with Westpac?

If you're already using Coupa, you'll receive an email to login to Coupa to connect to Westpac.

Once received, you'll need to log in and set up your profile and preferences.

If you have multiple logins under your business, you may merge your accounts.

CATALOGUES

Q: How do I learn about hosting my catalogue within Coupa?

Contact our [Supplier Enablement team](#) or your Westpac representative to express interest in setting up a catalogue.

It is mandatory that you have an active contract with Westpac to set up a catalogue with fixed item pricing.

Successful catalogues can be viewed and managed [via the CSP](#).

Q: How do I connect my punchout catalogue with Westpac via Coupa?

Once your webstore is CXML-configured and your technical resources are confirmed to support the connection setup, the following process will be followed by Westpac:

1. **Initial contact & information gathering:** CXML questionnaire overview, sharing of credentials, UNSPSC codes and requirements confirmation.
2. **Preparation of punchout:** Supplier configures punchout site and prepares the catalogue content (aligned to contractual agreed products & pricing).
3. **Test of punchout connection:** Test connection and purchasing/invoice scenarios to approve ready to move to production.
4. **Validation of punchout connection in production environment:** validate content on catalogue is accurate and complete end to end test in production to ensure connection is established.

It is mandatory that you have an active contract with Westpac to establish a connection to your punchout catalogue.

To initiate the above process, please complete email supplier-advocacy@westpac.com.au to confirm your interest and request the supplier form.



PURCHASE ORDERS

Q: Why is Westpac introducing Purchase Orders?

The introduction of Purchase Orders is an important shift in our procurement process to align to best practice.

Purchase Orders will make the process more efficient by ensuring upfront approval of spend, and enabling auto approval of invoices that are a match in Coupa. Not only does this make it easier for our staff to buy, it means that suppliers can be assured purchases are already approved, invoice submission are much simpler and payments can be paid more promptly.

Q: Can I supply to a Westpac buyer without a Purchase Order?

During the transition period, you may continue to supply to Westpac buyers who are not yet on Coupa. In these instances, you can follow the existing invoicing processes, which may include providing products / services without a Purchase Order. After the transition period, it is expected that all invoices must be submitted with a corresponding Purchase Order number.

Q: How do I view and manage Purchase Orders?

All Purchase Orders, including their status, can be viewed by clicking on the 'Purchase Orders' tab in CSP. [Learn more.](#)

Q: Where can I learn more about handling Purchase Orders via CSP?

Visit the [Purchase Orders FAQs](#).

INVOICES & PAYMENTS

Q: How can I submit my invoice to Westpac for payment?

All existing systems and processes for submitting invoices to Westpac will be replaced with Coupa. You must submit a valid invoice via Coupa, going forward. There are three methods of submitting invoices via Coupa:

1. **Coupa Supplier Portal:** This is Westpac's preferred method. Westpac will send you an email invitation to register on the Coupa Supplier Portal. On the portal, you can view all Purchase Orders and create and send invoices electronically as well as track the payment progress. Please refer to the video - [submitting an invoice via CSP](#) for further guidance.
2. **Supplier Actionable Notification (SAN):** You can submit an invoice directly from your email inbox upon receiving a Purchase Order - without registering or logging into the Coupa Supplier Portal. While this is still an efficient and digital method, you will not have the benefit of the portal where you can self-serve to update your supplier information and track the real-time status of invoice payments. Please refer to the video - [submitting an invoice via SAN](#) for further guidance.
3. **CXML Transmission:** This is for suppliers who have large volumes of transactions with us (purchases and invoices) and an internal IT support team to bulk and manage the CXML transmission. If suitable to you, please contact us.

Note: An alternate method may be arranged by exception only. Please contact us if you need to discuss this option.

Q: How can I invoice via CSP?

You can invoice via CSP by:

- Invoice from a Purchase Order
- Invoice from a Contract where published contracts are available for suppliers

[Learn more.](#)

Q: How do I create or edit an invoice?

You can easily flip a Purchase Order into an invoice. [Learn more.](#)

Q: How do I know if an invoice has been submitted?

You can check all submitted invoices and their status in the 'Invoices' tab of CSP. If the status is 'Draft' the invoice has not been submitted.

If the invoice has been submitted using Supplier Actionable Notification 'SAN' you will be notified via email when the invoice status changes to approved for payment and paid.

Q: Where can I learn more about invoicing via CSP?

Visit the [Invoices FAQs.](#)

Q: How do I create a credit note?

Credit notes can be issued to resolve a dispute on an invoice, correct an invoice or cancel a duplicate invoice. They can also be used to record miscellaneous credit. [Learn more.](#)

GENERAL QUESTIONS

Q: Some of my information has changed i.e. banking information, address information, organisation name, etc. How can I get this updated?

It's important that you notify us of any changes to your supplier information as soon as possible, so this can be updated on your supplier record. Any incorrect information could result in delays to processing your invoices for payment.

You can notify us of any updated information via the email address supplier-advocacy@westpac.com.au

MORE INFORMATION

Q: Where can I find more information about the transition?

Visit our westpac.com.au/Coupatransition or email supplier-advocacy@westpac.com.au

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