Coupa R22 Release Notes

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About Coupa Release 22

This chapter contains the following topics:

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A simple list of every topic in the Coupa 22 Release Notes. It's the easiest way to see everything at a glance.

How to Use Release Notes

Start here to better understand how we've organized the release notes and how you can use them to make sure your upgrade goes smoothly.

Supported Browsers

Coupa Release 22 supports Microsoft IE11 and Edge 42, Mozilla Firefox 61, and Google Chrome 67.

Presentations

Coupa 22 Webinars are hosted by the PM team and take place shortly after deployment.

Coupa 22 PDF and Changelog

See what's changed in the release notes and get the latest PDF since we update every two weeks.

Release Schedule

Check out these important dates for webinars, resources, and when we'll deploy Coupa Release 22 to your instance.

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How to Use Release Notes

Overview

We create release notes for each Coupa version so you can quickly get up to speed with what's changed and what the impact will be to your existing Coupa implementation. The release notes aren't intended to be the definitive source of information about how features work, but instead as a tool to help you successfully upgrade to the latest version and take advantage of new features after your implementation is complete.

Organization

We've made some changes to how we organize our content, and you'll be seeing this in both the release notes, the core documentation, and support troubleshooting content.

Release Notes

To make it easier to plan and execute your upgrade, the release notes are broken up into four main sections:

Section	Description	How to Use It
About	Information about the new release like these instructions, Release Schedule, Supported Browsers, and more.	Make sure you know how you can use the release notes in order to receive the latest version.
Upgrade Guidance	Detailed information about the changes we've made to integrations and roles/permissions.	Check out the Upgrade Impact List to see what changes impact integrations and permissions.
New Features	High-level information about the new features we've introduced in the release so you can get your head around what we've introduced in the new release. We've changed how we organize our documentation so it's based on the applications and licenses available. See Explore New Features for details about how things are organized and New Features Doc Format for details about how we document new features in the release notes.	Look at the new features based on which Coupa apps you've purchased so you can understand what you can take advantage of today. **Tip:** Take a look at some of the apps you haven't purchased to learn how you can get more value out of Coupa.
Maintenance Updates	Area of the release notes where we list the issues we've resolved in the major release, and information about each maintenance and daily update we make to the release.	See if we've resolved any issues you've reported to us through the Support Portal.

Feature Documentation

We've reorganized our documentation based on app and license details to make it easier for you to understand what new features you can take immediate advantage of. We've applied this organization to both the New Features section and our core documentation.

Area	Description	Apps Included
Platform	Practically every customer has the Coupa platform unless you've only bought certain stand-alone apps.	Not apps, but features like accounts, approvals, currencies, custom fields, notifications, reporting, and roles and permissions.
Core Applications	The primary parts of Coupa when you buy P2P or P2O, or a stand-alone Coupa application.	Procurement (including basic contracts, inventory, spot buy, etc.), Invoicing, Expenses, and some stand-alone apps.
Power Applications	Applications that you may have purchased as an add-on to a Coupa core application.	Add-on apps like Coupa Analytics, Coupa Contract Collaboration, Inventory, Coupa InvoiceSmash, Coupa Risk Aware, Services Maestro, Sourcing, Coupa Sourcing Optimization, and Supplier Management.
Early Access Program Apps & Features	New apps and features that are still in testing phase, and not yet available for most customers. See About Coupa's Early Access Program for more info.	Early Access Program apps change with each release. See the current list for details.

Documentation Formats

Different sections of the release notes are formatted differently. Use this list of formats to understand how and why we've chosen to document things the way we do.

Upgrade Impact Assessment

When trying to understand the scope of the new release, start by checking out the impact each new feature has when you take the upgrade.

Column	Description	Customer Thinking
Topic	The name and link to the article for the new feature in the New Features section.	Let me link out to in case I really want to see that feature documentation now.
Description	A high-level overview of what changed and why we changed it.	Give me a sense of what the feature's about. If I can understand it enough here, maybe I don't need to read that item in the New Features section.
Enabled	Indicates if the feature is turned on by default. It may still require configuration, but you don't need to reach out to Coupa in order to get it, assuming you have a license for the app.	Who do I need to talk to in order to get this feature in my Coupa instance?
Integrations	Indicate if there's any change to SFTP or API integration objects or behaviors.	Show me which features I need to pay attention to because they could potentially impact the integrations my Coupa instance has with my other systems.

Column	Description	Customer Thinking
Permissions	Indicate if we added or removed permissions, split up permissions, added new standard roles, or made changes to existing standard Coupa roles.	Show me which features introduced changes that might affect my custom roles and help me understand what new permissions affect what new features.

Permission Updates

A permission is a unique combination of a Controller/Action pair. We organize the new permissions by the controller name, and then show each of the new actions. and provide the details below. See Understanding Roles and Permissions for detailed info.

Column	Description	Customer Thinking
Action	The specific action we added. For example, index, create, or show history.	Tell me what new actions were added.
Description	The description of what the action does or where it's applied	I need to know what the action does.
Associated permissions	Some actions only work in association with other actions. We'll try and suggest combinations that can achieve business outcomes. Unless otherwise stated, the action listed is part of the same controller.	What's the difference between index, and show, or create and new? Help me figure out how to build my custom role.
Migration	The existing permission that, if in a custom role, will cause the role to automatically receive the new action. Called *Propagation* in Release 19.	I need to know when you change what a permission does, and what new permissions received some of the functionality of the old permission.
Feature	The new feature where the change was introduced.	Show me what feature is associated with the new permissions so I can learn more about the change.

New Features Topics

When we document a new feature, we want you to have an easy-to-follow format that helps you quickly understand the impact to your existing implementation, and decide how you'll address each new feature.

Section	Details	Customer Thinking
Feature overview	Gives you a high-level overview of what we've changed.	Let me quickly decide if I care about this feature.
What we were thinking	Explains why we added the new feature, or made the change, with a particular focus on the problem we're trying to solve.	After reading the overview, I still can't decide if I care or not. Tell me why you made this change, and why I might care.

Section	Details	Customer Thinking
		What problem is it trying to solve or what business benefit will this feature provide to me?
How it works	Specific detail about what has changed, and what new business logic we've introduced into Coupa. The goal is not to explain every detail of how the features work or how to configure it, but instead to help you understand what it does and why.	Okay, I'm interested. Tell me more about • What changed and what's going to happen to my instance now • Who's affected by the change, and what it looks like • The basics of how it works Maybe I don't need all the details right this second, but point me to where the details are.
Upgrade impact	Information about changes to roles and permissions, integration, and other system impacts. The goal is to give you a heads-up about changes that can impact you, even if you don't intend to implement or use the feature.	Have you changed the standard Coupa roles? What do I need to know from integration perspective if I want to use this feature or maintain my current functionality?
Availability	How does the customer get it? Does this feature need to be enabled by the Coupa Support team?	Alright, I'm sold! What do I need to do to start using this new feature? Am I already paying for it? Is it already enabled?

Supported Browsers

We do extensive testing before each Coupa release, and the list here indicates which browsers were used for testing. Coupa Release 22 supports the following web browsers:

- Microsoft Internet Explorer 11
- Microsoft Edge 42
- Mozilla Firefox 61
- Google Chrome 67

Presentations

First Look customer webinar

New Features webinar. Choose the session that best fits your schedule:

- **7/26/2018 at 8am PST**

University training

The Coupa University training webinar will be coming soon after upgrade.

Coupa 22 PDF and Changelog

Overview

Because we provide release notes ahead of the actual release, we'll make updates to the release notes as features are added or removed, and as new information becomes available. Check out this changelog to keep track of the changes we make to the release notes. Head over to the R22 Release Schedule to see when we'll update the release notes.

> **Warning:** The Release Notes include a validity date for the PDF version. Once the release has been deployed to production instances, we begin the maintenance phase and will discontinue updating the PDF. It's your responsibility to ensure your PDF version is the most recent version, and you should always check the live Success Site for the most accurate and up-to-date information.

Changelog

Additional Updates

Date	Topic	Change	Details
September 7, 2018	Improved SIM Form Visibility through New Statuses, Aging, and Alerts	Updated	Updated the *How it works* section to reference the newly added topic on New Form Statuses and Table Columns.
September 7, 2018	New Form Statuses and Table Columns	New topic	Added information about the changes that apply to all the forms and form responses, initially documented in Improved SIM Form Visibility through New Statuses, Aging, and Alerts.
September 5, 2018	Supplier Notifications for Increased Accelerate Adoption	Updated	Replaced the screenshots of the email and online notifications of the early payments opportunity to reflect the changes in the notification text.
September 5, 2018	Create CSP Accounts from PO Emails and Forward Invites	Updated	Updated the *What we were thinking* section with more information on why we introduced this feature, its pros and cons, and how customers can help suppliers use the CSP.
August 15, 2018	Other Platform Enhancements	Updated	New allowable attachment types: ZIP, GZ, and TAR.GZ
August 14, 2018	cXML Credit Notes to Accept Negative Totals	Updated	Updated the information in *Upgrade impact* section to reflect that this feature is disabled by default.

August 13 Release

Topic	Change	Details
Projects for Contracts	Updated	Updated the information in *How it works* section to reflect the current behavior of this feature.
Contract Integration with New Supplier Statuses	Updated	Updated the information in *How it works* and *Integrations* section to clarify the Evaluate Supplier status.
Enhanced Change Order Process	Updated and renamed	Renamed the topic from Buyer Initiated Change Orders and included more info about new roles and approval chain details.
Advanced Mileage Reimbursement on Mobile	New topic	Mobile users can enter mileage transactions anywhere using their iOS or Android device for advanced mileage reimbursement.
New Supplier Status: Evaluating	Updated	Updated the information on supplier status changes and on the option to select suppliers in Evaluating status when creating free-form requests.
Create CSP Accounts from PO Emails and Forward Invites	Updated	Replaced the screenshot of the CSP create account page as its layout changed to make the section for forwarding the invitation better visible.
Original Requester Added as Approver or Watcher on SIM Forms	Updated	Added a note about the restriction of where an original requester can be added to an approval chain.
Improved SIM Form Visibility through New Statuses, Aging, and Alerts	Updated	Updated the information on form statuses. Added a screenshot to show an example of recently submitted forms in the **Recent Activity** section on the **Home** page.
Sourcing > Other Changes and Improvements	Updated	Added information about the new field in Suppliers tab **Last seen**
Coupa Pay Virtual P-Cards	New topic	Coupa Pay generates virtual credit card numbers to pay approved suppliers and one-off, ad hoc transactions for EAP customers.
Release 22 Inbound API Changes	Updated	Tables describing Inventory Manage Transactions and Commodity Translations were removed until the API endpoints are exposed. Support continues for CSV loading and export of those tables.

July 30 Release

Topic	Change	Details
Large Line Invoicing Responsiveness	Removed	Removed from R22
Invoices API	Removed obsoleted request parameter	The Invoice API does not support deletion of invoices. The phrase, ":destroy=>"Delete draft invoice"," was removed from the request parameters list.
Dutch Reverse Auctions in Sourcing	Updated	Updated **Upgrade Impact** - no additional permissions are required.
CSO and Contracts integration	Removed	Information included in Link to Suppliers and Contracts from CSO in the CSO section.
Approvals for CLM and DocuSign	Removed	Removed from R22
Other Analytics Enhancements	Updated	Added other expressions to the KPIs object category.
Projects for Contracts	Updated	Changed topic title and *What We Were Thinking* section.
New Supplier Status: Evaluating	Moved	Moved topic from Procurement to Coupa Platform. Updated Release 22 Upgrade Impact List accordingly.
Custom Field Values Visible in Analytics	Updated	Changed title from *Custom Field Names in Analytics*. Updated the Release 22 Upgrade Impact List accordingly.
Receipt Processing in Parallel with Approvals	Updated	Updated *What We Were Thinking* and *How it Works* sections.
Coupa Process Builder	Added	Added new topic to describe the Coupa Process Builder tool with its initial trigger and action offering: Auto Dispute of Invoices.

Release Schedule

Important Dates

These are the dates of activities around R22. We'll deliver the first set of release notes on July 16, 2018, and update them every two weeks until we start deploying the release.

Date	Action
July 16, 2018	Release Notes v1 available for customers and partners with PDF. This version of the release notes focuses on high-level feature descriptions so you can understand what's new and changed, and why.
July 24 - July 26, 2018	New Features webinar. Choose the session that best fits your schedule: • **7/24/2018 at 4pm PST** • **7/26/2018 at 8am PST**
July 30, 2018	Release Notes v2 available for customers and partners. More details about how features work and how to configure them.
August 13, 2018	Release Notes v3 available for customers and partners. Video content in release notes will start rolling out. Finalized info that integrates with feedback from our professional services and support teams
September 12, 2018	Release certification training in full eLearning format available for customers and partners.
September 18, 2018	Webinar to review feature training for Coupa administrators

Upgrade Dates

These are the dates we'll be deploying R22 to sandbox and production instances. If you're not sure about your upgrade dates, talk to your CSM or contact Coupa Support.

Deployment Type	Dates
Sandbox Upgrades	August 13, September 4, or September 10
Production Upgrades	August 24, September 14, September 21, or October 5

Upgrade Planning

This chapter contains the following topics:

How to Get Ready to Upgrade

The key to a successful upgrade is to read the docs, decide on your changes, plan your testing, and execute your plan in sandbox.

Release 22 Upgrade Impact List

Use this list of the new features to help you assess the impact that upgrading to Release 22 will have on your Coupa implementation.

How to Get Ready to Upgrade

Overview

Coupa is extremely powerful and highly customizable, which means you may be using it in ways we can't always foresee. That's why it's important for you to do a few things for each new release. To make it easier for your upgrade to be successful, we suggest you use these steps to manage your upgrade.

1. Read The Docs

Read the release notes to identify what changes we made that impact your custom roles and integrations, and what new features are available.

1. Start with How to Use Release Notes if you haven't already read it.
2. Check out the Upgrade Impact List to see all the new features and if they introduce changes to your permissions and integrations.
3. Move on to the Roles Updates to learn what new permissions were added to our standard roles.
4. Examine the Integration Updates to learn what changes we introduced to integration formats.
5. Browse the New Features section for the apps you've purchased, and learn about the features that might interest you. Attend the
6. If you have open issues, look at the Resolved Issues list to see if it's been resolved in the release.

Remember, we update the release notes every two weeks between the first release and when we first deploy to sandbox. Make sure you're always working from the latest set of notes. See the R22 Release Schedule for details.

2. Decide On Your Changes

Based on impacts to your custom roles and integrations, decide what areas specific areas need attention in order to upgrade. Then choose the new features you want to implement. You'll need to know what apps you've bought (i.e. do you have an invoicing or sourcing license?), what custom roles you've created, and what objects are integrated with other systems in your organization.

1. Start by looking at the platform updates. Your custom roles and integrations are key. If there are changes, you'll want to verify their behavior.
2. Then consider what other changes might affect your business logic. Are there changes to how approvals work? Is there a new opportunity to simplify?
3. Move on to the apps you have licenses for, and decide if there's something you want to implement, or better understand the new behavior.
4. Are there any other apps you'd like to consider adding? Reach out to your CSM to have a conversation about how you could enhance your system.

3. Plan Your Project

Now that you know what areas of your implementation are impacted, you can begin to plan your upgrade project. Make sure you can answer the following questions:

Integrations

- Do we need to update an existing integration, or create an entirely new integration.
- If so, how much development work is involved?
- What other teams need to be involved?
- How much testing will you need to do?

Custom Roles

- What new permissions need to be added to your custom roles?
- How many workflows need to be tested to ensure the custom roles will work as expected after the upgrade?

New Features

- What configurations need to be set up in order to take advantage of new features?
- What testing will have to take place?
- Will you need to train your users in order for them to be able to use the new features?

Resolved Issues

- If we resolved any open issues you had, you can include testing for them during your upgrade project.

Once you understand your timelines and resources, you can reach out to your CSM to make sure you'll have enough time to build, configure, test, and train in your sandbox instance before your production instance is upgraded.

4. Execute

Once the release hits your sandbox, it's time to work on everything you planned. By this time, the Resolved Issues list be finalized and Coupa Support will be ready for your questions.

Release 22 Upgrade Impact List

Get the Most out of Coupa Release 22!

Use this list of all the new features to assess the upgrade impact of Coupa Release 22. It includes info about roles and permissions, integrations, and if the feature is enabled or disabled by default. List will be visible once Release Notes for R22 are available.

Coupa Platform

Feature	Description	Enabled	Permissions	Integrations
Projects and Groups for R22	Coupa now has both groups and projects, and we've replaced the Tags page with dedicated Contracts and Sourcing Events pages.	Enabled	New permissions added to standard roles	Changes to API and CSV
Approvals Enhancements	Easily add signatories to a contract approval, insights for cycle count approvals, and approval time columns for the user table.	N/A	None	None
Approve or Reject Directly from Slack	Approve or reject directly from Slack using Approve and Reject buttons and include comments with your actions.	Enabled	None	None
Commodity Insights Enhancements	The transaction analysis bar chart shows your spend amount or transaction count in percentage values, along with classification details for specific commodities.	Enabled	None	None
Content Groups Usability Improvements	We've improved Coupa's content group selectors so they're faster and easier to use while being able to support large numbers of content groups.	Enabled	None	None
Coupa Open API Integration Documentation	The Coupa Open API docs now include Swagger's Try it Now feature and object definitions.	Enabled	None	None
Coupa Process Builder	Coupa Process Builder enables automated processing based on custom conditions.	Enabled	New permissions added to standard roles	None
Email Management Improvements	We're starting to take steps to help prevent the emails that Coupa sends out from being identified as spam.	Enabled	None	None
New Item and Commodity Translations	We've introduced a new translation framework so customers can provide translations for data they load into Coupa.	Disabled	New permissions added to standard roles	New API and new fields on CSV
New Form Statuses and Table Columns	You can track the status of your forms more easily and view more details about your forms.	Enabled	None	None
New Supplier Status: Evaluating	You can use a new status for your suppliers to facilitate work during sourcing and contracting.	Enabled	New permission added to standard roles	New allowable value for supplier status
Scheduled Report Improvements	Display custom view logic in scheduled report emails and R22 Scheduled Report Enhancements.	Enabled	None	None
Usability Enhancements for Split Billing	We've built upon the improvements we made to billing splits in Coupa 21.	Enabled	None	None
Other Platform Improvements	Other minor enhancements we made to the Coupa platform in R22.	N/A	New permissions added to standard roles	None

Coupa Supplier Portal

Feature	Description	Enabled	Permissions	Integrations
Bulk Export Legal Invoices	Suppliers can bulk export all the legal invoice attachments in a `.zip` file.	Enabled	New permission added to a standard role	None
Create CSP Accounts from PO Emails and Forward Invites	Suppliers can create Coupa Supplier Portal (CSP) accounts by clicking on a button in a purchase order (PO) email.	Enabled	None	None

Core Apps

Expenses

Feature	Description	Enabled	Permissions	Integrations
Advanced Mileage Reimbursement on Mobile	Mobile users can enter mileage transactions anywhere using their iOS or Android device for advanced mileage reimbursement.	Enabled	None	None
Automated Expense Approvals	Expense reports that are based on travel preapprovals can now be auto-approved.	Disabled	None	None
Send Expense Lines Back to the Submitter	Approvers and accounting reviewers can send back individual expense lines instead of rejecting the entire expense report.	Disabled	New permission added to a standard roles	None

Invoicing

Feature	Description	Enabled	Permissions	Integrations
Allow usage of existing Coupa exchange rate field on header level across all invoicing channels	The Coupa exchange rate field can now be viewed throughout all areas of invoicing on the header level.	Disabled	None	Update to an existing object
Auto Dispute invoices based on validation rules	Configure validations and dispute rules to enforce supplier invoices.	Enabled	None	Update to an existing object
Bulk price with different UoM	Now add the price and review it in the unit of measure that is more recognizable to your business operation.	Enabled	None	Added a new object
Community Insight: Invoicing channels in use by a Supplier	Provide Admins/Project managers information on suppliers that are transacting with other customers on Coupa.	Enabled	None	None
Contract-Backed Invoicing Enhancements	Save time and money by not having AP check every contract back invoice for discrepancies.	Enabled	Updates to standard roles	Update to an existing object
cXML Credit Notes to Accept Negative Totals	Allow suppliers to connect to Coupa through cXML in order to send credit notes without additional setup.	Disabled	None	Update to an existing object
Invoicing Compliance as a Service for Italian SDI Clearance Model	Maintain compliance for Italy as they make changes in January 2019.	Disabled	New permission added to a standard role	None
Receipt processing in parallel with Approvals	Automate and simplify the receipt process, while awaiting approvals.	Disabled	None	None
Spain and Canary Islands Compliance	We've added the distinction between mainland Spain and the Canary Islands to our list of Compliant Invoice Countries.	Disabled	None	None

Procurement

Feature	Description	Enabled	Permissions	Integrations
Advanced Search Filtering	Filter your Coupa search results by supplier, commodity, and price range, to help you find what you're looking for.	Disabled	None	None
Bulk Pricing Improvements	Coupa supports orders and invoices where the bulk price for an item is in terms that are different than the unit of measure for the item.	Enabled	None	New fields for API and CSV; changes to existing fields
Buyer-Initiated PO Changes	Users can make PO change requests and drive approvals for orders that they didn't originally request, instead of just revising the PO.	Disabled	New role and new permissions	TBD
Visual Ordering	Order items based on an exploded view of an assembly or comparison chart of similar-looking items.	Enabled	New permission	None

Power Apps

Accelerate

Feature	Description	Enabled	Permissions	Integrations
Supplier Notifications for Increased Accelerate Adoption	Suppliers are notified when you enable Coupa Accelerate and you are ready to accept early payment discount offers, and they can act quickly on orders that can be accelerated.	Enabled	None	None
Visibility of Accelerated Invoices	You can create a view or search for all the invoices that have payment terms updated by Coupa Accelerate.	Enabled	None	None

Analytics

Feature	Description	Enabled	Permissions	Integrations
Bookmarks for Dashboards	You can save your dashboard settings by bookmarking your dashboards.	Enabled	None	None
Custom Field Values Visible in Analytics	Reports can display custom field values instead of custom field IDs.	Enabled	None	None
Other Analytics Enhancements	Coupa Analytics includes new measures, attributes, and other expressions to report on invoice summary charges, document types, tax lines, lookups, sourcing, and more.	Enabled	None	None

Contract Lifecycle Management

Feature	Description	Enabled	Permissions	Integrations
Contract Integration with New Supplier Statuses	Easily identify suppliers that are in the evaluating status and disallow contracts with inactive suppliers.	Disabled	New permissions added to standard roles	None
Projects for Contracts	Now add tags and user groups to contracts for more team collaboration.	Enabled	None	Added a new object
Retention Policy for Contract Collaboration	Comply with your companies retention policy by removing non-essential information to your contracts.	Disabled	None	None
UX and Workflow Improvements	We've made improvements to email notifications, branding, time zone settings and email links.	Enabled	None	None

Inventory

Feature	Description	Enabled	Permissions	Integrations
Cycle Time for Count Approvals	View cycle time metrics for cycle count approvals and how they relate to the community.	Disabled	None	None
Decimal Quantity Support for Internal Stock Order	Easily view decimal order quantities for internal orders and fulfillment transactions.	Enabled	None	None
Default Receiving Option	Prevent incorrect receipt and eliminate downstream mismatches in your inventory.	Disabled	None	None
Inventory Adjustment CSV to Enable Mass Adjustments	Integrate point of sale systems to easily update and make adjustments through Coupa Inventory.	Enabled	New permissions added to standard roles	Added new objects

Sourcing

Feature	Description	Enabled	Permissions	Integrations
Dutch Reverse Auctions in Sourcing	New event type to support Dutch reverse auctions	Enabled	None	None
Planned Savings Tracking	Possibility to compare planned savings with the outcome of the sourcing event	Enabled	None	None
Other Changes and Improvements	New supplier status, link to Projects and Tasks, and link from Contract to sourcing event	Enabled	None	None

Sourcing Optimization

Feature	Description	Enabled	Permissions	Integrations
New Terminology and UI	Update to match with rest of the Coupa platform	Enabled	None	None
Link to Suppliers and Contracts from CSO	Continued improvements of the flow of data from a CSO event	Enabled	None	Yes
Risk Aware Information in CSO	Possibility to incorporate supplier risk assessments into your strategic sourcing event	Enabled	None	Yes
Other Changes and Improvements	Update of help links and documentation, update of old pages, minor fixes and improvements	Enabled	None	None

Supplier Information Management

Feature	Description	Enabled	Permissions	Integrations
Original Requester Added as Approver or Watcher on SIM Forms	You can add the original requester as an approver or a watcher to approval lists for any Supplier Information Management (SIM) form response.	Enabled	None	None
Improved SIM Form Visibility through New Statuses, Aging, and Alerts	You can easily track the lifecycle of your forms, view more details about them, and remind your suppliers to respond to pending requests.	Enabled	New permission added to standard roles	None
New Primary Contact Subform	You can customize the primary contact information on your Supplier Information Management (SIM) form by defining what fields to include and whether they should be required.	Enabled	None	Update an existing object

EAP Apps & Features

Feature	Description	Enabled	Permissions	Integrations
Coupa Open Buy	Coupa Open Buy turns your supplier's punchout sites into hosted catalogs available for search from directly within Coupa.	Disabled	New permissions added to standard roles	Changes to API
Spend Guard - Phase 2	Spend Guard now includes a Total Spend Profile page with expenses, requisitions, purchase orders, and invoices, and a detailed Employee Spend Profile page.	Disabled	New permissions added to standard roles	None
Coupa Pay Virtual P-Cards	Coupa Pay generates virtual credit card numbers to pay approved suppliers and one-off, ad hoc transactions for approved requisitions.	Disabled	Three new roles added to enable administration, management, and processing of the Virtual P-Card feature.	New API to retrieve Charges.

Roles and Permissions

This chapter contains the following topics:

Release 22 Role Updates

Coupa Release 22 gets changes that affect standard roles. Check out this topic to see which roles are affected.

Release 22 Custom Roles Updates

See which permissions will cause custom roles to receive new permissions after the R22 upgrade.

Release 22 Permission Updates

Check out the permissions we've added and removed in Coupa Release 22, organized by controller.

Release 22 Role Updates

Overview

With each new Coupa release, we add new permissions to the Standard Coupa Roles. If you've created custom roles based on a standard Coupa role, make sure to see what new permissions we added to it. We will update this page once the Release Notes for R22 are available.

All permissions listed below are added to the role unless otherwise stated.

New Standard Roles

Edit Payment as Approver

Permission	Controller	Action	Feature
coupa_pay/invoices/data_graph	CoupaPay/Invoices	Data Graph	Coupa Pay
coupa_pay/invoices/search_coupa_pay_invoice_table	CoupaPay/Invoices	Search CoupaPay Invoice Table	Coupa Pay
coupa_pay/invoices/store_graph_display	CoupaPay/Invoices	Store graph display	Coupa Pay
coupa_pay/payment_batches/add_approver	CoupaPay/Payment Batches	Add approver	Coupa Pay
coupa_pay/payment_batches/approve	CoupaPay/Payment Batches	Approve	Coupa Pay
coupa_pay/payment_batches/data_graph	CoupaPay/Payment Batches	Data Graph	Coupa Pay
coupa_pay/payment_batches/destroy_payment	CoupaPay/Payment Batches	Destroy Payment	Coupa Pay
coupa_pay/payment_batches/edit	CoupaPay/Payment Batches	Edit	Coupa Pay
coupa_pay/payment_batches/hold	CoupaPay/Payment Batches	Hold	Coupa Pay
coupa_pay/payment_batches/reject	CoupaPay/Payment Batches	Reject	Coupa Pay
coupa_pay/payment_batches/search_coupa_pay_payment_batch_table	CoupaPay/Payment Batches	Search CoupaPay Payment Batch Table	Coupa Pay
coupa_pay/payment_batches/show	CoupaPay/Payment Batches	Show	Coupa Pay
coupa_pay/payment_batches/show_history	CoupaPay/Payment Batches	Show history	Coupa Pay
coupa_pay/payment_batches/store_graph_display	CoupaPay/Payment Batches	Store graph display	Coupa Pay
coupa_pay/payment_batches/update	CoupaPay/Payment Batches	Update	Coupa Pay
coupa_pay/payment_batches/update_approval_chain	CoupaPay/Payment Batches	Update approval chain	Coupa Pay
coupa_pay/payment_batches/withdraw	CoupaPay/Payment Batches	Withdraw	Coupa Pay
coupa_pay/payments/cancel	CoupaPay/Payments	Cancel	Coupa Pay
coupa_pay/payments/data_graph	CoupaPay/Payments	Data Graph	Coupa Pay

Permission	Controller	Action	Feature
coupa_pay/payments/destroy_detail	CoupaPay/Payments	Destroy Detail	Coupa Pay
coupa_pay/payments/edit	CoupaPay/Payments	Edit	Coupa Pay
coupa_pay/payments/ search_coupa_pay_payment_table	CoupaPay/Payments	Search CoupaPay Payment Table	Coupa Pay
coupa_pay/payments/show	CoupaPay/Payments	Show	Coupa Pay
coupa_pay/payments/show_history	CoupaPay/Payments	Show history	Coupa Pay
coupa_pay/payments/ store_graph_display	CoupaPay/Payments	Store graph display	Coupa Pay
coupa_pay/payments/update	CoupaPay/Payments	Update	Coupa Pay
coupa_pay_invoices/index	CoupaPay/Invoices	Index	Coupa Pay
coupa_pay_payment_batches/index	CoupaPay/Payment Batches	Index	Coupa Pay
coupa_pay_payments/index	CoupaPay/Payments	Index	Coupa Pay

Payment Processor

Permission	Controller	Action	Feature
coupa_pay/invoices/data_graph	CoupaPay/Invoices	Data Graph	Coupa Pay
coupa_pay/invoices/ search_coupa_pay_invoice_table	CoupaPay/Invoices	Search CoupaPay Invoice Table	Coupa Pay
coupa_pay/invoices/ store_graph_display	CoupaPay/Invoices	Store graph display	Coupa Pay
coupa_pay/payment_batches/create	CoupaPay/Payment Batches	Create	Coupa Pay
coupa_pay/payment_batches/ data_graph	CoupaPay/Payment Batches	Data Graph	Coupa Pay
coupa_pay/payment_batches/ destroy_payment	CoupaPay/Payment Batches	Destroy Payment	Coupa Pay
coupa_pay/payment_batches/edit	CoupaPay/Payment Batches	Edit	Coupa Pay
coupa_pay/payment_batches/ search_coupa_pay_payment_batch_table	CoupaPay/Payment Batches	Search CoupaPay Payment Batch Table	Coupa Pay
coupa_pay/payment_batches/show	CoupaPay/Payment Batches	Show	Coupa Pay
coupa_pay/payment_batches/ show_history	CoupaPay/Payment Batches	Show history	Coupa Pay
coupa_pay/payment_batches/ store_graph_display	CoupaPay/Payment Batches	Store graph display	Coupa Pay
coupa_pay/payment_batches/ submit_for_approval	CoupaPay/Payment Batches	Submit for approval	Coupa Pay
coupa_pay/payment_batches/update	CoupaPay/Payment Batches	Update	Coupa Pay
coupa_pay/payment_batches/ update_approval_chain	CoupaPay/Payment Batches	Update approval chain	Coupa Pay
coupa_pay/payments/cancel	CoupaPay/Payments	Cancel	Coupa Pay
coupa_pay/payments/data_graph	CoupaPay/Payments	Data Graph	Coupa Pay

Permission	Controller	Action	Feature
coupa_pay/payments/destroy_detail	CoupaPay/Payments	Destroy Detail	Coupa Pay
coupa_pay/payments/edit	CoupaPay/Payments	Edit	Coupa Pay
coupa_pay/payments/search_coupa_pay_payment_table	CoupaPay/Payments	Search CoupaPay Payment Table	Coupa Pay
coupa_pay/payments/show	CoupaPay/Payments	Show	Coupa Pay
coupa_pay/payments/show_history	CoupaPay/Payments	Show history	Coupa Pay
coupa_pay/payments/store_graph_display	CoupaPay/Payments	Store graph display	Coupa Pay
coupa_pay/payments/update	CoupaPay/Payments	Update	Coupa Pay
coupa_pay_invoices/index	CoupaPay/Invoices	Index	Coupa Pay
coupa_pay_payment_batches/index	CoupaPay/Payment Batches	Index	Coupa Pay
coupa_pay_payments/index	CoupaPay/Payments	Index	Coupa Pay

Payment Releaser

Permission	Controller	Action	Feature
coupa_pay/invoices/data_graph	CoupaPay/Invoices	Data Graph	Coupa Pay
coupa_pay/invoices/search_coupa_pay_invoice_table	CoupaPay/Invoices	Search CoupaPay Invoice Table	Coupa Pay
coupa_pay/invoices/store_graph_display	CoupaPay/Invoices	Store graph display	Coupa Pay
coupa_pay/payment_batches/data_graph	CoupaPay/Payment Batches	Data Graph	Coupa Pay
coupa_pay/payment_batches/release	CoupaPay/Payment Batches	Release	Coupa Pay
coupa_pay/payment_batches/search_coupa_pay_payment_batch_table	CoupaPay/Payment Batches	Search CoupaPay Payment Batch Table	Coupa Pay
coupa_pay/payment_batches/show	CoupaPay/Payment Batches	Show	Coupa Pay
coupa_pay/payment_batches/show_history	CoupaPay/Payment Batches	Show history	Coupa Pay
coupa_pay/payment_batches/store_graph_display	CoupaPay/Payment Batches	Store graph display	Coupa Pay
coupa_pay/payment_batches/update_approval_chain	CoupaPay/Payment Batches	Update approval chain	Coupa Pay
coupa_pay/payments/cancel	CoupaPay/Payments	Cancel	Coupa Pay
coupa_pay/payments/data_graph	CoupaPay/Payments	Data Graph	Coupa Pay
coupa_pay/payments/search_coupa_pay_payment_table	CoupaPay/Payments	Search CoupaPay Payment Table	Coupa Pay
coupa_pay/payments/show	CoupaPay/Payments	Show	Coupa Pay
coupa_pay/payments/show_history	CoupaPay/Payments	Show history	Coupa Pay
coupa_pay/payments/store_graph_display	CoupaPay/Payments	Store graph display	Coupa Pay

Permission	Controller	Action	Feature
coupa_pay_invoices/index	CoupaPay/Invoices	Index	Coupa Pay
coupa_pay_payment_batches/index	CoupaPay/Payment Batches	Index	Coupa Pay
coupa_pay_payments/index	CoupaPay/Payments	Index	Coupa Pay

Payments Admin

Permission	Controller	Action	Feature
coupa_pay/invoices/data_graph	CoupaPay/Invoices	Data Graph	Coupa Pay
coupa_pay/invoices/ search_coupa_pay_invoice_table	CoupaPay/Invoices	Search CoupaPay Invoice Table	Coupa Pay
coupa_pay/invoices/ store_graph_display	CoupaPay/Invoices	Store graph display	Coupa Pay
coupa_pay/payment_batches/ add_approver	CoupaPay/Payment Batches	Add approver	Coupa Pay
coupa_pay/payment_batches/approve	CoupaPay/Payment Batches	Approve	Coupa Pay
coupa_pay/payment_batches/create	CoupaPay/Payment Batches	Create	Coupa Pay
coupa_pay/payment_batches/ data_graph	CoupaPay/Payment Batches	Data Graph	Coupa Pay
coupa_pay/payment_batches/ destroy_payment	CoupaPay/Payment Batches	Destroy Payment	Coupa Pay
coupa_pay/payment_batches/edit	CoupaPay/Payment Batches	Edit	Coupa Pay
coupa_pay/payment_batches/hold	CoupaPay/Payment Batches	Hold	Coupa Pay
coupa_pay/payment_batches/reject	CoupaPay/Payment Batches	Reject	Coupa Pay
coupa_pay/payment_batches/release	CoupaPay/Payment Batches	Release	Coupa Pay
coupa_pay/payment_batches/ search_coupa_pay_payment_batch_table	CoupaPay/Payment Batches	Search CoupaPay Payment Batch Table	Coupa Pay
coupa_pay/payment_batches/show	CoupaPay/Payment Batches	Show	Coupa Pay
coupa_pay/payment_batches/ show_history	CoupaPay/Payment Batches	Show history	Coupa Pay
coupa_pay/payment_batches/ store_graph_display	CoupaPay/Payment Batches	Store graph display	Coupa Pay
coupa_pay/payment_batches/ submit_for_approval	CoupaPay/Payment Batches	Submit for approval	Coupa Pay
coupa_pay/payment_batches/update	CoupaPay/Payment Batches	Update	Coupa Pay
coupa_pay/payment_batches/ update_approval_chain	CoupaPay/Payment Batches	Update approval chain	Coupa Pay
coupa_pay/payment_batches/withdraw	CoupaPay/Payment Batches	Withdraw	Coupa Pay
coupa_pay/payments/cancel	CoupaPay/Payments	Cancel	Coupa Pay
coupa_pay/payments/data_graph	CoupaPay/Payments	Data Graph	Coupa Pay
coupa_pay/payments/destroy_detail	CoupaPay/Payments	Destroy Detail	Coupa Pay
coupa_pay/payments/edit	CoupaPay/Payments	Edit	Coupa Pay

Permission	Controller	Action	Feature
coupa_pay/payments/ search_coupa_pay_payment_table	CoupaPay/Payments	Search CoupaPay Payment Table	Coupa Pay
coupa_pay/payments/show	CoupaPay/Payments	Show	Coupa Pay
coupa_pay/payments/show_history	CoupaPay/Payments	Show history	Coupa Pay
coupa_pay/payments/ store_graph_display	CoupaPay/Payments	Store graph display	Coupa Pay
coupa_pay/payments/update	CoupaPay/Payments	Update	Coupa Pay
coupa_pay_invoices/index	CoupaPay/Invoices	Index	Coupa Pay
coupa_pay_payment_batches/index	CoupaPay/Payment Batches	Index	Coupa Pay
coupa_pay_payments/index	CoupaPay/Payments	Index	Coupa Pay

Purchase Order Change Manager

Permission	Controller	Action	Feature
order_header_changes/add_approver	Order Header Changes	Add approver	Enhanced Change Order Process
order_header_changes/add_line	Order Header Changes	Add line	Enhanced Change Order Process
order_header_changes/approve	Order Header Changes	Approve	Enhanced Change Order Process
order_header_changes/cancel	Order Header Changes	Cancel	Enhanced Change Order Process
order_header_changes/ cancel_order_header	Order Header Changes	Cancel order header	Enhanced Change Order Process
order_header_changes/ change_supplier_fields	Order Header Changes	Change supplier fields	Enhanced Change Order Process
order_header_changes/create	Order Header Changes	Create	Enhanced Change Order Process
order_header_changes/edit	Order Header Changes	Edit	Enhanced Change Order Process
order_header_changes/hold	Order Header Changes	Hold	Enhanced Change Order Process
order_header_changes/initiate_change	Order Header Changes	Initiate PO Change	Enhanced Change Order Process
order_header_changes/new	Order Header Changes	New	Enhanced Change Order Process
order_header_changes/reject	Order Header Changes	Reject	Enhanced Change Order Process
order_header_changes/ remove_and_regenerate	Order Header Changes	Remove and Regenerate	Enhanced Change Order Process
order_header_changes/ remove_approval	Order Header Changes	Remove approval	Enhanced Change Order Process
order_header_changes/ resend_change_approval	Order Header Changes	Resend Change Approval	Enhanced Change Order Process
order_header_changes/show	Order Header Changes	Show	Enhanced Change Order Process
order_header_changes/show_history	Order Header Changes	Show history	Enhanced Change Order Process
order_header_changes/update	Order Header Changes	Update	Enhanced Change Order Process
order_header_changes/ update_hide_price	Order Header Changes	Update Hide Price	Enhanced Change Order Process
order_headers/acknowledge	Order Headers	Acknowledge	Enhanced Change Order Process

Permission	Controller	Action	Feature
order_headers/ update_supplier_order_number	Order Headers	Update supplier order number	Enhanced Change Order Process

Virtual P-Card Admin

Permission	Controller	Action	Feature
charges/index	Charges	Index	Virtual P-Card Payments
charges/search_charge_table	Charges	Search Charges table	Virtual P-Card Payments
charges/show	Charges	Show	Virtual P-Card Payments
coupa_pay_payment_partners/create	Payment Partners	Create	Virtual P-Card Payments
coupa_pay_payment_partners/edit	Payment Partners	Edit	Virtual P-Card Payments
coupa_pay_payment_partners/index	Payment Partners	Index	Virtual P-Card Payments
coupa_pay_payment_partners/new	Payment Partners	New	Virtual P-Card Payments
coupa_pay_payment_partners/ search_payment_partner_table	Payment Partners	Search Payment Partner table	Virtual P-Card Payments
coupa_pay_payment_partners/show	Payment Partners	Show	Virtual P-Card Payments
coupa_pay_payment_partners/update	Payment Partners	Update	Virtual P-Card Payments
coupa_pay_statements/index	Statements	Index	Virtual P-Card Payments
coupa_pay_statements/ search_charge_table	Statements	Search Charges table	Virtual P-Card Payments
coupa_pay_statements/ search_statement_stable	Statements	Search Statement Stable	Virtual P-Card Payments
coupa_pay_statements/show	Statements	Show	Virtual P-Card Payments
coupa_pay_statements/ statement_list_csv	Statements	Statement table list CSV	Virtual P-Card Payments
coupa_pay_virtual_cards/index	Virtual Cards	Index	Virtual P-Card Payments
coupa_pay_virtual_cards/reissue	Virtual Cards	Reissue	Virtual P-Card Payments
coupa_pay_virtual_cards/ search_virtual_card_table	Virtual Cards	Search Virtual Cards table	Virtual P-Card Payments
coupa_pay_virtual_cards/show	Virtual Cards	Show	Virtual P-Card Payments
coupa_pay_virtual_cards/transmit	Virtual Cards	Transmit	Virtual P-Card Payments
order_headers/charges	Order Headers	View Related Charges	Virtual P-Card Payments
order_headers/retry_virtual_card	Order Headers	Retry issuing a failed Virtual Card	Virtual P-Card Payments
order_headers/transmit_virtual_card	Order Headers	Transmit	Virtual P-Card Payments

Virtual P-Card Manager

Permission	Controller	Action	Feature
charges/index	Charges	Index	Virtual P-Card Payments
charges/search_charge_table	Charges	Search Charges table	Virtual P-Card Payments

Permission	Controller	Action	Feature
charges/show	Charges	Show	Virtual P-Card Payments
coupa_pay_statements/index	Statements	Index	Virtual P-Card Payments
coupa_pay_statements/ search_charge_table	Statements	Search Charges table	Virtual P-Card Payments
coupa_pay_statements/ search_statement_stable	Statements	Search Statement Stable	Virtual P-Card Payments
coupa_pay_statements/show	Statements	Show	Virtual P-Card Payments
coupa_pay_statements/ statement_list_csv	Statements	Statement table list CSV	Virtual P-Card Payments
coupa_pay_virtual_cards/index	Virtual Cards	Index	Virtual P-Card Payments
coupa_pay_virtual_cards/reissue	Virtual Cards	Reissue	Virtual P-Card Payments
coupa_pay_virtual_cards/ search_virtual_card_table	Virtual Cards	Search Virtual Cards table	Virtual P-Card Payments
coupa_pay_virtual_cards/show	Virtual Cards	Show	Virtual P-Card Payments
coupa_pay_virtual_cards/transmit	Virtual Cards	Transmit	Virtual P-Card Payments
order_headers/charges	Order Headers	View Related Charges	Virtual P-Card Payments
order_headers/retry_virtual_card	Order Headers	Retry issuing a failed Virtual Card	Virtual P-Card Payments
order_headers/transmit_virtual_card	Order Headers	Transmit	Virtual P-Card Payments

Virtual P-Card Processor

Permission	Controller	Action	Feature
coupa_pay_virtual_cards/index	Virtual Cards	Index	Virtual P-Card Payments
coupa_pay_virtual_cards/reissue	Virtual Cards	Reissue	Virtual P-Card Payments
coupa_pay_virtual_cards/ search_virtual_card_table	Virtual Cards	Search Virtual Cards table	Virtual P-Card Payments
coupa_pay_virtual_cards/show	Virtual Cards	Show	Virtual P-Card Payments
coupa_pay_virtual_cards/transmit	Virtual Cards	Transmit	Virtual P-Card Payments
order_headers/charges	Order Headers	View Related Charges	Virtual P-Card Payments
order_headers/retry_virtual_card	Order Headers	Retry issuing a failed Virtual Card	Virtual P-Card Payments
order_headers/transmit_virtual_card	Order Headers	Transmit	Virtual P-Card Payments

Updated Standard Roles

Accounting Supervisor

Permission	Controller	Action	Feature
contract_collaboration/author_contract	Contract Collaboration	Author Contract	Contract Integration with New Supplier Statuses

Permission	Controller	Action	Feature
invoices/pick_from_contract	Invoices	Pick Lines from Contract	Contract-Backed Invoicing Enhancements

Accounts Payable

Permission	Controller	Action	Feature
contract_collaboration/author_contract	Contract Collaboration	Author Contract	Contract Integration with New Supplier Statuses
invoices/pick_from_contract	Invoices	Pick Lines from Contract	Contract-Backed Invoicing Enhancements
legal_invoices/index	Legal Invoices	Index	Italian Compliance

Admin

Added permissions

Permission	Controller	Action	Feature
charges/index	Charges	Index	Virtual P-Card Payments
charges/search_charge_table	Charges	Search Charges table	Virtual P-Card Payments
charges/show	Charges	Show	Virtual P-Card Payments
commodity_translations/add_translation	Commodity Translations	Add Translation	Item and Commodity Translation
commodity_translations/bulk_loader	Commodity Translations	Bulk loader	Item and Commodity Translation
commodity_translations/commodity_translation_list_csv	Commodity Translations	Export commodity translations to csv/Excel file	Item and Commodity Translation
commodity_translations/create	Commodity Translations	Create	Item and Commodity Translation
commodity_translations/destroy	Commodity Translations	Destroy	Item and Commodity Translation
commodity_translations/edit	Commodity Translations	Edit	Item and Commodity Translation
commodity_translations/index	Commodity Translations	Index	Item and Commodity Translation
commodity_translations/list_csv	Commodity Translations	List csv	Item and Commodity Translation
commodity_translations/load_file	Commodity Translations	Load file	Item and Commodity Translation
commodity_translations/new	Commodity Translations	New	Item and Commodity Translation
commodity_translations/search_commodity_translation_table	Commodity Translations	Search Commodity Translations table	Item and Commodity Translation
commodity_translations/show	Commodity Translations	Show	Item and Commodity Translation
commodity_translations/show_results	Commodity Translations	Show results	Item and Commodity Translation
commodity_translations/update	Commodity Translations	Update	Item and Commodity Translation
contract_collaboration/author_contract	Contract Collaboration	Author Contract	Contract Integration with New Supplier Statuses
contracts/auto_complete	Contracts	Auto complete	Projects and Groups for R22
coupa_pay_payment_partners/create	Payment Partners	Create	Virtual P-Card Payments

Permission	Controller	Action	Feature
coupa_pay_payment_partners/edit	Payment Partners	Edit	Virtual P-Card Payments
coupa_pay_payment_partners/index	Payment Partners	Index	Virtual P-Card Payments
coupa_pay_payment_partners/new	Payment Partners	New	Virtual P-Card Payments
coupa_pay_payment_partners/ search_payment_partner_table	Payment Partners	Search Payment Partner table	Virtual P-Card Payments
coupa_pay_payment_partners/show	Payment Partners	Show	Virtual P-Card Payments
coupa_pay_payment_partners/update	Payment Partners	Update	Virtual P-Card Payments
coupa_pay_statements/index	Statements	Index	Virtual P-Card Payments
coupa_pay_statements/ search_charge_table	Statements	Search Charges table	Virtual P-Card Payments
coupa_pay_statements/ search_statement_stable	Statements	Search Statement Stable	Virtual P-Card Payments
coupa_pay_statements/show	Statements	Show	Virtual P-Card Payments
coupa_pay_statements/ statement_list_csv	Statements	Statement table list CSV	Virtual P-Card Payments
coupa_pay_virtual_cards/index	Virtual Cards	Index	Virtual P-Card Payments
coupa_pay_virtual_cards/reissue	Virtual Cards	Reissue	Virtual P-Card Payments
coupa_pay_virtual_cards/ search_virtual_card_table	Virtual Cards	Search Virtual Cards table	Virtual P-Card Payments
coupa_pay_virtual_cards/show	Virtual Cards	Show	Virtual P-Card Payments
coupa_pay_virtual_cards/transmit	Virtual Cards	Transmit	Virtual P-Card Payments
coupa_pay_virtual_cards/transmit	Virtual Cards	Transmit	Virtual P-Card Payments
inventory_manage_transactions/ bulk_loader	Inventory Manage Transactions	Bulk loader	Inventory Adjustment CSV
inventory_manage_transactions/ list_csv	Inventory Manage Transactions	List csv	Inventory Adjustment CSV
inventory_manage_transactions/ load_progress	Inventory Manage Transactions	Load progress	Inventory Adjustment CSV
inventory_manage_transactions/ show_results	Inventory Manage Transactions	Show results	Inventory Adjustment CSV
isearch_adapters/index	iSearch adapters overview	Index	Coupa Open Buy
isearch_adapters/ search_punchout_site_table	iSearch adapters overview	Search punchout site table	Coupa Open Buy
isearch_adapters/ synchronize_all_adapters	iSearch adapters overview	Synchronize all adapters with the iSearch API	Coupa Open Buy
legal_invoices/index	Legal Invoices	Index	Italian Compliance
order_headers/charges	Order Headers	View Related Charges	Virtual P-Card Payments
order_headers/retry_virtual_card	Order Headers	Retry issuing a failed Virtual Card	Virtual P-Card Payments
order_headers/transmit_virtual_card	Order Headers	Transmit	Virtual P-Card Payments
spend_guard/index	Spend Guard	Index	Spend Guard

Permission	Controller	Action	Feature
supplier_information/ cancel_remind_form	Supplier Information	Cancel Reminder for Form Response	Improved SIM Form Visibility through New Statuses, Aging, and Alerts
suppliers/evaluate_supplier	Suppliers	Evaluate Supplier	New Supplier Status: Evaluating
user_group_links/create	User Group Links	Create	Projects and Groups for R22
user_group_links/destroy	User Group Links	Destroy	Projects and Groups for R22
user_group_links/new	User Group Links	New	Projects and Groups for R22
user_groups/contract_list_csv	User Groups	Contract list csv	Projects and Groups for R22
user_groups/quote_request_list_csv	User Groups	Quote request list csv	Projects and Groups for R22
user_groups/search_contract_table	User Groups	Search contract table	Projects and Groups for R22
user_groups/ search_quote_request_table	User Groups	Search quote request table	Projects and Groups for R22
workflows/processes/create	Workflows/Processes	Create	Coupa Process Builder
workflows/processes/create	Workflows/Processes	Create	Coupa Process Builder
workflows/processes/destroy	Workflows/Processes	Destroy	Coupa Process Builder
workflows/processes/edit	Workflows/Processes	Edit	Coupa Process Builder
workflows/processes/index	Workflows/Processes	Index	Coupa Process Builder
workflows/processes/new	Workflows/Processes	New	Coupa Process Builder
workflows/processes/update	Workflows/Processes	Update	Coupa Process Builder

Removed permissions

Permission	Controller	Action	Feature
order_headers/reopen	Order Headers	Reopen	Future functionality

Buyer

Added permissions

Permission	Controller	Action	Feature
contract_collaboration/author_contract	Contract Collaboration	Author Contract	Contract Integration with New Supplier Statuses
order_lines/reopen	Order Lines	Reopen for Receiving	Future functionality
order_lines/soft_close_for_invoicing	Order Lines	Soft Close for Invoicing	Future functionality
order_lines/soft_close_for_receiving	Order Lines	Soft Close for Receiving	Future functionality
suppliers/evaluate_supplier	Suppliers	Evaluate Supplier	New Supplier Status: Evaluating

Removed permissions

Permission	Controller	Action	Feature
order_headers/reopen	Order Headers	Reopen	Future functionality

Central Receiving

Permission	Controller	Action	Feature
order_lines/reopen	Order Lines	Reopen for Receiving	Future functionality
order_lines/soft_close_for_invoicing	Order Lines	Soft Close for Invoicing	Future functionality
order_lines/soft_close_for_receiving	Order Lines	Soft Close for Receiving	Future functionality

Dashboard

Permission	Controller	Action	Feature
spend_guard/index	Spend Guard	Index	Spend Guard

Edit Contract as Approver

Permission	Controller	Action	Feature
contract_collaboration/author_contract	Contract Collaboration	Author Contract	Contract Integration with New Supplier Statuses

Expense User

Permission	Controller	Action	Feature
expenses/expense_reports/send_back_line	Expenses/Expense Reports	Sending expense line back to submitter	Send Expense Lines Back

Supplier

Permission	Controller	Action	Feature
supplier_invoices/download_invoice_zip	Supplier Invoices	Download invoice zip	Bulk Export Legal Invoices

Supplier Manager

Permission	Controller	Action	Feature
supplier_information/cancel_remind_form	Supplier Information	Cancel Reminder for Form Response	Improved SIM Form Visibility through New Statuses, Aging, and Alerts
suppliers/evaluate_supplier	Suppliers	Evaluate Supplier	New Supplier Status: Evaluating

User

Permission	Controller	Action	Feature
order_headers/charges	Order Headers	View Related Charges	Virtual P-Card Payments
order_headers/retry_virtual_card	Order Headers	Retry issuing a failed Virtual Card	Virtual P-Card Payments
order_headers/transmit_virtual_card	Order Headers	Transmit	Virtual P-Card Payments
order_pads/visual_order_list	Order Pads	Visual Order List	Visual Ordering

Permission	Controller	Action	Feature
user/recent_activity	User	Recent Activity	Homepage Changes
user/search_work_confirmation_header_table	User	Search Service/Time Sheets	Service Maestro enhancements
user/work_confirmation_header_list_csv	User	Search Service/Time Sheets list CSV	Service Maestro enhancements
user/work_confirmation_headers	User	Service/Time Sheets	Service Maestro enhancements
user_groups/contract_list_csv	User Groups	Contract list csv	Projects and Groups for R22
user_groups/quote_request_list_csv	User Groups	Quote request list csv	Projects and Groups for R22
user_groups/search_contract_table	User Groups	Search contract table	Projects and Groups for R22
user_groups/search_quote_request_table	User Groups	Search quote request table	Projects and Groups for R22

New Supplier/CSP Roles

These new roles give Coupa Supplier Portal admins greater flexibility and control over what content supplier users can access through the CSP as part of the August 17 Release. Although they are available in the Coupa Platform, do not assign these roles to Coupa users.

CSP Catalog

Permission	Controller	Action
addresses/create	Addresses	Create
addresses/new_popup	Addresses	New popup
addresses/picker	Addresses	Picker
addresses/search_address_table	Addresses	Search address table
addresses/search_bill_to_address_table	Addresses	Search Bill To Address Table
addresses/search_picker_address_table	Addresses	Search picker address table
addresses/search_picker_bill_to_address_table	Addresses	Search Picker Bill To Address Table
addresses/sort_address_table	Addresses	Sort address table
attachments/attach	Attachments	Attach
attachments/create	Attachments	Create
attachments/destroy	Attachments	Destroy
attachments/retrieve	Attachments	Retrieve
attachments/update	Attachments	Update
catalogs/connect_catalog_item_list_csv	Catalogs	Connect catalog item list csv
catalogs/connect_catalog_list_csv	Catalogs	Connect catalog list csv
catalogs/connect_catalog_supplier_item_list_csv	Catalogs	Connect catalog supplier item list csv
catalogs/create	Catalogs	Create

Permission	Controller	Action
catalogs/delete	Catalogs	Delete
catalogs/edit	Catalogs	Edit
catalogs/index	Catalogs	Index
catalogs/new	Catalogs	New
catalogs/search_catalog_supplier_item_table	Catalogs	Search catalog supplier item table
catalogs/search_connect_catalog_supplier_item_table	Catalogs	Search connect catalog supplier item table
catalogs/search_connect_catalog_table	Catalogs	Search connect catalog table
catalogs/search_supplier_item_table	Catalogs	Search supplier item table
catalogs/show	Catalogs	Show
catalogs/supplier_item_list_csv	Catalogs	Supplier item list csv
catalogs/update	Catalogs	Update
comments/add_comment	Comments	Add Comment
data_table/add_condition	Data Table	Add condition
data_table/create_content_group_view	Data Table	Create content group restricted views
data_table/create_global_view	Data Table	Create global views
data_table/create_view	Data Table	Create private views
data_table/destroy_view	Data Table	Destroy view
data_table/edit_view	Data Table	Edit view
data_table/list_csv	Data Table	List csv
data_table/new_view	Data Table	New view
data_table/update_columns	Data Table	Update columns
data_table/update_view	Data Table	Update view
item_updates/bulk_field_descriptions	Item updates	Bulk field descriptions
item_updates/bulk_loader	Item updates	Bulk loader
item_updates/create	Item updates	Create
item_updates/delete	Item updates	Delete
item_updates/destroy	Item updates	Destroy
item_updates/edit	Item updates	Edit
item_updates/list_csv	Item updates	List csv
item_updates/load_file	Item updates	Load file
item_updates/load_progress	Item updates	Load progress
item_updates/new	Item updates	New
item_updates/show	Item updates	Show
item_updates/show_results	Item updates	Show results

Permission	Controller	Action
item_updates/update	Item updates	Update
items/show	Items	Show
lookup_values/auto_complete	Lookup values	Auto complete
uoms/auto_complete	Uoms	Auto complete
user/home	User	Home

CSP Invoice

Permission	Controller	Action
addresses/create	Addresses	Create
addresses/new_popup	Addresses	New popup
addresses/picker	Addresses	Picker
addresses/search_address_table	Addresses	Search address table
addresses/search_bill_to_address_table	Addresses	Search Bill To Address Table
addresses/search_picker_address_table	Addresses	Search picker address table
addresses/search_picker_bill_to_address_table	Addresses	Search Picker Bill To Address Table
addresses/sort_address_table	Addresses	Sort address table
attachments/attach	Attachments	Attach
attachments/create	Attachments	Create
attachments/destroy	Attachments	Destroy
attachments/retrieve	Attachments	Retrieve
attachments/update	Attachments	Update
comments/add_comment	Comments	Add Comment
data_table/add_condition	Data Table	Add condition
data_table/create_content_group_view	Data Table	Create content group restricted views
data_table/create_global_view	Data Table	Create global views
data_table/create_view	Data Table	Create private views
data_table/destroy_view	Data Table	Destroy view
data_table/edit_view	Data Table	Edit view
data_table/list_csv	Data Table	List csv
data_table/new_view	Data Table	New view
data_table/update_columns	Data Table	Update columns
data_table/update_view	Data Table	Update view
invoice_lines/pick_account	Invoice Lines	Pick account
invoices/legal_invoice	Invoices	Legal invoice

Permission	Controller	Action
invoices/retrieve_clearance_document	Invoices	Retrieve Clearance Document
invoices/search_show_invoice_line_table	Invoices	Search Show Invoice Line Table
lookup_values/auto_complete	Lookup values	Auto complete
supplier_accepted_terms/create	Supplier Accepted Terms	Create
supplier_accepted_terms/csn_read	Supplier Accepted Terms	Csn Read
supplier_accepted_terms/read	Supplier Accepted Terms	Read
supplier_information/csp_remit_to_address_picker	Supplier Information	Csp Remit To Address Picker
supplier_invoices/accelerate_payment	Supplier Invoices	Accelerate Payment
supplier_invoices/accelerate_payment_popup	Supplier Invoices	Accelerate Payment Popup
supplier_invoices/add_blank_line	Supplier Invoices	Add blank line
supplier_invoices/add_blank_tax_line	Supplier Invoices	Add blank tax line
supplier_invoices/autocomplete_invoice_header	Supplier Invoices	Autocomplete Invoice Header
supplier_invoices/calculate	Supplier Invoices	Calculate
supplier_invoices/calculate_tax_amount	Supplier Invoices	Calculate tax amount
supplier_invoices/change_buyer_tax_registration	Supplier Invoices	Change Buyer Tax Registration
supplier_invoices/change_supplier_tax_registration	Supplier Invoices	Change Supplier Tax Registration
supplier_invoices/create	Supplier Invoices	Create
supplier_invoices/create_remit_to_address	Supplier Invoices	Create Remit To Address
supplier_invoices/default_tax_info	Supplier Invoices	Default tax info
supplier_invoices/default_tax_rate_info	Supplier Invoices	Default Tax Rate Info
supplier_invoices/destroy	Supplier Invoices	Destroy
supplier_invoices/download_invoice_zip	Supplier Invoices	Download invoice zip
supplier_invoices/edit	Supplier Invoices	Edit
supplier_invoices/flip_contract	Supplier Invoices	Flip contract
supplier_invoices/flip_po	Supplier Invoices	Flip po
supplier_invoices/index	Supplier Invoices	Index
supplier_invoices/invalidate_invoice	Supplier Invoices	Invalidate Invoice
supplier_invoices/invoice_header_list_csv	Supplier Invoices	Invoice header list csv
supplier_invoices/item_auto_complete	Supplier Invoices	Item auto complete
supplier_invoices/list	Supplier Invoices	List
supplier_invoices/list_for_coupa_connect	Supplier Invoices	List for coupa connect
supplier_invoices/new_remit_to_address	Supplier Invoices	New Remit To Address
supplier_invoices/pick_remit_to_address	Supplier Invoices	Pick Remit To Address
supplier_invoices/registered_company_fields	Supplier Invoices	Registered Company Fields

Permission	Controller	Action
supplier_invoices/remit_to_address_picker	Supplier Invoices	Remit To Address Picker
supplier_invoices/remove	Supplier Invoices	Remove
supplier_invoices/resubmit	Supplier Invoices	Resubmit
supplier_invoices/retrieve_image_scan	Supplier Invoices	Retrieve image scan
supplier_invoices/retrieve_legal_invoice	Supplier Invoices	Retrieve legal invoice
supplier_invoices/search_connect_invoice_header_table	Supplier Invoices	Search connect invoice header table
supplier_invoices/search_invoice_header_table	Supplier Invoices	Search invoice header table
supplier_invoices/send_clearance_document_for_validation	Supplier Invoices	Send Clearance Document For Validation
supplier_invoices/show	Supplier Invoices	Show
supplier_invoices/sort_invoice_header_table	Supplier Invoices	Sort invoice header table
supplier_invoices/toggle_taxation	Supplier Invoices	Toggle taxation
supplier_invoices/update	Supplier Invoices	Update
supplier_invoices/update_buyer_vat_ids	Supplier Invoices	Update Buyer Vat Ids
supplier_invoices/update_invoice_header_account_segments	Supplier Invoices	Update invoice header account segments
supplier_invoices/update_notification_preferences	Supplier Invoices	Update Notification Preferences
supplier_invoices/void	Supplier Invoices	Void
terms_of_use/show	Terms Of use	Show
uoms/auto_complete	Uoms	Auto complete
user/home	User	Home

CSP Order

Permission	Controller	Action
addresses/create	Addresses	Create
addresses/new_popup	Addresses	New popup
addresses/picker	Addresses	Picker
addresses/search_address_table	Addresses	Search address table
addresses/search_bill_to_address_table	Addresses	Search Bill To Address Table
addresses/search_picker_address_table	Addresses	Search picker address table
addresses/search_picker_bill_to_address_table	Addresses	Search Picker Bill To Address Table
addresses/sort_address_table	Addresses	Sort address table
attachments/attach	Attachments	Attach
attachments/create	Attachments	Create
attachments/destroy	Attachments	Destroy
attachments/retrieve	Attachments	Retrieve

Permission	Controller	Action
attachments/update	Attachments	Update
comments/add_comment	Comments	Add Comment
data_table/add_condition	Data Table	Add condition
data_table/create_content_group_view	Data Table	Create content group restricted views
data_table/create_global_view	Data Table	Create global views
data_table/create_view	Data Table	Create private views
data_table/destroy_view	Data Table	Destroy view
data_table/edit_view	Data Table	Edit view
data_table/list_csv	Data Table	List csv
data_table/new_view	Data Table	New view
data_table/update_columns	Data Table	Update columns
data_table/update_view	Data Table	Update view
lookup_values/auto_complete	Lookup values	Auto complete
order_headers/show_custom	Order Headers	Show custom
supplier_order_headers/accelerate_payment	Supplier Order Headers	Accelerate Payment
supplier_order_headers/accelerate_payment_popup	Supplier Order Headers	Accelerate Payment Popup
supplier_order_headers/acknowledge	Supplier Order Headers	Acknowledge
supplier_order_headers/index	Supplier Order Headers	Index
supplier_order_headers/list	Supplier Order Headers	List
supplier_order_headers/list_for_coupa_connect	Supplier Order Headers	List for coupa connect
supplier_order_headers/order_header_list_csv	Supplier Order Headers	Order header list csv
supplier_order_headers/search_connect_order_header_table	Supplier Order Headers	Search connect order header table
supplier_order_headers/search_order_header_table	Supplier Order Headers	Search order header table
supplier_order_headers/search_supplier_order_line_table	Supplier Order Headers	Search Supplier Order Line Table
supplier_order_headers/ search_supplier_order_line_version_table	Supplier Order Headers	Search Supplier Order Line Version Table
supplier_order_headers/show	Supplier Order Headers	Show custom
supplier_order_headers/show_custom	Supplier Order Headers	Show custom
supplier_order_headers/sort_order_header_table	Supplier Order Headers	Sort order header table
supplier_order_headers/update	Supplier Order Headers	Update
supplier_order_headers/ update_order_header_account_segments	Supplier Order Headers	Update order header account
supplier_order_lines/list_for_coupa_connect	Supplier Order Lines	List for coupa connect
supplier_order_lines/order_line_list_csv	Supplier Order Lines	Order line list csv
supplier_order_lines/search_order_line_table	Supplier Order Lines	Search order line table

Permission	Controller	Action
uoms/auto_complete	Uoms	Auto complete
user/home	User	Home

CSP ASN

Permission	Controller	Action
addresses/create	Addresses	Create
addresses/new_popup	Addresses	New popup
addresses/picker	Addresses	Picker
addresses/search_address_table	Addresses	Search address table
addresses/search_bill_to_address_table	Addresses	Search Bill To Address Table
addresses/search_picker_address_table	Addresses	Search picker address table
addresses/search_picker_bill_to_address_table	Addresses	Search Picker Bill To Address Table
addresses/sort_address_table	Addresses	Sort address table
asn/supplier_headers/cancel	Asn/Supplier Headers	Cancel
asn/supplier_headers/connect_asn_header_list_csv	Asn/Supplier Headers	Connect Asn header List Csv
asn/supplier_headers/destroy	Asn/Supplier Headers	Destroy
asn/supplier_headers/edit	Asn/Supplier Headers	Edit
asn/supplier_headers/flip_to_asn	Asn/Supplier Headers	Flip To Asn
asn/supplier_headers/index	Asn/Supplier Headers	Index
asn/supplier_headers/search_connect_asn_header_table	Asn/Supplier Headers	Search Connect Asn Header Table
asn/supplier_headers/show	Asn/Supplier Headers	Show
asn/supplier_headers/update	Asn/Supplier Headers	Update
asn/supplier_lines/cancel	Asn/Supplier Lines	Cancel
asn/supplier_lines/delete	Asn/Supplier Lines	Delete
attachments/attach	Attachments	Attach
attachments/create	Attachments	Create
attachments/destroy	Attachments	Destroy
attachments/retrieve	Attachments	Retrieve
attachments/update	Attachments	Update
comments/add_comment	Comments	Add Comment
data_table/add_condition	Data Table	Add condition
data_table/create_content_group_view	Data Table	Create content group restricted views
data_table/create_global_view	Data Table	Create global views
data_table/create_view	Data Table	Create private views

Permission	Controller	Action
data_table/destroy_view	Data Table	Destroy view
data_table/edit_view	Data Table	Edit view
data_table/list_csv	Data Table	List csv
data_table/new_view	Data Table	New view
data_table/update_columns	Data Table	Update columns
data_table/update_view	Data Table	Update view
lookup_values/auto_complete	Lookup values	Auto complete
uoms/auto_complete	Uoms	Auto complete
user/home	User	Home

CSP Service and Time Sheet

Permission	Controller	Action
addresses/create	Addresses	Create
addresses/new_popup	Addresses	New popup
addresses/picker	Addresses	Picker
addresses/search_address_table	Addresses	Search address table
addresses/search_bill_to_address_table	Addresses	Search Bill To Address Table
addresses/search_picker_address_table	Addresses	Search picker address table
addresses/search_picker_bill_to_address_table	Addresses	Search Picker Bill To Address Table
addresses/sort_address_table	Addresses	Sort address table
attachments/attach	Attachments	Attach
attachments/create	Attachments	Create
attachments/destroy	Attachments	Destroy
attachments/retrieve	Attachments	Retrieve
attachments/update	Attachments	Update
comments/add_comment	Comments	Add Comment
data_table/add_condition	Data Table	Add condition
data_table/create_content_group_view	Data Table	Create content group restricted views
data_table/create_global_view	Data Table	Create global views
data_table/create_view	Data Table	Create private views
data_table/destroy_view	Data Table	Destroy view
data_table/edit_view	Data Table	Edit view
data_table/list_csv	Data Table	List csv
data_table/new_view	Data Table	New view

Permission	Controller	Action
data_table/update_columns	Data Table	Update columns
data_table/update_view	Data Table	Update view
lookup_values/auto_complete	Lookup values	Auto complete
uoms/auto_complete	Uoms	Auto complete
user/home	User	Home
work_confirmation/supplier_headers/cancel	Supplier Service/Time Sheets	Cancel
work_confirmation/supplier_headers/delete	Supplier Service/Time Sheets	Delete
work_confirmation/supplier_headers/edit	Supplier Service/Time Sheets	Edit
work_confirmation/supplier_headers/index	Supplier Service/Time Sheets	Index
work_confirmation/supplier_headers/new	Supplier Service/Time Sheets	New
work_confirmation/supplier_headers/save_as_draft	Supplier Service/Time Sheets	Save As Draft
work_confirmation/supplier_headers/ search_connect_work_confirmation_header_table	Supplier Service/Time Sheets	CSP Search Service/Time Sheets
work_confirmation/supplier_headers/show	Supplier Service/Time Sheets	Show
work_confirmation/supplier_headers/submit	Supplier Service/Time Sheets	Submit
work_confirmation/supplier_headers/update	Supplier Service/Time Sheets	Update
work_confirmation/supplier_headers/withdraw	Supplier Service/Time Sheets	Withdraw

CSP Profile

Permission	Controller	Action
attachments/attach	Attachments	Attach
attachments/create	Attachments	Create
attachments/destroy	Attachments	Destroy
attachments/retrieve	Attachments	Retrieve
attachments/update	Attachments	Update
comments/add_comment	Comments	Add Comment
easy_form_responses/create_child_widget	Form Responses	Create Child Widget
easy_form_responses/delete_child_widget	Form Responses	Delete Child Widget
supplier_information/csp_remit_to_address_picker	Supplier Information	Csp Remit To Address Picker
supplier_information/ csp_remit_to_address_populate_to_sim_easy_form_response	Supplier Information	Csp Remit To Address Populate To Sim Form Response
uoms/auto_complete	Uoms	Auto complete
user/home	User	Home

Release 22 Custom Roles Updates

Overview

In order to make sure your custom roles continue to behave as expected after an upgrade, sometimes we'll add permissions to your custom roles as part of the upgrade migration. We do this only to maintain existing functionality for a custom role (i.e. during a permission split) and we'll never add new functionality to your custom role.

Migrations

This table shows which permissions will drive a new permission to be added to your custom roles. If your custom roles has any of the permissions listed in the left-hand column, they'll get the permission in the middle column.

If your custom role has this permission...	Your custom role automatically gets these permissions	Feature
Background Jobs Admin/Index	Inventory Manage Transactions/Bulk loader, Inventory Manage Transactions/List csv, Inventory Manage Transactions/Show results, Inventory Manage Transactions/Load progress	Inventory Adjustment CSV to Enable Mass Adjustments
Commodities/Edit	Commodity Translations/Add Translation, Commodity Translations/Create, Commodity Translations/Destroy, Commodity Translations/Edit, Commodity Translations/Index, Commodity Translations/New, Commodity Translations/Show, Commodity Translations/Update, Commodity Translations/Search Commodity Translations table	Item and Commodity Translations
Contracts/Edit	Contract Collaboration/Author Contract	Contract Integration with New Supplier Statuses
Expense Reports/Reject	Api/Expense Reports/Sending expense line back to submitter, Expenses/Expense Reports/Sending expense line back to submitter	Send Expense Lines Back to the Submitter
Expenses/Expense Risk/Show	Spend Guard/Index	Spend Guard
Object Definitions/Create	Workflows/Processes/Index, Workflows/Processes/Destroy, Workflows/Processes/New, Workflows/Processes/Edit, Workflows/Processes/Update, Workflows/Processes/Create	Coupa Process Builder
Order Headers/Close	Order Lines/Soft Close for Invoicing	Future functionality
Order Pads/Edit	Order Pads/Visual Order List	Visual Ordering
Supplier Information Form Responses/Show	Supplier Information Form Responses/Edit, Supplier Information Form Responses/Destroy	R22 Resolved Issue
Tax Code Rules/Index	Legal Invoices/Index	Italian Compliance
User Groups/Show	User Groups/Contract list csv, User Groups/Quote request list csv, User Groups/Search contract table, User Groups/Search quote request table, User Group Links/New, Contracts/Auto complete, User Group Links/Destroy	Projects and Groups for R22
User/Recent reqs	User/Recent Activity	Homepage changes

Release 22 Permission Updates

Overview

This list shows permissions we've added or removed in R22. It's organized by controller, showing each new action and what feature introduced the new action. See How to Use Release Notes more info

If you're not sure of the difference between a controller, an action, and a permission, see Understanding Roles and Permissions.

New Controllers

This is a list of new controllers we added in R22. See List of Coupa Controllers for the full list.

- Charges
- CoupaPay/Invoices
- CoupaPay/Payment Batches
- CoupaPay/Payments
- Payment Partners
- CoupaPay/Statements
- Virtual Cards
- Inventory Manage Transactions
- iSearch adapters overview
- Legal Invoices
- Spend Guard
- User Group Links
- Processes

Permissions Added

Charges

Permission	Action	Description	Feature
charges/index	Index	View list of charges	Virtual P-Card Payments
charges/search_charge_table	Search Charge Table	Search the Charges data table	Virtual P-Card Payments
charges/show	Show	View charge details	Virtual P-Card Payments

Commodity Translations

Permission	Action	Description	Feature
commodity_translations/ add_translation	Add Translation	Add translation for the commodity	Item and Commodity Translation

Permission	Action	Description	Feature
commodity_translations/bulk_loader	Bulk Loader	Use csv file to load/update commodity translations	Item and Commodity Translation
commodity_translations/commodity_translation_list_csv	Export commodity translations to csv/Excel file	Export commodity translations to csv/Excel file	Item and Commodity Translation
commodity_translations/create	Create	Create translation for the commodity	Item and Commodity Translation
commodity_translations/destroy	Destroy	Delete translation for the commodity	Item and Commodity Translation
commodity_translations/edit	Edit	Edit translation for the commodity	Item and Commodity Translation
commodity_translations/index	Index	List commodity translations	Item and Commodity Translation
commodity_translations/list_csv	List csv	Download CSV Template / Data for Commodity Translations	Item and Commodity Translation
commodity_translations/load_file	Load file	Click on 'Finish Upload' to upload file for Commodity Translations	Item and Commodity Translation
commodity_translations/new	New	Create translation for the commodity	Item and Commodity Translation
commodity_translations/search_commodity_translation_table	Search Commodity Translation table	Search commodity translations table	Item and Commodity Translation
commodity_translations/show	Show	Show translation for the commodity	Item and Commodity Translation
commodity_translations/show_results	Show results	Show Commodity Translations bulk loader results	Item and Commodity Translation
commodity_translations/update	Update	Update translation for the comomdity	Item and Commodity Translation

Contract Collaboration

Permission	Action	Description	Feature
contract_collaboration/author_contract	Author contract	Author Contract button	Contract Integration with New Supplier Statuses

Contracts

Permission	Action	Description	Feature
contracts/auto_complete	Auto complete	Auto complete for contract names	Projects and Groups for R22

CoupaPay/Invoices

Permission	Action	Description	Feature
coupa_pay/invoices/data_graph	Data Graph	View data graph for Invoices to Pay	Coupa Pay
coupa_pay/invoices/index	Index	Allows access to CoupaPay Invoices table	Coupa Pay
coupa_pay/invoices/search_coupa_pay_invoice_table	Search CoupaPay Invoice Table	Search Invoices to Pay Data Table	Coupa Pay
coupa_pay/invoices/store_graph_display	Store graph display	Store data graph setting for Invoices to Pay	Coupa Pay

CoupaPay/Payment Batches

Permission	Action	Description	Feature
coupa_pay/payment_batches/add_approver	Add approver	Add approver to Payment Batch	Coupa Pay
coupa_pay/payment_batches/approve	Approve	Approve Payment Batch	Coupa Pay
coupa_pay/payment_batches/create	Create	Create Payment Batch	Coupa Pay
coupa_pay/payment_batches/data_graph	Data Graph	View data graph for Payment Batches	Coupa Pay
coupa_pay/payment_batches/destroy_payment	Destroy Payment	Destroy Payment	Coupa Pay
coupa_pay/payment_batches/edit	Edit	Edit Payment Batch	Coupa Pay
coupa_pay/payment_batches/hold	Hold	Hold Payment Batch	Coupa Pay
coupa_pay/payment_batches/index	Index	Allows access to CoupaPay Payment Batches table	Coupa Pay
coupa_pay/payment_batches/reject	Reject	Reject Payment Batch	Coupa Pay
coupa_pay/payment_batches/release	Release	Release Payment Batch	Coupa Pay
coupa_pay/payment_batches/search_coupa_pay_payment_batch_table	Search CoupaPay Payment Batch Table	Search Payment Batch Data Table	Coupa Pay
coupa_pay/payment_batches/show	Show	View Payment Batch details	Coupa Pay
coupa_pay/payment_batches/show_history	Show history	View Payment history	Coupa Pay
coupa_pay/payment_batches/store_graph_display	Store graph display	Store data graph setting for Payment Batches	Coupa Pay
coupa_pay/payment_batches/submit_for_approval	Submit for approval	Submit Payment Batch for approval	Coupa Pay
coupa_pay/payment_batches/update	Update	Update Payment Batch	Coupa Pay
coupa_pay/payment_batches/update_approval_chain	Update approval chain	Update approval chain	Coupa Pay
coupa_pay/payment_batches/withdraw	Withdraw	Withdraw Payment Batch	Coupa Pay

CoupaPay/Payments

Permission	Action	Description	Feature
coupa_pay/payments/cancel	Cancel	Close edit/view mode of payment	Coupa Pay
coupa_pay/payments/data_graph	Data Graph	View Payments data graph	Coupa Pay
coupa_pay/payments/destroy_detail	Destroy Detail	Destroy Payment Detail	Coupa Pay
coupa_pay/payments/edit	Edit	Edit Payment	Coupa Pay
coupa_pay/payments/index	Index	Allows access to CoupaPay Payments table	Coupa Pay
coupa_pay/payments/search_coupa_pay_payment_table	Search CoupaPay Payment Table	Search Payment Data Table	Coupa Pay
coupa_pay/payments/show	Show	View Payment Information	Coupa Pay

Permission	Action	Description	Feature
coupa_pay/payments/show_history	Show history	View Payment history	Coupa Pay
coupa_pay/payments/store_graph_display	Store graph display	Store data graph setting for Payments	Coupa Pay
coupa_pay/payments/update	Update	Update Payment	Coupa Pay

Payment Partners

Permission	Action	Description	Feature
coupa_pay_payment_partners/create	Create	Create new payment partner	Coupa Pay
coupa_pay_payment_partners/edit	Edit	Update Payment Partner	Coupa Pay
coupa_pay_payment_partners/index	Index	Lists all payment partners	Coupa Pay
coupa_pay_payment_partners/new	New	Create new payment partner	Coupa Pay
coupa_pay_payment_partners/search_payment_partner_table	Search Payment Partner table	Search Data TAble for payment partners	Coupa Pay
coupa_pay_payment_partners/show	Show	View payment partner detail info	Coupa Pay
coupa_pay_payment_partners/update	Update	Update Payment Partner	Coupa Pay

CoupaPay/Statements

Permission	Action	Description	Feature
coupa_pay_statements/index	Index	Show list of Statements	Coupa Pay
coupa_pay_statements/search_charge_table	Search Charge table	Search charges on a statement	Coupa Pay
coupa_pay_statements/search_statement_table	Search Statement table	Search Statements data table	Coupa Pay
coupa_pay_statements/show	Show	See details and charges for a statement	Coupa Pay
coupa_pay_statements/statement_list_csv	Statement table list CSV	Export reports from Statements data table	Coupa Pay

Virtual Cards

Permission	Action	Description	Feature
coupa_pay_virtual_cards/cancel	Cancel		Virtual P-Card Payments
coupa_pay_virtual_cards/index	Index	Ability to view the virtual card data table page	Virtual P-Card Payments
coupa_pay_virtual_cards/reissue	Reissue	Ability to issue a new credit card for a PO if existing card expires	Virtual P-Card Payments
coupa_pay_virtual_cards/search_virtual_card_table	Search Virtual Cards Table	Ability to search virtual card data table	Virtual P-Card Payments
coupa_pay_virtual_cards/show	Show	Ability to a card's detail page	Virtual P-Card Payments
coupa_pay_virtual_cards/show_history	Show history	View Virtual Card history	Virtual P-Card Payments

Permission	Action	Description	Feature
coupa_pay_virtual_cards/transmit	Transmit	Ability to resend Virtual Card details if there is an issue	Virtual P-Card Payments

Expenses/Expense Reports

Permission	Action	Description	Feature
expenses/expense_reports/ send_back_line	Sending expense line back to submitter	Sending expense line back to submitter	Send Expense Lines Back

Inventory Manage Transactions

Permission	Action	Description	Feature
inventory_manage_transactions/ bulk_loader	bulk_loader	CSV Bulk Loader for Inventory transactions	Inventory Adjustment CSV
inventory_manage_transactions/ list_csv	list_csv	Download CSV Template / Data for Inventory Transactions	Inventory Adjustment CSV
inventory_manage_transactions/ load_progress	load_progress	Allows user to show Inventory transactions bulk loader progress	Inventory Adjustment CSV
inventory_manage_transactions/ show_results	show_results	Show Inventory Transactions bulk loader results	Inventory Adjustment CSV

Invoices

Permission	Action	Description	Feature
invoices/pick_from_contract	Pick Lines from Contract	Allow user to pick invoice lines from Contract.	Contract-Backed Invoicing Enhancements

iSearch adapters overview

Permission	Action	Description	Feature
isearch_adapters/index	Index	Access the iSearch adapters overview page.	Coupa Open Buy
isearch_adapters/ search_punchout_site_table	Search punchout site table	Search Punchout Site / adapter registration status data table.	Coupa Open Buy
isearch_adapters/ synchronize_all_adapters	Synchronize all adapters with the iSearch API	Synchronize all existing punchout sites with the iSearch adapters.	Coupa Open Buy

Legal Invoices

Permission	Action	Description	Feature
legal_invoices/index	Index	Used to show user legal invoices processing	Italian Compliance

Order Header Changes

Permission	Action	Description	Feature
order_header_changes/initiate_change	Initiate PO Change	Allow user to initiate PO Change	Buyer-Initiated PO Changes
order_header_changes/ change_supplier_fields	Change supplier fields	Allow user to change supplier fields during a PO change request	Buyer-Initiated PO Changes

Order Headers

Permission	Action	Description	Feature
order_headers/charges	View Related Charges	Show charges directly against the PO such as from a Virtual Card	Buyer-Initiated PO Changes
order_headers/retry_virtual_card	Retry issuing a failed Virtual Card	Retry to generate a virtual card if initial generation fails	Virtual P-Card Payments
order_headers/transmit_virtual_card	Transmit	Queue the latest virtual card for transmission to the supplier	Virtual P-Card Payments

Order Lines

Permission	Action	Description	Feature
order_lines/reopen_for_invoicing	reopen_for_invoicing	Allow users to reopen orders for invoicing and receiving	Future functionality
order_lines/reopen_for_receiving	reopen_for_receiving	Allow users to reopen orders for receiving	Future functionality
order_lines/soft_close_for_invoicing	soft_close_for_invoicing	Allow user to soft close order for invoicing	Future functionality
order_lines/soft_close_for_receiving	soft_close_for_receiving	Allow user to soft close order for receiving	Future functionality

Order Pads

Permission	Action	Description	Feature
order_pads/visual_order_list	Visual Order List	Edit visual order lists	Visual Ordering

Spend Guard

Permission	Action	Description	Feature
spend_guard/index	Index	Access to Global Spend Guard Dashboard	Spend Guard

Supplier Information

Permission	Action	Description	Feature
supplier_information/ cancel_remind_form	Cancel Reminder for Form Response	Stop Easy Form Response Reminder for this specific form from the buyer side	Improved SIM Form Visibility through New Statuses, Aging, and Alerts

Supplier Invoices

Permission	Action	Description	Feature
supplier_invoices/ download_invoice_zip	Download invoice zip	This action will download the legal invoices zip file created by background job	Bulk Export Legal Invoices

Suppliers

Permission	Action	Description	Feature
suppliers/evaluate_supplier	Evaluate Supplier	Ability to change the status of a supplier to evaluating	New Supplier Status: Evaluating

User

Permission	Action	Description	Feature
user/recent_activity	Recent Activity	View recent activity	Service Maestro enhancements
user/ search_work_confirmation_header_table	Search Service/Time Sheets	Search Service/Time Sheet data table on Activity Service/Time Sheets sub-tab	Service Maestro enhancements
user/ work_confirmation_header_list_csv	Search Service/Time Sheets list CSV	Export Service/Time Sheet data table on Activity page	Service Maestro enhancements
user/work_confirmation_headers	Service/Time Sheets	Access to Service/Time Sheets tab on Activity page	Service Maestro enhancements

User Group Links

Permission	Action	Description	Feature
user_group_links/create	Create	Allows the user to create a new link for a group	Projects and Groups for R22
user_group_links/destroy	Destroy	Allows to unlink a document	Projects and Groups for R22
user_group_links/new	New	Allows the user to create a new link for a group	Projects and Groups for R22

User Groups

Permission	Action	Description	Feature
user_groups/contract_list_csv	Contract list csv	Allows to export the data table of linked contracts	Projects and Groups for R22
user_groups/quote_request_list_csv	Quote request list csv	Allows to export the data table of linked sourcing events	Projects and Groups for R22
user_groups/search_contract_table	Search contract table	Allows to search the data table of linked contracts	Projects and Groups for R22
user_groups/ search_quote_request_table	Search quote request table	Allows to search the data table of linked sourcing events	Projects and Groups for R22

Processes

Permission	Action	Description	Feature
workflows/processes/create	create	Create a new workflow process	Coupa Process Builder
workflows/processes/destroy	destroy	Destroy a workflow process	Coupa Process Builder
workflows/processes/edit	edit	Edit an existing workflow process	Coupa Process Builder
workflows/processes/index	index	View the workflow processes data table	Coupa Process Builder
workflows/processes/new	new	Build a new workflow process	Coupa Process Builder
workflows/processes/update	update	Update an existing workflow process	Coupa Process Builder

Permissions Removed

Order Headers

Permission	Action	Description	Feature
order_headers/reopen	reopen	Allows user to reopen a PO if it was soft closed	

Integration Updates

This chapter contains the following topics:

Release 22 Flat File (CSV) Loader Changes

Overview

This list shows the changes we've made to our flat file (CSV) loaders across the Coupa platform.

If a column name is labeled as hidden this means the column is available for use in the loader, but it is not included in the template. To use hidden columns they need to be manually added to the CSV file that will be loaded.

Approval Group

Approval Group now supports the following field:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
Type	Blank for Groups or Project for Projects	NO	NO	NO		any	Projects and Groups

The descriptions for these fields are modified to reflect their use for both groups and projects.

Column Name	Change
Name	Name for Approval Group -> Name
Id	Coupa generated Id for Approval Group -> Coupa Generated Id
Active	If this Approval Group is currently active -> If this Project or Group is currently active
Users By Login	A semi-colon (;) separated list of Logins for all users in this group -> A semi-colon (;) separated list of Logins for ALL users of this project or group
Users By Employee Number	A semi-colon (;) separated list of Employee Numbers for ALL users of this group -> A semi-colon (;) separated list of Employee Numbers for ALL users of this project or group

Commodity Translation

Commodity Translation now supports the following field:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
Original Name	Original name of the master record	NO	NO	NO		any	Commodity Translations

Note: The Commodity Translation does not support automated SFTP loading from CSV, but CSV values can be loaded using the Bulk Loader Commodity Translation page.

External Order Header

External Order Header now supports the following fields:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
Bulk Price Conversion Numerator	Bulk Price Conversion Numerator	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM
Bulk Price Conversion Denominator	Bulk Price Conversion Denominator	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM

Invoice Header

Invoice Header now supports the following fields:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
Bulk Price Conversion Numerator	Conversion Numerator of the Bulk Price UOM	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM
Bulk Price Conversion Denominator	Conversion Denominator of the Bulk Price UOM	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM

Supplier

Supplier now supports the following field:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
Virtual Card Email	Email Address where Virtual P-Cards will be sent if Payment Method is Virtual Card	NO	YES	NO	string(255)	Any	Virtual P-Card Payments

The following Supplier field changed:

Column Name	Allowable Value	Description
Payment Method	Adds: ["virtual_card"]	Must be "Invoice", "P-Card", "Invoice Only", or "P-Card Only" -> Must be "Invoice", "P-Card", "Invoice Only", "P-Card Only", or "Virtual

Tax Code Rule

The following Tax Code Rule fields changed:

Column Name	Change	Feature
Jurisdiction	Domestic, EU, International -> Domestic, Intra-EU, Cross-Border	
Subcategory	Raw materials, Investment Materials, Services Exceptions -> Raw materials, Investment Goods, Services Exceptions	
Deductibility	Full, Partial, Non -> Fully, Partially, Not	

Note: The Tax Code Rule table does not support automated SFTP loading from CSV, but CSV values can be loaded using the Bulk Loader Tax Code Rule page.

User

The following User field changed:

Column Name	Change	Feature
Default Locale	Adds the following allowable value: es-IC	21.2 Maintenance Update

User Group

User Group adds the following field:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
Type	Blank for Groups or Project for Projects	NO	NO	NO	string(255)		Projects and Groups enhancements

The following fields in User Group are changed:

Name	Changed
Name	Name for Approval Group -> Name
Id	Coupa Generated Id for Approval Group -> Coupa Generated Id
Active	If this Approval Group is currently Active -> If this Project or Group is currently Active
Users By Login	A semi-colon (;) separated list of Logins for ALL users of this group -> A semi-colon (;) separated list of Logins for ALL users of this project or group
Users By Employee Number	A semi-colon (;) separated list of Employee Numbers for ALL users of this group -> A semi-colon (;) separated list of Employee Numbers for ALL users of this project or group
Open	Group open for everyone to join or owner must invite others -> Project or Group open for everyone to join or owner must invite others
Content Groups	Content Groups for the Group -> Content Groups for the Project or Group

Release 22 Flat File (CSV) Export Changes

Overview

This list shows the changes we've made to our flat file (CSV) exports across the Coupa platform.

If a column is shown as hidden, this means the column won't appear in the export unless it's populated.

Invoice Header

Invoice Header now supports CSV export of the following fields:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
delivery-date	The date of supply in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ.	NO	NO	NO	datetime	any	
registered-company-license-number	Company License Number	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
registered-company-register-legal-entities	Register Legal Entities	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
registered-company-name	Registered Company Name	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
dispute-method	Dispute Method, Possible values are: Auto, Manual	NO	NO	NO	string(10)	any	Auto Dispute Invoices Based on Validation Rules

Invoice Line

Invoice Line now supports export of the following fields:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
bulk-price-uom	Describes the UoM to express the Bulk Price. This is required if the line UoM is different than 'Bulk Price UoM'.	NO	NO	NO	string(6)	any	Bulk price with different UoM
bulk-price-conversion-numerator	Numerator value for the ratio to convert from 'Bulk Price UoM' to line UoM. Value defaults from corresponding PO line if invoice line UoM matches PO line UoM and the PO Bulk Price UoM matches the invoice 'Bulk Price UoM'.	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM
bulk-price-conversion-denominator	Denominator value for the ratio to convert from 'Bulk Price UoM' to line UoM. A blank is interpreted as 1 as long as 'Bulk Price UoM' is present.	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM

The following Invoice Line fields have changed:

Column Name	Change
bulk-price	Price of the bulk material -> Describes the non unit quantity price. This can be used to provide price agreed for a bulk quantity. This should be accompanied with 'Bulk Price Quantity' and optionally 'Bulk Price UoM', 'Bulk Price Conversion Numerator' and 'Bulk Price Conversion Denominator'.
bulk-price-qty	Quantity of the bulk material -> Describes the number of units of the line item the 'Bulk Price' describes the price for.

Supplier

Supplier now supports CSV export of the following field:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
Virtual Card Email	Email where Virtual Cards are sent when Payment Method is Virtual Card	NO	YES	NO	string(255)	any	Virtual P-Card Payments

The following Supplier field is changed:

Column Name	Change	Feature
Payment Method	Adds the option: virtual_card	Virtual P-Card Payments

Supplier Information Address

The Supplier Information Address now supports the following fields:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
Account Currency	Account Currency	NO	NO	NO	string(255)	any	New Primary Contact Subform
Bank Name	Bank Name.	NO	NO	No	string(255)	any	

The following Supplier Information Address field changed:

Column Name	Change
Account Currency	Now a required field

User

The following User field has changed:

Column Name	Change	Feature
Default Locale	Adds the allowable value: es-IC	21.2 Maintenance Update

Release 22 Inbound API Changes

Overview

This page lists R22 changes to the Coupa inbound API. For a more complete view refer to the Coupa API documentation.

Bulk Price

Bulk Price adds the following fields:

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
conversion_numerator	UOM conversion numerator	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM
conversion_denominator	UOM conversion denominator	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM

The following Bulk Price fields changed:

Element	Change
uom	Now a required field

Charge

This new API includes the following elements:

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
external_ref_id	Unique 3rd party system ID	NO	NO	NO	string(255)	any	Virtual P-Card Payments
coupa_pay_id	Unique Coupa Pay ID	NO	NO	NO	integer	any	Virtual P-Card Payments
coupa_pay_statement_id	Unique Coupa Pay Statement ID	NO	NO	NO	integer	any	Virtual P-Card Payments
charge_date	Date of the charge	NO	YES	NO	datetime	any	Virtual P-Card Payments
total	Total of the charge in the card base currency	NO	NO	NO	decimal	any	Virtual P-Card Payments
merchant_total	Total the merchant charged in merchant currency	NO	NO	NO	decimal	any	Virtual P-Card Payments
merchant_reference	Card provided merchant information	NO	NO	NO	string(255)	any	Virtual P-Card Payments
mcc	Merchant Category Code	NO	NO	NO	string(255)	any	Virtual P-Card Payments
card_provider_account	Card Provider Account	NO	NO	NO	string(255)	any	Virtual P-Card Payments
virtual_card	Coupa's unique ID for the virtual card	NO	YES	NO	interger	any	Virtual P-Card Payments
statement	Coupa's unique ID for the	NO	NO	NO	integer	any	Virtual P-Card Payments
supplier		NO	YES	NO	supplier	any	Virtual P-Card Payments
id	Unique Coupa ID	NO	NO	NO	integer	any	Virtual P-Card Payments
created_at	Automatically created by Coupa in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ	NO	NO	NO	datetime	any	Virtual P-Card Payments

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
updated_at	Automatically created by Coupa in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ	NO	NO	NO	datetime	any	Virtual P-Card Payments
virtual_card_id	Coupa ID for associated Virtual Card	NO	NO	NO	integer	any	Virtual P-Card Payments
statement_id	Unique Coupa ID	NO	NO	NO	integer	any	Virtual P-Card Payments
supplier_id	Unique Coupa Supplier ID	NO	NO	NO	integer	any	Virtual P-Card Payments
currency	Base currency of the card	NO	YES	NO		any	Virtual P-Card Payments
merchant_currency	Currency the card was charged in	NO	YES	NO		any	Virtual P-Card Payments
charge_allocations	Account Allocations for charge	NO	NO	NO	[ ]	any	Virtual P-Card Payments
created_by	User who created	NO	NO	NO	integer	any	Virtual P-Card Payments
updated_by	User who updated	NO	NO	NO	integer	any	Virtual P-Card Payments

Contract

Contract adds the following fields:

Filed Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
tags		NO	NO	NO	[ ]	any	Projects and Tasks for Contracts
taggings		NO	NO	NO	[ ]	any	Projects and Tasks for Contracts

The following Contract fields are changed:

Field Name	Description
source_id	integer -> string(255)

Inventory Transaction

Inventory Transaction now includes the following field:

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
soft_close_for_receiving	Soft close PO line for Receiving	NO	NO	NO	boolean	any	Future functionality

The following field is removed from Inventory Transaction:

Element	Description
status	Inventory Transaction Status

Item

Item adds the following fields:

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
manufacturer_name	Manufacturer name	NO	YES	NO	string(255)	any	Coupa Open Buy
manufacturer_part_number	Manufacturer part number	NO	NO	YES	string(255)	any	Coupa Open Buy

Order Header Change

Order Header Change adds the following fields:

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
ship_to_attention	Attention user for the PO	NO	NO	NO	string(255)	any	Enhanced Change Order Process
supplier_site	Supplier Site	NO	NO	NO	Supplier Site	any	Enhanced Change Order Process
ship_to_address	Ship to address	NO	NO	NO	Address	any	Enhanced Change Order Process
supplier	Supplier	NO	NO	NO	Supplier	any	Enhanced Change Order Process

Supplier

Supplier adds the following field:

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
virtual_card_email	Email Virtual P-Cards are sent when payment method is "Virtual Card"	NO	YES	NO	string(255)	any	Virtual P-Card Payments

Supplier Information Address

Supplier Information Address adds the following field:

Column Name	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
bank_name	Bank Name	NO	NO	NO	string(255)	ANY	
currency	Account Currency	NO	NO	NO	string(255)		New Primary Contact Subform

The following Supplier Information Address field changed:

Element	Change
kind	Now a required field

Supplier User

The following Supplier User field changed:

Element	Change	Feature
default_locale	Adds allowable value: es-IC	21.2 Maintenance Update

User

The following User field changed:

Element	Change	Feature
default_locale	Adds an allowable value: es-IC	21.2 Maintenance Update

User Group

User Group added the following field:

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
type	Blank for Groups, Project for Projects	NO	NO	NO	string(255)	any	Projects and Groups enhancements

Release 22 Outbound API Changes

Overview

These are the changes we made to Coupa's outbound APIs in R22. Everything listed below are newly added attributes unless stated otherwise.

Bulk Price

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
conversion_numerator	UOM conversion numerator	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM
conversion_denominator	UOM conversion denominator	NO	NO	NO	decimal(30,6)	any	Bulk price with different UoM

The following Bulk Price fields changed.

Element	Change
uom	Now a required field

Charge

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
external_ref_id	Unique 3rd party system ID	NO	NO	NO	string(255)	any	Virtual P-Card Payments
coupa_pay_id	Unique Coupa Pay ID	NO	NO	NO	integer	any	Virtual P-Card Payments
coupa_pay_statement_id	Unique Coupa Pay Statement ID	NO	NO	NO	integer	any	Virtual P-Card Payments
charge_date	Date of the charge	NO	YES	NO	datetime	any	Virtual P-Card Payments
total	Total of the charge in the card base currency	NO	NO	NO	decimal	any	Virtual P-Card Payments
merchant_total	Total the merchant charged in merchant currency	NO	NO	NO	decimal	any	Virtual P-Card Payments
merchant_reference	Card provided merchant information	NO	NO	NO	string(255)	any	Virtual P-Card Payments
mcc	Merchant Category Code	NO	NO	NO	string(255)	any	Virtual P-Card Payments
card_provider_account	Card Provider Account	NO	NO	NO	string(255)	any	Virtual P-Card Payments
virtual_card		NO	YES	NO		any	Virtual P-Card Payments
statement		NO	NO	NO		any	Virtual P-Card Payments
supplier		NO	YES	NO		any	Virtual P-Card Payments
id	Unique Coupa ID	NO	NO	NO	integer	any	Virtual P-Card Payments
created_at	Automatically created by Coupa in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ	NO	NO	NO	datetime	any	Virtual P-Card Payments
updated_at	Automatically created by Coupa in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ	NO	NO	NO	datetime	any	Virtual P-Card Payments
virtual_card_id	Coupa ID for associated Virtual Card	NO	NO	NO	integer	any	Virtual P-Card Payments

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
statement_id	Unique Coupa ID	NO	NO	NO	integer	any	Virtual P-Card Payments
supplier_id	Unique Coupa Supplier ID	NO	NO	NO	integer	any	Virtual P-Card Payments
currency	Base currency of the card	NO	YES	NO		any	Virtual P-Card Payments
merchant_currency	Currency the card was charged in	NO	YES	NO		any	Virtual P-Card Payments
charge_allocations	Account Allocations for charge	NO	NO	NO	[]	any	Virtual P-Card Payments
created_by	User who created	NO	NO	NO	integer	any	Virtual P-Card Payments

Charge Allocation

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
id	Coupa unique identifier	NO	NO	NO	integer	any	Virtual P-Card Payments
created_at	Automatically created by Coupa in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ	NO	NO	NO	datetime	any	Virtual P-Card Payments
updated_at	Automatically created by Coupa in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ	NO	NO	NO	datetime	any	Virtual P-Card Payments
amount	dollar amount for this allocation	NO	NO	NO	decimal(30,2)	any	Virtual P-Card Payments
pct	percent	NO	YES	NO	decimal(16,10)	any	Virtual P-Card Payments
billing_note		NO	NO	NO		any	Virtual P-Card Payments
account	account	NO	YES	NO		any	Virtual P-Card Payments
period	budget period	NO	NO	NO		any	Virtual P-Card Payments
currency		NO	YES	NO		any	Virtual P-Card Payments
created_by	User who created	NO	NO	NO	integer	any	Virtual P-Card Payments
updated_by	User who updated	NO	NO	NO	integer	any	Virtual P-Card Payments

Commodity Translation

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
locale		NO	YES	NO	string(255)	any	Commodity Translations
name		NO	YES	YES	string(255)	any	Commodity Translations
commodity		NO	YES	NO	commodity	any	Commodity Translations
id	Coupa unique identifier	NO	NO	NO	integer	any	Commodity Translations
created_at	Automatically created by Coupa in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ	NO	NO	NO	datetime	any	Commodity Translations
updated_at	Automatically created by Coupa in the format YYYY-MM-DDTHH:MM:SS+HH:MMZ	NO	NO	NO	datetime	any	Commodity Translations

Contract

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
tags		NO	NO	NO	Tags	any	Projects and Tasks for Contracts
taggings		NO	NO	NO	Tagging	any	Projects and Tasks for Contracts
source	The URL to the source of contract creation	NO	NO	NO	string	any	

Expense Line

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
last_send_back_reason	Last reason why line was sent back	NO	NO	NO	reason_insight_event	any	Send Expense Lines Back to the Submitter
last_send_back_comment	Last comment why line was sent back	NO	NO	NO	comment	any	Send Expense Lines Back to the Submitter

Invoice Header

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
delivery_date	Date of Supply	NO	NO	NO	datetime	any	
dispute_method	Dispute Method	NO	NO	NO	string(10)	any	Auto Dispute invoices based on validation rules
dispute_reasons	Dispute Reason*	NO	NO	NO	[]	any	Auto Dispute invoices based on validation rules

*The `dispute_reason` field has been deprecated and will be removed from InvoiceHeader in R24. Use `dispute_reasons` instead.

Item

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
manufacturer_name	Manufacturer name	NO	YES	NO	string(255)	any	Coupa Open Buy
manufacturer_part_number	Manufacturer part number	NO	NO	YES	string(255)	any	Coupa Open Buy

Order Header Change

The following Order Header Change field changed.

Element	Description
ship_to_address	-> Ship to address

Registered Company

Registered Company is a referenced object in Supplier Remit To, and doesn't have its own endpoint.

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
permit_number	Permit Number	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
unique_shareholder	Unique Shareholder	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
liable_company	Liable Company	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
tax_regime	Tax Regime	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
legal_type	Legal Type of Company	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
registered_seat	Registered Seat	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
chairman_of_the_board	Chairman of the Board	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
court_of_registration	Court of Registration	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
commercial_register_number	Commercial Register & Number	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
liquidation_remark	Remark if Company in Liquidation	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
license_number	License Number	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model
register_legal_entities	Register Legal Entities	NO	NO	NO	string(255)	any	Invoicing Compliance as a Service for Italian SDI Clearance Model

The following Registered Company field changed:

Element	Description	Change
company_registration_number	-> Company Registration Number	string(255) -> string(20)

Supplier

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
virtual_card_email	Email Virtual P-Cards are sent when payment method is "Virtual Card"	NO	YES	NO	string(255)	any	Virtual P-Card Payments

The following Supplier field has changed.

Element	Change	Feature
payment_method	Adds: virtual card	Virtual P-Card Payments

Supplier Information

Element	Change
ship_to_address	-> Ship to address

Supplier Information Address

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
bank_name	Bank Name	NO	NO	NO	string(255)	any	
currency	Account Currency	NO	NO	NO	string(255)	any	New Primary Contact Subform

The following field was changed to required.

Element	Required
kind	YES

Supplier User

The following field added an allowable value.

Element	Change	Feature
default_locale	Adds: es-IC	21.2 Maintenance Update

User

The following field added an allowable value.

Element	Change	Feature
default_locale	Adds: es-IC	21.2 Maintenance Update

User Group

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
type	Blank for Groups, Project for Projects	NO	NO	NO	string(255)	any	Projects and Groups enhancements

Coupa Platform

This chapter contains the following topics:

Scheduled Report Improvements

Display logic behind custom views in scheduled report emails for improved visibility.

Split Billing Enhancements

We've added further improvements to Coupa's split billing capabilities in Coupa 22.

Other Platform Improvements

Other enhancements we have made to the Coupa platform in R22.

Projects and Groups enhancements

Feature overview

To make project management more intuitive and as a foundation for future enhancements, Groups have been split up into Groups and Projects. Within a project or group, we replaced the **Tags** page with dedicated **Contracts** and **Sourcing Events** pages where you can easily associate the project or group with a contract or sourcing event.

What we were thinking

Customers are increasingly looking to use Coupa for project management in various areas of spend management, especially in the the source-to-contract (S2C) lifecycle. Teams are collaborating, assigning, and completing tasks, and for many situations, the end result is a sourcing event or contract. Now you can manage those directly within a project.

How it works

We've made two significant but related changes in R22:

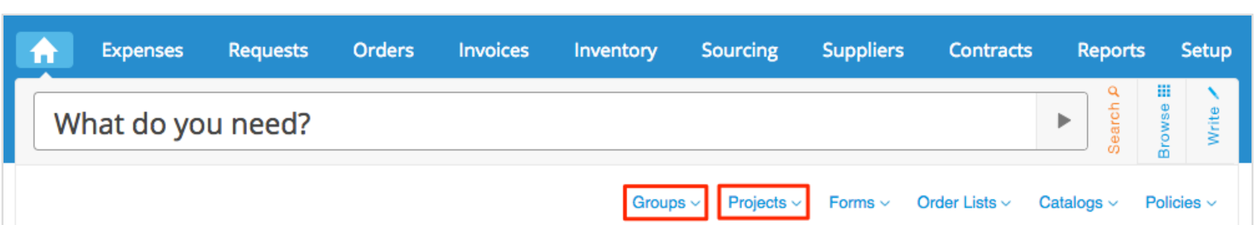
- Added concept of projects. Groups and projects are still shown in the same data table and are created the same way.
- Replaced tags tab in groups with separate Contracts and Sourcing Event tabs. This is a more intuitive way to link contracts and sourcing events to projects and groups. Linked projects and tasks also show up on the contract or sourcing event so users can navigate in both directions.

Today, projects and groups are functionally very similar. For example, both have the option to be used in approvals, both can have tasks, etc, but over time projects will get more features, becoming significantly different from groups. Currently, the only differences are:

- Only groups can be integration contacts
- Only projects can be linked to from sourcing events and contracts. However, links can be added to Sourcing Events and Contracts from Groups

Groups and Projects

We started by adding Projects to Coupa. You can see this on the **Setup** page, where the **Groups** page has been renamed to **Groups and Projects**. On the home page, now there are separate dropdown menus for **Groups** and **Projects**.

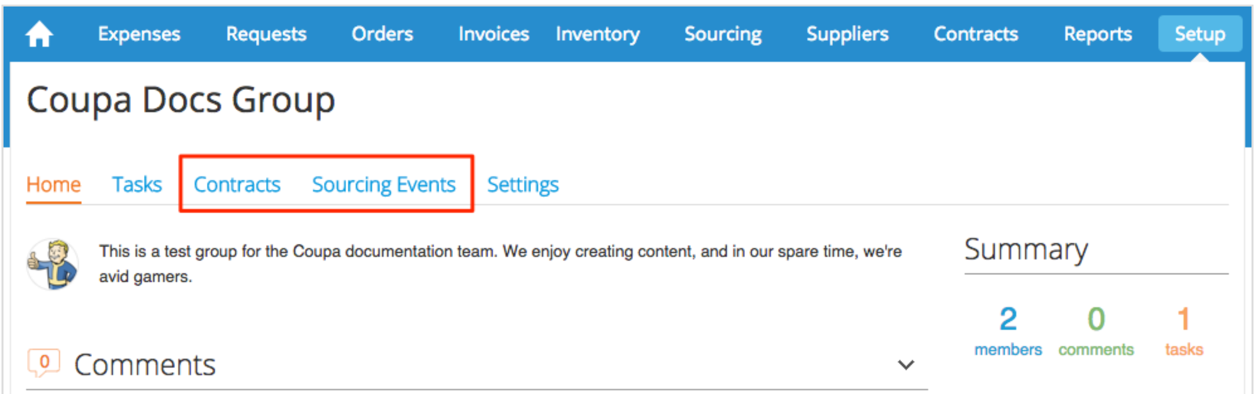


However, behind the scenes, the Groups table is now called the **Projects and Groups** table. We added a new column called **Type**. All of your existing groups will be shown as the type **Group**.

Note: In R22, you can only add projects to a contract or sourcing event from the object itself. If you want to add a group to a contract or sourcing event, you'll have to do it from the Group's page.

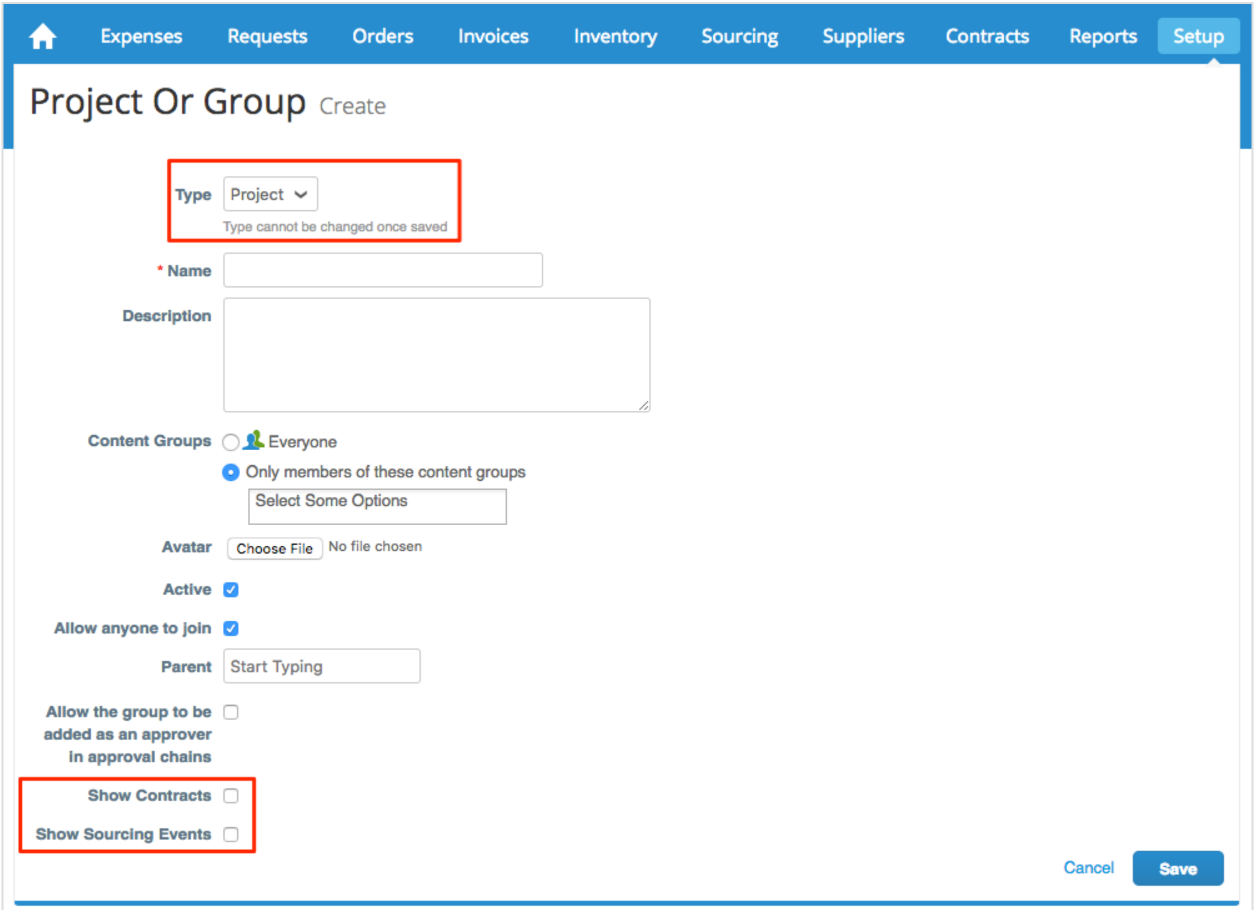
Objects instead of tags

When you go to a groups page, you have two new tabs named **Contracts** and **Sourcing Events** that can be enabled from the group **Settings** page under **Group Settings** by selecting the **Show Contracts** and **Show Sourcing Events** checkboxes. These new tabs replace the **Tags** tab where previously you'd go to see objects associated with your group in a generic tags table.



Create a new project or group

Go to the **Setup > Groups and Projects** page and then click the **Create** button. You get the option to choose if you're creating a Group or a Project. Once you choose the type, you won't be able to change it, which means if you want to convert a group into a project, you'll have to recreate it. But don't worry, for now, groups and projects are essentially the same.



If you choose not to show the Contracts or Sourcing Events tab, you can still associate a project or group with those objects, with a couple of caveats:

- You can make the association only from the object itself, not from the group or project
- If an association is made, you won't be able to see that association from the group or project page unless you later choose to show the tab

Link a group or project to a contract or sourcing event

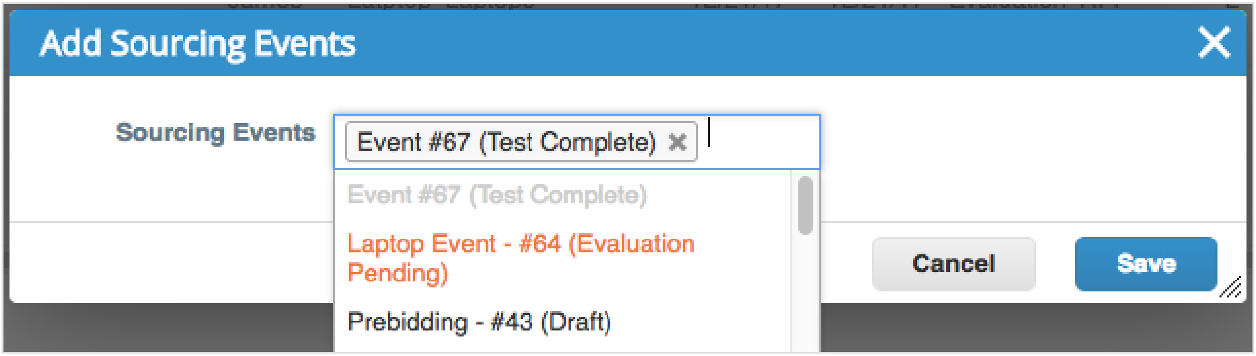
You can link a contract or sourcing event to a project either from the object itself or from the project page. However, you can only add groups to an object from the group. See Projects and Tasks for Contracts and Projects and Tasks for Sourcing Events for instructions on how to add a project or task from the object.

These instructions are for adding a group to a sourcing event, but projects and contracts behave in exactly the same way.

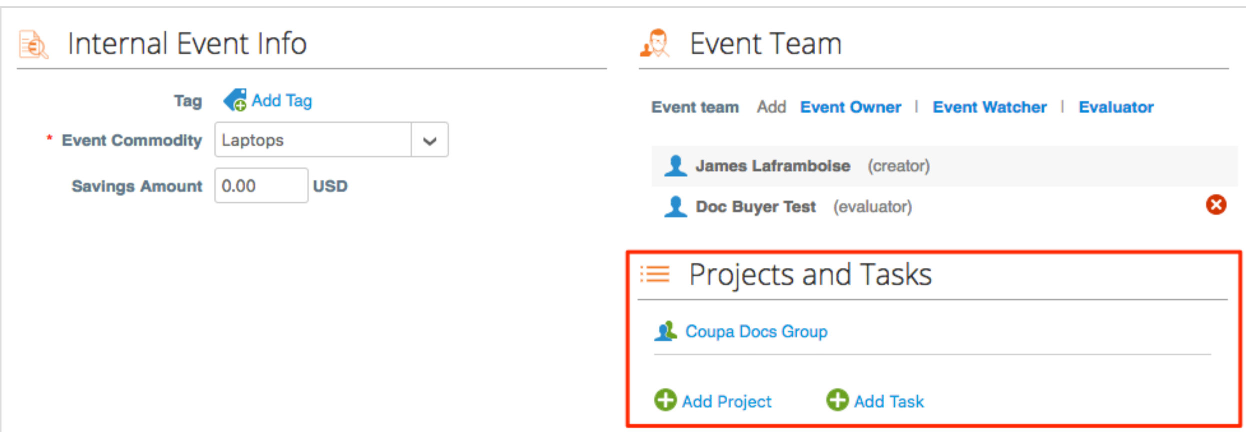
1. From the group page that you want to add to a sourcing event, and click the **Sourcing Events** tab.

2. Click the **Add Sourcing Events** button. This lets you link any existing contract or event with your group.

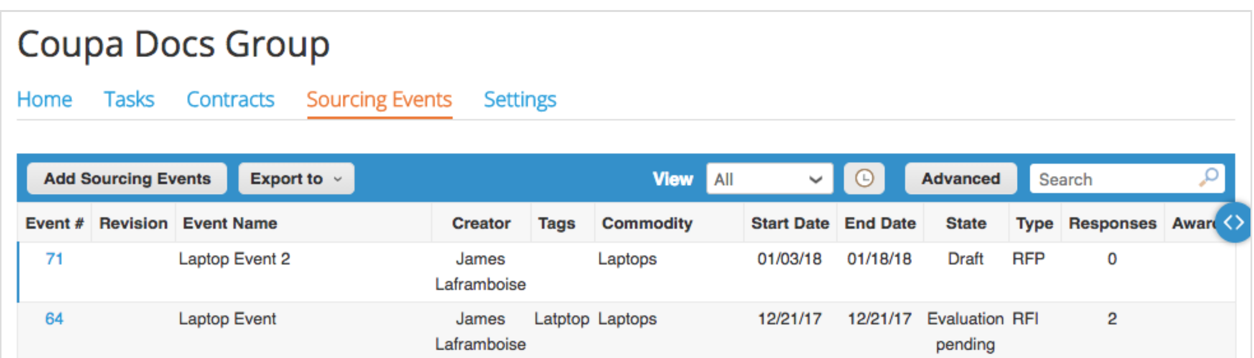
3. Begin typing the name of the event you want to link, and a list of matching events will appear. Choose the one(s) you want. Click **Save** when you're done.



4. Once the link is added, you can see the linked group/project on the sourcing event under **Projects and Tasks**.



5. The associated event now appears in the group's **Sourcing Event** table.



A few notes about the group link tables

- None of the custom views from the parent object tables carry over to these tables
- Only the standard Coupa views are available

Content security

To be able to link an object to a group, users require the following:

- A license for the appropriate module (i.e. sourcing or contracts)
- The permissions required to edit the object (i.e. they can edit a sourcing event or contract)
- The proper content group for the object (when applicable)

Further, if a user has permission to the group and their content/account security allows, they can see detailed info for a given object. This includes the extra columns associated just with that object.

For example, even if a user has a Sourcing license, but doesn't have permissions to view the details of the Sourcing data table, they can still view detailed sourcing info in the Group.

Upgrade impact

Notifications

No changes.

Roles/permissions changes

These new permissions were added to the **User** and **Expense User** roles, as well as any custom roles with the **User Groups/Show** permission. **User Group Links** is a new controller.

Controller	Action	Description
User Group Links	Create	Allows the user to create a new link for a group (assign with **New**)
User Group Links	Destroy	Allows unlinking a document
User Group Links	New	Allows users to create a new link for a group (assign with **Create**)
User Groups	Contract List csv	Allows users to export the data table of linked contracts
User Groups	Quote Request List csv	Allows users to export the data table of linked sourcing events
User Groups	Search Contract Table	Allows users to search the data table of linked contracts
User Groups	Search Quote Request Table	Allows users to search the data table of linked sourcing events

This dialog window is controlled by **User Groups Link** permissions that were added to the **User** and **Expense User** roles.

Custom roles with the **User Groups/Show** permission will get the following permissions:

- User Groups/Contract list csv
- User Groups/Quote request list csv
- User Groups/Search contract table
- User Groups/Search quote request table
- User Group Links/New
- User Group Links/Destroy

- Contracts/Autocomplete

Integrations

The User Group API and CSV gained a new Type field. See Release 22 Integration Updates for more info.

Availability

This enhancement is enabled by default for all customers who upgrade to R22 but you'll need to enable the **Contracts** and **Sourcing Events** tabs for your Group.

Accessibility Enhancements

Introduction

In order to make our end-user workflows accessible to those with disabilities, Coupa is making more changes to our product in accordance with United States federal requirements and related international standards. Our goal is to meet requirements for US ADA section 508, and similar Canadian AODA standards (applying WCAG 2.0 Level AA) Accessibility for end-users of Coupa Web and Mobile in areas of Home page, Expenses and Procurement, by the end of 2019. We'll log these improvements to Coupa products in this Success Portal over time, where you can follow and see the updates that occur, especially during our major releases.

We will be making a number of changes across the product, including a number of 508/accessibility enhancements, such as:

- Keyboard-based navigation
- Focus highlighting
- Descriptive Alt-Text for navigation images and controls
- More structured UI tagging of hierarchy, association of field labels with input fields, logical grouping, accessible data tables, other screen reader improvements.
- Descriptive error-message text, adding more visual clarity, removing dependencies on position and color.

Coupa Release 22 Enhancements

With the Release 22, we've included specific accessibility enhancements in the following areas:

Platform

- Split billing workflows
- Comments on reqs, POs, and invoices

Procurement

- Working with the shopping cart
- Adding to the cart from a punchout
- Order list workflows
- Requisition data table workflows

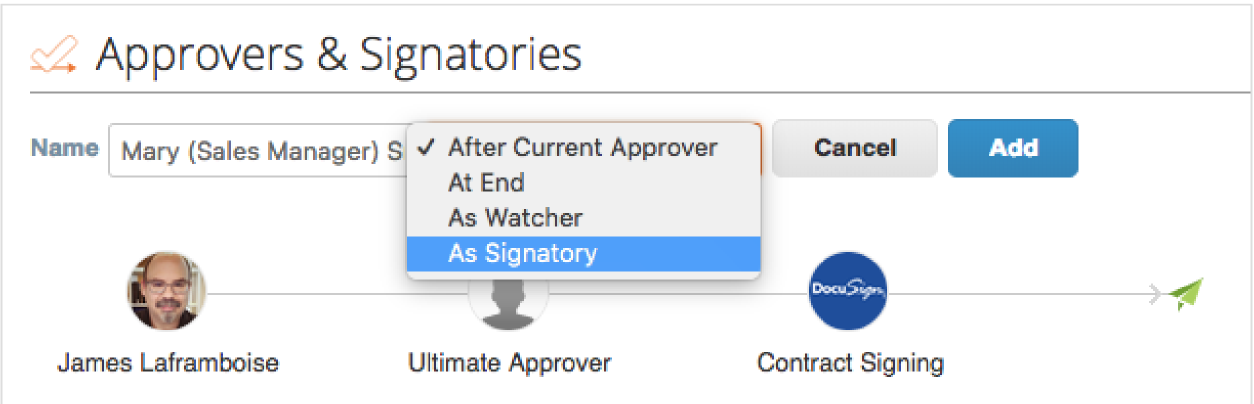
Expenses

- Submitter and approver workflows
- Working with lookups
- Working with the wallet

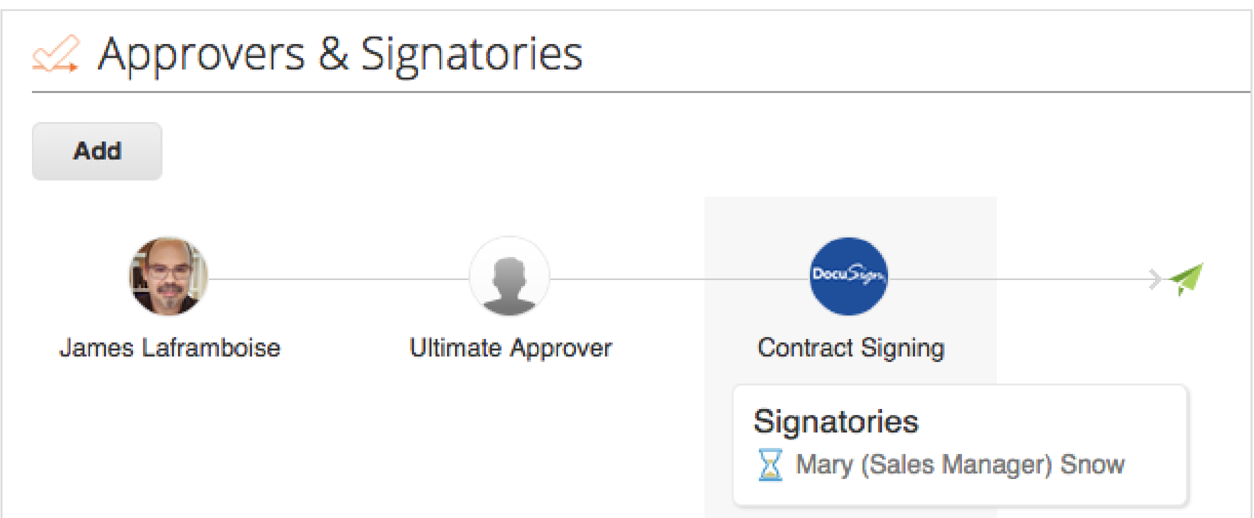
Approvals Enhancements

Add signatories to contract approvals

Now adding signatories to a contract is easy. You can manually add a signatory to a contract approval chain the same way you add an approver or watcher. On a contract under the **Approvers & Signatories** section, click the **Add** button to see the options for adding a someone to the approval. **As Signatory** is a new option.

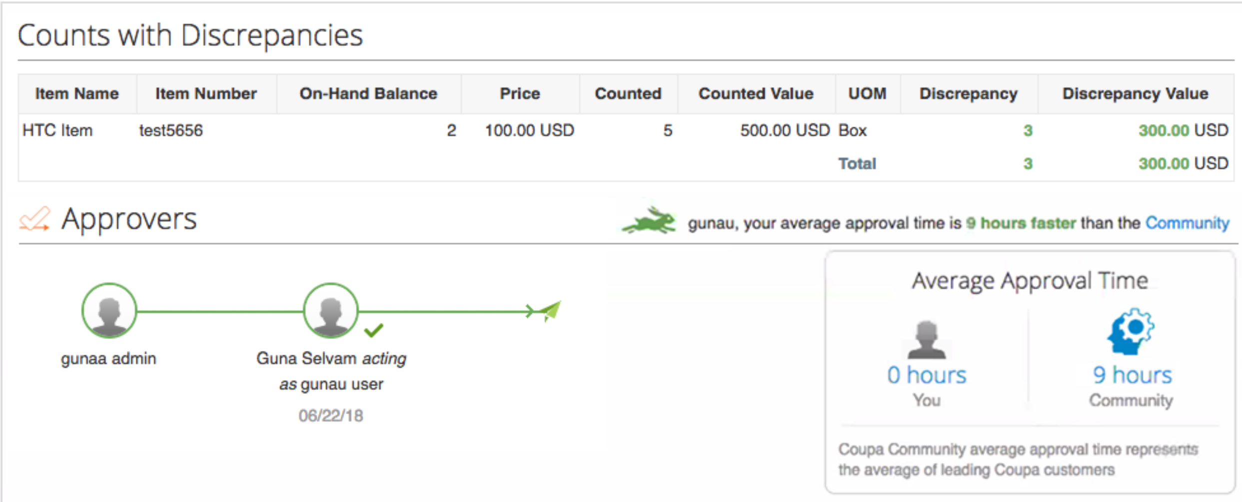


After you've added someone as a signatory, hover over the Contract Signing approval step, and you'll see the signatory added to the list.



Insights for cycle count approvers

In R21, we introduced Insights for Approvers which covered expense reports, requests, and invoices. We continue to build out our community insights throughout the platform to help customers perform better. More information about how individuals and organizations are performing compared to their peers makes the platform more engaging, creates greater awareness, and stimulates action. So, in R22, we've added insights for Cycle Count approvals.



Average approval times columns for users

Now you can start reporting on individual users' average approval times. We've added three new columns to the **Setup > Users** table that you can add to your custom views. The columns are:

- Requisition Average Approval Time
- Invoice Average Approval Time
- Expense Average Approval Time

These approval time columns are populated regardless if the Insights for Approvers are enabled or not. Because they're available to anyone with access to the User table, we didn't include the columns in any standard Coupa view.

Approve or Reject Directly from Slack

Feature overview

Now you can approve or reject directly from Slack using **Approve** and **Reject** buttons and include comments with your actions.

What we were thinking

We're always trying to find new ways to make working with Coupa easier. Approving directly from Slack is part of Coupa's philosophy is that the best UI is no UI. This makes approving easy and convenient and helps minimize approval times.

How it works

We've improved the notifications the Slack Coupabot sends you. Once you've connected Slack to your account and enabled Slack notifications, you'll be able to approve or reject directly from Slack. Approvals are available for requisitions, purchase orders, invoices, and expenses. Approval notifications include the following elements:

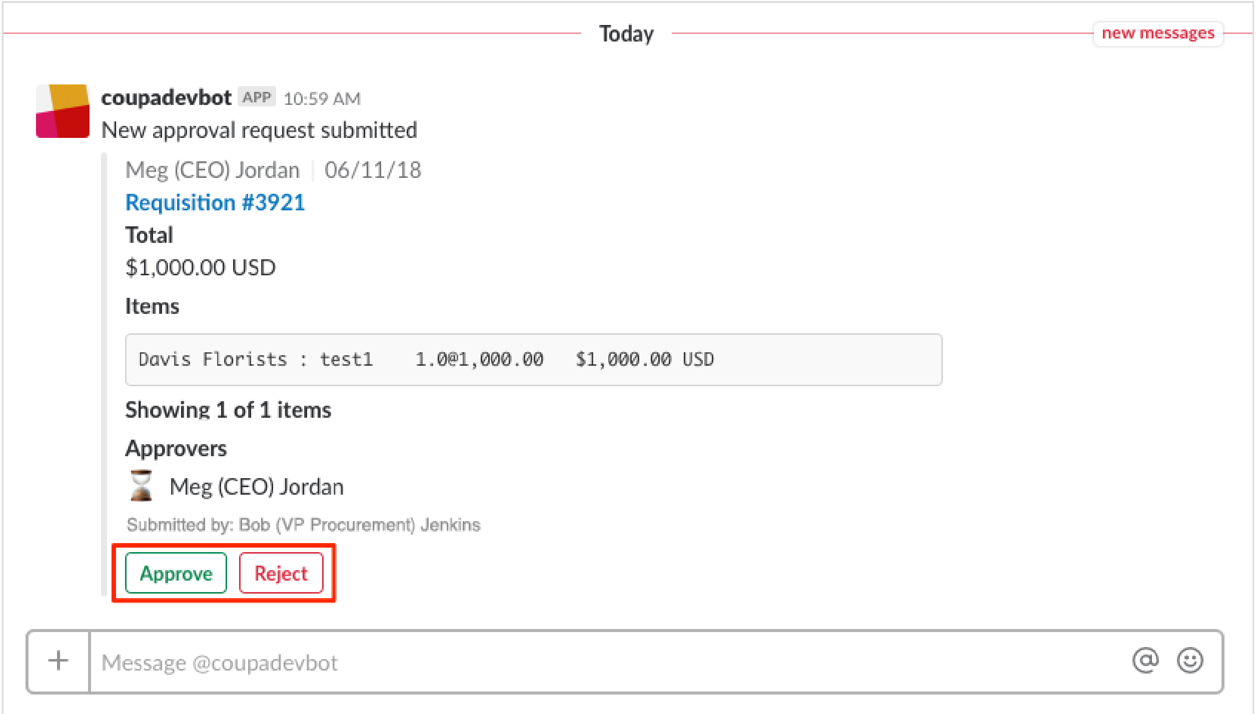
- A link the object in Coupa
- The total amount
- The line items
- The list of approvers
- Approve and Reject buttons.

Approval notifications for other types of objects (contracts, catalogs, etc) use the older, simplified notification style, and need to be approved in Coupa.

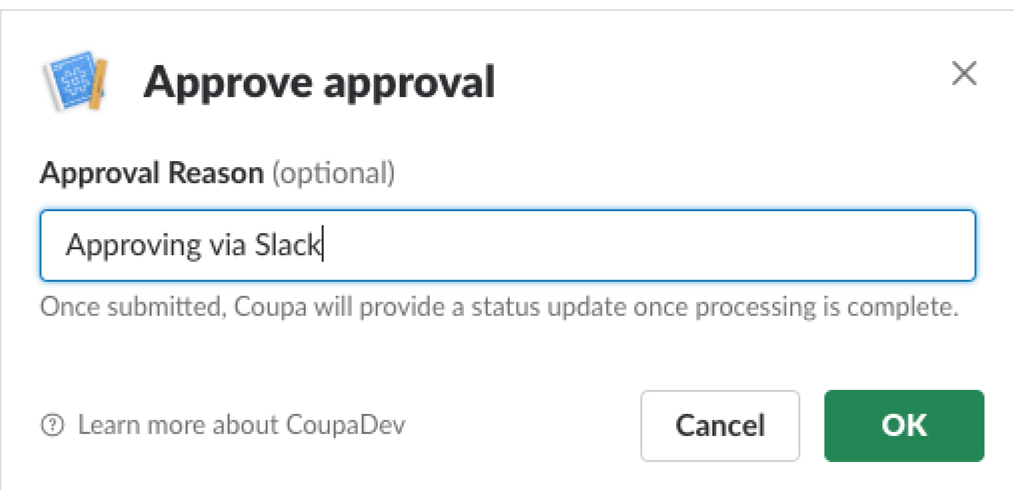
A comment is required for rejecting a document, so make sure to add a note in the rejection's interactive Slack notification before moving on to your next task.

Approve or reject a request

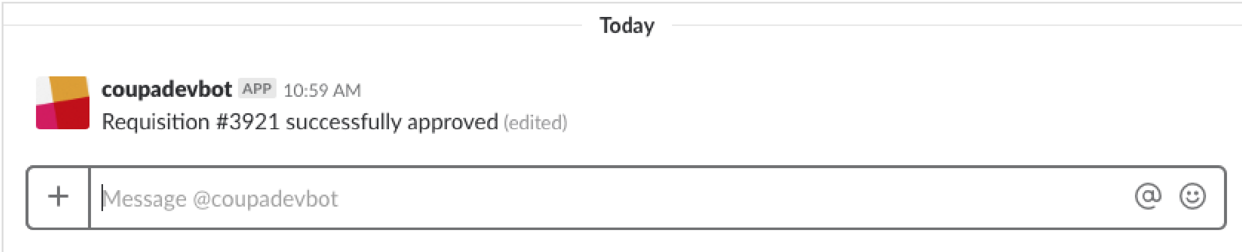
1. When a new approval notification comes in, click the **Approve** or **Reject** button.



2. Slack prompts you to provide a comment. Approval comments are optional, but rejection comments are required.



3. Once Coupa processes your response, the original approval request is edited so it's no longer an approval request. Instead, it's a status update for the approval you just acted on.



Upgrade impact

None. No new integrations, permissions, or notifications.

Availability

This feature is enabled by default for all customers who upgrade to Coupa 22 and use Slack integration.

Commodity Insights Enhancements

Feature overview

The transaction analysis bar chart shows your spend amount or transaction count in percentage values, along with classification details for specific commodities.

What we were thinking

In Release 21, we introduced [Commodity Insights](), which allows customers to view and analyze data related to their commodity transactions, for example, their spend amount or transaction count by transaction type in various industries.

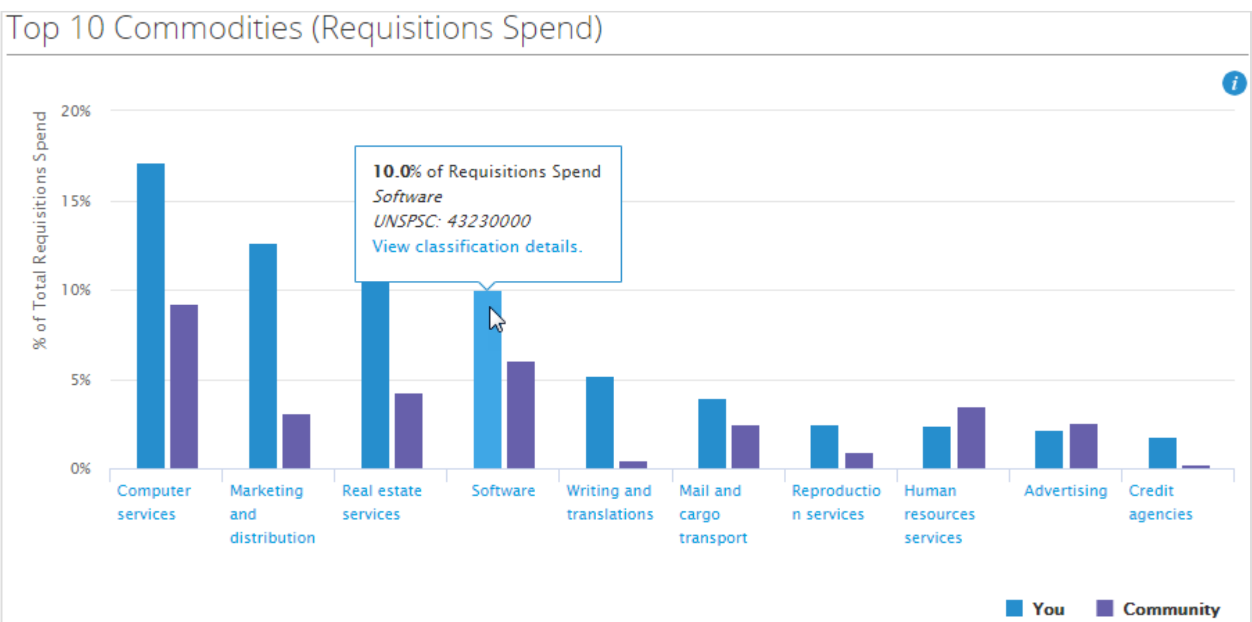
Depending on the size of customers and their industries, these absolute values might show large discrepancies, diluting the value of the comparison, so customers might prefer a comparison of their commodity transactions based on percentage values of the total spend. To provide more meaningful reporting and insights, the transaction analysis is now based on relative terms (percentage values) for both spend and count, and recommendations are provided accordingly.

In addition, we made other enhancements, for example, allowing to search for a commodity based on the UNSPSC and showing more contextual information.

How it works

View percentage of spend and count

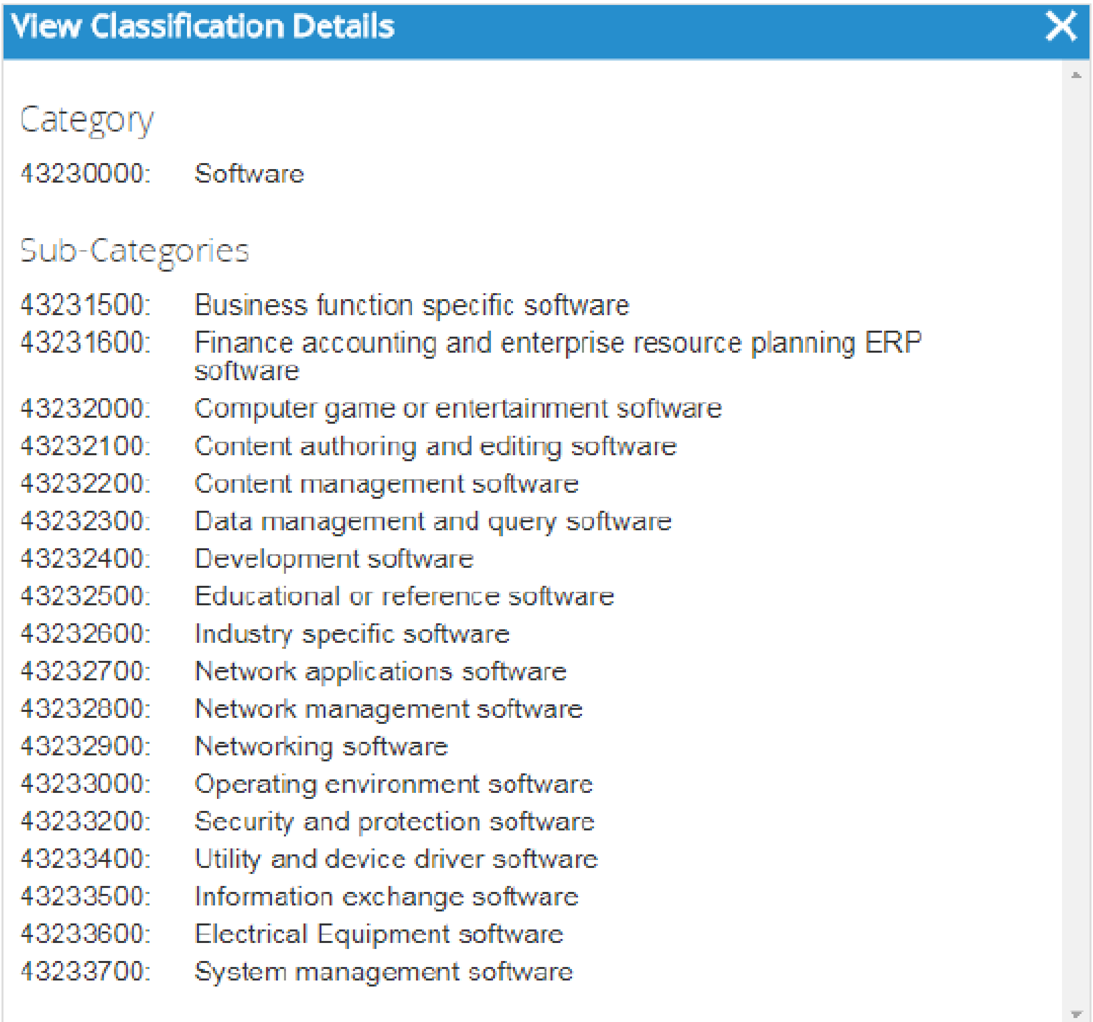
On the transaction analysis bar chart, hover your cursor over a bar to see the percentage of total spend amount or transaction count, the commodity category, the matching UNSPSC, and a link to the classification details of a specific commodity.



Recommendations based on the transaction analysis reflect the percentage value calculations, for example: "Drive more spend under Sourcing. Your spend (17.2% of total) is 1.9 times higher than the Community average (9.2% of total) for Computer services."

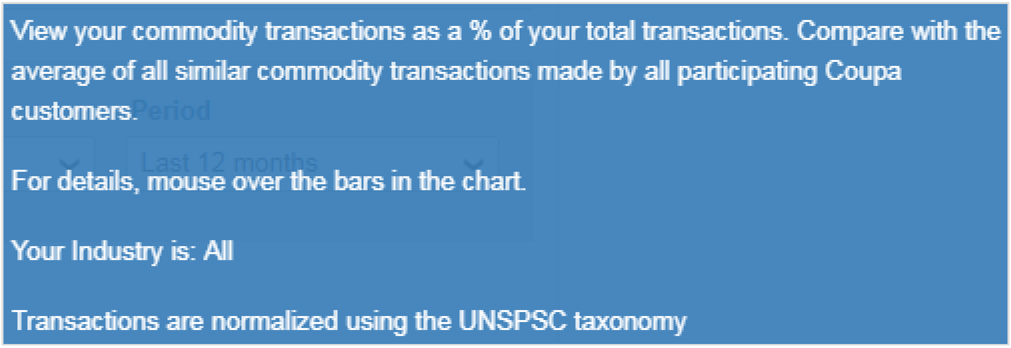
View commodity subcategories

Click on the **View classification details** link in a bar tooltip to see the sub-categories for a commodity with their UNSPSCs.



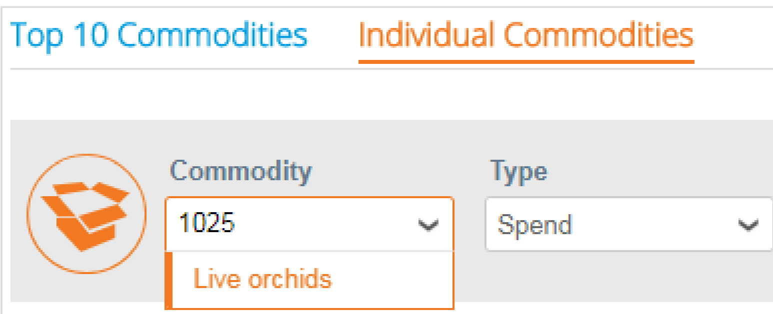
View contextual information

Click on the blue **Information** icon in the top right corner to see information and instructions for the bar chart.



Search by UNSPSC

On the **Individual Commodities** tab, enter the UNSPSC, for example, 1025 (or orchid) to find "Live orchids".



> **Note:** As Commodity Insights supports the UNSPSC taxonomy level 2 (family), the search is based on the first four digits of the eight-digit UNSPSC categories found in Coupa.

> **Tip:** Partial matching within the first four digits shows multiple categories, for example, entering 025 instead of 1025 shows "Live orchids" and also "Underground mining structures and materials".

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

This feature is available to all customers with a Procurement and a Risk Aware license, and with Invoicing.

Customers with only Procurement and Invoicing can also use the feature, but they cannot see and explore supplier health information.

Customers that do not use Invoicing cannot see **Invoices** as an option in their global selector due to data not being available about their invoicing transactions.

> **Note:** To give Risk Aware license to your users, you need to have the Risk Aware license enabled. This provides additional security in accessing the feature. See About Coupa Licenses for more info.

Commodity Translations

Feature overview

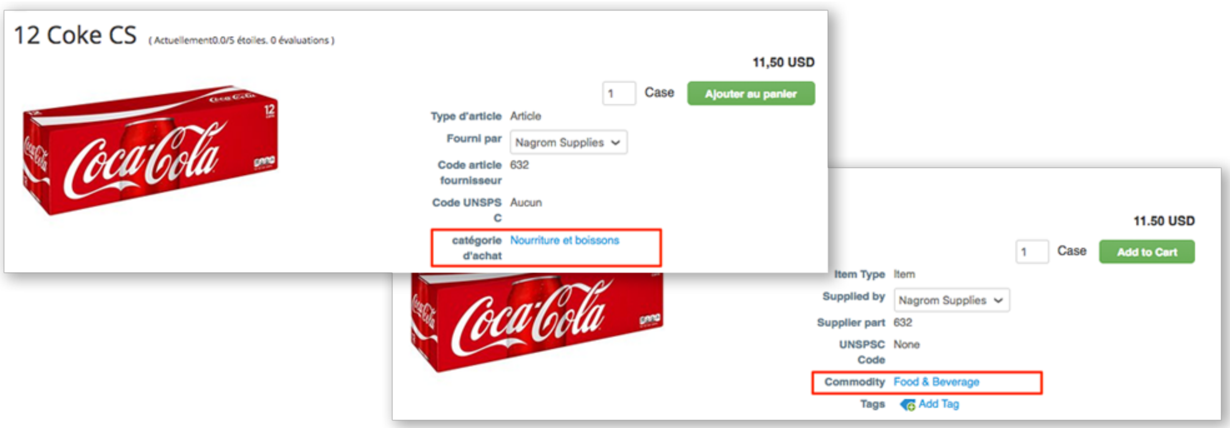
We've introduced the ability for customers to provide translations for commodity names so that users can see commodity names in their own locale when using search, browse, or other basic procurement workflows.

What we were thinking

We translate Coupa into a variety of languages for our users. We cover all the UI elements and notification messages that the system uses, but we're not able to translate customer-provided data like commodities. We wanted to provide customers with the ability to create their own translations for the data they load into Coupa so they could support users who work in a different language than the language their Coupa instance was set up to use.

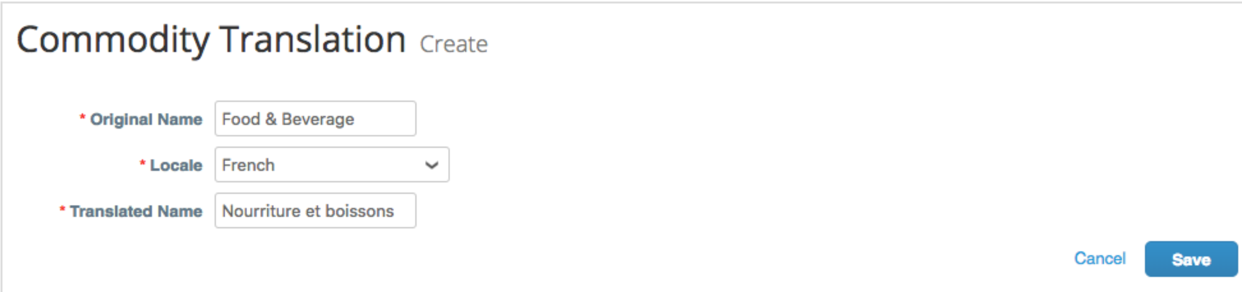
How it works

You provide translations for your commodity names, which are used to substitute the original name when the user views it in the UI. Then when someone views the item in another language (say, French), the commodity name is displayed in translated and appears in French.



Create a commodity translation

Go to **Setup > Company Setup > Commodity Translations** to start defining commodity translations. There, you can define a translation for the object by defining the original name, the translated name, and the locale where you want the translated name to appear.



Enable commodity translation for users

To make translated commodity and item names visible to your users, you need to go to **Setup > Company Setup > Company Information** and under **System Options**, select the **Commodity Translations** checkbox. When enabled, commodity translations are available for:

- Coupa homepage (search, browse, and write-in requests)
- Forms and web forms
- Req lines and the cart
- Catalogs
- Notifications
- Recent Activity

Important info for customers with existing translations

If you go to the Company Information page to enable translations, and you see the message *Updated commodity translations can only be enabled once legacy translations are disabled. Contact Coupa support for more info*, this means you've used our deprecated translation framework, and you'll need to work with Coupa support to upgrade to the new framework.

Upgrade impact

For customers who've never used commodity translations, there's no impact. If you use translations today, reach out to Coupa support to talk about a path to upgrade to the new framework.

Roles & Permissions

- New controller: Commodity Translations
- New permissions for the Admin role
- Migration for custom roles with the Commodities/Edit permission

Integrations

- New API: **Commodity Translation**
- New column for Commodity Translation CSV In: **Original Name**

Notifications

None.

Availability

This feature is disabled by default for customers who haven't used item translations in the past. If you previously used item translations and would like to use the new framework, contact Coupa support.

Content Groups Usability Improvements

Feature overview

We've improved Coupa's content group selectors so they're faster and easier to use while being able to support large numbers of content groups.

What we were thinking

Customers always find unique and creative ways to use the Coupa platform. When we first introduced content groups, we envisioned that an organization would use perhaps hundreds of groups. As engagement of the feature increased, we've optimized the UI to allow for the use of thousands of content groups.

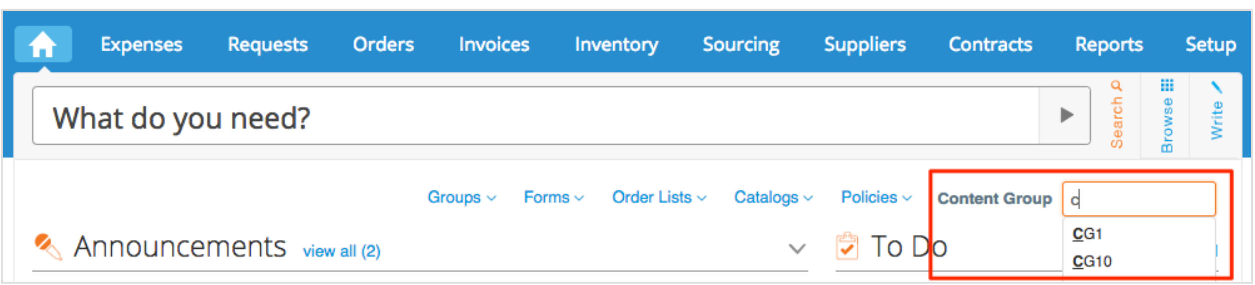
How it works

We've reworked how content groups are stored and displayed in the Coupa UI. Most of the changes are under the hood to make sure pickers remain responsive when searching through content groups. However, we did make some minor changes to the pickers so they behave like other dynamic search boxes in Coupa.

On the Coupa homepage & in the cart

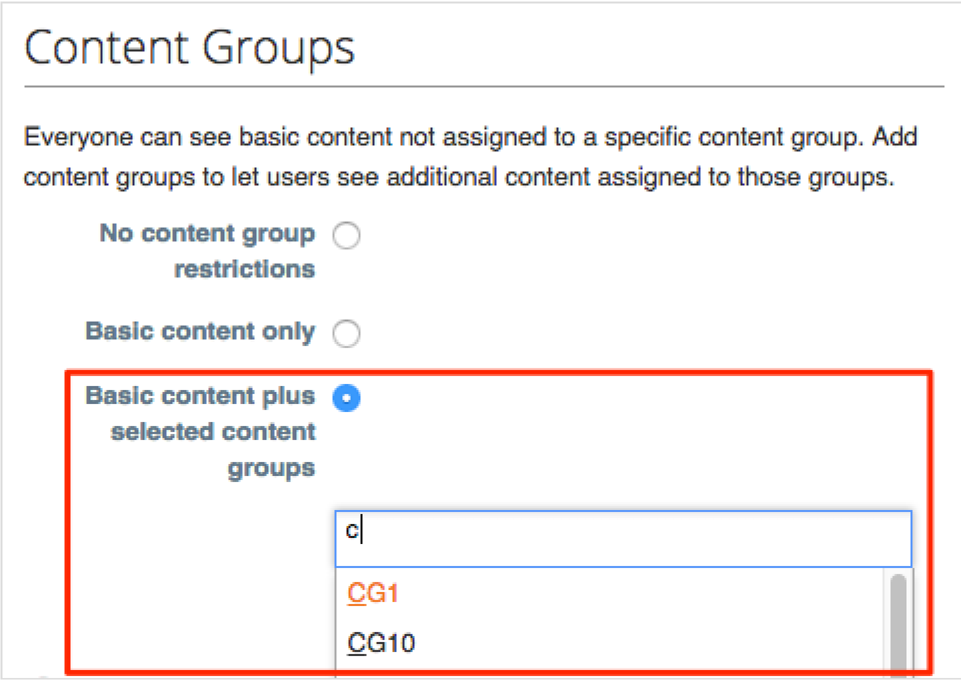
Now, the Content Group filter uses dynamic search in place of a dropdown selector when the user has access to more than 100 content groups.

Note: Also, on Review cart page we have replaced the CG dropdown selector as "Auto- complete content group picker"



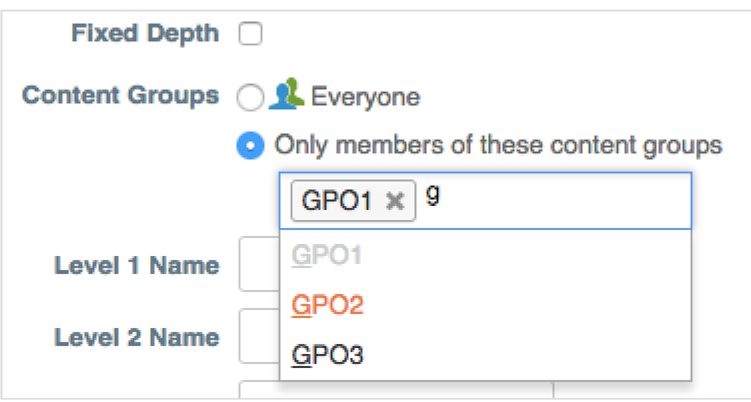
On the user record

When editing a user's content groups, the dropdown has been replaced with a dynamic search box.



Other Coupa objects

Most other Coupa areas, like the **Lookup > Create** page look the same as before, although a search is faster now.



Upgrade impact

No impact on notifications, roles/permissions or integrations.

Availability

This enhancement is available by default for all customers who upgrade to Coupa 22.

Coupa Open API Integration Documentation

Feature overview

The Open API docs now provide full object definitions for each path and support for the Try it Out functionality. We've also broken out the API docs in Coupa by product area to improve performance and make it easier to find the API you want.

What we were thinking

The new format shows you the elements that are available for your specific configuration and built into your instance. This is possible because the docs are accessible only through your site. Use the Open API framework for the following reasons:

- Open API is up to date for your instance, so you capture new feature updates that occur in Coupa.
- Both customers and prospects now have interactive documentation to validate that Coupa has what you need to ensure successful integrations.
- Both technical and non-technical users can access the API through this intuitive framework.

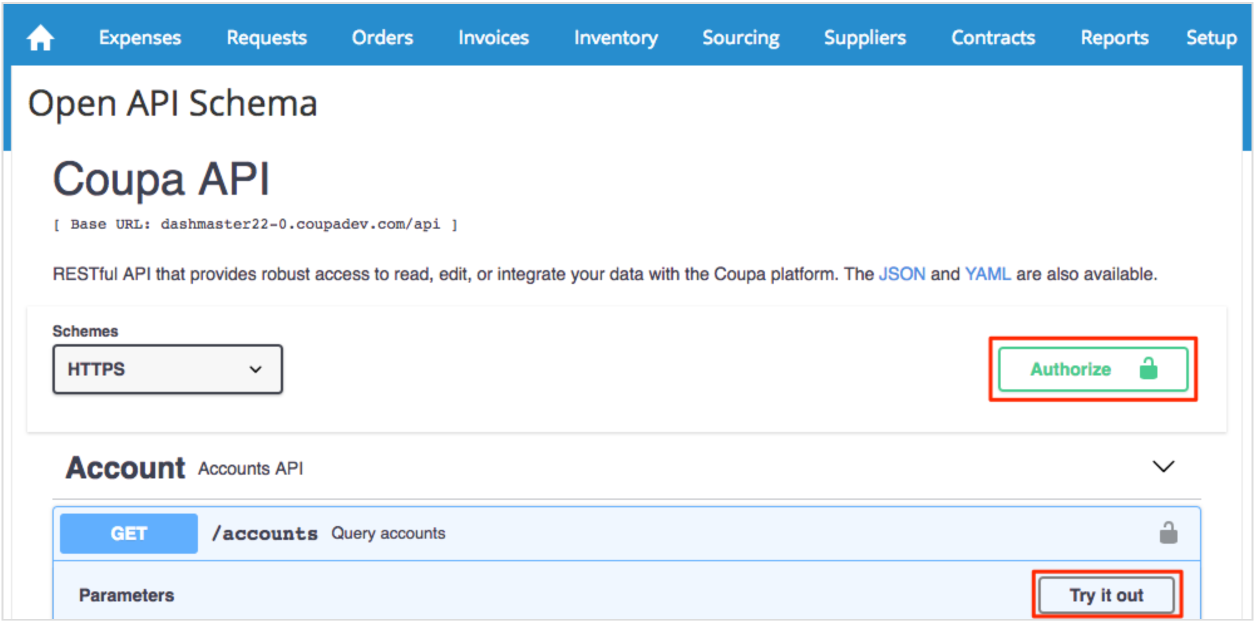
How it works

Now when you go to **Setup > Integrations > Integration Documentation**, you'll see that the Open API Schema is broken up into the following sections:

- Core Platform
- Purchasing
- Expense Reporting
- Sourcing
- Contracts
- CoupaPay Virtual Card

Try it out

With Try it Out, you can use the Open API to make real calls against your sandbox instance. It's disabled in production since it makes real-time changes to your data.



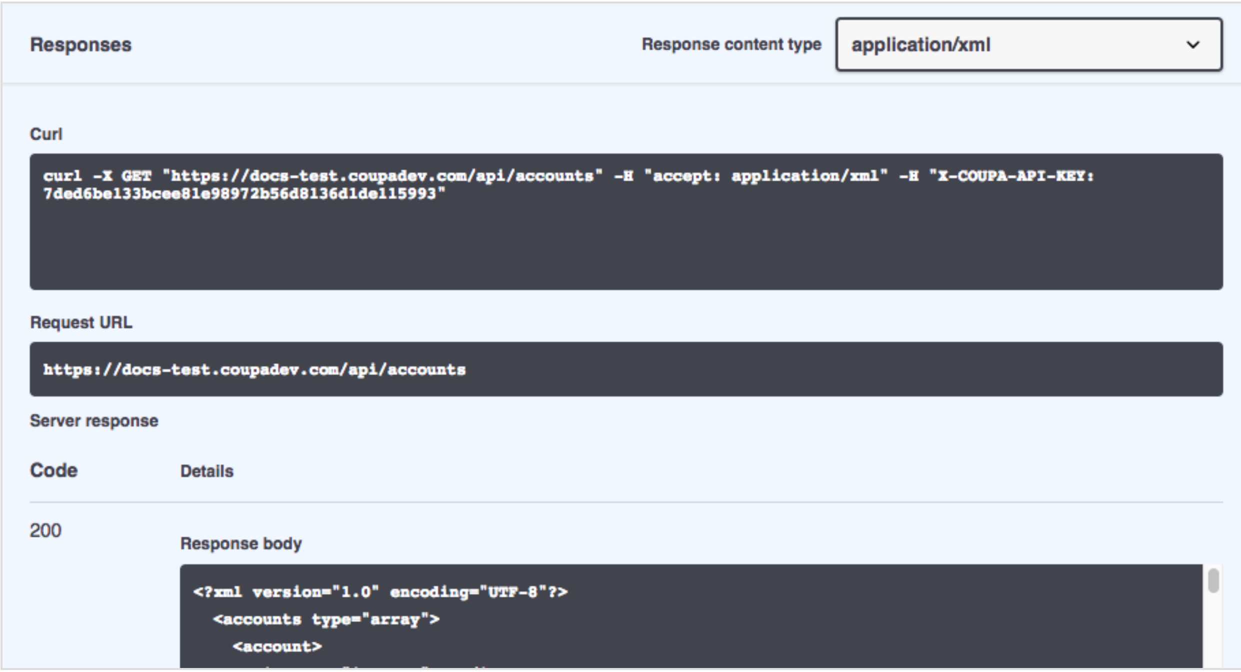
Make a call

Before you can use Try It out, you'll need to generate an API key.

1. Go to **Setup > Integrations > Integrations Documentation** and under **Open API Schema**, choose the product area you want to try out.
2. Click the **Authorize** button, provide your API key in the window that opens, click **Authorize** to save your changes, and then click **Close**.
3. Scroll down to the endpoint you want to test, expand it, and click the **Try it out** button.
4. Specify values for any of the desired parameters.
5. Click the **Execute** button.

Coupa shows you the Curl command that was executed, the path, and the response in either XML or JSON.

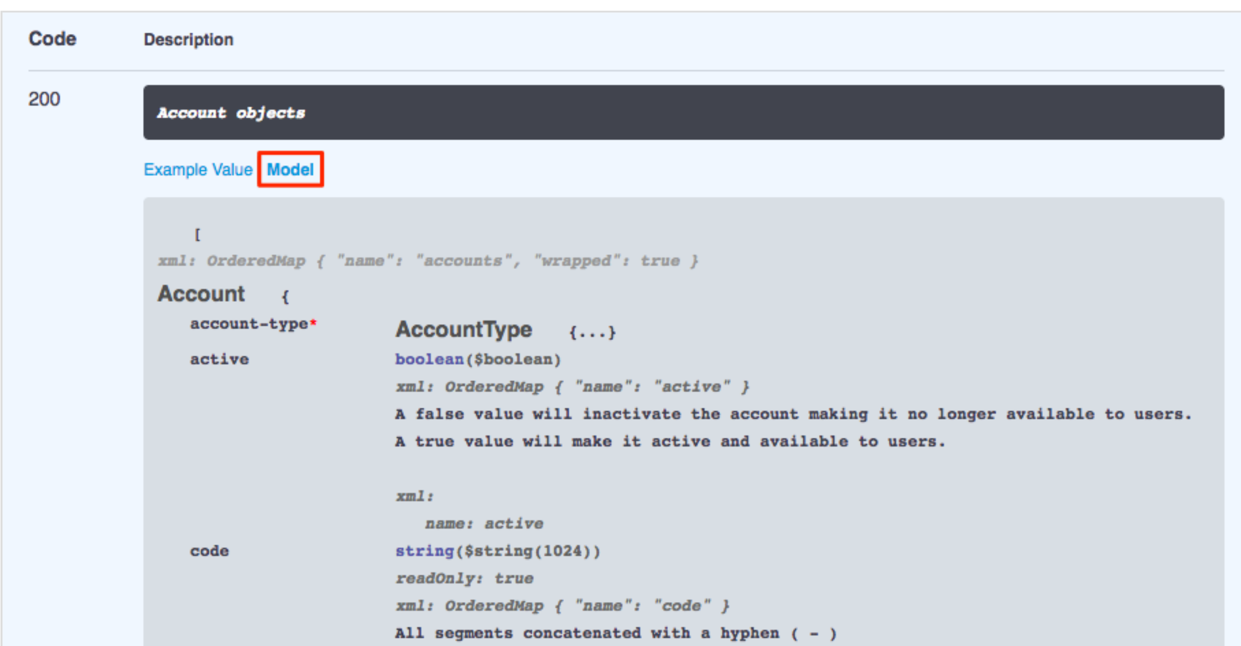
> **Note:** When sending a PUT or POST request, make sure the **Parameter content type** and **Response content type** fields are the same, or the call won't work.



The Coupa Open API doesn't support custom fields when displaying the model and any default XML or json payloads. You can use your custom fields with Try it out as part of your custom payloads, and they'll be included in the output.

Object definitions

Get a real-time view of the API endpoint's specific schema in the Open API docs. Just click the model button to see a list of the endpoint's elements and info about each element.



Upgrade Impact

There's no impact to roles, permissions, integrations, or notifications. This feature is available only to Coupa Admins.

Availability

This feature is enabled by default in R22 instances.

Coupa Process Builder

Feature Overview

Coupa Process Builder lets you define custom workflows for automated business processes. The Coupa Process Builder currently offers invoice review on first submit based on specific criteria so errant invoices can be auto-disputed based on defined rules.

What we were thinking

Coupa Process Builder lets you automate an action based on your custom business logic. You can reduce the time you spend evaluating supplier invoices by setting automatic processes to evaluate the submission according to your custom conditions.

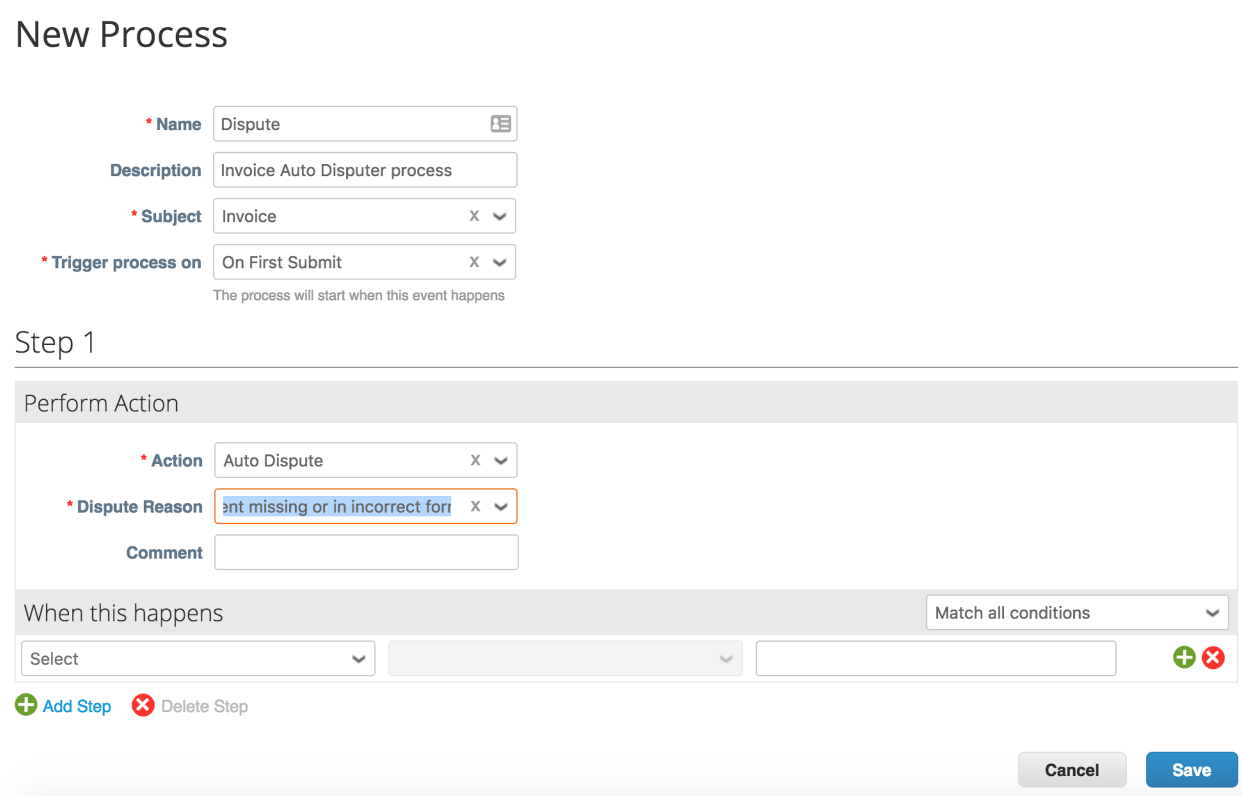
For R22, the first invoice submission triggers an evaluation of the invoice on defined process conditions. If conditions are met then the auto dispute action moves the invoice to Disputed status and sends a notification to the supplier according to your Process configuration.

While this feature is currently limited to auto dispute of the invoices object, it demonstrates how Coupa Process Builder will enable more objects, event triggers, and actions based on custom process conditions for the Coupa Platform.

How it works

From the Processes page, you can view/edit and delete existing processes. From the Processes page, you can also create new processes using Coupa Process Builder.

Go to **Setup** > **Platform** > **Processes** and then **Create** to see Coupa Process Builder as the New Process page or use the Edit icon at the right side of any existing process in the list to open the Edit Process page.



New Process or Edit Process

Process Header Fields

Field Name	Description
Name (required)	Name your process so it can be identified readily.
Description	Optional internally-used descriptive text.
Subject (required)	Subject specifies the object on which the trigger will be set. For R22 "Invoice" can be used.
Trigger process on (required)	The object event that starts the process evaluation using the conditions defined in the *When this happens* section of the process builder.

Step 1

Processes can have more than one step and each step can execute a separate action based on conditions defined in that step.

Perform Action

Field Name	Description
Action	In R22 the action can be set to Auto Dispute for invoices. Refer to Auto Dispute Invoices Based on Validation Rules for more information.

Field Name	Description
	Usage Note: First specify the Subject, Trigger, and Action entries to display relevant conditions criteria in the *When this happens* section.
Dispute Reason	Dispute Reasons are text descriptions used to notify the supplier when the Auto Dispute action is triggered by the process conditions. The same set of reasons are available for both the Auto Dispute action and the Accounts Payable users disputing manually. Administrators may define what dispute reasons are active and available for selection.
Comment	Comment is a note to the supplier who submitted the invoice, perhaps telling why the action was taken and how they may correct the submission. This field is only sent when the condition(s) trigger the action.

When this happens

When this happens defines one or more condition rows as the criteria for performing the action.

When two or more condition rows are evaluated, the setting "Match all conditions" or "Match at least one condition" determines whether all conditions must be true to perform the action or if only one condition row being true triggers the action.

Field Name	Description
Process field	Select the field object on which the logical comparison is performed.
Logical comparator	The logical operator compares the selected field with the value set. The available logical operators changes depending on the type of process field selected in the first field of the row.

You can add another condition rows with the + icon at the right of the row. Make sure to set "Match all conditions" or "Match at least one condition" to define whether one or all conditions should be true to perform the action.

You can add another step to define different dispute reasons within the same process or you can define more processes.

Upgrade impact

Roles & Permissions

The Coupa Process Builder adds new permissions to the Admin Role to enable configuration and setup of the process builder workflow processes.

A new controller is also added to group: Workflows/Processes

Custom Role Upgrade

If your custom role has Object Definitions/Create then it gets these new permissions:

- Workflows/Processes/Index

- Workflows/Processes/Destroy
- Workflows/Processes/New
- Workflows/Processes/Edit
- Workflows/Processes/Update
- Workflows/Processes/Create

See Release 22 Custom Roles Updates for a full list of all custom role changes.

Integrations

None

Availability

This feature is enabled by default for all customers who upgrade to R22 and who have Invoicing. If you would like to get this and other Invoicing features, talk to your TSM or CSM.

For a condition to trigger for 'auto dispute' evaluation, it must be enabled on the tolerance setup for the Chart of Account in context.

Email Management Improvements

Feature overview

We have taken additional steps to help prevent the emails that Coupa sends out from being identified as spam.

What we were thinking

Recipients, email clients, and Mail Transfer Agents (MTAs) can report and/or auto-classify Coupa-originated emails as spam. This has clear impacts to cycle times, efficiency, and success metrics. We needed to start taking steps to identify how and why Coupa emails are being labeled as spam, and so we've built tools and practices to help ensure Coupa emails get to their intended recipients and provide value to the people who receive them.

How it works

There are a variety of ways that Coupa emails to be marked as spam, but they fall into one of two categories: user-reported spam complaints and email client or MTAs classification of Coupa email as spam.

In this release, we've taken a couple of steps to help Coupa emails reach the right people:

- Implemented automated rules that immediate block email addresses that report Coupa emails as spam
- Improved tooling and reporting so customers and Coupa Operations can gather greater insight into how Coupa's emails are being used

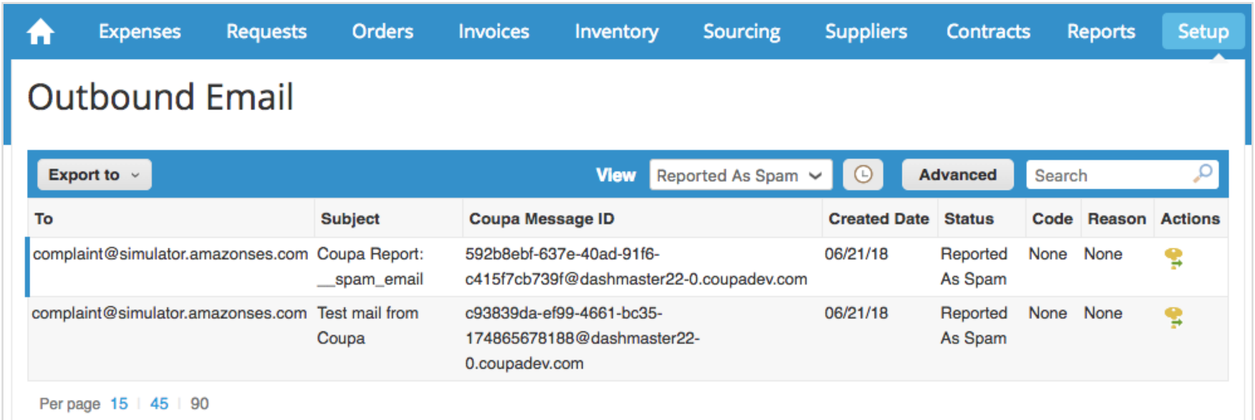
Email blocking rules

Now, if an email address reports a Coupa email as spam, we'll take preventative measures to ensure that all Coupa emails don't get blocked by spam filters. Coupa will add that email address to a blocked email list for that instance.

This will prevent Coupa instances from sending emails to blocked email addresses, preventing further reports of spam. You can manually remove blocked emails from your instance-specific list. See Email Management for more info.

Improved tooling

The **Setup > Reporting > Outbound Email** table now includes a new Status and Standard View for **Reported as spam**. You can use it to troubleshoot user email addresses that aren't receiving Coupa emails.



Upgrade impact

No changes to notifications, roles/permissions, or integrations.

Availability

This enhancement is enabled by default for all customers who upgrade to R22.

New Form Statuses and Table Columns

Feature overview

You can track the status of your forms more easily and view more details about your forms.

What we were thinking

Previously, it was not clear if form responses in Draft status were saved, worked on, or rejected, so to clearly differentiate the stages of form responses, we introduced the New status for newly created forms and Draft now indicates whether a form has been saved. We also added the Canceled status as a terminal state so that form responses do not stay in Draft indefinitely.

To ensure better visibility of form responses, we added new table columns to provide more information.

This feature was a top Coupa Community item.

How it works

Statuses

Form responses have the following new statuses:

Status	Description
Canceled	The form response link expired. When using SIM forms, form status also changes to Canceled from New or Draft if form reminders are enabled and form requests are older than 15 days. See Improved SIM Form Visibility through New Statuses, Aging, and Alerts for more info.
New	The form was newly created.
Draft	The form was edited and saved, but it was not submitted. Sometimes Coupa does actions on your behalf and in those cases forms also transition to Draft.

New form response table columns

You can select the following new columns to view in form response tables, for example, in the **User Form Responses**, **Expenses Preapproval Form Responses**, **Supplier Information Form Responses, Supplier Review Form Responses**, or **Invoice Form Responses** tables:

- Rejected?
- Last Rejected At
- Requested By
- Submitted At

- Last Updated Date
- Created By*
- Last Updated By*

> **Note:** The columns marked with an asterisk (*) are not in the table view by default.

These categories except for **Rejected?** are also searchable with the Advanced search and sortable. To view a list of rejected forms, select **Rejected** from the **View** dropdown.

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

These changes are available by default to all Coupa customers who use Forms.

New Supplier Status: Evaluating

Feature overview

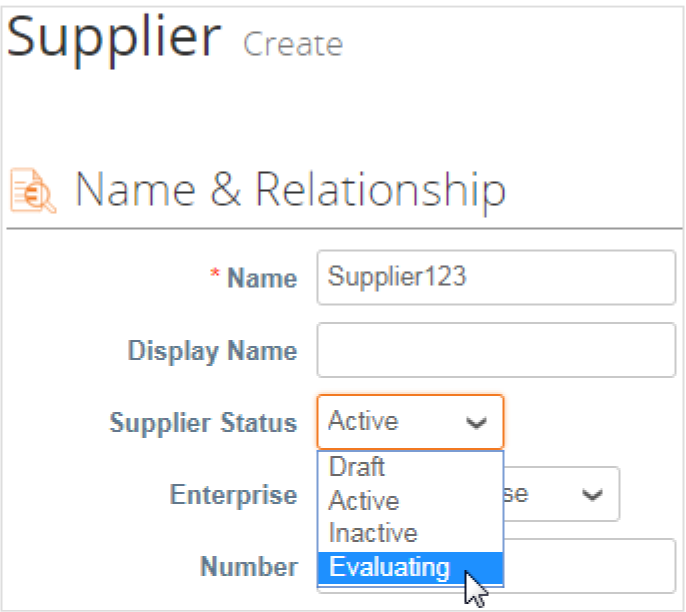
You can use a new status for your suppliers to facilitate work during sourcing and contracting.

What we were thinking

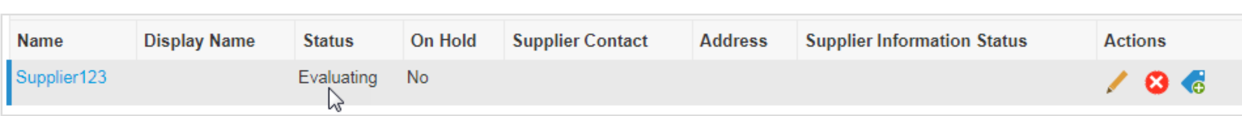
Previously, we had draft, active, and inactive statuses for suppliers, and when using Supplier Information Management (SIM) also an onboarding status. We wanted to enhance Coupa's support for source to contract, so we added a new status, Evaluating, that customers can use while running sourcing events and creating contracts, before deciding to onboard suppliers, award them, or finalize a contract with them.

How it works

When you create a supplier, you can select the **Evaluating** status. See Supplier Settings for more info.



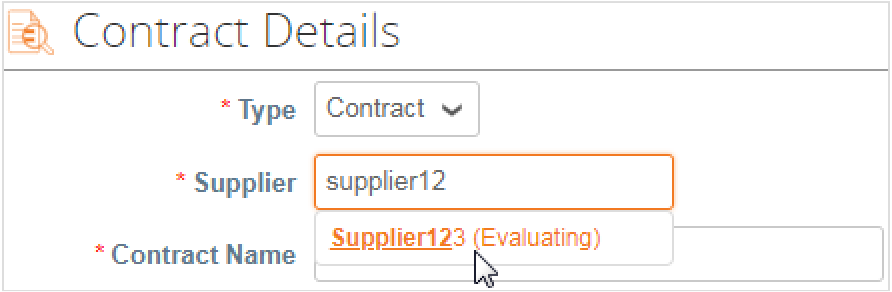
The status is shown in the **Suppliers** table.



Name	Display Name	Status	On Hold	Supplier Contact	Address	Supplier Information Status	Actions
Supplier123		Evaluating	No				

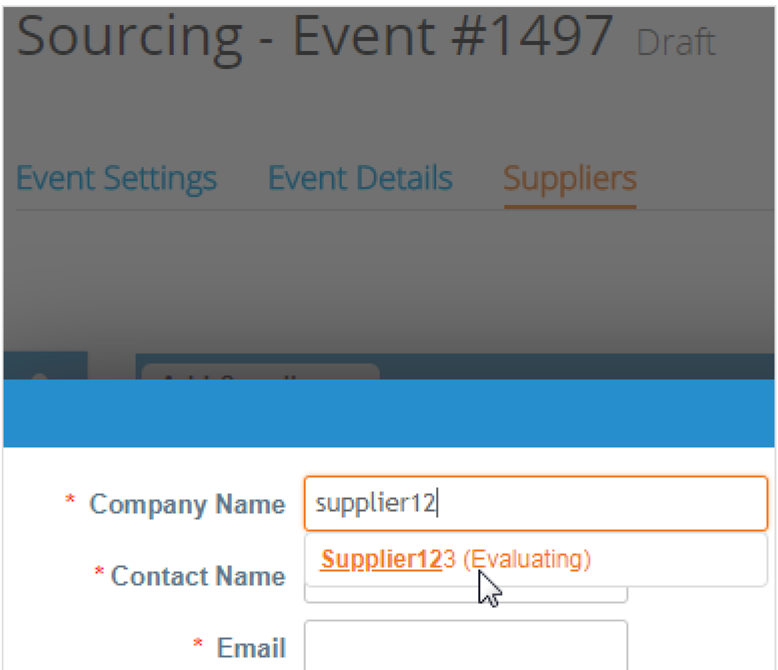
The new status is displayed also when you:

- Create contracts:



See [Contract Integration with New Supplier Statuses]() for more info.

- Add suppliers to sourcing events:



- Create supplier records from Coupa Sourcing Optimization (CSO) sourcing events.

  See Link to Suppliers and Contracts from CSO and Other Changes and Improvements in Coupa Sourcing for more info.

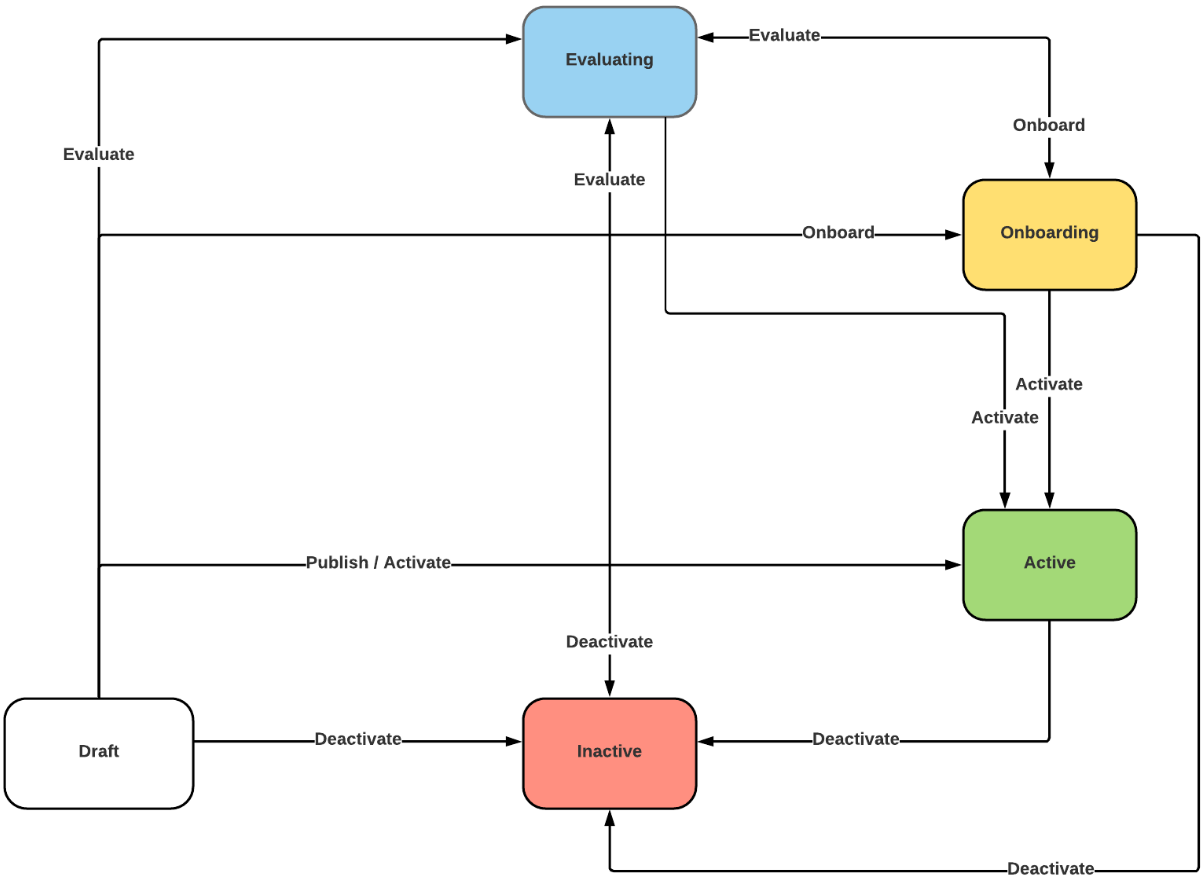
If you created a supplier with Evaluating status, you can see the supplier also when you create a free-form request.

Supplier status changes

The supplier status can change:

- to Evaluating from Draft, Onboarding, and Inactive
- from Evaluating to Active, Onboarding, and Inactive

The following graphic shows all the possible supplier status changes.



On the supplier record, you can see and select only the possible supplier status(es) depending on the supplier's current status.

When using Supplier Information Management (SIM), if a supplier update - searchable (internal) request form is approved and applied, the supplier status changes from **Evaluating** to **Onboarding**. Also, If you send an external SIM form to a supplier in Evaluating status or if you invite suppliers in Evaluating status to the CSP, the supplier status changes to Onboarding.

Status changes are recorded in the history.

Upgrade impact

Roles and permissions

We made changes to the following roles: **Admin**, **Buyer**, and **Supplier Manager**.

We added a new permission: **Suppliers / Evaluate Supplier**.

See Release 22 Role Updates and Release 22 Permission Updates for more info.

Integrations

You can change the supplier status to Evaluating also through the API.

Availability

This feature is available to all customers.

Scheduled Report Improvements

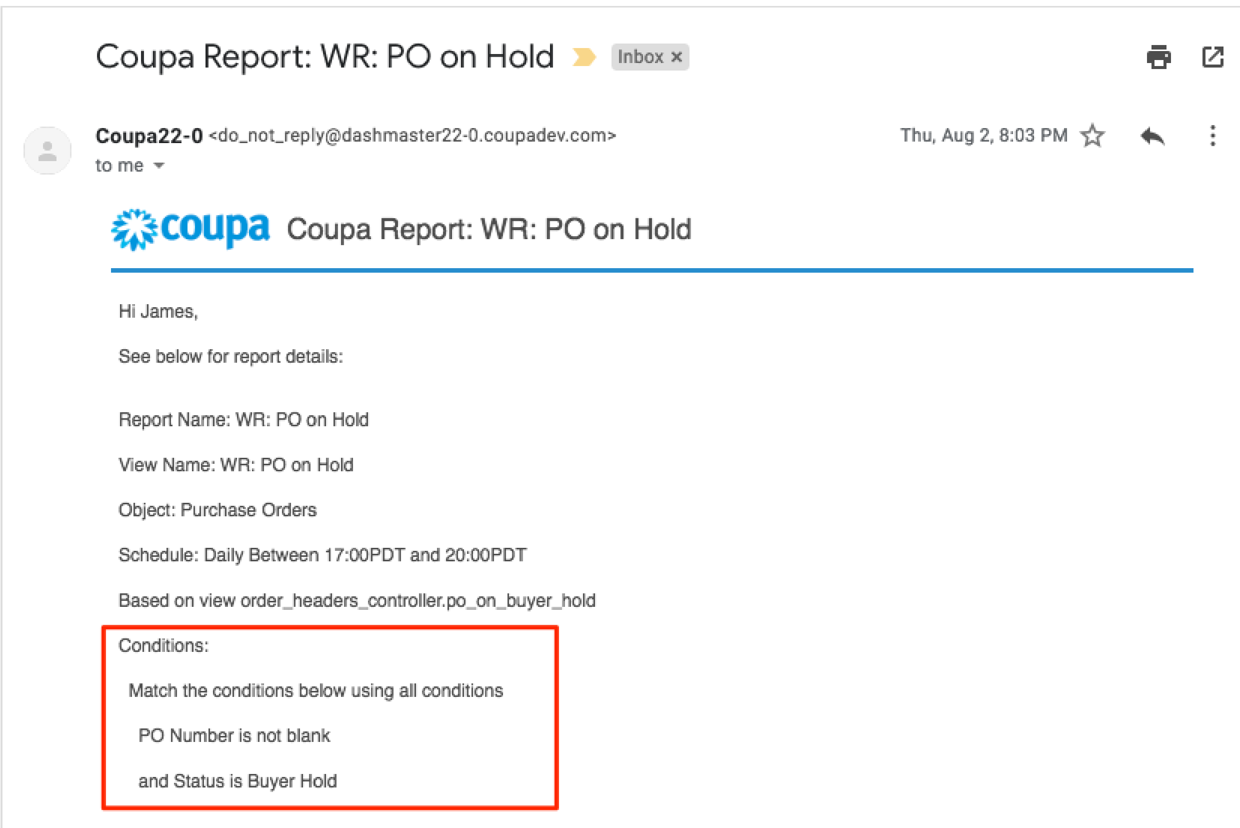
Overview

Now the email Coupa sends with your scheduled reports will include information about the report. This is great for people who receive multiple scheduled reports from the same object since they can easily tell the difference between the reports. It also helps identify problems if someone changes the conditions of a specific view that other users rely on. Often, these changes are anything but transparent and lead to confusing data.

How it works

Custom view filter details

The scheduled report email now includes the filter details of the view used for the scheduled report. This makes it easy to understand the details of the scheduled report.



Note: Coupa can send a scheduled report to multiple recipients, even an individual recipient doesn't have access to the view used for the report. This means the restricted user will also be able to see and share the conditions used to generate the emailed report.

Scheduling and resource usage improvements

In R19, we introduced eight new scheduled report job windows to give users and admins the ability to decide when their scheduled report is run (and subsequently delivered). However, most users just take the default assigned to them. This led to most reports being scheduled to run in the same default window, resulting in a performance bottleneck.

Now, when someone creates a new scheduled report, the default window presented to the user will be the least-utilized window available during the least busy time of the day. Additionally, the platform will smartly stagger the start of each report run within each 3-hour span. This will better-leverage your reporting resources within the reporting window, improving overall timeliness of report delivery.

While the new scheduling default is put into place to improve the performance of your instance, you can continue to override the default if your reports require delivery within a specific 3-hour time range.

Row limit increase

Prior to R20, the standard limit for a scheduled report was 10,000 rows. In R20, this limit was increased to 100,000 rows. Now in R22, the new limit will be 200,000 rows for both scheduled and on-demand reports. This should greatly improve the ability for customers to do reporting in Coupa.

Upgrade impact

There are no changes to roles/permissions or integrations. Notifications now contain more info, but report conditions haven't changed.

Availability

These enhancements are available by default once you've upgraded to Coupa 22

Split Billing Enhancements

Feature overview

We've expanded on and built out new functionality for split billing to make it easier and more intuitive to use.

What we were thinking

In Coupa Release 21 we made a batch of usability enhancements, focusing on the creation and management of account allocations. For Release 22 we have focused on creating a better user experience for the downstream processes: notifications, removal of account allocations, and ability to use the import/export loader beyond invoices. With these updates, we've smoothened out the end to end user experience.

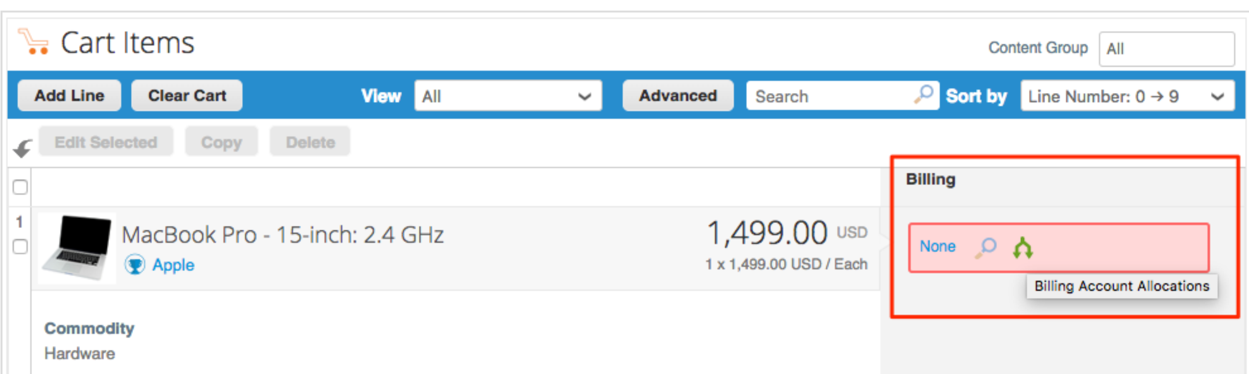
How it works

Split billing is now known as Billing Account Allocations. We have added a number of useful improvements.

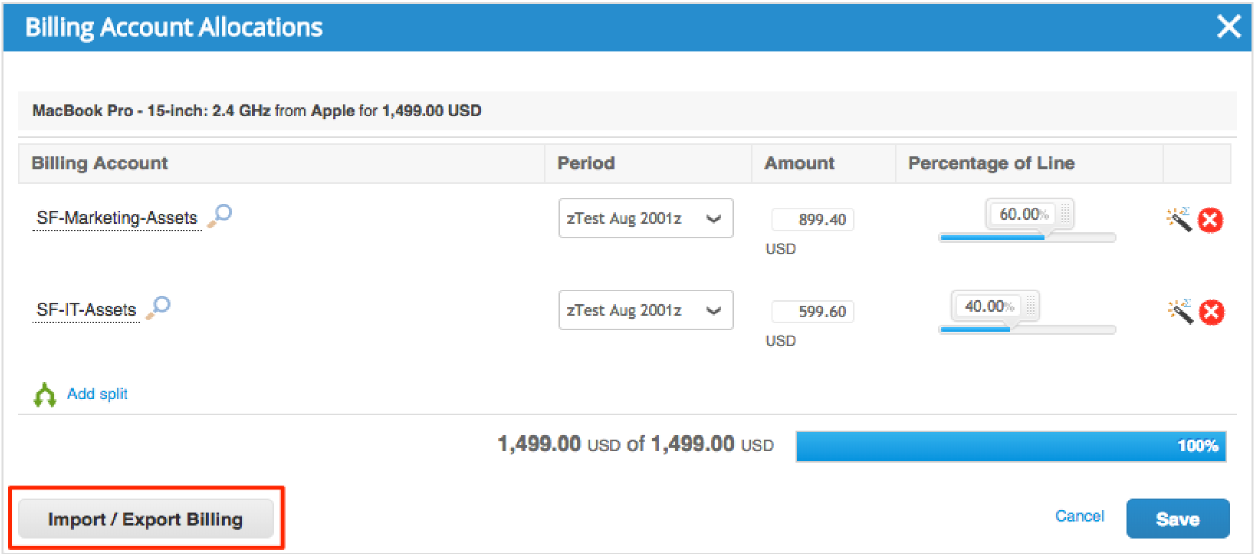
- Account allocations import/export loader is available for requisitions, PO change requests, and PO revisions.
- Notifications with account allocations display the details in a table structure.
- When an account allocation is updated to 0%, it is automatically removed.
- If account allocations are no longer needed (one allocation is updated to 100% and all others are updated to 0%), the account moves back to the line level and split billing is no longer used.
- If a line has account allocations, the hover-over information has been replaced with a new window that includes buttons to **Export** and **Edit** the account allocations.
- The split billing page was renamed to **Billing Account Allocations**.

Support for bulk loading of allocations

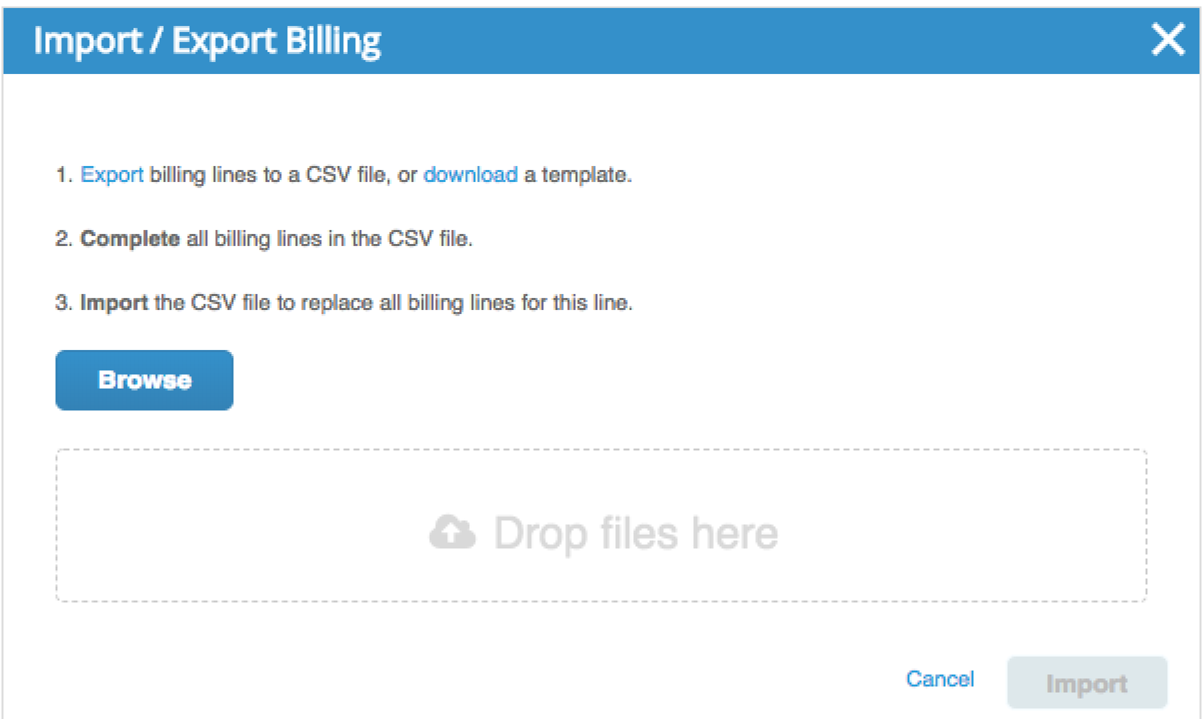
One of the new actions allows you to bulk load your allocations on reqs. Previously this was only available for invoices.



When you edit your allocations and add at least one account, the Import / Export Billing button becomes available.

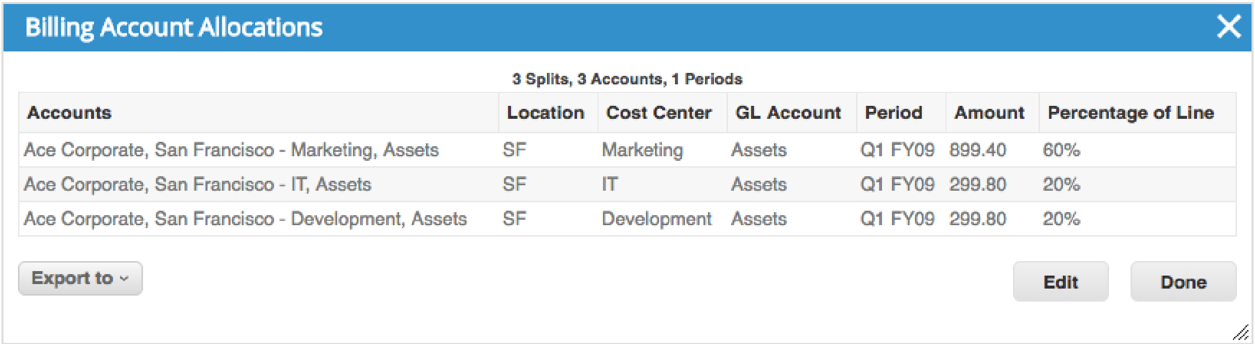


When you click it, you can drag or drop your allocations directly to the UI, as well as the usual bulk loader functions.



Edit from the details view

Now you can edit your allocations directly from the detailed view. Previously, if you looked at the allocation details and didn't like what you saw, you had to close the view, and then click the Billing Account Allocations icon ( ).

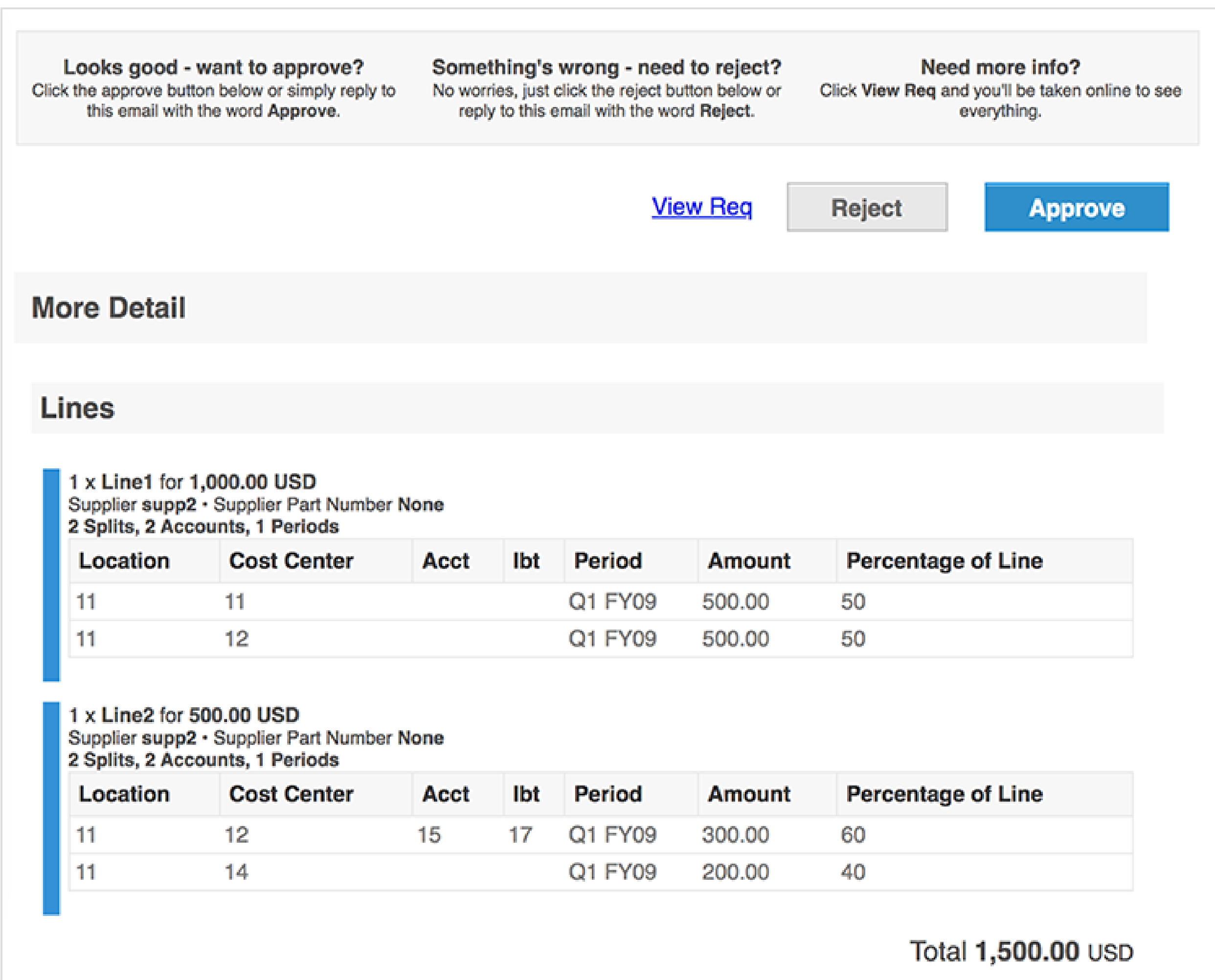


Accounts	Location	Cost Center	GL Account	Period	Amount	Percentage of Line
Ace Corporate, San Francisco - Marketing, Assets	SF	Marketing	Assets	Q1 FY09	899.40	60%
Ace Corporate, San Francisco - IT, Assets	SF	IT	Assets	Q1 FY09	299.80	20%
Ace Corporate, San Francisco - Development, Assets	SF	Development	Assets	Q1 FY09	299.80	20%

You can also export your allocations to use with the bulk loader.

Improved notifications

Notifications now show the same information as the detailed view for splits (screenshot above) but will limit the number of splits shown to 10 splits if there are less than 5 lines on the req. If the req has more than 5 lines than the detailed view will be limited to 5 splits per line.



Location	Cost Center	Acct	Ibt	Period	Amount	Percentage of Line
11	11			Q1 FY09	500.00	50
11	12			Q1 FY09	500.00	50

Location	Cost Center	Acct	Ibt	Period	Amount	Percentage of Line
11	12	15	17	Q1 FY09	300.00	60
11	14			Q1 FY09	200.00	40

Upgrade impact

None

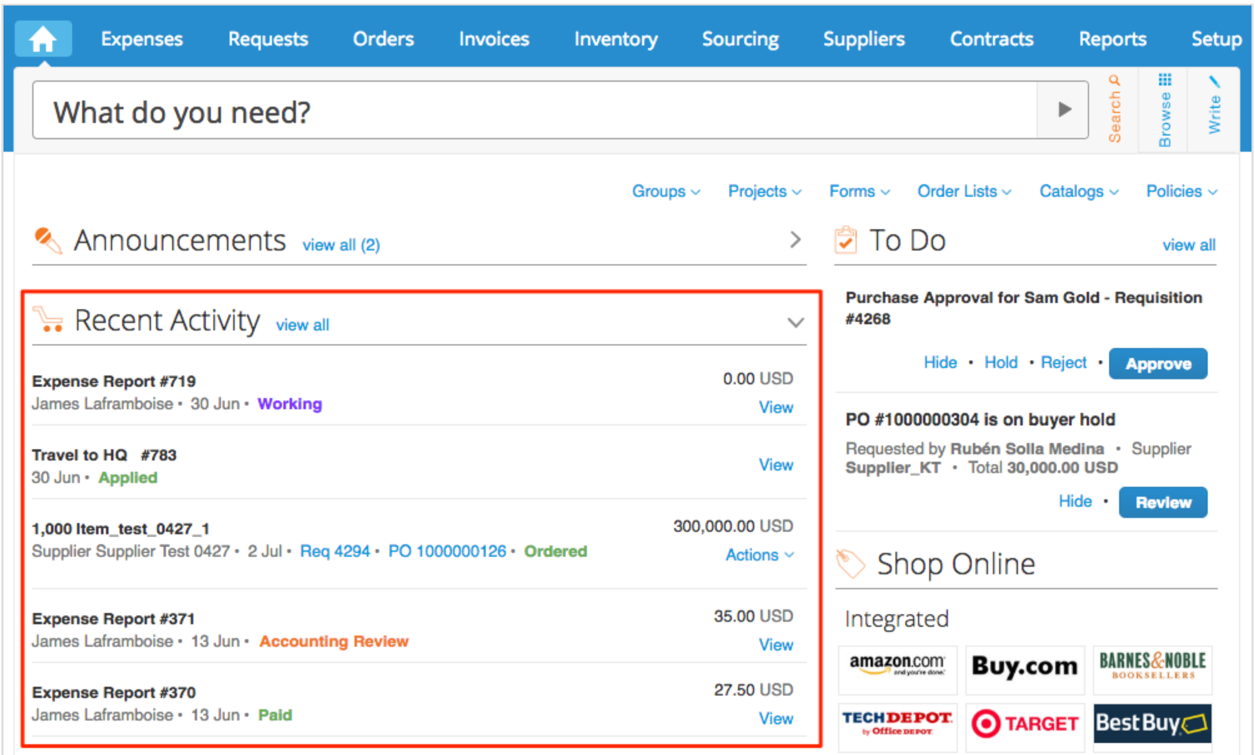
Availability

These enhancements are enabled by default for all customers who upgrade to R22.

Other Platform Improvements

Homepage changes

We renamed the **Recent Orders** section of the Coupa homepage to **Recent Activity** to better reflect the new types of activities that are now shown there. It now includes your activity for **Expense Reports** and **Form Responses**. We also added a bit of color coding to the status of each activity to make it easier for you to see how it's progressing.

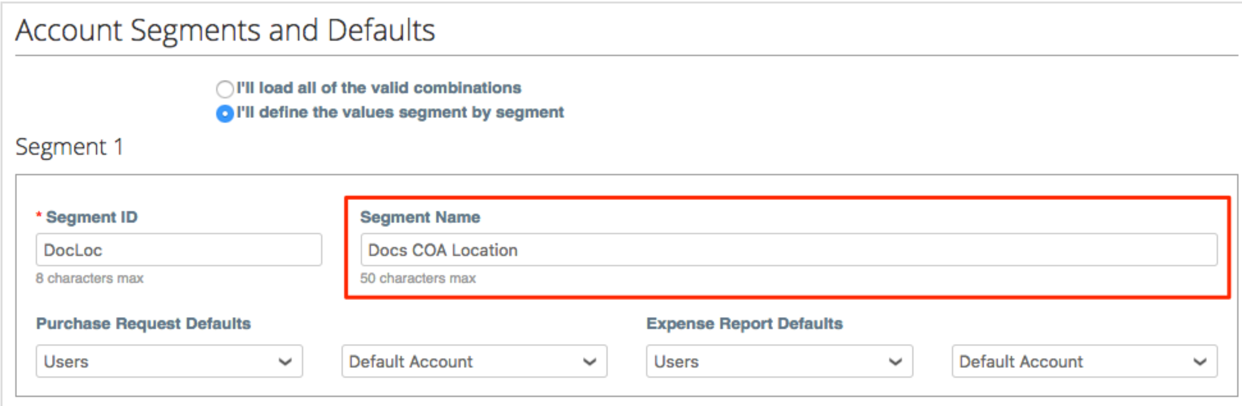


Roles and Permissions

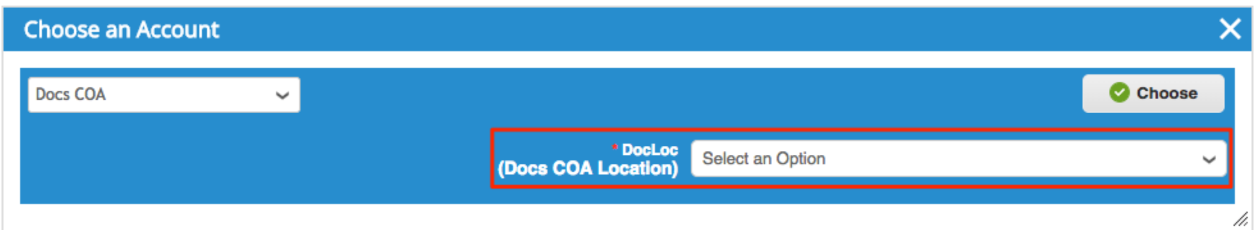
To support this, we created a new permission, **User/Recent Activity** and added it to the **User** role and any custom roles with the **User/Recent reqs** permission.

New Account Segment Name field on COAs

We added a new **Segment Name** field to the **Account Segments and Defaults** section of the **Chart of Accounts** create page:



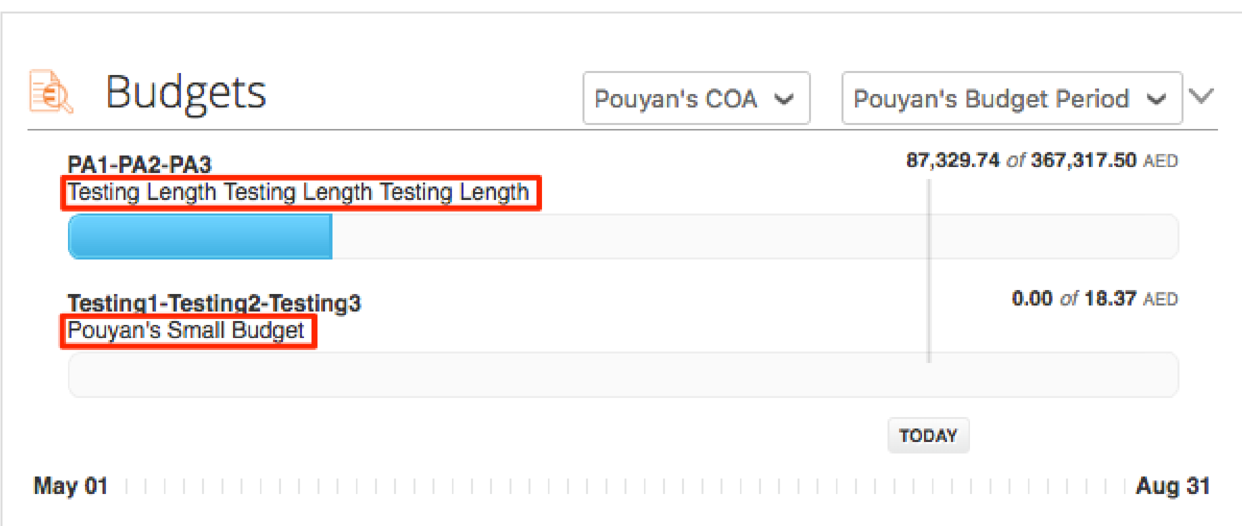
We also exposed this Segment Name field to users when they're choosing accounts:



This makes it easier for both Admins and users to identify the accounting segment since they can see a full name for the account segment, not just an 8 character code. You can easily update any of your COAs by going to **Setup > Financial Setup > Chart of accounts** and editing any of your COAs.

Budget description on budgets homepage view

Now budget owners can see the description for the budgets they own when looking at the budget on their Coupa homepage.



Increased number of custom object definitions

We've increased the number of Custom Objects you can create in your Coupa instance from 3 to 10. This gives customers greater flexibility when implementing custom objects and the ability to implement more custom business processes in Coupa.

Increased number of rows in scheduled reports and on-demand downloads

Prior to R20, the standard limit for a report was 10,000 rows. In R20, this limit was increased to 100,000 rows. Now in R22, the new limit will be 200,000 rows. This should greatly improve the ability for customers to do reporting in Coupa.

Manager and "Manager of Manager" approver support for custom objects

Manager and **Manager of Manager** are now available as dynamic approvers for **Specific Approvers** type approvals in Custom Object Form Approval Chains.

New allowable attachment types

With enhanced malware scanning rolling out to customers, Coupa now allows ZIP, GZ, and TAR.GZ files to be attached to Coupa objects.

See File Size and Type Limitations for more info.

Coupa Supplier Portal

This chapter contains the following topics:

Bulk Export Legal Invoices

Feature overview

Suppliers can bulk export all the legal invoice attachments in a `.zip` file.

What we were thinking

Coupa creates legal invoice attachments for suppliers whose customers have country compliant invoicing enabled.

Previously, if they wanted copies of these legal (compliant) invoices, they had to go to each invoice to download it individually. This was time-consuming when they downloaded multiple legal invoices, so we added the option to export all the legal invoices with one click.

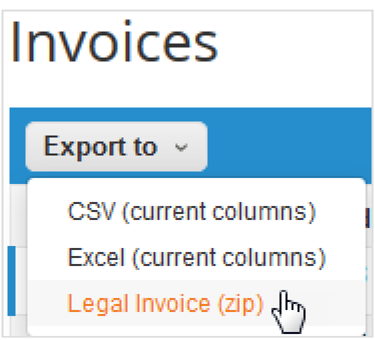
See [Compliant Invoicing] and [Legal PDF Invoice Creation] for more info.

How it works

If your customers use compliant invoicing, you can bulk export all the legal invoice attachments from your current **Invoices** table view.

> **Tip:** You can set your **Invoices** table view to show and export your legal invoices by status, created date, invoice date, period of time, and so on.

From the **Invoices** table in the CSP, select the **Legal Invoice (zip)** option from the **Export to** dropdown to create the `.zip` file with the legal invoice attachments, usually PDFs for most countries.



A green message bar informs you that "The data you requested will be emailed to you shortly."

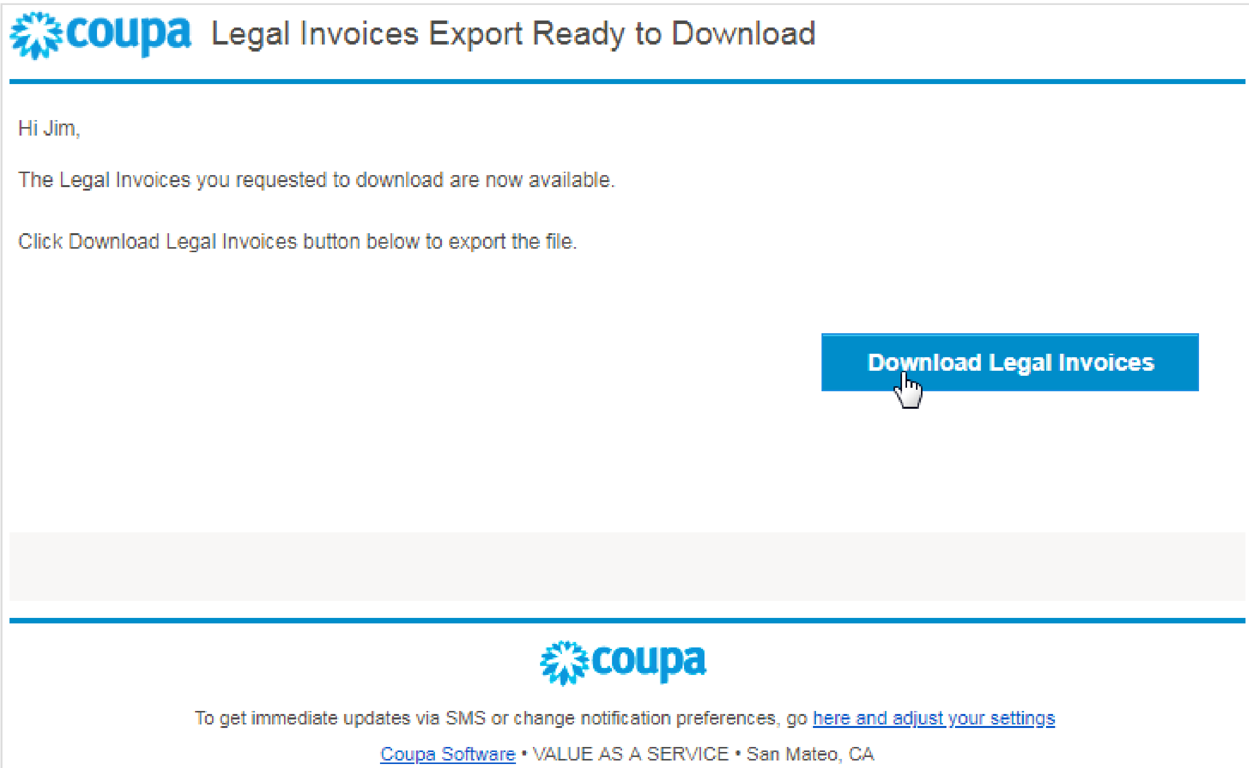
> **Note:** The export usually takes about one minute. In case of a large number of invoices it may take longer. There is no limitation on the number of invoices or file size.

Online and email notifications are on by default, so if you have not turned off your online notification for **Legal Invoice Export Ready**, you also get a notification in the CSP.

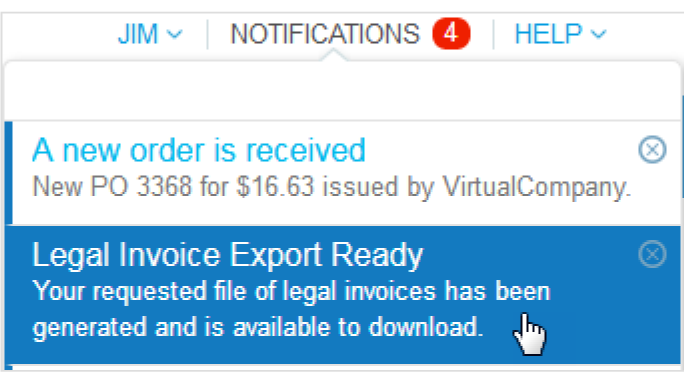
Tip: Depending on your notification preference settings, you can also get an SMS notification.

See View and Manage Notifications for more info.

Email notification



Online notification



Warning: If you turn off notifications for this feature, the `.zip` file is not generated, so you cannot bulk export your legal invoices. You can see a warning in the message bar to enable your notifications.

When you click on the **Download Legal Invoices** button in the email or on the notification in the CSP, the compressed file is downloaded to your device.

> **Note:** If you are not logged into the CSP, you are directed to the **Login** page and you need to go to your notifications to download the file; or after logging in, you can click on the **Download Legal Invoices** button from your email notification again.

> **Warning:** The `.zip` file expires 30 days after you export it. After expiration you cannot download it from your email or online notification.

See Coupa Supplier Portal for more info.

Upgrade impact

Roles and permissions

We made changes to the **Supplier** role.

We added a new permission: **Supplier Invoices / Download invoice zip**.

See Release 22 Role Updates and Release 22 Permission Updates for more info.

Integrations

N/A

Availability

This feature is available to all suppliers using the Coupa Supplier Portal (CSP) that submit compliant invoices.

Create CSP Accounts from PO Emails and Forward Invites

Feature overview

Suppliers can create Coupa Supplier Portal (CSP) accounts by clicking on a button in a purchase order (PO) email.

What we were thinking

Previously, suppliers could create CSP accounts only when they received an invitation email from their customers. The email was sent once, and suppliers that used Supplier Actionable Notifications (SAN), InvoiceSmash, or other PO methods, did not have an easy way to create a CSP account and take advantage of the benefits of the CSP. Also, if the supplier email used for inviting a user to the CSP was incorrect, it was difficult to invite the right user.

We want to make it easier for the right suppliers to start using the CSP, so we allow suppliers not linked to the CSP but receiving PO email notifications to create a CSP account from these emails. Since PO emails are a frequent communication channel, they provide a good opportunity to make suppliers aware of the benefits of the CSP.

Customers can use the following existing tools to help communicate to the new suppliers how to use the CSP:

- Instructions above the **Invoices** and **Orders** tables, specifying, for example, policies or best practices. For more information, see View and Manage Invoices and View and Manage POs.
- Preventing a supplier from creating invoices at invoice level. For more information, see Supplier Settings.
- Submission warning messages to suppliers. For more information, see Submission Warning Approval Chains and Create or Edit an Invoice.

We understand this is a change that needs to be managed, but we should allow suppliers to have control over their own level of security for viewing and creating transactions by having access to more secure options. As Coupa usage has grown exponentially, suppliers increasingly have connections to multiple Coupa customers for multiple purposes (not only simple orders and invoices). Also, payment information is increasingly being stored by suppliers for delivery to customers for compliant invoicing, SIM, and Coupa Pay, so we need to help them secure this data with multiple users and authentication methods.

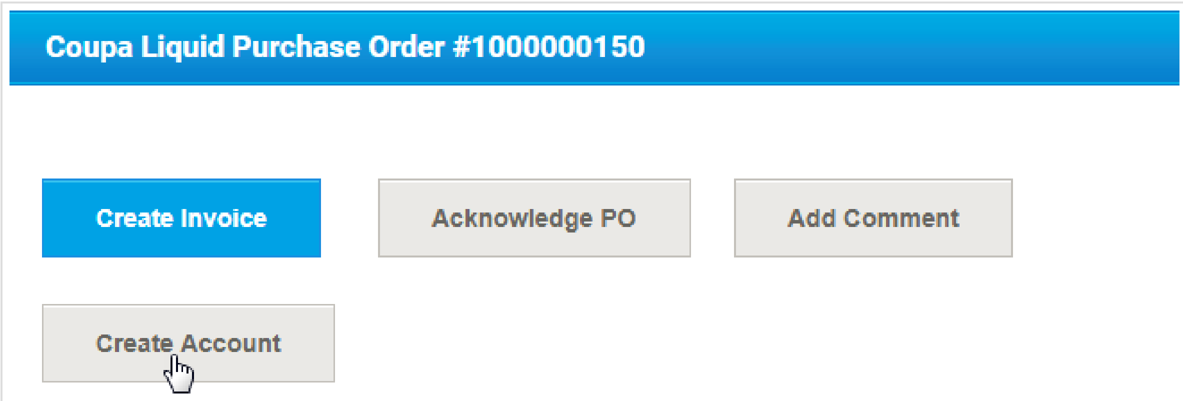
Pros and cons of creating a CSP account with the new methods

Method	Benefits	Considerations
PO email	Suppliers can choose to create a CSP account, which allows them to add security to their data, invite other users from their organization, configure their notification preferences, get connected to multiple Coupa customers in one place, and more. Customers can use electronic invoicing and other transactions with more of their suppliers without having to manage a campaign. This means more electronic invoicing in general and less support requests to customers and Coupa about how to get connected, where their POs are, or what the status of their invoices is.	Suppliers that have not been invited by customers may have questions about the CSP and why they are not configured to create invoices correctly. While this might have some short-term actions on customers' end to clarify or correct configurations, it allows for all the benefits of using the CSP.
Forwarded invitation from a supplier user	Suppliers can send their invites easily to the right person at their organization. Customers do not need to unlink suppliers, re-send invitations, or manage the process of incorrect invitations. Both suppliers and customers end up with the right user(s) linked to and transacting through the CSP with less work for all.	While the word "security" might be a concern, understand that anyone with access to an email invitation can log in (just by creating a password) and invite other users (with different email domains) to join their account and start transacting. So in some ways, this feature has more built-in security by restricting sending invitations to the same email domain. We believe that when thought through, the security of this feature should not be a concern and it drastically improves getting the right supplier contact(s) connected to and transacting through the CSP.

How it works

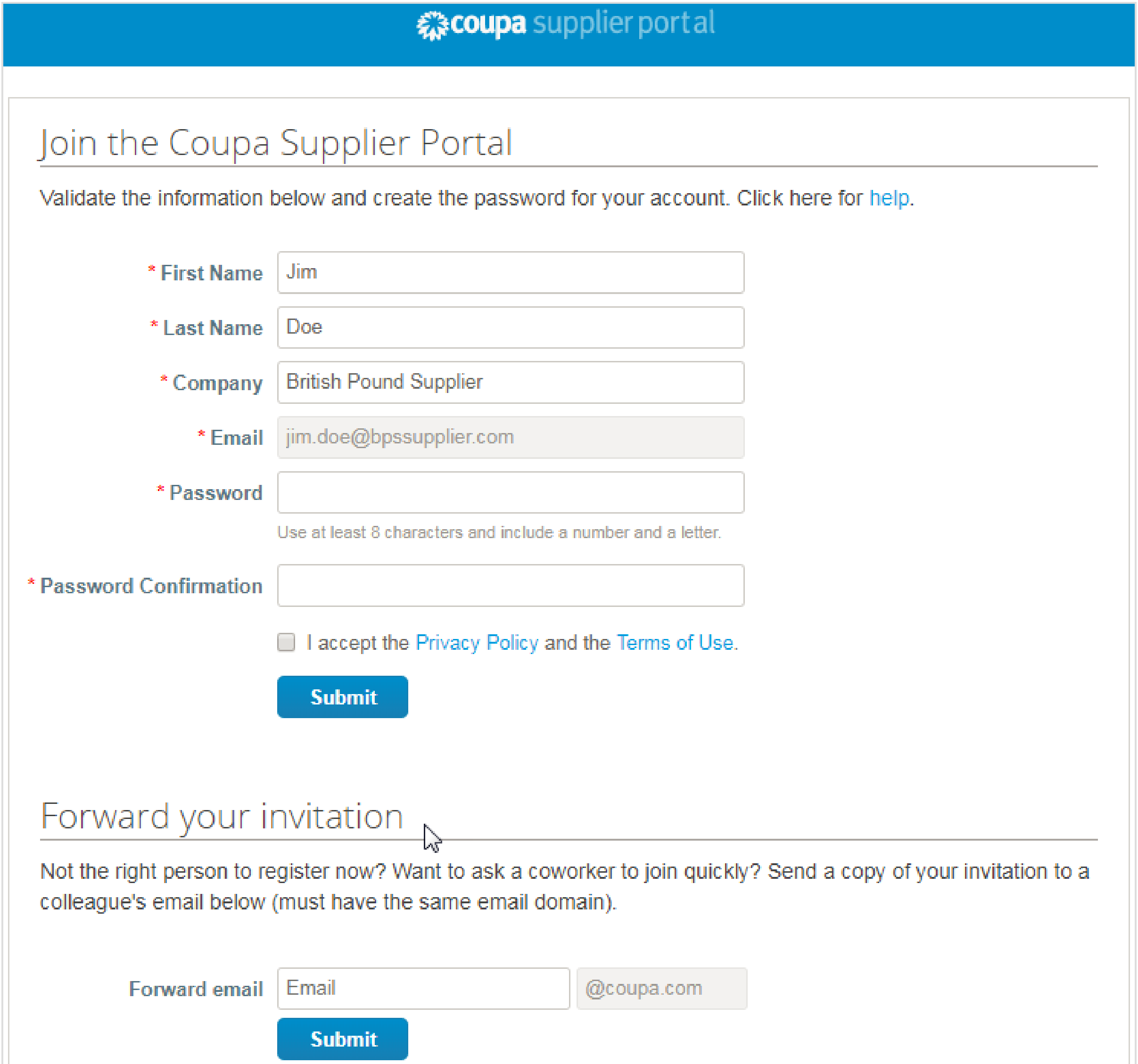
Create a CSP account from a PO email

If you transact with your customers through PO methods other than the CSP and you are not linked to the CSP, you can see the **Create Account** button in your PO notification email.



Note: If you are already linked to the CSP, you can see the **Login** button instead of **Create Account**.

Clicking on the **Create Account** button directs you to create an account to the CSP.



Forward an invitation to the CSP

You can invite others to the CSP by forwarding them your email or by sending them an invitation from the create account page.

From the create account page, you can invite others any time by entering their email address in the **Forward email** field in the **Forward your invitation** section and clicking **Submit**.

> **Warning:** You can forward the invitation only to email addresses with the same domain.

An invitation to the CSP is sent to the email address that you specified.

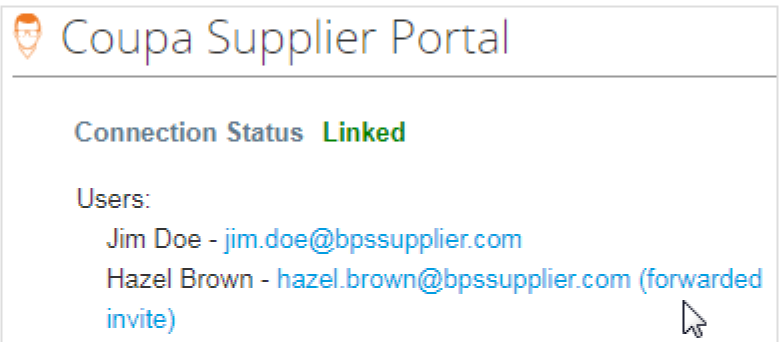
When the invited user clicks on the link in the email, the user is directed to create an account to the CSP.

If the user is already linked to the CSP or tries to create an account from an expired invitation, the user is directed to the **Register / Login** page where a red message bar displays the following: "Your invitation has expired or already been activated."

> **Warning:** Invitations to the CSP expire after 30 days.

See Coupa Supplier Portal for more info.

Customers can see the list of users linked to the CSP on the supplier record. The information whether a user created the account from a forwarded email invite is also shown next to the user's name and email address.



The email invitations from customers now have a more informative subject line (Action Required: Click Link to Join Coupa) and clearer instructions, and they include information on the possibility to forward them to another user.

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

This feature is available to all customers that have a Procurement license.

Expenses

This chapter contains the following topics:

Advanced Mileage Reimbursement on Mobile

Overview

Coupa's mobile app fully supports [Advanced Mileage Reimbursement](). Coupa Expenses customers can configure mileage expense categories through the web application, so their users can enter mileage transactions anywhere and anytime from their iOS or Android device.

Advanced Mileage allows a detailed, customized, and accurate mileage calculation and expense line creation.

How it works

Advanced Mileage enables users to enter a much more detailed mileage transaction, including:

- Google maps – Available with Basic Mileage. Allows adding routes, calculating distance automatically, and saving routes as receipts to the expense line.
- Mileage accumulation – Available with Advanced Mileage. Applies different mileage rates at various levels of cumulative distance traveled.
- Region, vehicle type, and number of passengers – Available with Advanced Mileage. Refines the expense calculation and allows the implementation of variable rates and policies.

Create a mileage expense line (Expense users)

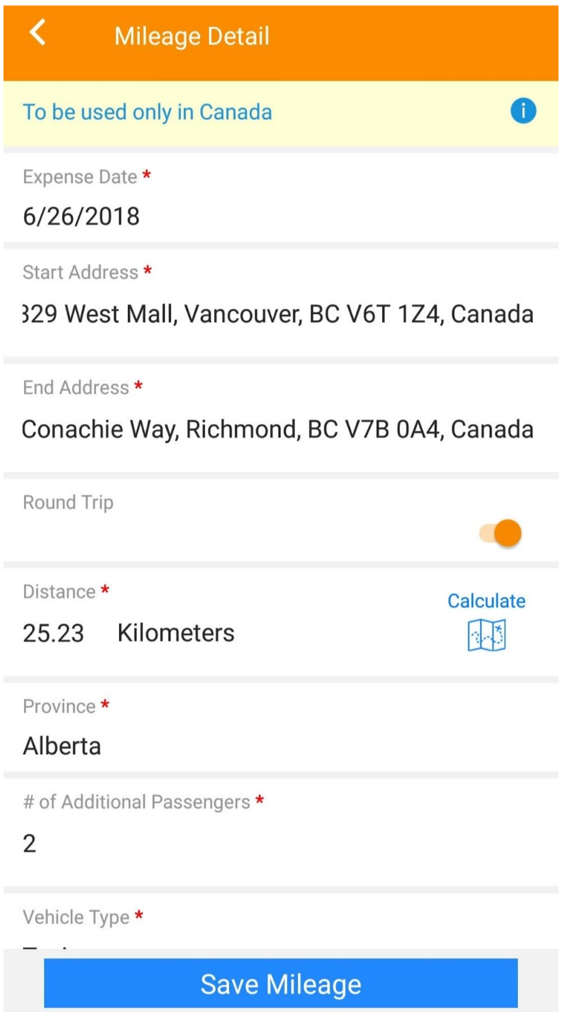
1. Click on the **Add Expense** button to create an expense report, and give your report a name.
2. Choose **Manual** and add a description.
3. On the expense line, under **Expense Category**, choose the appropriate **Mileage** category.

   Depending on the mileage category chosen and your company's configuration for that mileage category, the following fields may populate on the same screen (if the category was created before Coupa Release 20) or on a new screen (if the category was created after Coupa Release 20):

Field	Description
Expense Date	Defaulted from the expense line but available for you to update. The expense date is used to calculate the correct reimbursement rates.
Start Address and End Address	Start address and destination.
Round Trip	Toggle option.
Distance	Can be calculated automatically if **Google Maps** is enabled for that category by clicking on **Calculate**. Otherwise, you must enter the distance traveled manually. If **Google Maps** is enabled, you may also choose to save your route as a receipt to the expense line.
Region/Province/State	Applies specific rates and policies based on the region. Available with categories configured for Advanced Mileage only.

Field	Description
Passengers	Number of passengers traveling. Available with categories configured for Advanced Mileage only.
Vehicle Type	Type of the vehicle being driven, for example, SUV, electric, or sedan. Available with categories configured for Advanced Mileage only.
Total	Amount to be reimbursed. It is calculated automatically and cannot be changed.

4. When the distance is entered or calculated based on data input, the total amount to be reimbursed will populate and the mileage details can be saved to the expense line.



5. Save the expense line.

Tip: To review or change the mileage expense line after saving it, go to the **Mileage Detail** section of the expense line.

6. Repeat the steps above to add more expense lines in the same report. Once the expense lines are finalized, you can submit the expense report for approval.

Configure Advanced Mileage (Administrators)

See Basic and Advanced Mileage Reimbursement for more info.

Upgrade impact

None

Availability

Mobile Attendee Tracking is available by default for all mobile users on iOS 6.0 / Android 6.0 and with Coupa Enterprise instances on R21 or later.

Auto Approval for Preapproved Expenses

Feature overview

Improve efficiency and cycle times by configuring Coupa to automatically approve travel expenses that are fully within the preapproved amount.

What we were thinking

Managers today must manually approve every expense report submitted by end users, even if the report is fully compliant, and even if the expenses were preapproved. By auto-approving through users on an expense report who already pre-approved the expenses, Coupa reduces the workload and cycle times for expense reports with preapprovals.

How it works

Now, Coupa will automatically approve the expense report (ER) when the ER is associated with the preapproval as long as the amount is less than or equal to the amount of the preapproval. If the ER incudes additional lines that aren't in the preapproval, or cause the ER to exceed the preapproval amount, Coupa won't auto-approve the report.

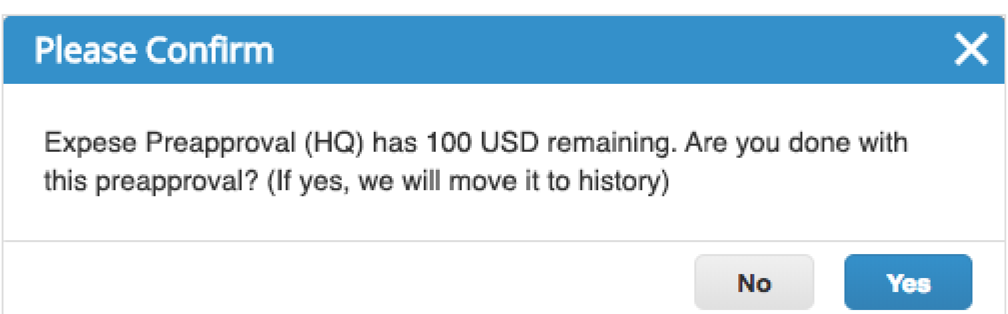
There's no change in the way the approval chain for the ER is generated, but any users who previously approved the expense preapproval are automatically approved on the ER. This works for any approver, with a couple of exceptions:

- Coupa will never auto-approve remote approvers, even if they approved the expense preapproval.
- If your **Accounting Review Settings** are set to **Always**, an expense report will still need to be approved by someone in accounting, and won't ever be fully auto-approved.

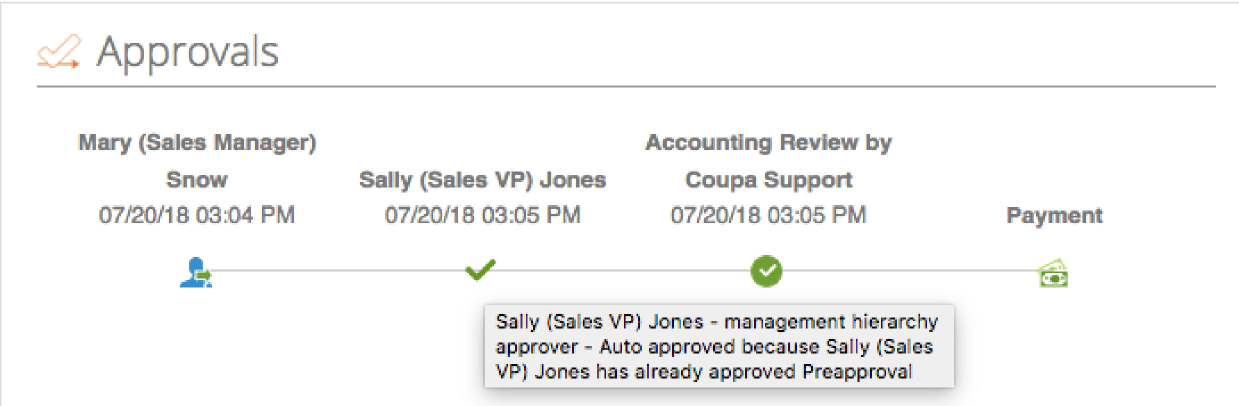
Workflow

The basic workflow follows these steps:

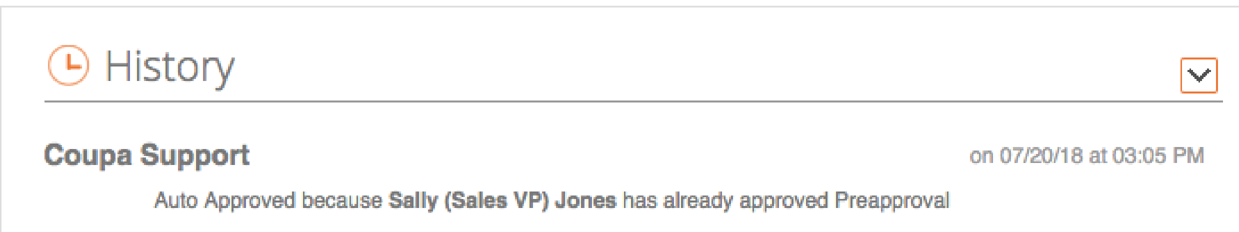
1. Submit an expense preapproval request and get it approved.
2. Create an expense report for the preapproved travel.
3. Associate the expense report with the preapproval.
4. Submit the expense report. If there's a balance remaining on the preapproval Coupa asks if you if you're done...



5. If the expense report is within the preapproval limit, the report is auto-approved for any of the approvers on the preapproval. You can see the auto-approval in the **Approvals** section...



6. and in the expense report history...



Coupa follows standard approval chain practices: "auto-approve approvers" will be added in the approval chain wherever they would naturally show up; they don't take precedence or are placed in a special order. If blocked by another approver who doesn't meet the auto-approval requirements, "auto-approve" approvers will have to wait until the approvers approve the expense report before they will get auto-approved and vice-versa.

Finally, the auto-approval won't happen if the expense report:

- Isn't within the amount of the preapproval
- Doesn't conflict with any implicit submission blockers

Configure auto-approvals

Before Coupa can auto-approve people who alread preapproved, you need to do a couple of things:

1. Set up the [Travel Expenses Preapprovals]() feature that was introduced in R20 (forms, and approval chains).
2. Enable auto approvals by going to **Setup > Expense Tools > Expense Settings** and selecting the **Enable Auto Approval for Pre-Approved Expenses** checkbox. If you don't see the checkbox, verify that your Expense Preapprovals are working as expected.

Upgrade impact

No changes to roles and permissions or integrations, but now, notifications won't be sent for expense reports that are auto-approved.

Availability

This feature is available to customers who've purchased Expense Preapprovals, but isn't enabled by default.

Send Expense Lines Back to the Submitter

Feature overview

Approvers and accounting reviewers can send back individual expense lines to the submitter instead of rejecting an entire expense report.

What we were thinking

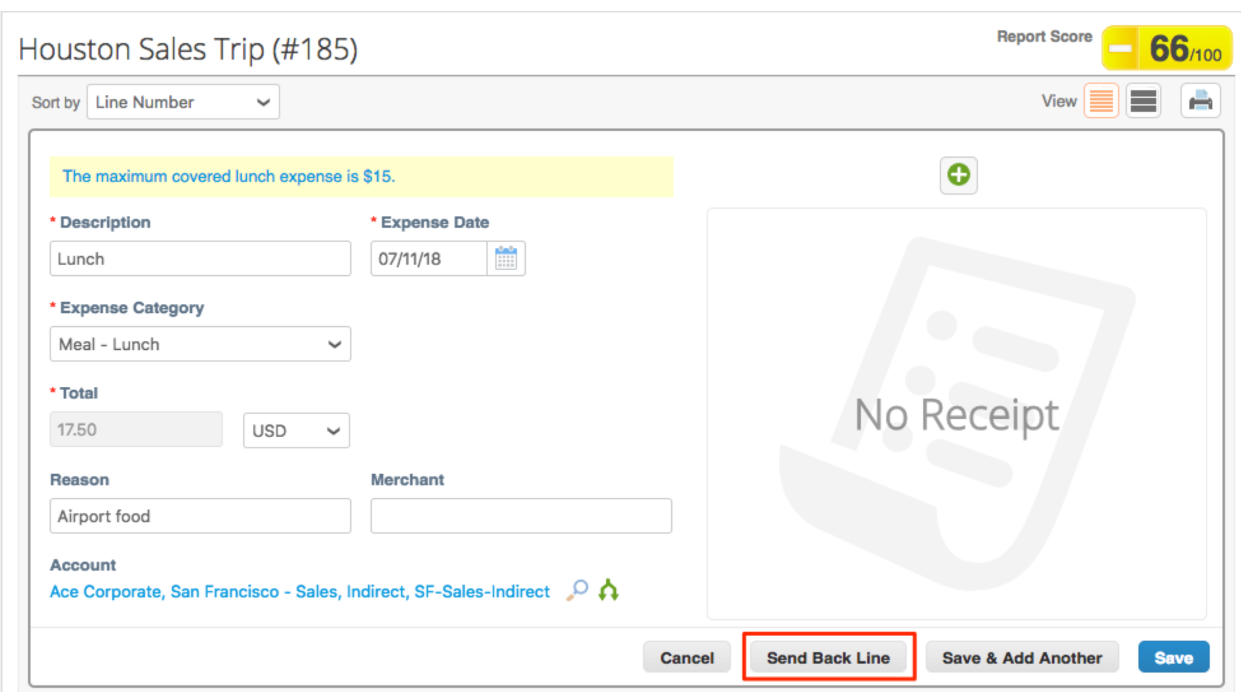
Nobody likes waiting for expenses to be reimbursed, and delays in getting paid are the worst. Yet, delays are common when expense reports aren't filled out correctly. The person reviewing the report often rejects the entire report when just one line has issues. Then, the report needs to be edited, resubmitted, and often, sent through the full approval path again.

With the ability to send back a bad line instead of the whole report, lines with all of the necessary information can be immediately approved, resulting in quicker payment, fewer approvals, improved cycles times, and ultimately, reduced cost.

This was a top community requested enhancement.

How it works

We've added a new **Send Back Line** button to the expense report line that lets reviewers remove the individual line and send it to a new draft expense report for the expensed by user. The button shows up when the report has more than one line and lets the reviewer remove an incomplete or invalid line and then approve the expense report.

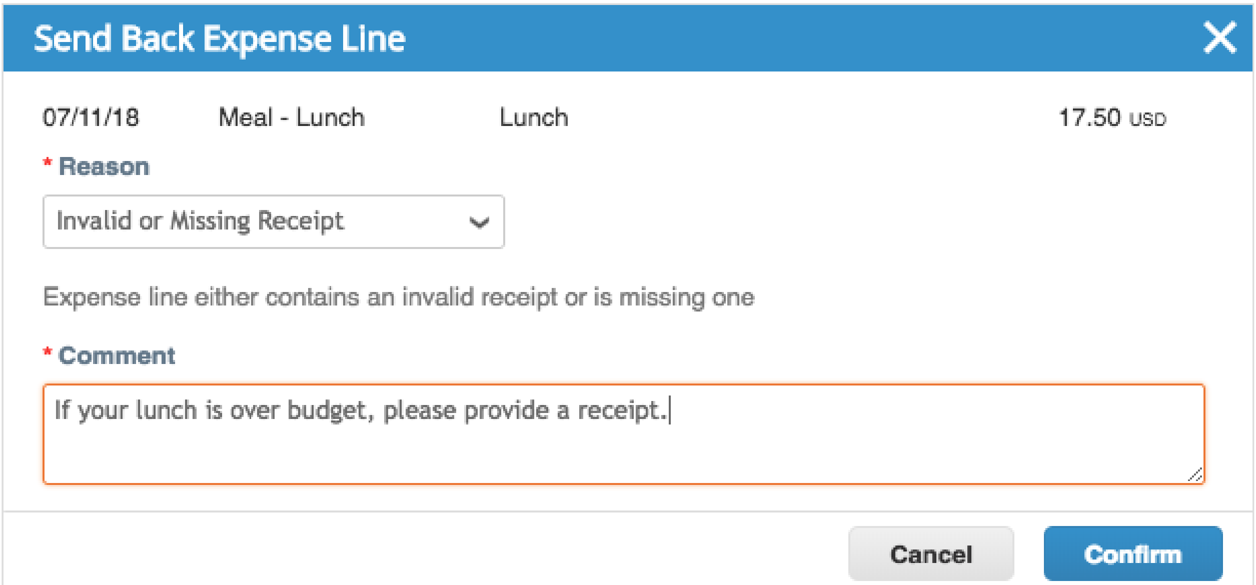


Detailed workflow

1. A user submits an expense report (for example, **Returned lines test (#370)**) with two or more lines on it.

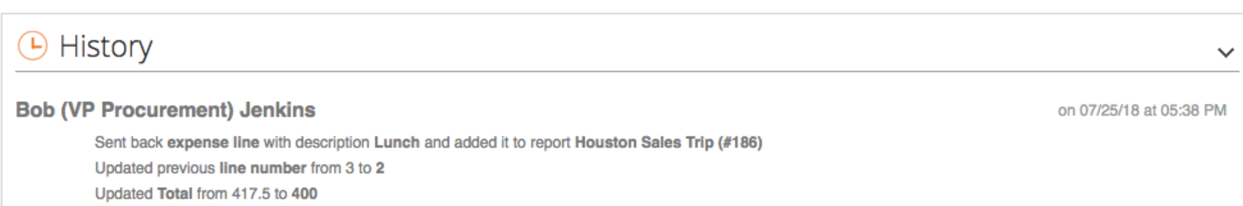
2. While reviewing the individual lines, the reviewer sees an incomplete line and clicks the **Send Back Line** button.

3. The reviewer needs to choose a **Reason** and provide a **Comment** before they can send back a line. The reason is taken from the [Reason Insights](#) table.



4. Lines sent back from an expense report are added to a new draft report with the same title as the original report, but a different ID. Every expense report gets its own draft when a line is sent back, regardless of who sent the lines back or when they were sent back. As long as there's an existing draft for the original expense report, any lines sent back are added to it. If the draft report was submitted and then additional lines from the original report are sent back, a new draft is created.

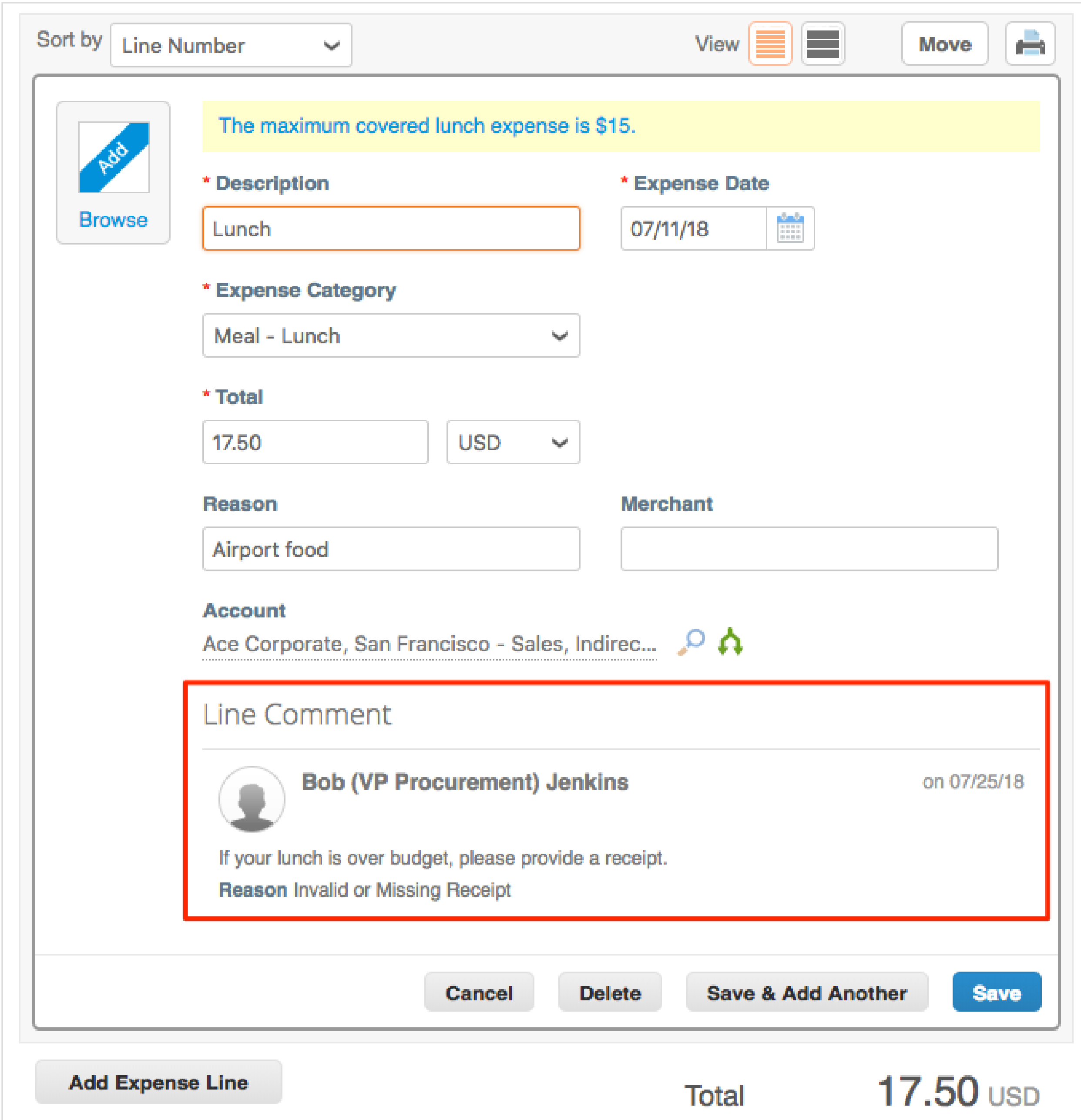
   All sent back line events are recorded in the history of the original expense report. Within the sent back line, the submitter will see the approvers reason and comment on why the line was sent back. If a line is sent back multiple times, then only the most recent reason and comment will be reflected.



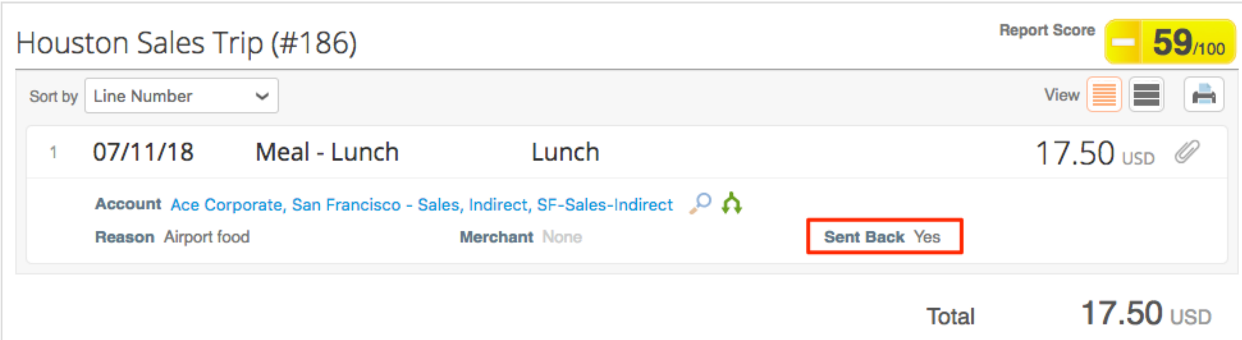
5. The original expense report (with no offending lines) can be approved and moved forward without having to wait for the sent back lines.

6. The submitter gets a notification (if configured, see [Notifications](#) below) that the line was sent back, and that there's a new draft report waiting for them. When they view the returned line for the draft report, they see that it was sent back. Lines from the same original expense report go to the same draft. Lines from different reports will

go to their own drafts. The rejected comment for a line is only the most recent comment.



7. When the sent back line is resubmitted, we make it easy for the reviewer to identify lines that were sent back by seeing the **Sent Back Yes** label.



For expense lines that have itemized expenses, only the parent will have the option to send the line back. When the parent line is sent back, both the parent and the itemized lines are included on the new draft expense report.

How to enable it

To enable the Send Back Line feature, go to **Setup > Expense Tools > Expense Settings** and select the **Enable Send Back Line** checkbox. Then any expense lines on a report with two or more expense lines will show the **Send Back Line** button.

Reason insights

To enable the workflow, we've pre-populated the **Reason Insights Setup** table with some standard reasons under the **Send Back Expense Line** reason type:

Reason	Description
Out of Policy	Expense line is out of policy and will not be reimbursed as currently submitted
Non-Reimbursable Expense	Expense line is non-reimbursable
Expense Details Don't Match Receipt Details	Expense line details don't match receipt details
Invalid or Missing Receipt	Expense line either contains an invalid receipt or is missing one
Incorrect or Missing Category	Expense line either has incorrect categorization or is missing a category
Expense Line Needs Itemization	Expense lines needs to be itemized before it can be approved
Incorrect or Missing Attendee Information	Expense line either has incorrect attendees or is missing them
Incorrect or Missing Mileage Information	Expense line either has incorrect mileage information or is missing it
Pre-Approval Required	A pre-approval is required to be submitted with this expense
Past Submission Deadline	Expense line was submitted past the required deadline

Reason	Description
Needs More Information	Expense line needs more information
Other	Other

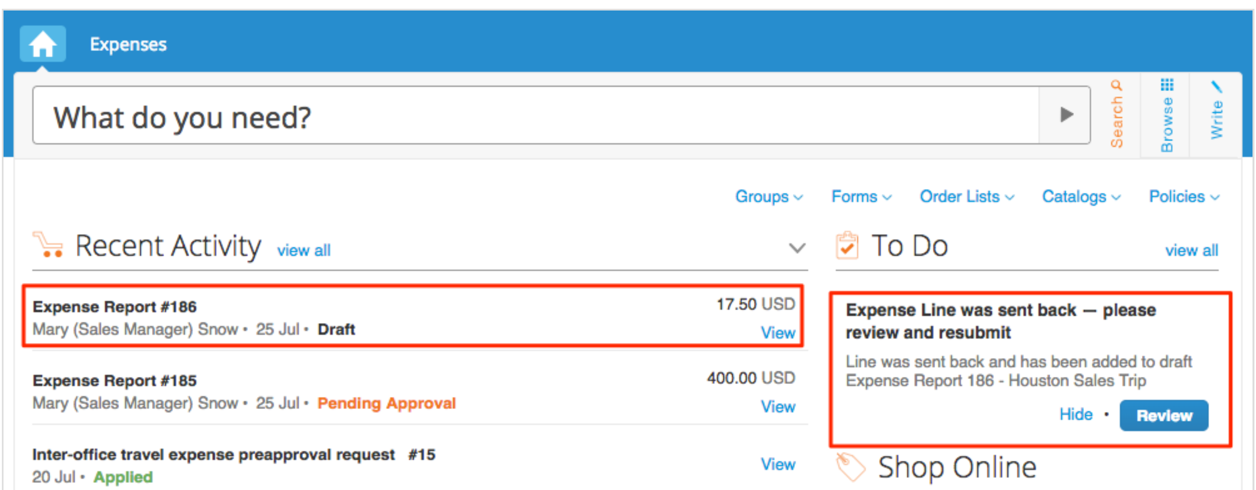
You can add or remove reasons at **Setup > Reporting > Reason Insights Setup**.

Upgrade impact

Notifications

We added a new notification which is disabled by default for users.

- End users can enable it by going to **Username > Settings > Notifications** and under Expenses, selecting **My expense line was sent back**.
- Admins can manage the settings for users, and modify the notification by going to **Setup > Platform > Notifications**.



Roles and Permissions

- New actions for the Expenses/Expense Reports controller
- New permissions for Expense User standard role
- Migration for custom roles with the Expenses/Expense Reports/Reject permission

Integrations

None.

Availability

This feature is available for all customers on R22. Enable it by going to **Setup > Expense Tools > Expense Settings** and selecting **Enable Send Back Line**.

Invoicing

This chapter contains the following topics:

Allow Usage of Existing Coupa Exchange Rate Field on Header Level Across All Invoicing Channels

Feature overview

Input all data in Coupa including the exchange rate instead of having to go to the ERP.

What we were thinking

There was an inconsistency depending on the method of entering invoices when it comes to being able to utilize the existing Coupa exchange rate field on the header level.

For compliant invoicing, the exchange rate field on the header level is required if the country in question requires an exchange rate if the currency on the invoice differs from the default currency for that country. Previously, the exchange rate field was not available to be used when AP enters invoices and it was not available on the default template.

An exchange rate is important data that often is needed in the ERP system in order to be able to do calculations.

Buyers can now expose the existing exchange rate on the header level. This allows the existing exchange rate fields to be used across all invoicing channels. These changes apply to compliant Invoice presentations (if required by the country, Coupa displays the exchange rate field if needed), default presentation and AP entered invoices.

How it works

Current Behavior:

The exchange rate is conditionally exposed for compliant invoicing when the invoice currency is different from the origination country's primary currency. The exchange rate rule applies when compliant invoicing is in use to all countries except:

- Canada
- Germany
- Japan
- Luxembourg
- Mexico

As of R22, if invoice compliance is used in the following countries, the exchange rate rule currently applies.

- Australia, Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, United Kingdom, Greece, India, Ireland, Italy, Latvia, Lithuania, Malaysia, Malta, Netherlands, New Zealand, Norway, Poland, Romania, Singapore, Slovakia, Slovenia, South Africa, Spain, Sweden, Serbia.

The exchange rate **DOES NOT** impact the transactional totals on the invoice itself. The exchange rate **DOES** impact three additional compliant fields:

Field Name	Description	Exposed in OK2Pay
taxes_in_origin_currency	Total taxes * exchange rate	Yes

Field Name	Description	Exposed in OK2Pay
origin_currency_net	Total * exchange rate	Yes
origin_currency_gross	Gross total * exchange rate	Yes

The exchange rate is currently exposed as an exportable field on the OK2Pay.

New Behavior:

We've added the exchange rate as a configurable field on the default presentation. The exchange rate field can be configured to be active or inactive. If set to active, it will be exposed to both suppliers and buyer-entered invoices. If the exchange rate field is set as a required field, please note that this will only apply to supplier-entered invoices and **not** buyer-entered invoice.

If exchange rate field is set to active, all invoices governed by the default presentation will display the exchange rate field. The *summary gross total, taxes,* and *total* fields in the origin country currency **do not appear** in invoices generated against the default presentation.

If enabled the exchange rate field against the default presentation will be using the same field as used for invoices against compliance invoice presentations.

> **Note:** If an invoice is coming in via Coupa compliant invoicing channel, Coupa already renders the field exchange rate correctly.

The Supplier **Show** and **Edit** views now display the exchange rate field if the default presentation is the applicable presentation.

Upgrade impact

Integrations

There are new integrations for this feature. The **exchange rate** has been added to the inbound flat file loader for buyer created invoices. The existing exchange rate field is utilized in the outbound invoice file and API.

The exchange rate value is now visible in CSV/SFTP, cXML, CSP, InvoiceSmash and SAN.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is disabled by default for all customers who have Invoicing. If you would like to get this and other Invoicing features, contact your Coupa representative.

Auto Dispute Invoices Based on Validation Rules

Feature overview

Configure select field validations as rules to dispute supplier invoices with an automated review.

What we were thinking

It is common for AP teams to enforce content policy on incoming invoices before they are processed for payment. Most policy constraints are enforced/implemented as validation rules on incoming invoices. In Coupa, we want to ensure that suppliers are not using traditional non e-invoicing channels just because their invoices fail to submit due to such enforced validations.

For any common content validation that AP team wants to enforce on supplier invoices, we allow configuration of these validations as auto dispute rules. These dispute rules are based on configured invoice tolerance checks.

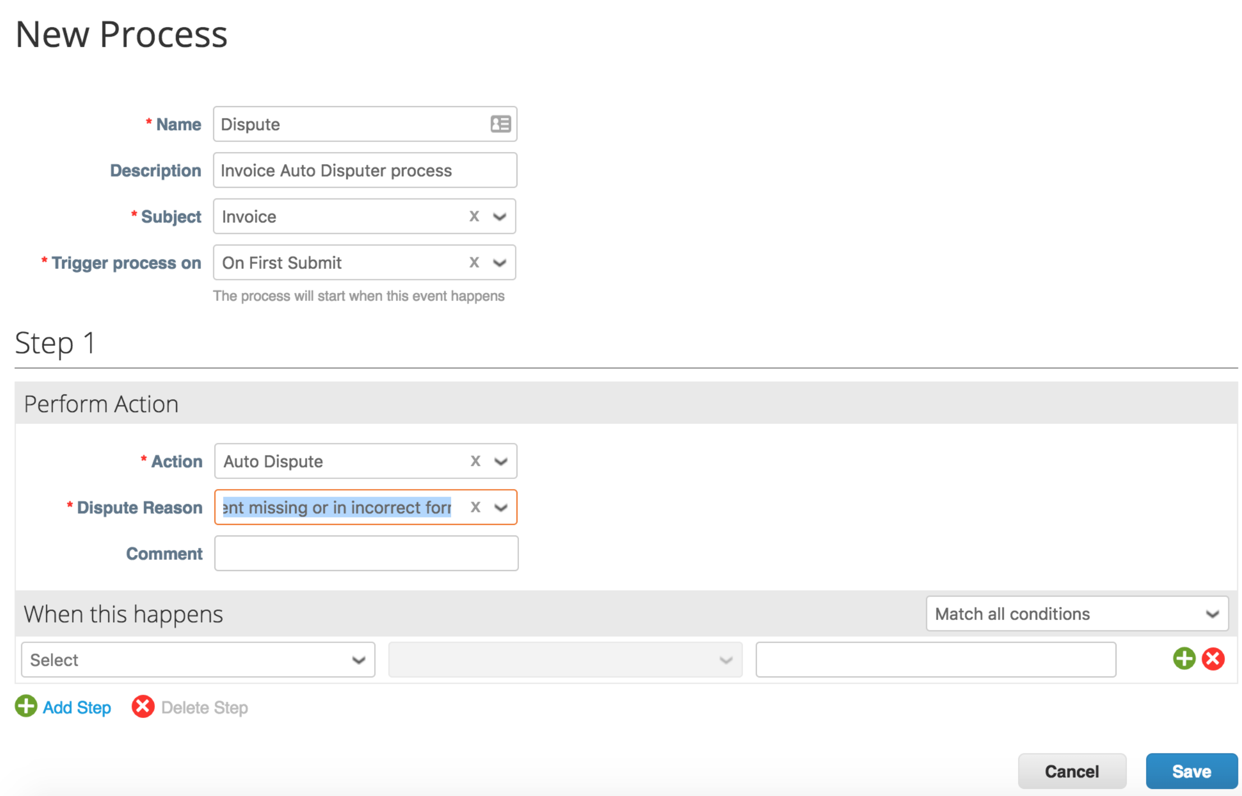
On supplier submitting invoices through CSP, SAN, cXML or CSV/sFTP if any of the dispute validation rules match, Coupa automatically triggers a dispute on the invoice for supplier to review and correct.

> **Note:** Auto dispute rules apply for supplier submitted invoices only. We offer other methods like submission blockers/approval blockers for internally entered invoices. We offer different tools for buyer entered and supplier created invoices to allow flexibility in process control for invoices coming in different routes and the related implications:
>
> - The objective of Auto Dispute is to reduce AP review of invoices where they are not manually reviewing the invoices.
> - A supplier can usually make a decision on how an invoice should be corrected for content, while the invoice coder or Accounts Payable may not - hence requiring an internal review and validation before disputing the invoice.

How it works

Go to **Setup > Platform > Processes > Create** a new Process. With R22, **Auto Dispute** is the only Step Action Type available for a process. The Auto Dispute process triggers when the invoice is submitted for the first time. When you create an auto dispute process, the rule can be triggered automatically by each **Step** that is introduced in the process. A process can have one or more steps. Select the validation you want to evaluate in **When this happens** section. The validation conditions allow for invoice tolerance checks and for field comparisons with absolute values. Specify the dispute reason(s) and any optional comments to send to your supplier.

> **Note:** Suppliers will not see that an invoice has been auto-disputed. This can only be seen on the buyer side.



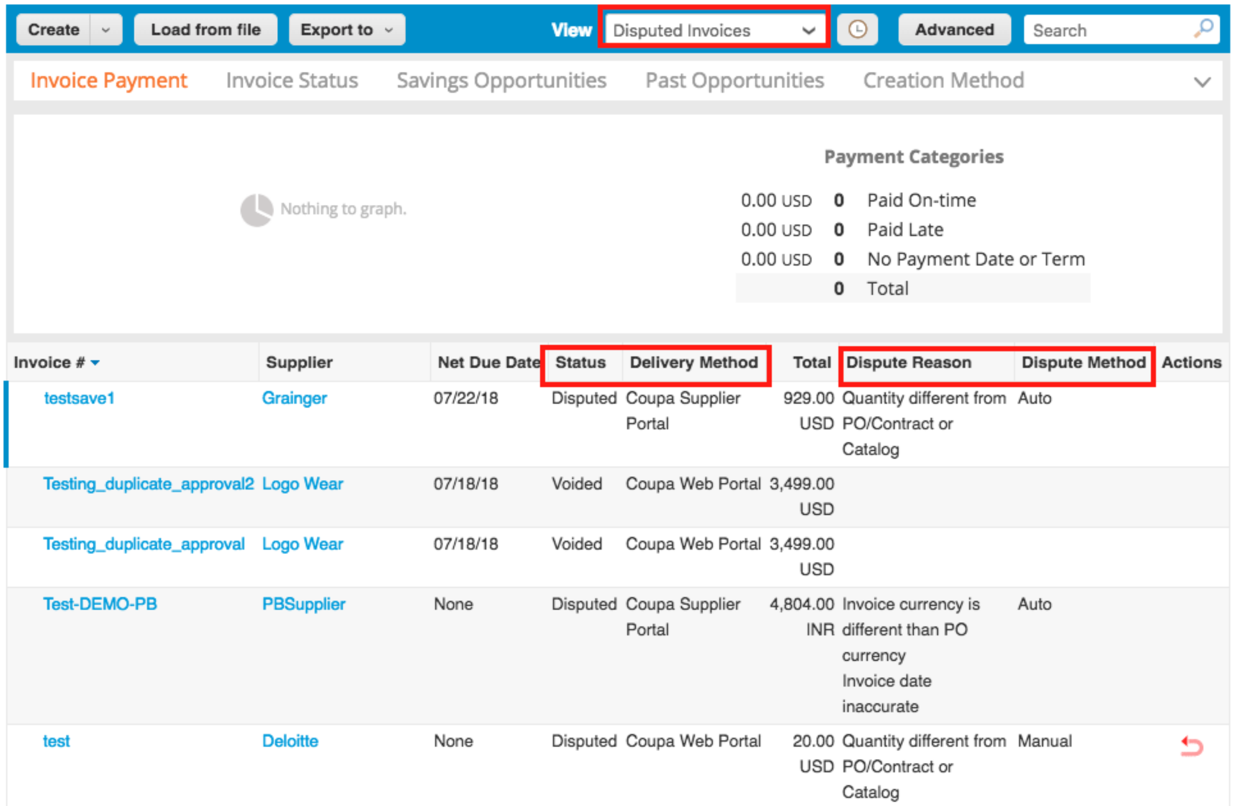
Tip: All **Dispute Reasons** can be set in **Setup > Invoicing > Dispute Reasons.**

Viewing disputed invoices

All invoices that have been disputed can be viewed in the Invoices data table. The **Disputed Invoices** view displays all invoices that have been disputed as well as the delivery method which they were imported and the dispute method (auto or manual).

All invoices tagged via the **Auto Dispute Process** will show the dispute method as Auto. Any user in your team will show invoices' dispute methods as manual.

Suppliers view both manual and auto disputed invoices in the same method. The dispute method field is not visible to suppliers and suppliers can resolve auto disputed invoices as they do manually disputed invoices.



Upgrade impact

Integrations

There are changes to integrations for this feature.

Element	Description	Hidden	Req'd	Unique	Type	Allowable Values	Feature
delivery_date	Date of Supply	NO	NO	NO	datetime	any	
dispute_method	Dispute Method	NO	NO	NO	string(10)	any	Auto Dispute invoices based on validation rules
dispute_reasons	Dispute Reason*	NO	NO	NO	[]	any	Auto Dispute invoices based on validation rules

*The `dispute_reason` field has been deprecated and will be removed from InvoiceHeader in R24. Use `dispute_reasons` instead.

Roles

If your custom role has Object Definitions/Create then it gets these new permissions:

- Workflows/Processes/Index
- Workflows/Processes/Destroy

- Workflows/Processes/New
- Workflows/Processes/Edit
- Workflows/Processes/Update
- Workflows/Processes/Create

See Release 22 Custom Roles Updates for a full list of all custom role changes.

Permissions

There are no new permissions for this feature.

Availability

This feature is enabled by default. This feature is available to all customers who have Invoicing. If you would like to get this and other Invoicing features, contact your Coupa representative.

Bulk price with different UoM

Feature overview

Now add the price and review it in the unit of measure that is more recognizable to your business operation.

What we were thinking

Direct material orders for raw materials often use complex pricing, where the price is negotiated for large quantities, sometimes in alternative Units of Measure (UoM). This means that item price is negotiated for a different UoM than the one it is transacted in (which describes the transaction quantity).

To allow a better data management and end-user experience for such direct orders and related invoices, the order line and invoice line input can be specified to the pricing UoM and conversion relationship between the transaction and the price UoM. This information is used to validate the unit price when it is provided to determine the unit price.

In R21 we introduced complex bulk pricing for direct orders and related invoices for scaled prices for direct materials. This allowed bulk prices to be added for large quantity items.

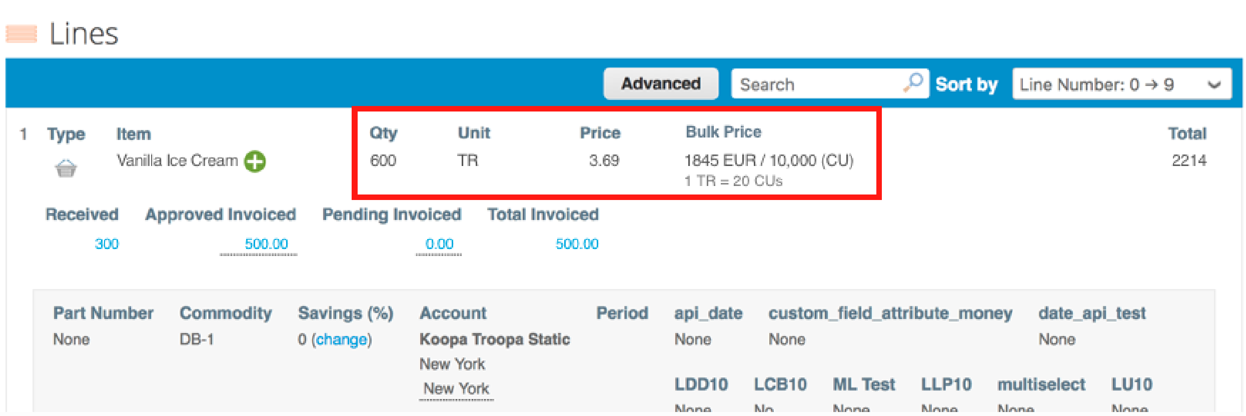
For R22, we're adding support to process the price in UoM. This means that Coupa can accept the price per tray, the conversion between cups and tray, but transact in the UoM of cups. This allows for the price to be negotiated, converted to the unit price in Coupa and used for review and processed internally.

How it works

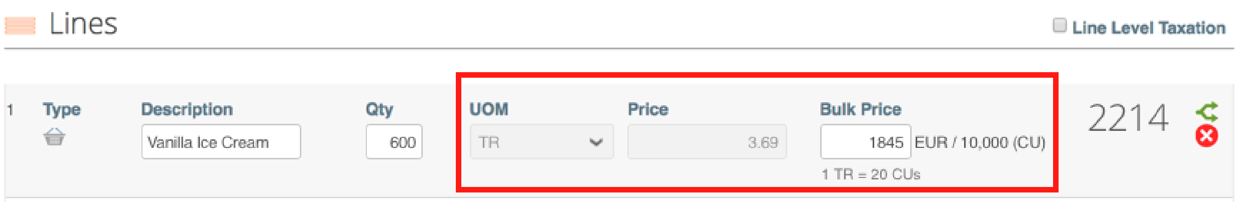
When a UoM is imported into a PO from an external source, the different UoM and the conversions are shown on the PO Line. Some of the rules that are applied on the invoice are that the supplier can not change the conversion, bulk price, or bulk quantity. If fields are shown, they carry over from the PO and are shown as read-only on the invoice. Bulk price displays on the invoice view and edit page.

Bulk pricing is loaded through external POs that have Bulk price attributes in the PO creation template. An Invoice is identified as Bulk priced only when it is flipped from Bulk price PO.

Order lines



Invoice lines edit view



Upgrade impact

This feature is Enabled by default.

> **Note:** This feature is displayed only as bulk price fields are entered on the order line. The invoice line links is then linked to the order line.

Notifications and emails

This feature will be displayed to Invoice notifications.

Mobile interface updates

This feature displayed invoices with bulk prices and new fields on the mobile interface.

Behavior change

In R21 we introduced the Bulk UoM field on inbound integrations. This field did not process UoMs that were different than that of the transaction (Qty). This feature will allow flexibility using that field.

Integrations

There are changes to integrations for this feature.

See Release 22 Flat File (CSV) Loader Changes, Release 22 Inbound API Changes, Release 22 Flat File (CSV) Export Changes.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is available to all customers who have Invoicing. If you would like to get this and other Invoicing features, contact your Coupa representative.

Community Insight: Invoicing Channels In Use By a Supplier

Feature overview

Provide Admins/Project managers information on channels suppliers are using to send invoices to all customers in Coupa.

What we were thinking

E-invoicing enables quicker invoice review and processing with lesser errors. With a view to encouraging better e-invoicing adoption, we want to offer your enablement team with the right tools and information to achieve this goal. In this release version, we share with you the invoicing channels a given supplier is already set up to use with Coupa. Given your engagement level with the supplier and expected invoice volumes, this information can help you guide the supplier enablement process at your end.

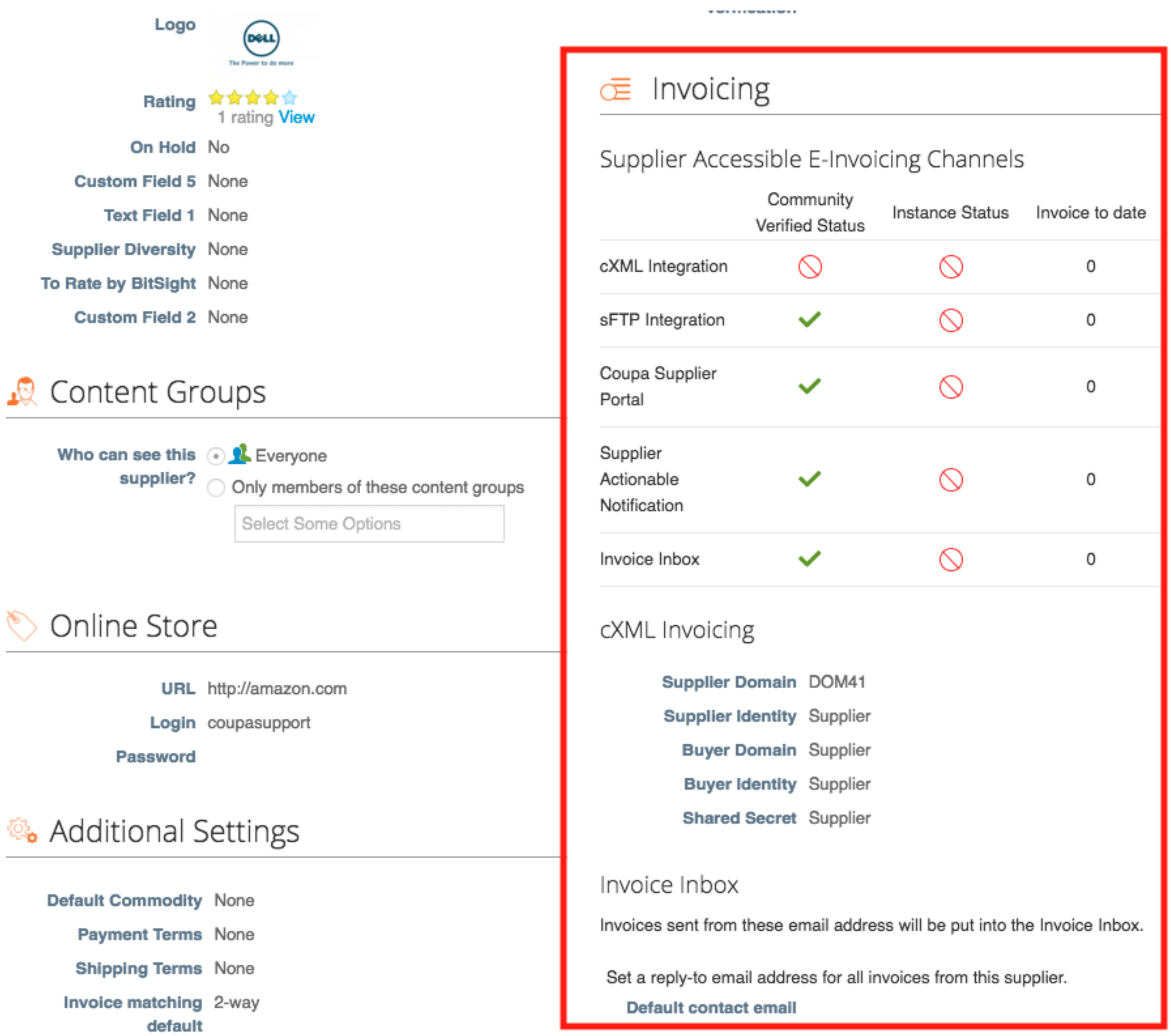
Given specific volume ranges of invoices from a supplier, different e-invoicing channels may make sense for a given customer. This assessment can differ by time or phase in engagement with the supplier. Currently, in Coupa, there is no straightforward method for an Admin/Customer representative to assess if it makes sense for a given supplier to be implemented.

In this release, we are looking to provide self-service information for Admins and Project Managers to assess suppliers for an enablement approach. You've been able to indicate supplier readiness to encourage customers to leverage available channels to lead to a smoother enablement experience and expectation setting.

How it works

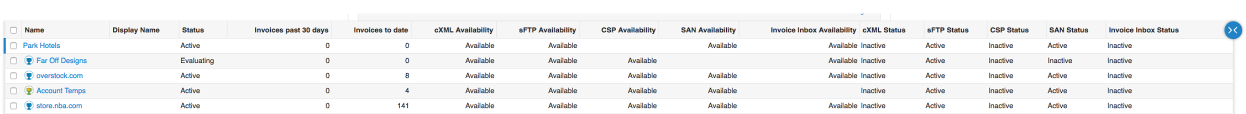
To access the information on a supplier, go to **Suppliers** and select a Supplier record. The information is presented for each of the invoicing channels:

- Integration cXML
- sFTP download
- Coupa Supplier Portal
- Supplier Actionable Notification
- Invoice Inbox



We indicate if the supplier is capable of using any of these channels if you have successfully used any of them, and what has been the past annual volume of invoices from that supplier for your instance.

This information is also available as a consolidated canned data table view under the Suppliers tab:



Name	Display Name	Status	Invoices past 30 days	Invoices to date	cXML Availability	sFTP Availability	CSP Availability	SAN Availability	Invoice Inbox Availability	cXML Status	sFTP Status	CSP Status	SAN Status	Invoice Inbox Status
Park Hotels		Active	0	0	Available	Available		Available	Available	Inactive	Active	Inactive	Active	Inactive
Far Off Designs		Evaluating	0	0	Available	Available	Available		Available	Inactive	Active	Inactive	Inactive	Inactive
overstock.com		Active	0	8	Available	Available	Available	Available	Available	Inactive	Active	Inactive	Active	Inactive
Account Temps		Active	0	4	Available	Available	Available	Available		Inactive	Active	Inactive	Active	Inactive
store.nba.com		Active	0	141	Available	Available	Available	Available	Available	Inactive	Active	Inactive	Active	Inactive

The channel availability indicates if that supplier has submitted invoices via that channel to you or other customers via Coupa.

The channel status indicates if the supplier has invoices submitted via that channel in your instance.

Usually, high volume suppliers are amenable to cXML/sFTP integration, while medium-low volume suppliers can find success with Coupa Supplier Portal and/or Supplier Actionable Notifications.

Please note that information is updated on a weekly basis and depends on identifying the supplier in your instance as the same as the community supplier everyone else is transacting with. We present the data only if we are sure of that association.

Upgrade impact

This feature is enabled by default.

Integrations

There are no new integrations for this feature.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is available to all customers who have Invoicing. If you would like to get this and other Invoicing features, contact your Coupa representative.

Contract-Backed Invoicing Enhancements

Feature overview

Save time and money by not having AP check every contract-backed invoice for discrepancies.

What we were thinking

Coupa has traditionally supported invoicing directly against contracts with standard invoicing. However, with a few minor adjustments, we could easily introduce more flexibility to handle many more use cases and make invoicing off of contracts more robust, helping our customers get more spend under management.

How it works

Old settings

- Allow invoicing
- Contract-backed invoice line tolerance

The primary use cases that this helps drive are to invoice against a contract as if it were a blanket PO, triggering approvals only when a spend threshold is exceeded, and leveraging contracts to default account segments onto invoice lines.

New features

Internally Created Invoices

Name	Condition	Tolerance
Invoice backdate	Invoice Date backdated more than specified calendar days	Days
Invoice contract line	Contract backed non-PO line greater than	USD
Invoice contract price %	Invoice price greater than contract price by %	%
Invoice contract price amount	Invoice price greater than contract price by amount	USD

Strict invoicing

When invoicing against a contract, only catalog items on invoice lines are acceptable as contract-backed lines. For all freeform items or catalog items that have had contracts or supplier part numbers modified, they will be treated as completely unbacked lines when this setting is enabled. Coupa still applies default billing set on the contract.

Contract price tolerance

When invoicing against a contract item, Coupa now allows you to configure percentage and amount-based tolerance checks against the contract/catalog price.

AP invoice pick from contract screen

When AP users are editing invoices and have the right permission, they can quickly add new lines by using the new pick lines from contract feature. It works just like Pick from PO, but brings in item detail from the contract, instead.

Setting up your items

When setting up your items:
Coupa requires that your supplier items under the same item header are unique enough to be distinguished from on the supplier inbound invoicing channel.

Upgrade impact

This feature is enabled by default.

Roles

There are updates to roles standard roles: Accounting Supervisor, Accounts Payable.

Permissions

There are no changes to permissions.

Integrations

There are new integration changes.

Availability

This feature is available to all customers who have Invoicing. If you would like to get this and other Invoicing features, contact your Coupa representative.

cXML Credit Notes to Accept Negative Totals

Feature overview

cXML credit notes can have negative line and header totals. This can conflict with Coupa invoice presentation controls to only accept credit notes with positive line and header totals. With this enhancement, we will accept incoming cXML credit notes with negative totals but transform them to comply with the instance preference of the sign if needed.

Behavior change

Coupa cXML invoices allow specific customer configurations to create cXML content validation. This poses a roadblock for suppliers in self-enabling across multiple customers where reasonable.

Currently, we allow supplier created cXML credit note lines and totals to be either positive or negative according to the present configuration. Since R19, we allowed incoming credit notes to be more flexible in matching the Coupa configuration and not the cXML specification.

Suppliers that deal with more than one Coupa customer need to create different versions of cXML based on how the customer instance is configured in Coupa, whereas the cXML standard is more prescriptive here.

In this release, a supplier can submit credit notes with negative lines and totals, independent of instance invoicing presentation configuration.

Upgrade impact

This feature is disabled by default. When enabled, your instance will allow the successful creation of credit notes which were failing earlier due to negative input on line and header totals. This change will effect new credit notes only.

Integrations

There are changes to integrations for this feature. This enhancement, when enabled, transforms the sign of negative incoming cXML before they are turned to a credit object. Specifically, the credit line total and header total is flipped to positive values if your presentation in effect requires them to be positive.

Roles

There are no new roles for this feature.

Permissions

There is no new permissions for this feature.

Availability

This feature is available to all customers who have Invoicing. If you would like to get this and other Invoicing features, contact your Coupa representative.

Invoicing Compliance as a Service for Italian SDI Clearance Model

Feature overview

Effective on the 1st of January, 2019, Italy mandates all domestic Italian invoices be routed through their **Sistema di Interascambio** (SDI). For Coupa customers leveraging e-invoicing channels with their suppliers, Coupa is introducing new functionality to route these invoice through the Italian SDI system and deliver a compliant invoicing solution through this changing landscape.

What we were thinking

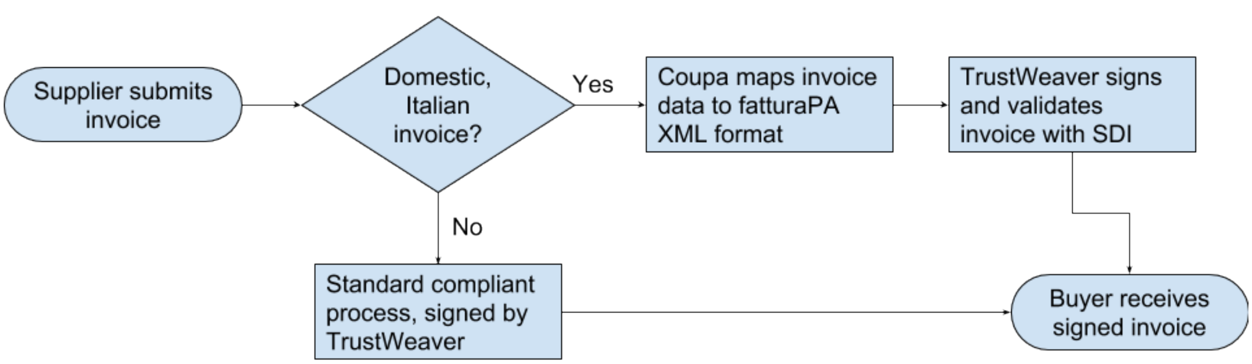
Coupa takes compliance as a service seriously. That's why, when legal changes happen, we act fast to deliver updates for you to keep processing invoices compliantly. With Italy's upcoming mandate to enforce e-invoicing through their SDI, we recognize that any invoices not compliant with the electronic requirements will be treated as not having been issued and penalties may range between 90 to 180% of the VAT not correctly documented. That's why Coupa is working with our partners to deliver the robust set of technology that you need for all your Coupa e-invoicing channels to work with this new flow.

How it works

The new clearance mandate in Italy applies to all domestic Italian invoices. For any invoices leveraging the Italian presentation but have a destination country other than Italy, Coupa routes them through the same compliant workflow that it does today. When the destination country is also Italy, Coupa routes these invoices through a new process.

When Coupa receives an invoice from a supplier through any of the currently supported e-invoicing channels (SFTP, cXML, CSP, and SAN), it maps the invoice data to the Italian fatturaPA XML format required to send through the Italian SDI. This XML file is then sent to our partner, TrustWeaver, for digital signing and verification. After signing the invoice data, TrustWeaver corresponds directly with the SDI and validates the invoice. Coupa retrieves the invoice from TrustWeaver after it has been validated by the SDI and then transmits it to your Coupa instance, where it's routed for processing just like any other e-invoice in your instance.

Here's a look at what this looks like:

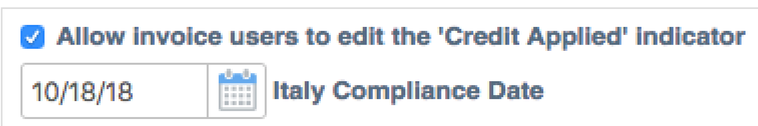


When you receive invoices through this process, you should note a few things that make them different than invoices received through other standard compliant flows.

- Coupa attaches the fatturaPA XML that was sent to TrustWeaver for signing as an attachment on the invoice record.
- Coupa attaches a PDF of the fatturaPA to the invoice record as well. This format is determined by the Italian government and is different than the standard PDF format that you're used to seeing for other compliant countries or international invoices.
- Coupa attaches a delivery receipt from the SDI, in XML format.

Compliance date setting

In order to facilitate testing, Coupa is introducing an **Italy Compliance Date** setting under **Setup > Company Information > Invoices**. You can use this setting to test in the new workflow in your testing/stage environment, prior to the new regulation actually coming into effect. This way, you can be entirely familiar with the new process, before the 1st of January 2019, when the mandate will be effective.



> **Note:** The compliance date for your production instance should be set to the 1st of January 2019 to ensure that you're ready for the new regulation. It is only in your test instance that you should set it to anything else, and strictly for the purpose of testing.

Known issue: When you create invoices in your test instance with the new flow, these invoices are accessible only if you download them while the new flow is enabled. If you disable the clearance flow by editing the **Italy Compliance Date** under **Setup > Company Information > Invoices**, then Coupa will follow the old process normally, but you temporarily won't be able to download and view the legal invoices that you've created with the clearance flow, until you reset the date to today's date or sooner and re-enable the compliance flow. Since the Italian government has set the date for this new flow to 1 January 2019, and you should not leverage the old flow, this should not be a concern beyond initial testing in your test instance.

Error Handling

Coupa's standard validations and error handling workflows apply to invoices following the Italian clearance model. In addition to these validations, Coupa now supports Error handling for any invoices that are not validated properly by the SDI.

- These errors are sent to the supplier's email for them to review.
- In the CSP, Coupa re-routes these invoice records to **Draft** status and displays the error message at the top of the invoice record for the supplier to review and resubmit.
- Invoices that fail validation through the SDI process are not submitted to buyers.

Upgrade impact

Integrations

There are no changes to integrations.

Roles

There are updates to standard roles: Accounts Payable, Admin.

Permissions

There is a new permission.

Permission	Action	Description	Feature
legal_invoices/index	Index	Used to show user legal invoices processing	Italian Compliance

Availability

This feature is disabled by default and customers can configure it with the **Italy Compliance Date** setting described above. This functionality will not impact any customers that do not have invoicing compliance as a service enabled for Italy.

This feature is available to all customers who have compliant Invoicing. If you would like to get this and other Invoicing features, contact your Coupa representative.

Receipt Processing in Parallel with Approvals

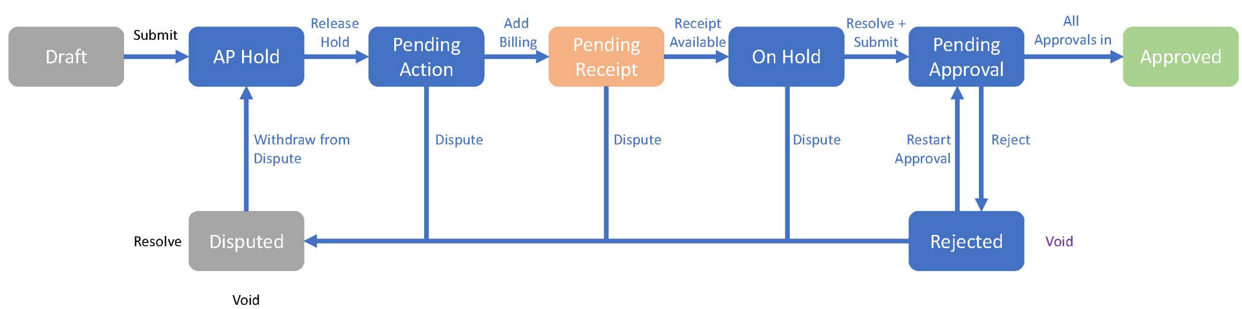
Feature overview

Process invoice approvals and review, while awaiting receipts for 3-way/3-way-direct match transactions.

What we were thinking

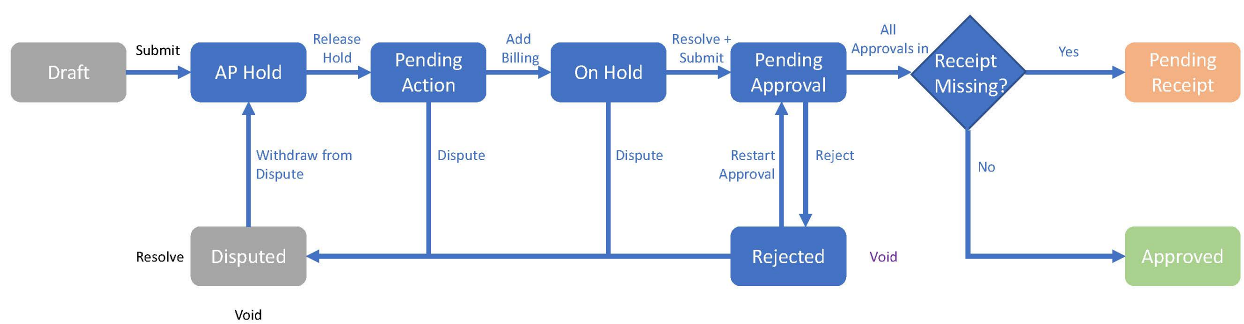
3-way match requires that an invoice has confirmed receipts to cover for the quantity/amount before it is approved for payment. In many cases, invoices awaiting receipts can be reviewed by approvers for a financial approval and signed off while still awaiting receipts.

Currently, a 3-way/3-way-direct match invoice in Coupa is available to approvers for review only after all the receipts are available.



Note: This is the current flow for a 3-way/3-way-direct match invoice. The order of Pending receipt and Pending Approval statuses as they are until R21.

In release 22, Coupa allows an instance to be configured so that 3-way/3-way-direct invoices do not wait in the **Pending Receipt** status unless all approvers have approved the invoice. While the invoice is going through the approval process, Coupa displays a missing receipt tolerance and processes any incoming receipts in the background. When approvals and receiving is completed, the invoice will transition to approved.

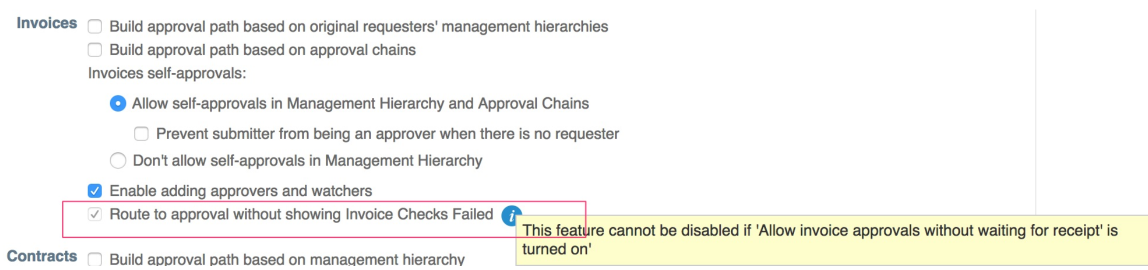


Note: Starting in Release 22, this is how the 3-way/3-way-direct match invoice order of Pending receipt and Pending Approval statuses can be configured.

How it works

As the invoice is submitted, missing receipts and tolerances are evaluated to indicate that the invoice requires a 3-way match. Missing receipts and other tolerances can be set up to require approvals on the invoice. In the modified work process, the invoice will show missing receipts tolerances which approvers can approve in the Pending Approval status. While approvals are being submitted, any incoming receipts will be available for the invoice through 3-way or 3-way-direct match process. Once all the approvals are available all receipts are reviewed to ensure they are available for the invoice lines. If not, the invoice now moves to **Pending Receipt** to wait for receipts before approval.

This feature can only be enabled if your invoice approval configuration prevents Accounts Payable from seeing the **Invoice checks failed** popup on submit. To enable this setting go to **Setup > Approvals > Invoices > Route to approval without showing Invoice Checks Failed.**



If this feature is enabled, you'll be prevented from enabling the **Invoice checks failed** popup.

Tip: The **Invoice checks failed** popup is used to review the tolerance failures and to add approvers at submission time. Both of these actions can be performed on the invoice after it is submitted as well if the popup were to be turned off. It also controls whether supplier-submitted invoices route to **on hold**, before **pending approval**, when approvals are required. Without the popup, these supplier-submitted invoices route past **on hold**, to **pending approval**.

Upgrade impact

Enabling this feature affects the process flow change for any new invoices created after the change or submitted first from *Draft, New, Pending Action, AP Hold, On Hold* statuses. Any invoices already in Pending Receipt status at the time of enabling this feature, will remain in that status until receipts are created in Coupa.

Note: The **PO line qty** tolerance compares PO line quantity against the invoice line quantity and also evaluates whether a line is missing receipts. Starting in Release 22, this tolerance has been separated from receipts and only evaluated to compare PO line qty against the invoice line qty. If the invoice line uses the 3-way/3-way-direct match, the missing receipts tolerance failure will indicate missing receipts.

Integrations

There are no changes to integrations for this feature.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is disabled by default. This feature is available to all invoicing customers on request. If you would like to get this and other Invoicing features, contact your Coupa representative.

Spain and Canary Islands Compliance

Feature Overview

In addition to Spain, in R22 Coupa invoicing adds the distinction between mainland Spain and the Canary Islands due to the fact the Canary Islands are currently exempt from the Spanish VAT scheme.

For this feature to take effect:

- The buyer has to be on R21.2 or higher (as Coupa had to add Spain - Canary Island as a new Locale)
- The Invoice Presentation for Spain - Canary Island has to be activated by the buyer
- The supplier has to invoice from a legal entity based in the Canary Islands with this fact represented by a legal entity on the Coupa CSP

To learn more about Coupa Invoicing Compliance, see Compliant Invoicing. To see a complete list of our compliant countries, see Coupa Compliant Invoicing Countries List.

Availability

This feature is available to all customers who have a compliant Invoicing. If you're not licensed for compliant invoicing, but would like to get this and other Invoicing features contact your Coupa representative.

Procurement

This chapter contains the following topics:

Advanced Search Filtering

Feature overview

Filter your Coupa search results to help you find what you're looking for.

What we were thinking

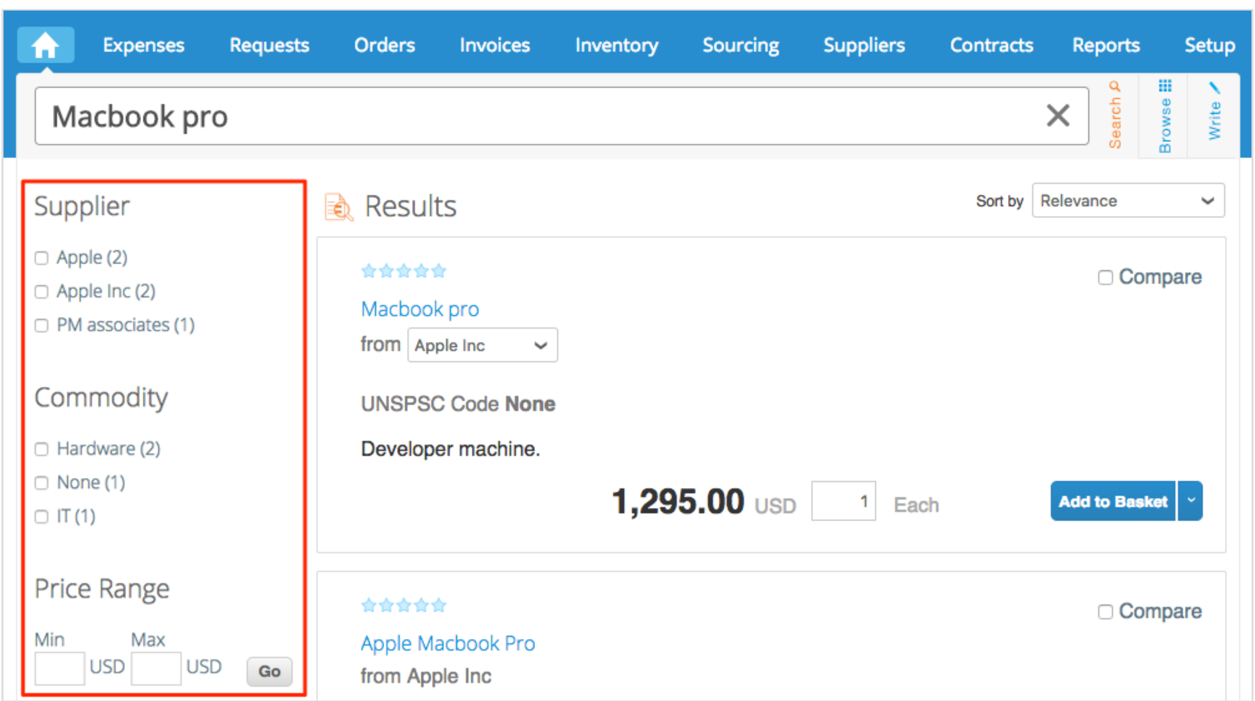
Sometimes you don't know exactly what you need. Sometimes you have a good idea for what you need, but there are too many similar results from your search query and you need to narrow down those results. We wanted to make it easier for users to find what they're looking for using advanced search.

How it works

When you perform a search, the results page now includes filters on the left-hand side. Filter your initial search results by these standard item fields:

- Supplier
- Commodity
- Price range

To filter your search results, just choose the options you want, specify a price range, and click the **Go** button.



Enable advanced search filters

You can turn on advanced search filters for your users by performing the following steps:

1. Go to **Setup > Company Setup > Company Information**.
2. Scroll down to the **Search** section under **Systems Options > Search**.
3. Select the **Enable Faceted Search** checkbox.
4. Scroll down further, and under the **Supplier Instructions** section, click the **Save** button.

> **Warning:** Searches may be a bit slower if you enable search filters. Check to see if there's a performance change before rolling this out to your users.

Upgrade impact

None. No changes to roles and permissions, integrations, or notifications.

Availability

This feature is available in all R22 instances but needs to be enabled for users.

Bulk Pricing Improvements

Feature overview

Coupa supports orders and invoices where the bulk price for an item is in terms that are different than the unit of measure for the item.

What we were thinking

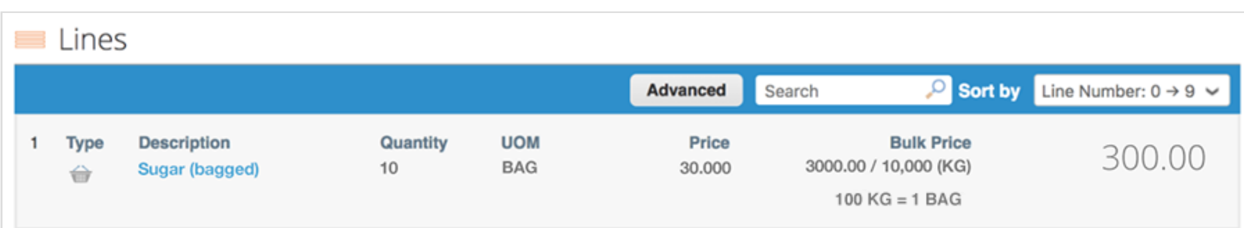
In Coupa 21, we introduced Bulk Pricing for orders submitted through the API or SFTP, and their corresponding invoices. However, the order line price and the bulk price had to be in the same Unit of Measure (UoM). For example, if the bulk price of sugar was $3000/10,000kg, Coupa required you to order sugar in kgs. This was a great first start, but if someone wanted to buy using a different UoM (say, bags), they'd have to do some additional calculations to figure out the cost of a bag in bulk pricing terms they're familiar with, instead of the cost per kg.

How it works

The simplest way to think of this is to understand that Coupa now supports the expression of the cost of an item using a different UoM than what's used to order the item. With our sugar example, we've set up Coupa to process external order lines to display the price of sugar by the bag, and still use the standard way of defining bulk pricing for sugar, which is expressed as the cost of 10,000kg of sugar.

To support different UoMs, we've introduced the concept of a *conversion factor*. In our example of sugar, we've set the conversion factor 1 Bag = 100kg of sugar (shown beneath the **Bulk Price** field). With the conversion factor and the bulk price of $3000/10,000kg of sugar, Coupa can calculate the **Price** field (price per bag) as $30.000.

This means now Coupa lets you transact in a familiar unit (bags), but process the price in bulk terms (price per 10,000kg).



Bulk price fields

To support bulk pricing in R21 and R22, we've added several new fields/element to loaders and APIs for purchase orders and invoices. The example column contains the values from our example of bags of sugar: 1 Bag = 100kg at a price of $3000/10,000kg.

Field or element	Description	Example value
Bulk Price	The price of the item, specified in bulk terms.	3000

Field or element	Description	Example value
Bulk Price Qty	The quantity used to express the bulk price.	10,000
Bulk Price UoM	The unit of measure for the bulk price.	kg
Bulk Price Conversion Numerator	The number of individual bulk price UoMs in one item UoM. In the sugar example, the individual UoM is kg and the item UoM is Bag. 1 Bag = 100kg, so the numerator is 100.	100
Bulk Price Conversion Denominator	The number of individual item UoMs for the numerator. If sugar were sold in pairs of bags, the value would be 2. 2 Bags = 200kg. This value is assumed to be one if not specified.	1

The bulk price conversion numerator and denominator combine to produce the bulk price conversion factor seen in the example line above (1 Bag = 100 kg).

Ways to express price

Coupa now allows incoming order on external POs submitted through the API or SFTP integrations to describe the price in the following ways:

Price method	Description
Standard price	Simple pricing where the price is specified as the line unit price. Doesn't utilize bulk pricing fields. This was the only method available for pricing in R20 and earlier. Example: 1000kg of sugar at a price of $0.3000/kg.
Bulk price (quantity)	The bulk price is based on the Bulk Price and Bulk Price Qty fields. UoM isn't required in this case, and when it's not provided, Coupa uses the line item UoM and assumes a conversion factor of 1. This is the method introduced in R21. Example: 1000kg of sugar at a bulk price of $3000/10,000kg
Bulk price (UoM)	The bulk price is based on Bulk Price, Bulk Price Qty, Bulk Price UoM, and the bulk price conversion factor (Numerator and denominator). All fields are required. This is the method introduced in R22. Example: 10 Bags of Sugar where 1 Bag = 100kg at a bulk price of $3000/10,000kg. **Note:** The conversion factor and bulk price for the line item aren't stored with the item in Coupa. The conversion factor and bulk price are always included in the line-level transaction. For this example, this means Coupa never keeps information about the amount of sugar (100kg) in a bag or the bulk price. Only the standard price is stored.

As in R21, bulk pricing is only supported on orders submitted through an integration, and on invoices lines that are backed by bulk pricing.

Upgrade impact

Integrations

CSV

We added two new fields to the External Orders and Invoices integration loaders.

Column	Description	Hidden	Req'd	Unique	Type	Allowable values
Bulk Price Conversion Numerator	Numerator value for the ratio to convert from 'Bulk Price UoM' to line UoM. Value defaults from corresponding PO line if invoice line UoM matches PO line UoM and the PO Bulk Price UoM matches the invoice 'Bulk Price UoM'.	false	false	false	decimal(30,6)	any
Bulk Price Conversion Denominator	Denominator value for the ratio to convert from 'Bulk Price UoM' to line UoM. A blank is interpreted as 1 as long as 'Bulk Price UoM' is present.	false	false	false	decimal(30,6)	any

API

We updated the Bulk Price API found on the Order Line API and Invoice Lines API with new elements and changed the name of other elements

New elements

Element	Description	Hidden	Req'd	Unique	Type	Allowable values
conversion_numerator	UOM conversion numerator	false	false	false	decimal(30,6)	any
conversion_denominator	UOM conversion denominator	false	false	false	decimal(30,6)	any

Updated elements

Element name	Change
price	Name changed to `bulk_price`
qty	Name changed to `bulk_price_qty`
uom	Name changed to `unit_of_measure` and is now a required field

Other Impacts

- Bulk price attributes added to the Order Lines and Invoice Lines tables
- Supplier Email template
- PO cXML

No changes to roles or permissions or notifications.

Availability

This feature is enabled by default for all R22 instances, but only available for orders that are imported into Coupa.

Enhanced Change Order Process

Feature overview

Now administrators can configure any user to initiate changes for orders that they didn't originally request using a new standard role.

What we were thinking

Previously, the only person who can submit a PO change request for an order is the original requester. Certain power users, like buyers, can make PO revisions, but revisions don't go through approvals, even though the revision is captured in the order history. By allowing others to request changes to an order, organizations can easily make changes when the original requester isn't available to make the change. Thus, it improves the efficiency of the whole change order process and reduces the number of users that need to be involved in simple PO changes.

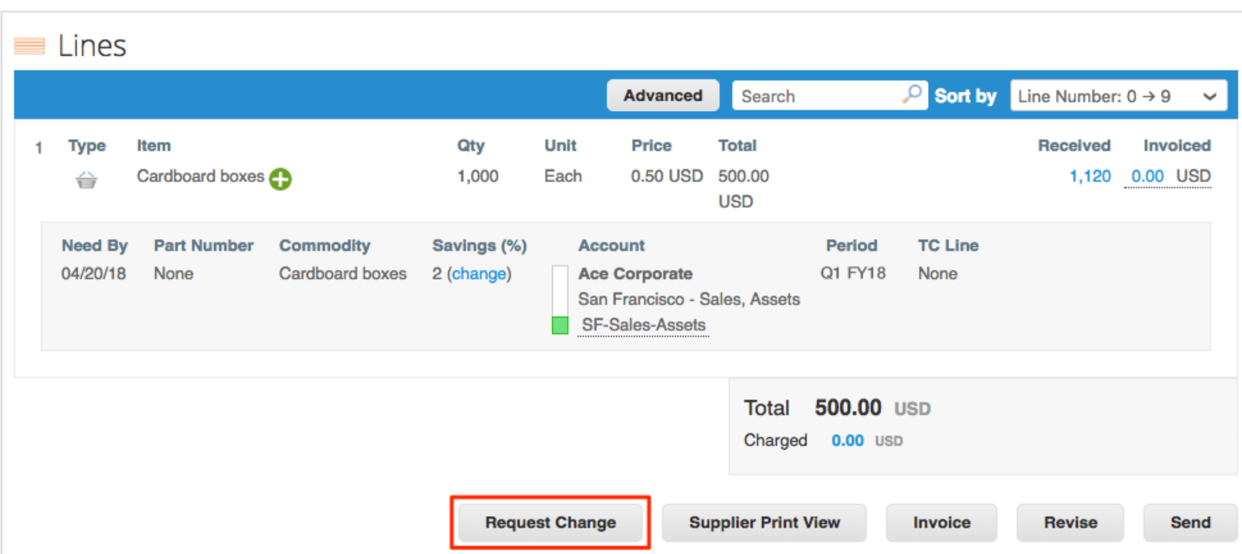
This is one of the top-voted requests on the community.

How it works

We added a new standard role to Coupa called **Purchase Order Change Manager** that includes a couple of important new permissions:

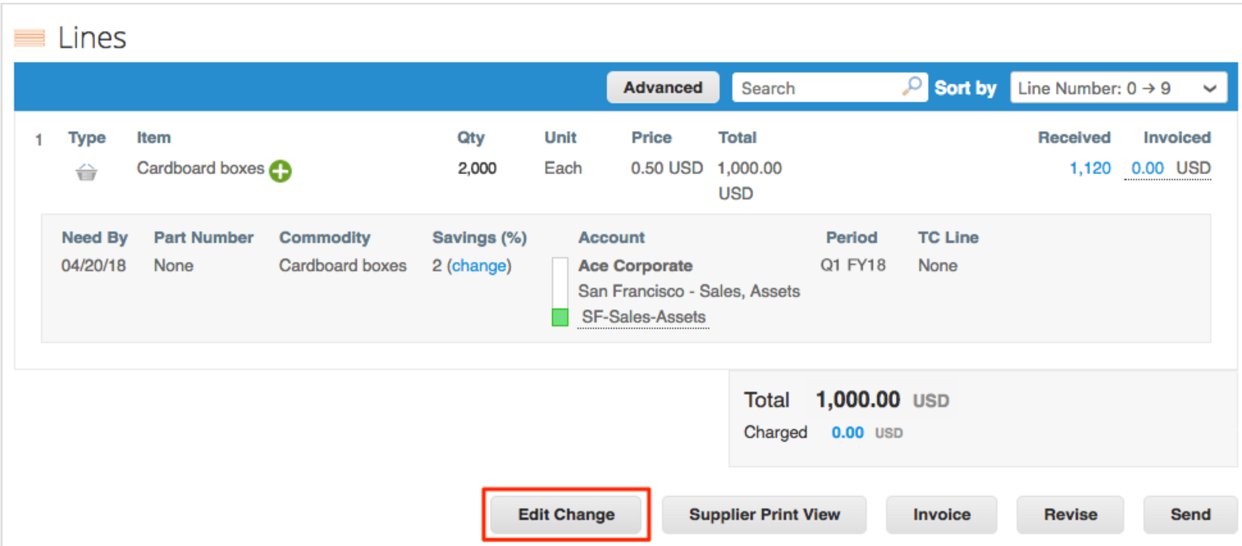
- **Order Header Changes/Initiate PO Change**, which lets the current approver initiate a PO change request
- **Order Header Changes/Change Supplier Fields**, which lets the current approver change supplier fields during a PO change request

When you assign the new role to a user who you want to be able to make purchase order change requests, they'll see a new **Request Change** button on the PO.



Clicking the button lets the user make changes to the order, and then resubmit it for approvals. if configured. Any PO change request submitted by a different user will cause a notification to be sent to the person who created the original requisition, and the approval path is regenerated based on your PO change approval configuration. Once approved, if the supplier-facing information has been changed, the current PO is canceled and a new PO is created.

Additionally, the Purchase Order Change Manager role allows users to edit change requests.



With the new workflow, admins can choose to remove the **Revise** option and ensure that all changes are routed through relevant approvals.

New modifiable fields on order change requests

Another update we made to the PO change requests is that now when requesting a change, you can change the shipping address. This wasn't possible in R21. Changes to the shipping address had to be made through PO revisions. Now, changes to the shipping address will cause the approval chain to be regenerated.

Approval rules

The approval chain that gets applied to the change request would be as per the configuration in approval rules (Requisition or PO Change). If management hierarchy approvals are set up, they'll also be added based on the change requester. If you'd like, you can set up the PO change approval chain so that it brings in the original requester as a watcher or approver using the **Requester** dynamic approver.

Upgrade impact

Roles and Permissions

- New actions for Order Headers and Order Changes controllers
- New standard role: Purchase Order Change Manager

Notifications

We added a new notification Enable it by going to **{Username} > Settings > Notifications** and under Orders, selecting **An order change is submitted by a different user**. Admins can preview or modify the notification under **Setup > Platform > Notifications**.

Integrations

New API In fields.

Availability

This feature is available for all customers on R22, but won't be available for users unless they're assigned the new standard role.

Services Usability Enhancements

Overview

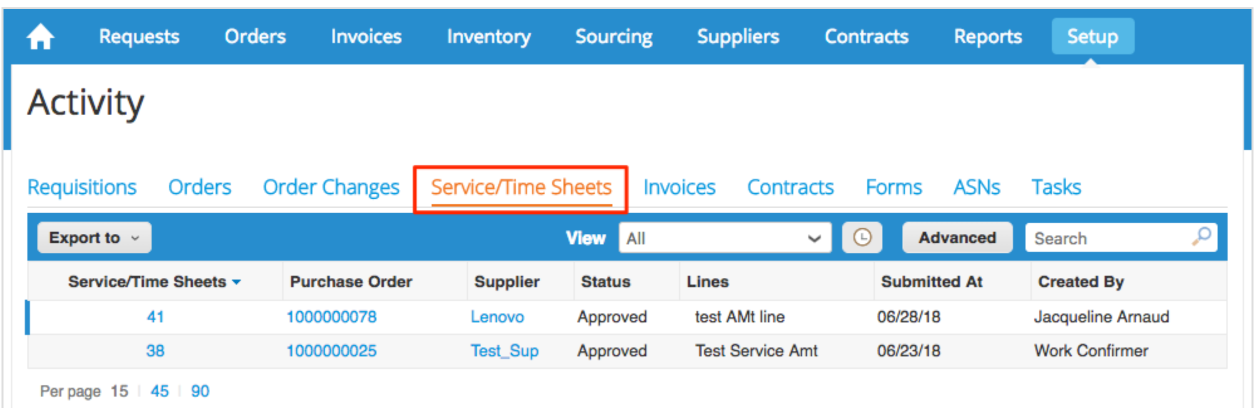
Now Service Maestro users can see their activity for Service/Time Sheets in their Activity history.

What we were thinking

Before this enhancement, Coupa users were unable to easily see their spend history for Service/Time Sheets.

How it works

You can find your history under **{Username} > Activity > Service/Time Sheets**. The list includes Service/Time Sheets that are approved, pending approval, or being watched. The view also includes the Created By column, so it's easy to see who exactly created the service/time sheet.



Upgrade impact

Notifications

None

Roles and Permissions

Migration for custom roles with the Order Headers/Show permission.

To make sure any custom roles based on the standard User role gets this new functionality, we'll automatically update your custom role:

Availability

This feature is enabled by default for customers with a Spend Maestro license.

Visual Ordering

Feature overview

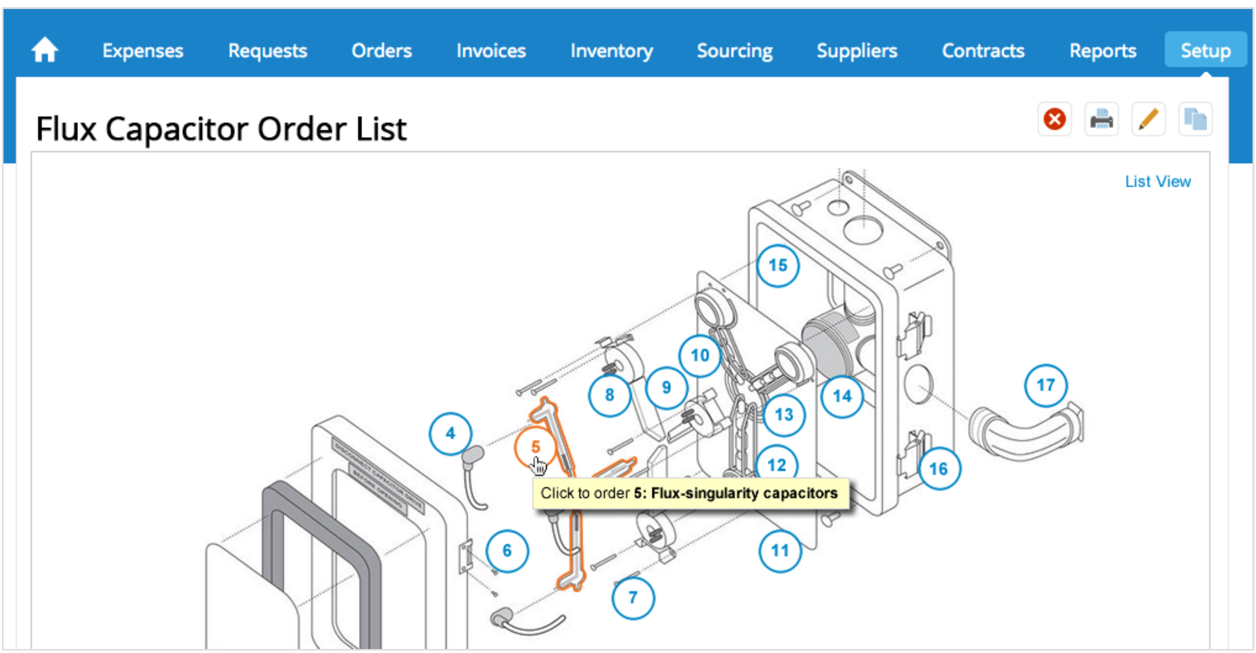
Now you can order items based on an exploded view of an assembly or comparison chart of similar-looking items.

What we were thinking

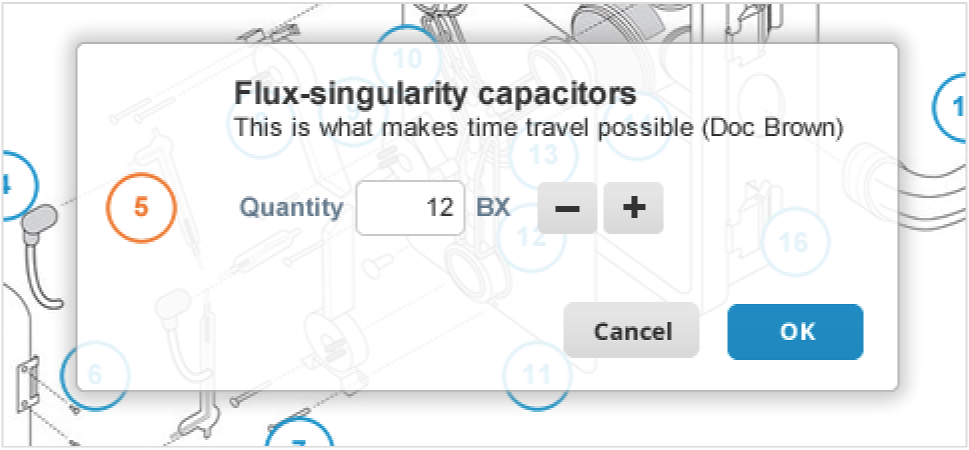
Some customers who work with complex assemblies, order items for repair jobs, or do onsite ordering have struggled to identify the specific part they needed to order. Ordering small parts based on a catalog number or item description isn't always easy, particularly when out in the field. We thought, wouldn't it be great if customers could use a visual representation to help identify items.

How it works

We've added images and tagging to order lists so that users looking for a specific part of an assembly can go to the order list for the assembly, and order a specific part from the exploded view of the assembly with numbered parts.



Just click on the part you want, and you'll get an option to update the quantity in the order list.



Create a visual order list

1. Go to **Setup > Procurement > Order Lists** and create a new order list.
2. On the create page, there's a new setting called **Visual Order**. Use it to upload your parts breakout diagram.
3. Start adding items to the list. Add the items in the order you want them to appear on your breakout list. Coupa assigns each item a number.
4. Click **Save** when you're done adding the items from the breakout diagram.

Associate list items with the diagram parts

When you create a new order list, you now have the option to add an image to your order list. As you add items to the list, you'll have the opportunity to drag them to the image to associate the item with a part on the exploded view.

1. Open the list and click the **Edit** icon ( ).
2. Click the **Visual Order List** button at the bottom of the page. If there's no button, verify that you've attached an image to the order list using the **Visual Order** button.
3. Drag the numbered items from your order list (on the left) to the appropriate location in the breakout diagram.
4. When you release the mouse button, the list item turns into a numbered circle.
5. Continue until all of your list items have been placed on the image. If you don't like the position of a numbered circle, click it, click **Delete**, and try again.
6. Click **Save** when you're done.

Upgrade impact

Notifications

None

Roles and permissions

- New actions added to the Order Pads controller

- New permission added to the standard User role
- Custom roles with the Order Pads/Edit permission get new permissions

Integrations

None

Availability

This feature is enabled by default. Add an image to an order list to utilize it.

Accelerate

This chapter contains the following topics:

Supplier Notifications for Increased Accelerate Adoption

Feature overview

Suppliers are notified when you enable Coupa Accelerate and you are ready to accept early payment discount offers, and they can act quickly on orders that can be accelerated.

What we were thinking

After introducing Coupa Accelerate in Release 18 as part of the Coupa Early Access Program (EAP) and making it generally available in Release 20, we want to improve the user experience and increase the adoption among suppliers of accepting early payment discount terms.

Suppliers using the Coupa Supplier Portal (CSP) now receive notifications of customers who are ready to accept early payment discounts, and they can set their payment terms directly from the CSP notifications. To encourage suppliers to offer early payment discounts, we also made the Accelerate option more visible on PO and invoice transactions, and added a button to quickly accelerate from a PO email.

How it works

Notifications

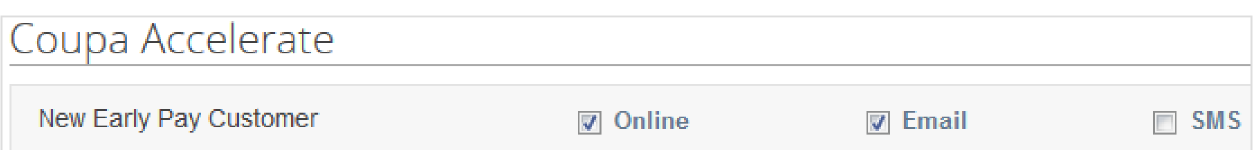
If you turn on Coupa Accelerate, it sends notifications of the early payments opportunity to all your existing suppliers that are linked to the CSP. Depending on the suppliers' notification preference settings, they receive email, online, and/or SMS notifications.

> **Warning:** Suppliers might choose not to receive notifications for Coupa Accelerate.

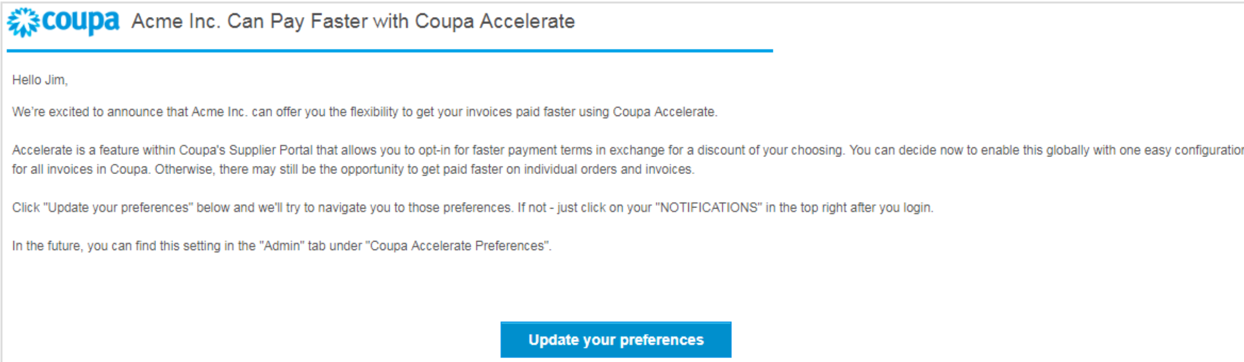
See View and Manage Notifications for more info.

> **Note:** Notifications are sent within 24 hours after you enable Coupa Accelerate.

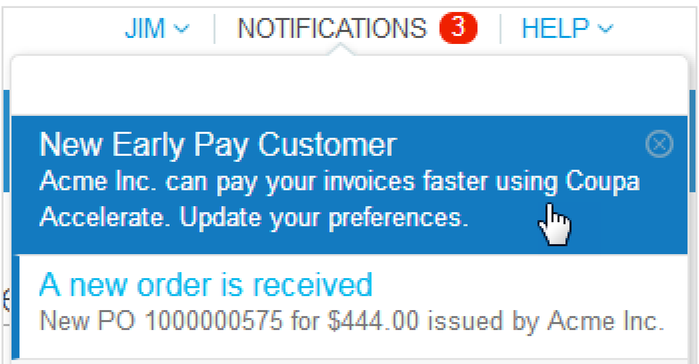
If you already enabled Coupa Accelerate and create a new supplier, the new supplier receives an email and an online notification after being linked to the CSP as online and email notifications are on by default.



Email notification



Online notification



When suppliers click on the **Update your preferences** button in the email or on the notification in the CSP, they are directed to the **Coupa Accelerate Preferences** page where they can set their payment terms.

> **Note:** If suppliers are not logged into the CSP, they are directed to the **Log In** page. After logging in, they need to navigate to the **Admin > Coupa Accelerate Preferences** page.

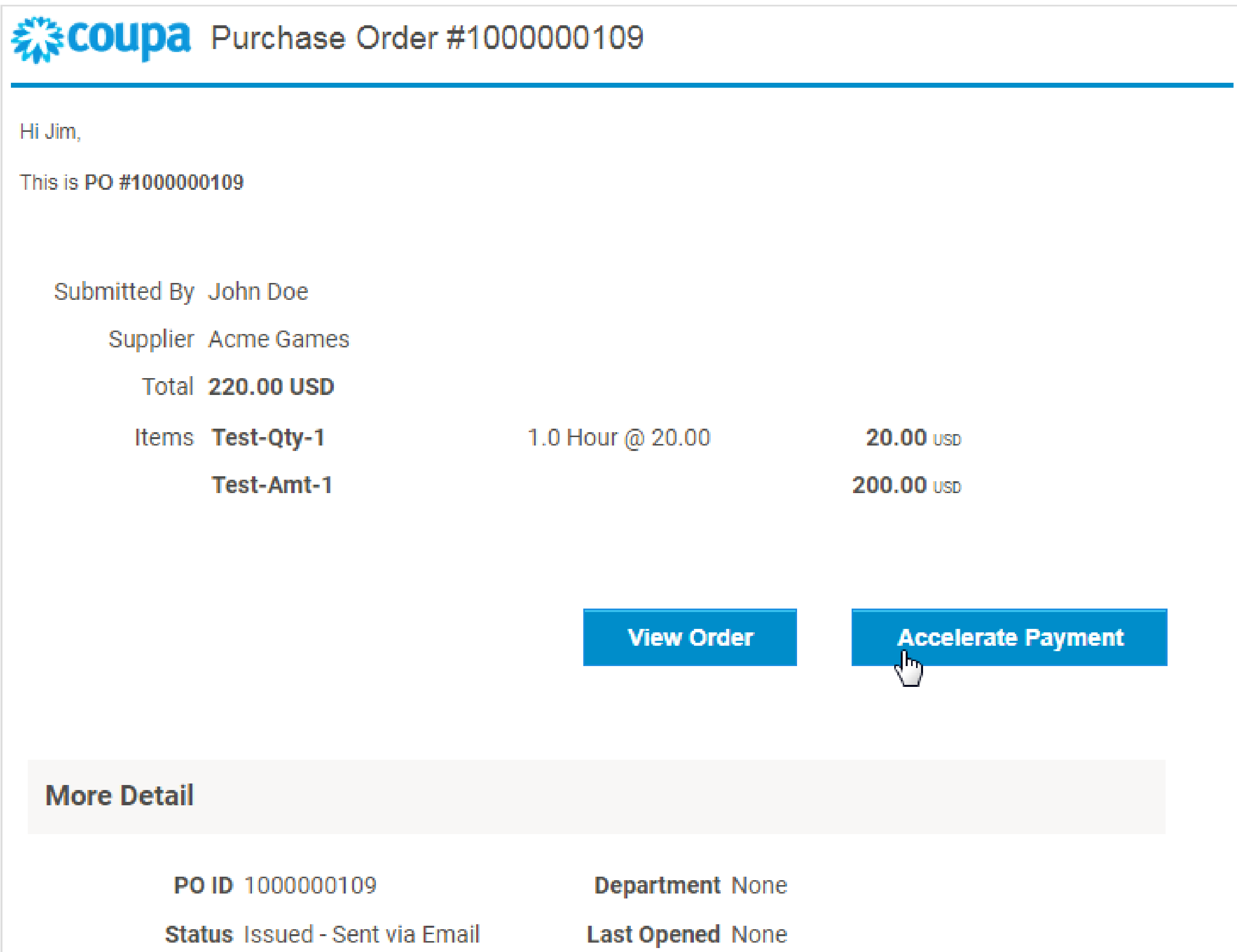
When suppliers work with invoices or orders, they can now see the **Gauge** ( ) icon next to the **Accelerate Payment** button.

Accelerate orders from PO emails

Suppliers using CSP or SAN can accelerate orders directly from PO emails if:

- Customers enabled Coupa Accelerate.
- Suppliers using the CSP set accelerate preferences.
- POs have net terms that can be accelerated.
- Customers set up matching payment terms.

Suppliers click on the **Accelerate Payment** button in the PO email.



From CSP and SAN emails, suppliers are directed to the PO and the **Accelerate Payment** dialog box appears. See Accelerate orders or invoices for more info.

> **Note:** If suppliers are not logged into the CSP, they are directed to the **Log In** page. After logging in, they need to navigate to the PO that they want to accelerate.

See Coupa Accelerate and Coupa Supplier Portal for more info.

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

You need a Coupa Accelerate license and you need to have Invoicing to use this feature.

If you have the license and the feature is not activated, contact Coupa Support to enable it for you.

Visibility of Accelerated Invoices

Feature overview

You can create a view or search for all the invoices that have payment terms updated by Coupa Accelerate.

What we were thinking

In Release 18, we introduced Global Early Payment Discount Terms in CSP, and in Release 20, we allowed suppliers to set these Early Payment Discount Terms at Transaction Level.

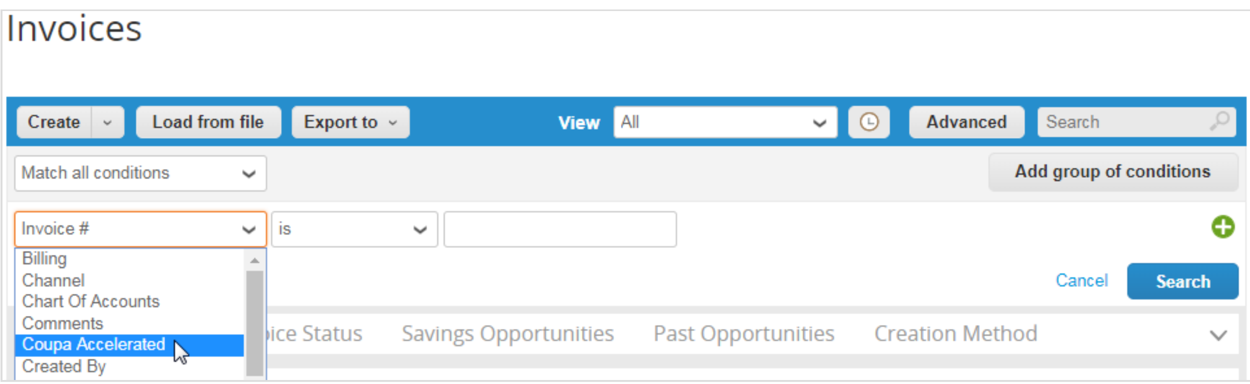
Customers want to report on invoices that have early payment discount terms updated by Coupa Accelerate to ensure that they are approved quickly, and also for internal accounting reasons, so we provide the option to list all the accelerated invoices by searching or creating a view for them.

How it works

To view a list of all your accelerated invoices on the **Invoices** page, you have the following options:

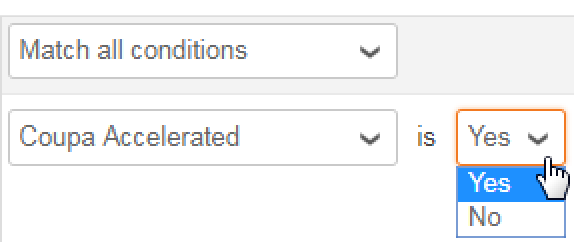
Use advanced search

Go to **Advanced** search and select the **Coupa Accelerated** field from the drop-down list, then click **Search**.



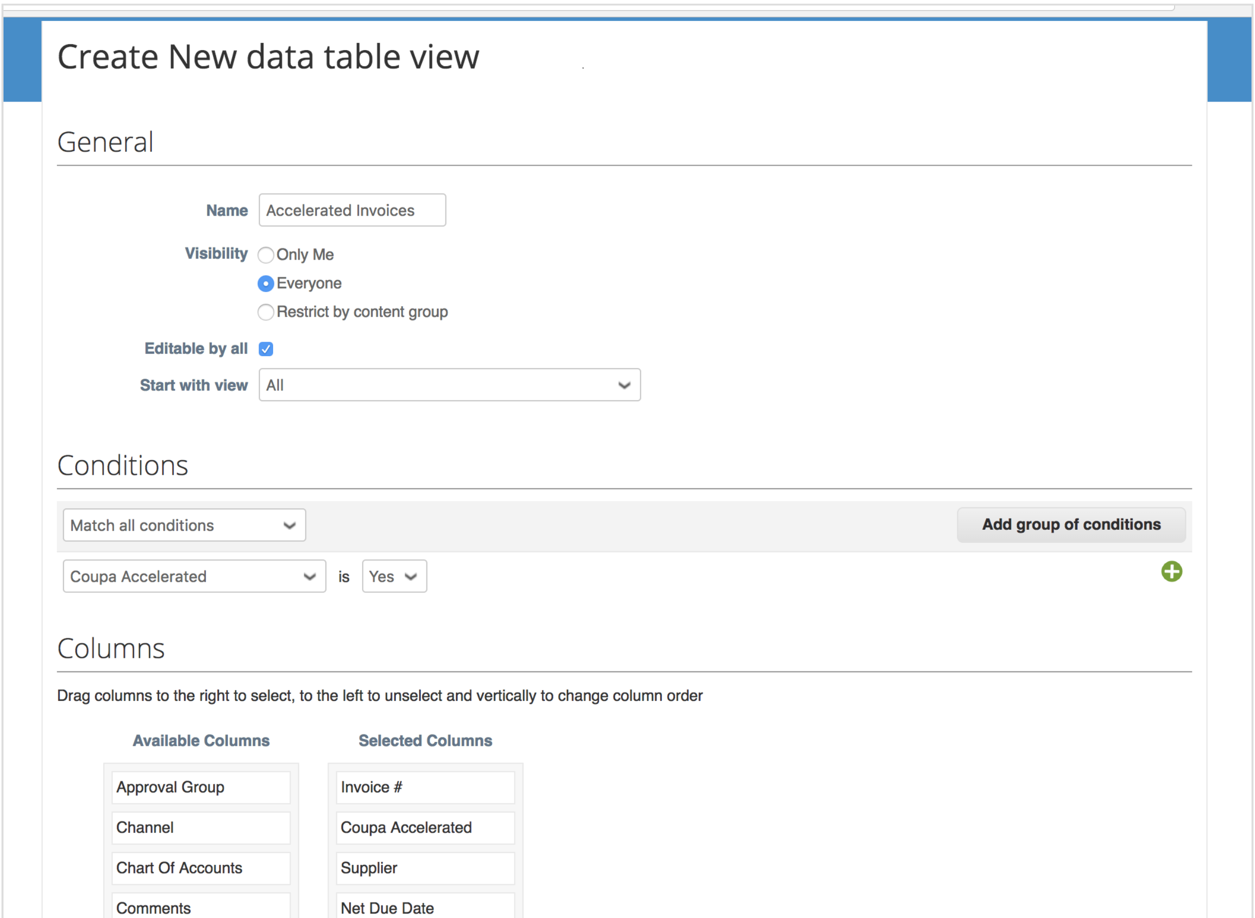
The **Invoices** table shows the accelerated invoices.

To view non-accelerated invoices, set the filter to **No**.



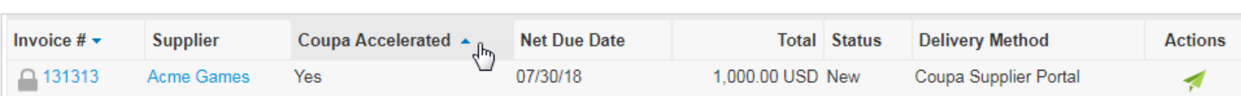
Sort by column

Go to **View** to create a new table view. Give it a relevant name, for example, Accelerated Invoices, and after setting its visibility and conditions, select **Coupa Accelerated** from the **Available Columns** and drag it to the **Selected Columns**.



Tip: You can change the order of the columns.

Save your view to see the new column in your invoices table.



See Coupa Accelerate for more info.

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

You need a Coupa Accelerate license and you need to have Invoicing to use this feature.

If you have the license and the feature is not activated, contact Coupa Support to enable it for you.

Analytics

This chapter contains the following topics:

Bookmarks for Dashboards

Feature overview

You can save your dashboard settings by bookmarking your dashboards.

What we were thinking

When users create dashboards, they may need to apply multiple complex filter selections, for example, date ranges, currency, or chart of accounts. Filter selections are not saved over sessions, so users need to reset their filters every time they access their dashboards.

We introduced the option for users to create bookmarks to save their dashboards with the filter and dashlet view settings.

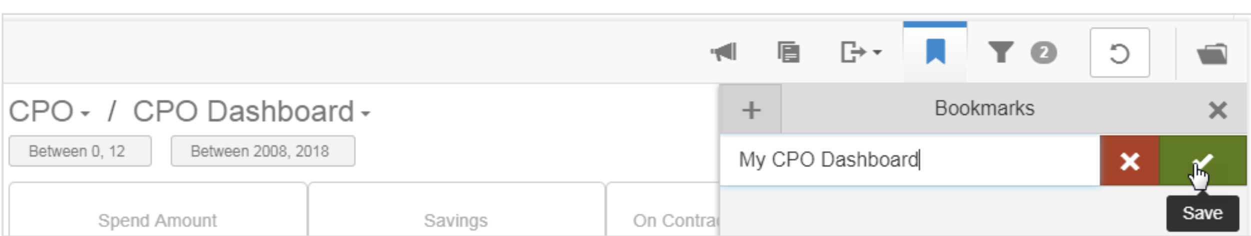
Bookmarking saves time for users as it allows them to access the information they need without having to change their configuration repeatedly. Having saved filters also gives users consistent views and increases usability and adoption.

How it works

You can save filters and views on out-of-the-box or custom dashboards by bookmarking them.

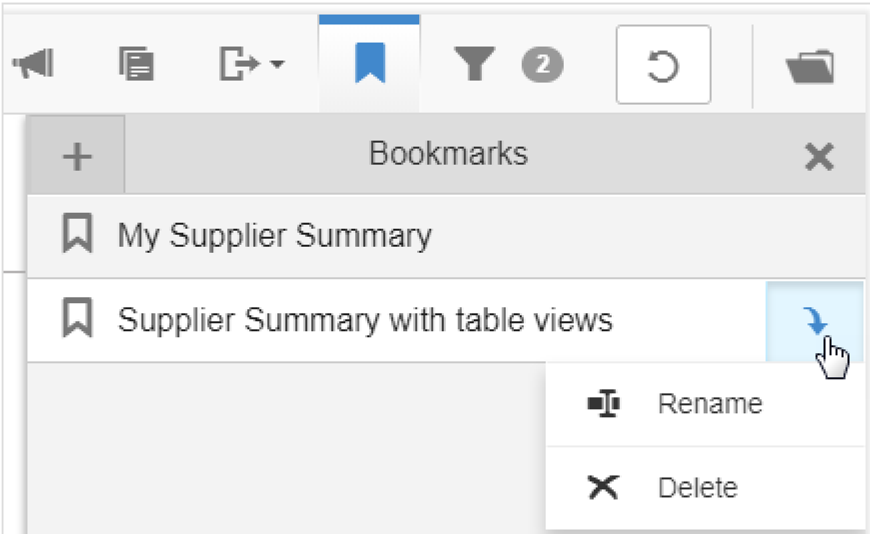
> **Note:** A bookmark does not save the results of the reports.

1. Go to **Reports > Analytics** and select a dashboard from a collection.
2. Set your filters and select your dashlet/report views with the **View Selector**. See Analytics for more info.
3. In the top right corner, click on the **Bookmarks** icon on the left of the **Filters** icon, and then on the plus (+) sign to create a bookmark.
4. Name your bookmark and cancel or save it.



The dashboard is bookmarked and your filter and view selections are saved.

5. To rename or delete a bookmark, click on the relevant icon next to the bookmark name.



Note: Dashboard bookmarks are private and cannot be shared.

You can add multiple bookmarks to one dashboard.

Each dashboard has its own bookmark(s). Also, when you select a dashboard, the default dashboard page is displayed. So, if you want to access a bookmark for a dashboard, you need to navigate to the **Bookmarks** of the specific dashboard within a collection and click on a bookmark name to load the dashboard with the settings specific to the bookmark. The "Bookmark was successfully applied." message is displayed.

Note: If a filter value changes due to a change in the Coupa configuration, you need to update your bookmark(s) by resetting your filter(s).

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

This feature is available to all customers who have a Coupa Analytics license.

Custom Field Values Visible in Analytics

Feature overview

Reports can display custom field values instead of custom field IDs.

What we were thinking

Previously, Coupa Analytics reports populated custom fields only with their IDs and not their actual values. For example, if a user added a custom field for Manager for the Supplier object category, the Manager field would display the ID, that is, 12.

Customers want to see also the actual values of the custom fields in their reports so that they can more efficiently build dashboards that are meaningful to them, for example, instead of the ID (12), the Manager field should display the actual value (Diane W., the name associated with the ID).

Also, customers want to create reports with the same custom fields that they use in other Coupa apps, including two new custom field types: multi-select and money that we introduced in Coupa Release 20. See Use Money and Multi-Select Custom Fields for more info.

To provide a better user experience, we introduced new attributes with custom field names that allow customers to report both the value and the ID for custom field types.

To make it easier to find custom fields, we placed them into their own separate categories.

How it works

When creating reports in various visualizer object categories that have custom fields, you can select from a new Custom Field Name set of attributes (recommended).

Object Category / Custom Fields Object Category	Attribute
Address / Address Custom Fields	Address Custom Field *n* (1-20) Name
Contract / Contract Custom Fields	Contract Custom Field *n* (1-20) Name
Department / Department Custom Fields	Department Custom Field *n* (1-20) Name
Expenses / Expense Custom Fields	Expense Report Custom Field *n* (1-20) Name, Expense Line Custom Field *n* (1-20) Name
Invoice Header Charge / Invoice Charge Custom Fields	New category. Invoice Charge Custom Field *n* (1-20) Name
Invoices / Invoice Custom Fields	Invoice Header Custom Field *n* (1-20) Name, Invoice Line Custom Field *n* (1-20) Name
Lookup / Lookup Custom Fields	New category. Lookup Custom Field *n* (1-20) Name
Orders / Order Custom Fields	Order Header Custom Field *n* (1-20) Name, Order Line Custom Field *n* (1-20) Name
Receipts / Receipt Custom Fields	Receipt Custom Field *n* (1-20) Name
Requisitions / Requisition Custom Fields	Requisition Header Custom Field *n* (1-20) Name, Requisition Line Custom Field *n* (1-20) Name
Sourcing / Sourcing Custom Fields	Quote Request Custom Field *n* (1-20) Name
Supplier / Supplier Custom Fields	Supplier Custom Field *n* (1-20) Name
User / User Custom Fields	User Custom Field *n* (1-20) Name

All the custom field and custom field name attributes for the object categories are grouped into separate custom fields object categories, for example, **Address Custom Fields**, **Contract Custom Fields**, or **Supplier Custom Fields**. However, they are documented under the main object category, for example, supplier custom fields are listed under Supplier.

See Analytics Data Dictionary for more info.

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

This feature is available to all customers who have a Coupa Analytics license.

Other Analytics Enhancements

Feature overview

Coupa Analytics includes new measures, attributes, and other expressions to report on invoice summary charges, document types, tax lines, lookups, sourcing, and more.

What we were thinking

Previously, Coupa Analytics did not have invoice charges in reporting currency, so customers could run reports on invoice line amount but not on other charges, for example, handling amount, shipping amount, or miscellaneous charges. As reporting total for invoice charges is now available, we enabled customers to run reports on the charges amount for each invoice and tax line in both transaction and reporting currency.

To ensure completeness of reporting and a more holistic view of spend under management, we also introduced miscellaneous additional measures, attributes, and other expressions requested by customers or required by our new platform capabilities, for example, invoice history, invoice header taxes, document types, sourcing, and more.

We also added attributes to display values instead of IDs, for example, for users that created or updated addresses, departments, suppliers, or receipts.

How it works

The following table lists the new and modified visualizer object categories along with the new measures, attributes, and other expressions.

Object Category	Measure, Attribute, Other Expression
Address	Address Created By Name, Address Updated By Name
Department	Department Created By Name, Department Updated By Name
Expenses	Expense Updated By Name
Invoice Header Charge	New category. Contains measures and attributes for invoice charges.
Invoice Header Tax	New category. Contains measures and attributes for tax at header and line level.
Invoice History	Invoice Header ID
Invoices	Invoice Line Tax Amount, Invoice Line Tax Reporting Amount, Document Type, Invoice Updated By Name
KPIs	Sourcing Awarded Amount, Contract Cycle Time, Work Cycle Time Day, Reviewer Cycle Time, Order Change Cycle Time, Number of Contracts Authored, Number of Suppliers in Contract Collaboration, Number of Contracts That Expire in 1 Month, Number of Contracts That Expire Between 1 and 3 Months, Number of Contracts That Expire Between 3 and 6 Months, Number of Contracts That Expire Between 6 and 12 Months
Lookup	New category. Contains attributes for creating and viewing reports with lookup details.
Orders	Order Updated By Name, Receipts Total Quantity
Receipts	Receipt Created By Name, Receipt Updated By Name
Requisitions	Requisition Updated By Name
Sourcing	Quote Response Line Reporting Price Amount, Quote Reporting Bid Price, Quote Request Created By Name, Quote Request Updated By Name, Quote Supplier Name, Quote Request Line Price Currency Code, Quote Response Line Price Currency Code
Sourcing Supplier	New category. Contains measures and attributes for viewing information related to suppliers participating in sourcing events.
Supplier	Supplier Created By Name, Supplier Updated By Name, Tax Code, Payment Term Code, Primary Contact Name, Supplier Address Name, Commodity Name, Shipping Term Code, Supplier Created By

User	User Created By Name, User Updated By Name, Manager Name, Currency Code

All the attributes related to custom fields for the object categories are grouped into separate custom fields object categories, for example, **Address Custom Fields**, **Contract Custom Fields**, or **Supplier Custom Fields**. However, they are documented under the main object category, for example, supplier custom fields are listed under Supplier.

We also added the following date and time dimensions:

- By Invoice Charge Created At
- By Invoice Charge Updated At
- By Tax Created At
- By Tax Supply Date
- By Tax Updated At

See Analytics Data Dictionary for more info.

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

This feature is available to all customers who have a Coupa Analytics license.

Contract Lifecycle Management

This chapter contains the following topics:

Contract Integration with New Supplier Statuses

Easily identify suppliers that are in the evaluating status and disallow contracts with inactive suppliers.

Projects for Contracts

Now add tags and user groups to contracts for more team collaboration.

Retention Policy for Contract Collaboration

Comply with your companies retention policy by removing non-essential information to your contracts.

UX and Workflow Improvements

We've made improvements to email notifications, branding, time zone settings, and email links.

Contract Integration with New Supplier Statuses

Feature overview

We're introducing an intermediary supplier state so that customers can complete contracts with suppliers without being forced to onboard them.

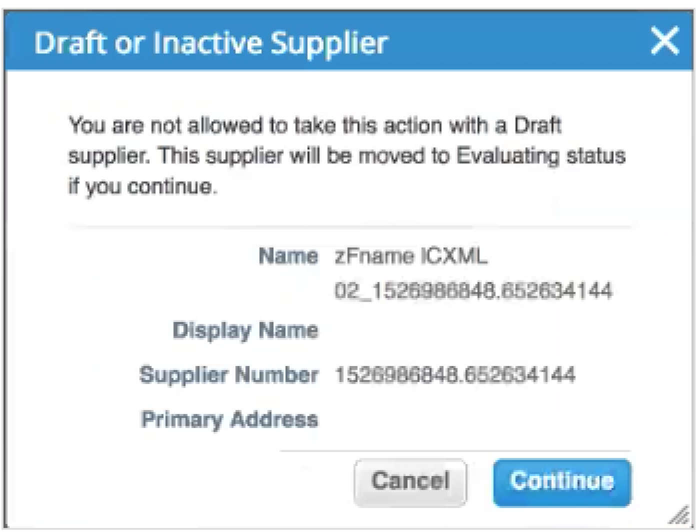
What we were thinking

In order to support the Source to Contract workflow, we needed to enhance the current Supplier state machine. eg: Customers may need to sign an NDA with a supplier before onboarding them. This ensures that we keep a clean supplier record and a supplier who is currently being evaluated.

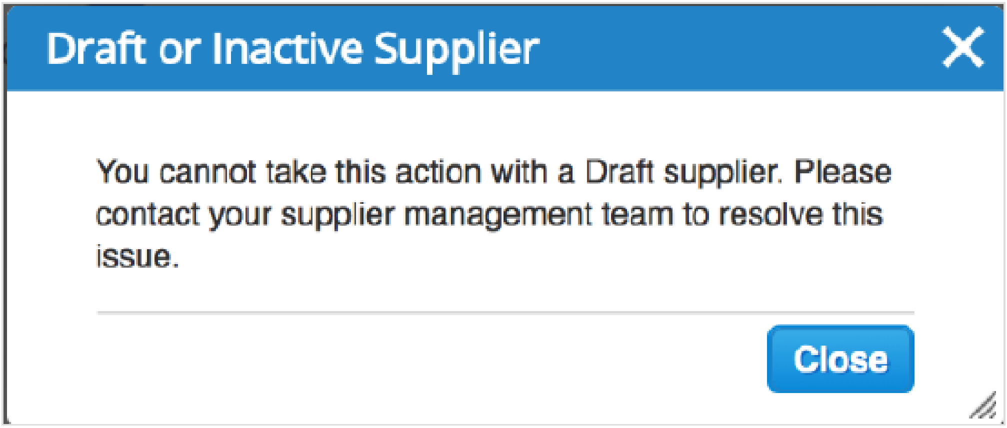
To address this issue, we are introducing a new status called **Evaluating** to help fill the missing gaps as inactive suppliers are chosen.

How it works

We are introducing the **Evaluating Supplier** permission that allows moving an inactive/draft supplier to **Evaluating** status. When an [Admin, Buyer] and [Supplier Manager] tries to author a contract with an inactive/draft supplier or when submission for approval or an invite for signing submitted from Coupa, that is when that user is allowed to move the supplier to evaluating.



If a contract is authored by a user who doesn't not have permissions, then a message appears to indicate the need to contact the Supplier management team in order to get this supplier action to move to evaluating status.



Upgrade impact

Integrations

There are no new integrations for this feature.

Roles

There are updates to roles for this feature: Admin, Buyer and Supplier Manager.

Permissions

There is a new permission.

Permission	Action	Description	Feature
suppliers/evaluate_supplier	Evaluate Supplier	Ability to change the status of a supplier to evaluating	New Supplier Status: Evaluating

Availability

This feature is disabled by default. This feature is available to all customers who have a Contract Lifecycle Management license. If you would like to get this and other features, contact your Coupa representative.

Projects for Contracts

Feature overview

We've introduced some project management tools in tags and the creation of user groups in contracts.

What we were thinking

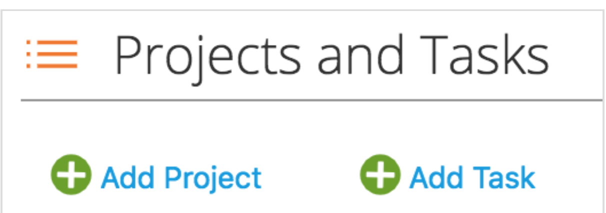
Contract management is usually part of a larger flow of activities, including sourcing and supplier management. Today, there is no way to enable communication, track tasks, or collaborate with a larger cross-functional team within an organization.

By introducing tags on contracts, it allows the project owner to collaborate with AP teams. Previously a contract could only accept 20 custom fields, using tags on contracts helps to mitigate this problem and allows contracts to be included in a tag user group as well as in approval chains and can be used in search as well as reflected in the API.

How it works

Projects and Tasks

Within a contract, you can add and delete a **Project** and **Task** to be associated with the contract. Projects and Tasks are viewable and editable from Contracts Show page only. See [Projects and Tasks for R22](#) for more info.



> **Note:** Projects and Tasks can only be added to contracts that have been saved.

Tags

Tags can be used to organize contracts and drive approvals. When creating, editing or viewing a contract select

(**Add Tag**) at the top of the screen to add a contract. For more information on Tagging, see [Tags](#).

Tags can also be used to drive approval chains. Go to **Setup > Approvals > Approval Chains.** As a contract approval chain is created, a new condition **Tags** can be selected to create an approval chain. Contracts can also be searched for by using specific tags. Tags are not inherited by child contracts. When a tag is added or deleted this is captured in the contract history.

Upgrade impact

Integrations

There are new integrations for this feature.

See Release 22 Inbound API Changes.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is enabled by default. This feature is available to all customers who have a Contract Lifecycle Management license. If you would like to get this and other Contract Lifecycle Management features, contact your Coupa representative.

Retention Policy for Contract Collaboration

Feature overview

Reduced risk of a lawsuit being affected by damaging internal information from during contract negotiations.

What we were thinking

During a contract negotiation, sensitive internal information is often discoverable and could be used in the event of a lawsuit. To prevent this, companies have a *Retention Policy* implemented into their contract process. We've introduced **Essential** and **Non-Essential Information** that can be used when creating a contract in Contract Collaboration.

Essential Information is what's needed to use the contract (final document text and data). Non-Essential Information encompasses everything else (comments, messages, past versions of the document, additional files, and even the audit log of the negotiations). To comply with a company's retention policy, all of this data will need to be deleted at the right time.

In this release, we're deleting all essential data from Contract Collaboration which includes the contract record, legal agreement PDF, attachments and executive summary. This means having the ability to delete the Contract Collaboration document, all its associated records and files, the *Legal Document* stored in Coupa , and any history of the negotiation stored on the Contract Record.

How it works

Setting an archive policy

To ensure that Non-Essential information is archived properly go to **Setup > History > Archive > Contract Policy > Edit.** From the Contract Policy menu, set the field for **Delete Online Record** and **Activate** the policy.

Triggering a contract to delete

While creating a contract, the expiration date should be set to correspond with the timeframe in the archive policy.

Once a contract meets the criteria of expiration and deletion, then it is removed from Coupa. If you try to search for a contract that has been deleted it will not appear anywhere in Coupa and the Contract ID will not be found.

Upgrade impact

Integrations

There are new integrations for this feature.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is disabled by default. This feature is available to all customers who have a Contract Lifecycle Management license. If you would like to get this and other Contract Lifecycle Management features, contact your Coupa representative..

UX and Workflow Improvements

Feature overview

We've made improvements to email notifications, branding, time zone settings, and email links.

Improvements

Feature	Description
Email notifications	Changed the way default notifications come through. Activity emails only come through when you sign and complete a contract. To manage the notifications that come to each user, view them in **{user name} > Settings > Notifications > Contracts**.
Email Links	Added links to emails for user notifications preferences.
Corporate Branding	When working through Contract Lifecycle Management, the same enterprise color and logo are now apparent throughout the application.
Timestamp	In Contract Collaboration we now use the same time zone that you set in **Setup > Company Information > Regional Settings > Default Time Zone**. This allows for all communication coming from Contract Lifecycle Management to appear at times that are appropriate to the user.

Upgrade impact

Integrations

There are no new integrations for this feature.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

These features are enabled by default. This feature is available to all customers who have a Contract Lifecycle Management license. If you would like to get this and other Contract Lifecycle Management features, contact your Coupa representative..

Inventory

This chapter contains the following topics:

Cycle Time for Count Approvals

Feature overview

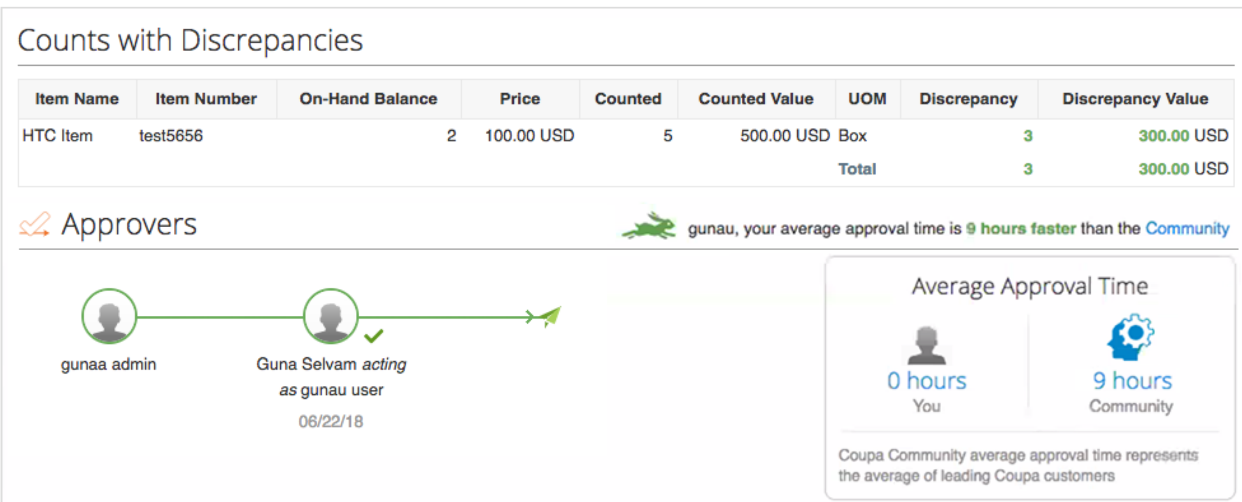
Now you can easily view cycle time metrics for cycle count approvals and how they relate to the community.

What we were thinking

We currently measure the cycle time for requisition and invoice approvals. The same has been extended for cycle count approvals in Release 22.

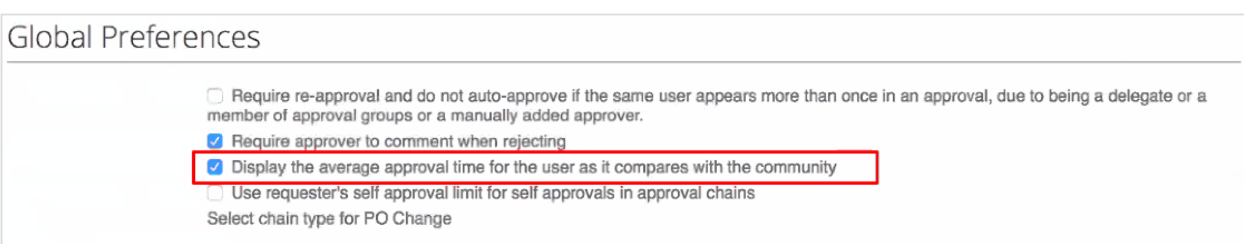
Now the average time for a cycle count approval for an approver is displayed in the Cycle Count Approval page. This allows you to compare the average time of cycle count approval with the top customers within the community. This community intelligence feature helps to motivate approvers to approve the cycle count faster.

In R21, we introduced Insights for Approvers which covered expense reports, requests, and invoices. We continue to build out our community insights throughout the platform to help customers perform better. More information about how individuals and organizations are performing compared to their peers makes the platform more engaging, creates greater awareness, and stimulates action. So, in R22, we've added insights for Cycle Count approvals.



How it works

Go to **Setup > Approvals > Global Preferences** to enable this feature.



From a list of cycle counts that are pending approval, view the discrepancy reports. In the discrepancy report as an approver, you can see the average approval time and the community average time. Once the cycle time has been approved, the average cycle count time is re-adjusted.

Upgrade impact

Integrations

There are no new integrations for this feature, and it does not apply to API or CSV loaders.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is disabled by default. This feature is available to all customers who have a Procurement or Inventory license. If you would like to get this and other Inventory features, contact your Coupa representative.

Decimal Quantity Support for Internal Stock Order

Feature overview

Support for decimal quantities for internal orders and fulfillment transactions.

What we were thinking

Prior to Release 22, internal stock orders could be created for only positive integer quantities. This created issues for items that are liquids or measured in volumes and caused a gap in the product as decimal quantities were supported for other inventory transactions.

This feature introduces support for decimal quantities for internal orders and downstream fulfillment transactions.

How it works

To set the decimal, go to **Setup > Units of Measure,** you can define the decimal precision for the unit of measure. The decimal precision will be supported when a quantity ordered is approved as well as when the item is picked from the pick list of received in the destination warehouse. The decimal quantity will be supported for internal orders created in both the UOMs on the item i.e. Consumption UOM or Order UOM. Decimal Quantity is supported for lot controlled items, but not supported for asset tag items.

> **Note:** There have been no changes with Cycle Count Decimal support, the existing functionality remains the same.

Upgrade impact

Integrations

There are no new integrations for this feature, and it does not apply to API or CSV loaders.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is enabled by default. This feature is available to all the customers who have Inventory license. If you would like to get this and other Inventory features, contact your Coupa representative..

Default Receiving Option

Feature overview

This feature will help the receiver choose the right receipt option for the receipt to prevent any incorrect receipts and will eliminate any downstream mismatches within the inventory.

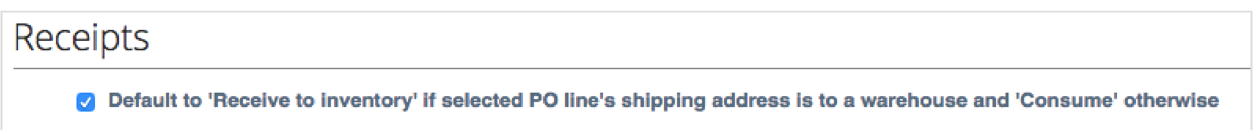
What we were thinking

When performing a quick receipt transaction, there are four options that a receiver can select: **Receive into Inventory, Consume, Dispose** and **Return to Supplier**. Currently, we default the action to Receive into Inventory. It's possible that, at times, the receiver can forget to update the receipt option. This can result in an item, inadvertently, being received into inventory when it was supposed to be consumed and has downstream impacts on other processes such as cycle counts, item availability etc. because the on-hand balance in the system is inaccurate.

While the user should select the right option when performing a receipt, it is desired that the system should aid in making the right selection for the receipt. Therefore, we have introduced a new configuration option under inventory setting which will update the defaulting logic to select the appropriate action depending on the type of lines selected for receipt.

How it works

A new configuration option has been introduced under **Setup > Inventory Settings**. This new parameter **Default to Receive into Inventory** if selected receipt lines are stockable items and warehouse specified on the requisition' will be disabled by default.



However, when this parameter is enabled and when the user performs a quick receipt transaction using **Inventory > Receipts,** the system will default the receipt action based on the logic below -

1. If all the lines selected for receiving are for non-stockable items i.e. the item number for the item is null in the Item Master, then we will always default the receipt option to 'Consume'. This is because the non-stockable items can never be received into inventory.
2. If all the lines selected for receiving are for stockable items i.e item number is specified for these items in the Item Master and the warehouse is specified on the requisition(s), then we will default the receipt option to 'Receive into Inventory'.
3. If all the lines selected for receiving are for stockable items i.e item number is specified for these items in the Item Master but the warehouse is not specified on the requisition(s), then we will not default any receipt option and force to the user to select an option. This is because such items can be either consumed or received into inventory.
4. If the lines selected for receiving are a mix of any of the above scenarios, then in such scenario the system will not default any receipt option and let the user select the receipt option.

> **Note:** A warehouse can be specified on the requisition if the user creating the requisition has a 'Replenisher' role associated.

The above logic to default the receipt option will work for receipt against all the different documents like **PO, Internal Stock Orders, ASN** etc.

Behavior change

We are changing the existing behavior of always defaulting the receipt option to **Receive into Inventory** when performing a quick receipt as this may not be the desired behavior for all the different scenarios.

Upgrade impact

Integrations

There are no new integrations for this feature, and it does not apply to API or CSV loaders.

Roles

There are no new roles for this feature.

Permissions

There are no new permissions for this feature.

Availability

This feature is disabled by default. This feature is available to all customers who have procurement or Inventory license. If you would like to get this and other Inventory features, contact your Coupa representative..

Inventory Adjustment CSV to Enable Mass Adjustments

Feature overview

Integrate Point of Sale (POS) or other systems to easily update and make inventory adjustments within Coupa Inventory.

What we were thinking

Currently, we allow Inventory adjustments to happen for only one item at a time using the On-Hand Balance report. There is no integration mechanism available to adjust inventory within Coupa. This can create an issue when inventory adjustments need to occur in bulk, or if there is a need to integrate the inventory adjustments from another system like POS system into Coupa.

To eliminate this issue we've built a CSV loader which will allow the bulk adjustment of the on-hand balance of the items within Coupa Inventory and will enable balance updates from a third party system.

How it works

To use this feature, download the .csv template to **adjust Inventory.**

Individual item adjustment

To adjust a single item, go to **Inventory > Adjust Inv. > Individual Item Adjustment**

Bulk adjustment

To adjust items in bulk, go to **Inventory > Adjust Inv. > Bulk Adjustment.** Adjusting items in bulk can be done using CSV template which can be downloaded and then uploaded back with the data.

Upgrade impact

Integrations

There are new integrations that will adjust inventory balances.

See Release 22 Inbound API Changes.

Roles

There were updates to standard roles: Admin.

Permissions

There is a new permission.

Permission	Action	Description	Feature
inventory_manage_transactions/ bulk_loader	bulk_loader	CSV Bulk Loader for Inventory transactions	Inventory Adjustment CSV
inventory_manage_transactions/ list_csv	list_csv	Download CSV Template / Data for Inventory Transactions	Inventory Adjustment CSV
inventory_manage_transactions/ load_progress	load_progress	Allows user to show Inventory transactions bulk loader progress	Inventory Adjustment CSV
inventory_manage_transactions/ show_results	show_results	Show Inventory Transactions bulk loader results	Inventory Adjustment CSV

Availability

This feature is enabled by default. This feature is available to all customers who have Inventory license. If you would like to get this and other Inventory features, contact your Coupa representative..

Sourcing

This chapter contains the following topics:

Dutch Reverse Auctions in Sourcing

New event type to support Dutch reverse auctions

Planned Savings Tracking

Possibility to compare planned savings with the outcome of the sourcing event

Other Changes and Improvements

Supplier status 'Evaluating', 'Last seen' field, link to Projects and Tasks and link from Contract to sourcing event

Dutch Reverse Auctions in Sourcing

Feature overview

Dutch reverse auction ("First bid wins") is now available as an event type in Sourcing. Each item is given an initial price which is to be lower than the price to be awarded. During the event, the price is increased automatically by a set amount or percentage over a set period of time. The first bidder to accept the call-out prices wins all items in the event.

What we were thinking

Dutch auctions are popular across many categories. The event type may be used for spot-buy or simple events where the price is the sole award criterion.

How it works

Select **Dutch Reverse Auction** as the **Event type** for your new event and set the time between price changes. Make sure to allow the participants adequate time to consider all items in your event in each step. Set the number of steps after which the auction is to end, i.e. when the call-out price has reached a level at which you do not want to buy the item anymore. Once you have defined your items, the total cost for each step can be seen by hovering over the icon to the right.

Go to the **Events details** page and define your items. For each item, set the initial start price and the change in price for each interval. The change can be set as an amount or as a percentage of the start price. Since the CS Dutch auction is an all-or-nothing event, grouping of items into lots may be relevant only as a means to facilitate overview in case multiple items of different types are included in the same event.

When the auction has started, the supplier sees the call-out price and the total cost as it increases with each interval. As soon as a supplier has accepted the total cost, the event ends.

The setup is described in more detail here.

Upgrade impact

No impact on current functionality.

Availability

No actions are required to activate the feature.

Planned Savings Tracking

Feature overview

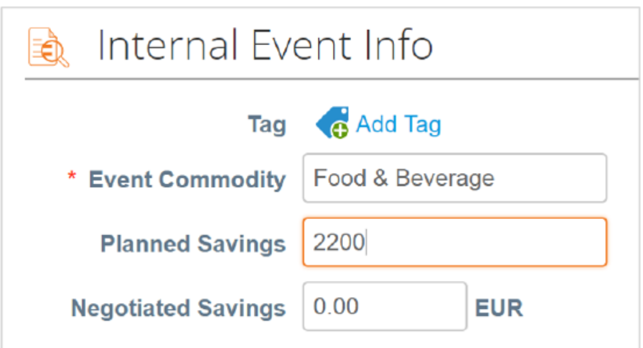
A new field, **Planned Savings**, has been added to the **Internal Event Info** section in the **Event Settings** page. Planned savings are shown in the data table and dashboards on the **Events** page in the Sourcing section.

What we were thinking

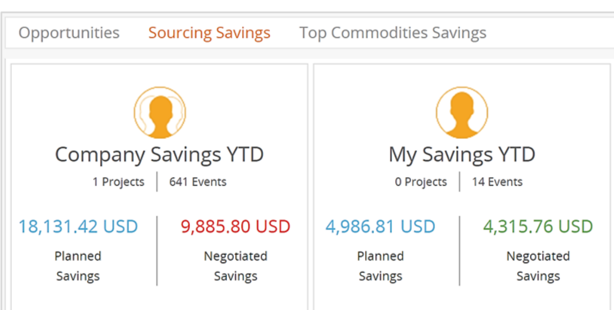
The possibility to compare the negotiated savings from a sourcing event with the planned ones allows buyers to monitor and assess the outcome of their sourcing process.

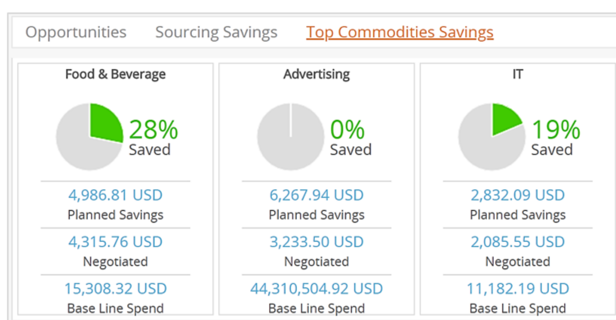
How it works

A value for **Planned Savings** for the event at hand can be entered in the **Internal Event Info** section at any time during the event. The value is expected to be expressed in the event currency. The field is also available in templates. The planned savings and the reporting planned savings (the value expressed in the reporting currency of the instance) can be displayed in the data table in a custom view. If no value is given, planned savings will show as blank in the table.



In the Sourcing dashboards, the sum of the planned savings for the individual events are shown in the reporting currency. If no value is given for an event, planned savings will be taken as 0 for the dashboard sums.





Upgrade impact

No impact on either current functionality or roles and permissions.

Availability

No actions are required to activate the field.

Other Changes and Improvements

New supplier status 'Evaluating'

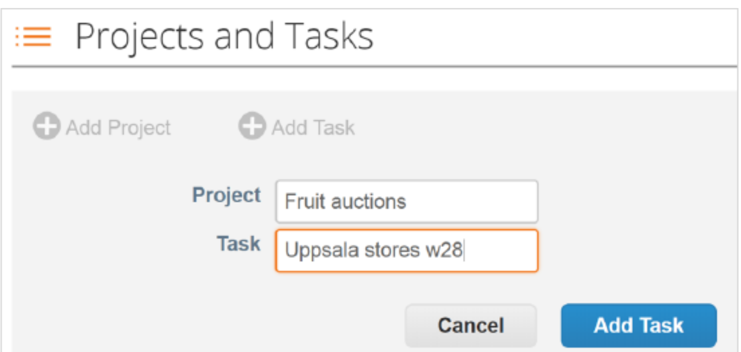
To allow sourcing events and contract collaboration with suppliers that are in inactive or draft state in Coupa, a new state, **Evaluating**, has been introduced for supplier records. No actions are required to activate the new state on your instance. Read more about the new supplier state here and about improvements of the linking of Suppliers from a Coupa Sourcing Optimization event to Coupa here.

New field 'Last Seen'

A new field **Last seen** has been added in the Suppliers tab in the sourcing event to facilitate monitoring of supplier activity. The field indicates when the supplier accessed the event the last time.

Link Sourcing events to Projects and Tasks

Sourcing events can now be linked to Projects and Tasks, read more here.



Link Contract to Sourcing event

The Source ID field in the Contract details page has been replaced by a field **Source** which links back to the sourcing event.

Sourcing Optimization (CSO)

This chapter contains the following topics:

New Terminology and UI

Feature overview

The CSO terminology is updated to match with the rest of the Coupa suite. In addition, the top navigation bar is updated to provide a more unified look.

What we were thinking

In order to present a unified look and feel, as well as consistent vocabulary, we're updating the terminology and UI of CSO. We expect these changes to facilitate navigation between the different modules of the product.

How it works

Terminology

As previously announced, the CSO terminology is being updated, The changes apply also in functions, prefixes to fields, commands, and tags. Documentation will be updated on a continuous basis.

Old CSO term	**New term**
Lot	Item
Lot type	Item type
Lot supplement	Item Question
Bid supplement	RFQ Question
Bid type	Predefined alternative bid
Project	Event
Agreement document	Terms and conditions
Tendered volume	Quantity
Rate	Price
Incumbent volume	Incumbent quantity
Bidder	Supplier
Organization	Company
Account	User

Navigation bar

The top navigation bar is changed to match the Coupa look and feel with an additional layer showing the Coupa modules that are available. The non-event related headers can be hidden by clicking the hide/expand button to the right.

On-line help is now available from the **Help** menu rather than the icon.

If the CSO instance is linked to a Coupa instance with a custom company logo, that logo will be displayed also on the CSO site.

CSO web addresses

As part of the ongoing integration of CSO technical operations and maintenance into Coupa procedures, the web addresses will be changed. This project will start during the coming release period and continue until all instances are transferred to the care of Coupa Operations.

Upgrade impact

N/A

Availability

All CSO instances are automatically updated with the new terminology and top navigation bar.

Link to Suppliers and Contracts from CSO

Feature overview

The possibility to push data from a sourcing event in CSO into Coupa to align the Supplier list or to include the contract in the negotiation process has been further streamlined.

What we were thinking

The linking of data in CSO to other modules of the Coupa platform was introduced in release version 21 and is being extended and refined. Some new features to improve usability and efficiency are described below.

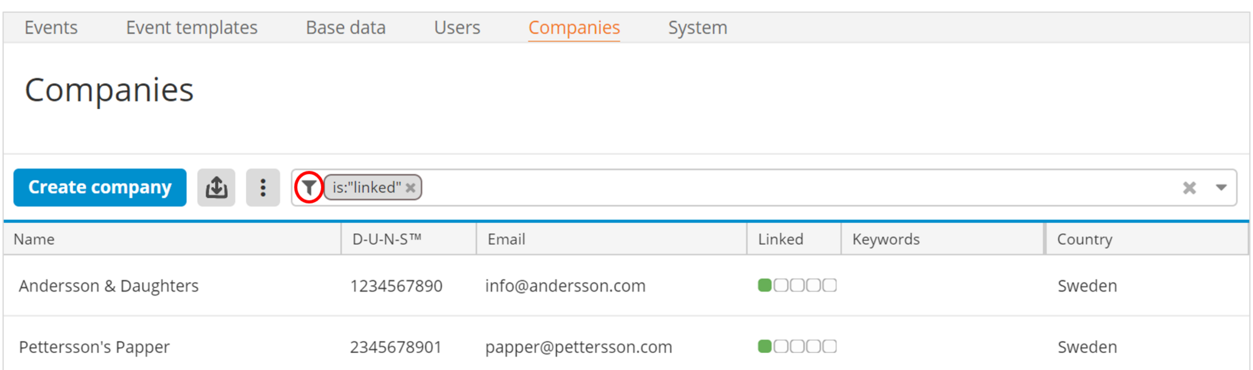
How it works

Linking Suppliers

It is now possible to allow linking to supplier records that are in state 'inactive' or 'draft' from CSO . Clicking **Create Supplier record** from the CSO event, the state of the non-active supplier is changed to the new state 'evaluating' and can be linked .

Linking of suppliers by matching on e-mail addresses has been removed. If the CSO supplier company cannot be matched with a supplier record by DUNS or exact name, a new supplier record is created in the Coupa Suppliers module. Documentation has been updated.

It is now possible to filter for supplier companies that are linked in the **Company** page.



The company alias for linking (an Id code) is also included in Excel exports of Companies and Suppliers to facilitate overview and verification.

A system feature has been introduced to prevent editing and deletion of supplier companies once they are linked to Coupa. Adjusting this setting is part of the configuration of the system.

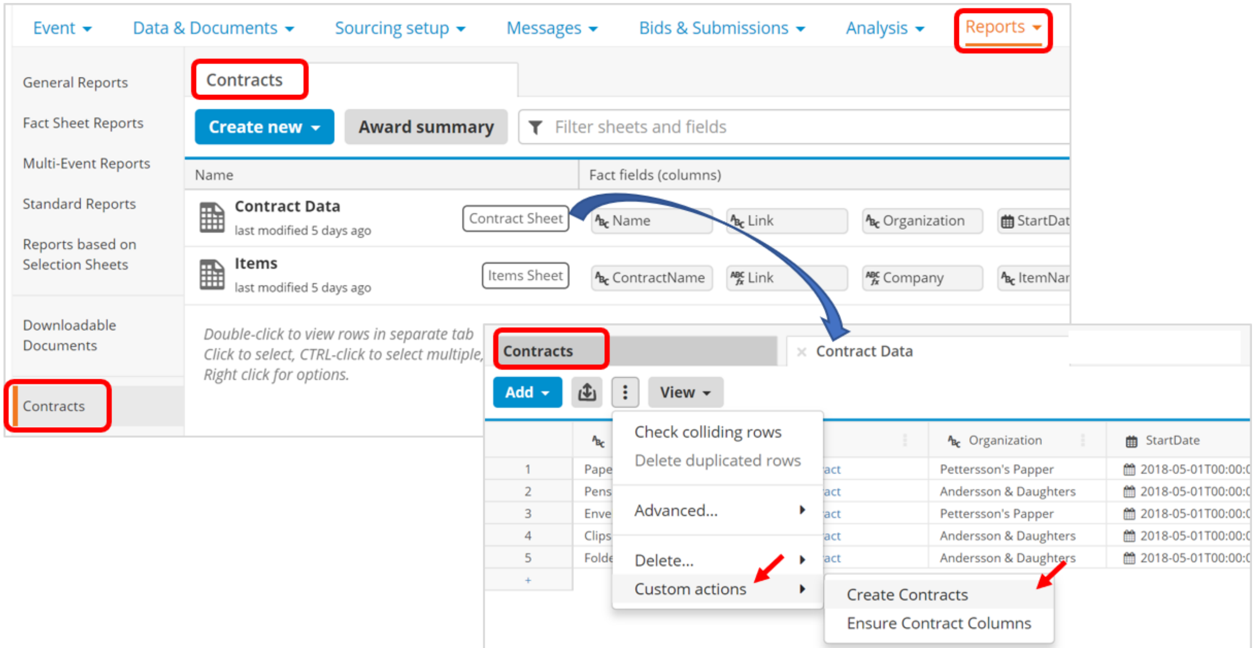
Create contracts from a CSO event

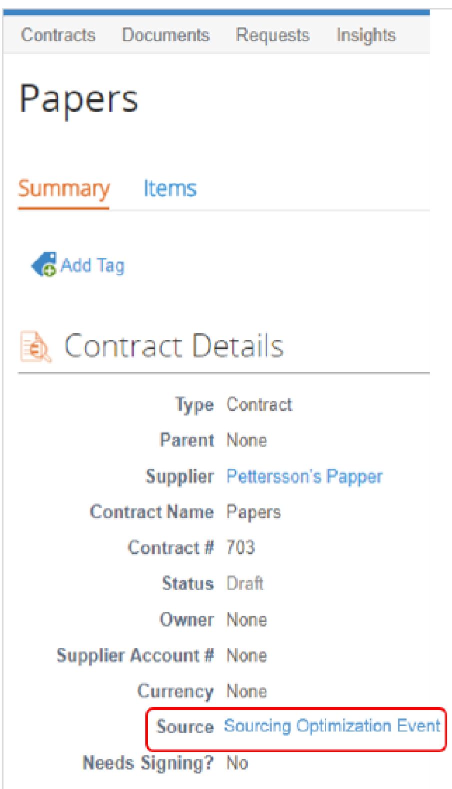
The **Contracts** page in CSO, **Reports** > **Contracts**, has been updated to include the labeled fact sheets when the instance has been configured to link to Coupa. You may now create your contracts and items sheets and push the data from CSO into Coupa from this page as well as from the Fact sheets section. The CSO **Award summary** is available as before.

To verify that all fields that are required for the flow of data between the CSO event and Coupa, click **Ensure Contract Columns** in the **Custom actions** menu of the labeled fact sheet. The system automatically adds possible missing fields.

The ability to control the visibility of fact fields in the field editor (see **The Field Editor** in [Other changes and Improvements]) allows for the display of only the fields that are relevant to the user in a Contracts fact sheet, in other words, a cleaner view.

The Source ID field in the Contract details page in Coupa has been replaced by a field **Source** which links back to the sourcing event.





Upgrade impact

N/A

Availability

The feature is available to all customers that have licenses for both CSO and CLM as of release version 21. Contact your Coupa contact to plan for the setup.

Risk Aware Information in CSO

Feature overview

Information about supplier risk can now be made available in CSO sourcing events from Coupa Risk Aware.

What we were thinking

Coupa Risk Aware provides support to assess the health of a supplier's business. As this may be important information in a strategic sourcing event, we have now made Coupa Risk Aware levels available in CSO. Read more about Risk Aware here.

How it works

The Risk Aware health icons are shown next to the supplier company name in the CSO Company page as well as in the Suppliers page in the event. The lists can be filtered on the health label in the filter boxes on these pages.

Two new functions are available, **supplierRisk()** and **supplierHealth()**, to retrieve the risk score and the health indicator for the bidding company in bid fields or bid analysis fields. The risk indicators are also available as reporting facts, **Supplier Risk Score** and **Supplier Health**, available in a separate section, **RiskAware**, of the Fact picker in the General report editor.

The retrieval of risk information at regular intervals from Coupa Risk Aware can be configured to be automated.

Upgrade impact

N/A

Availability

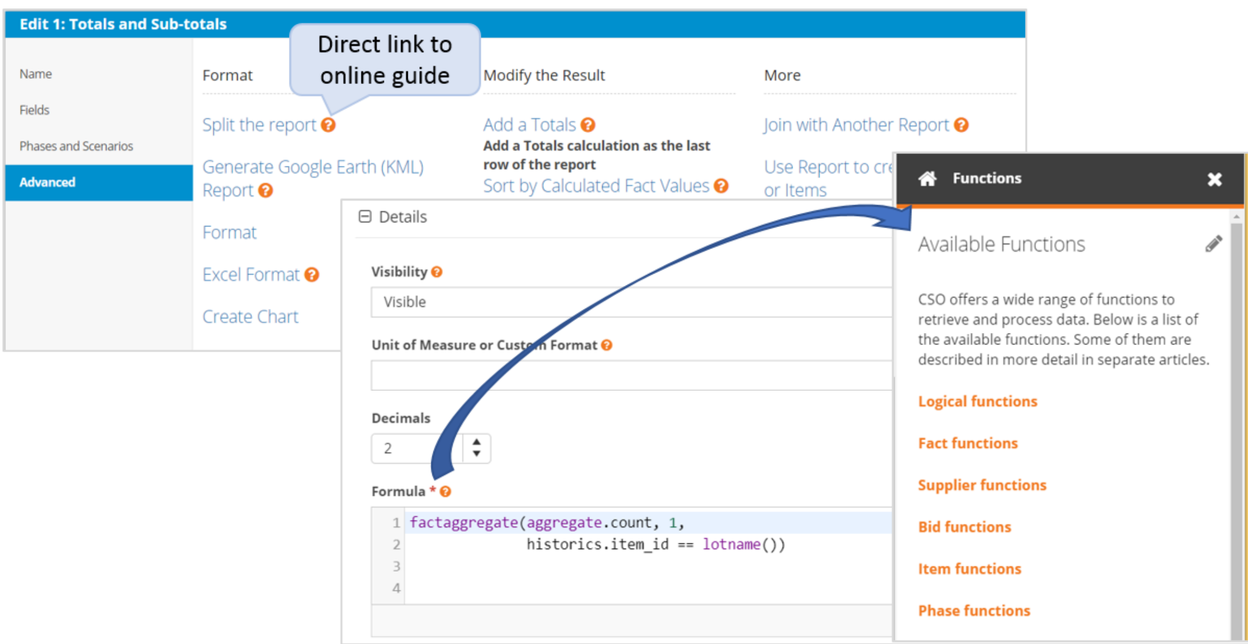
The feature requires access to Risk Aware as well as CSO and a configuration effort to link the two parts of the product.

Other Changes and Improvements

Direct links to online help

The previous links from the platform to CSO Knowledge Base articles are being replaced by direct links to online guides. Click the orange help icon and a brief description is opened in the guide panel to the right (a). Links to Knowledge Base articles from Excel reports, for instance the Main Solver Report, are removed.

The old Knowledge Base, based on the TESS view, is being transferred to the Success portal but is still available from the **TESS Knowledge Base** button in the **Help** panel (b). The documentation is continuously being updated in CSO section of the Success portal which is reached via the **CSO Documentation** button in the **Help** panel.



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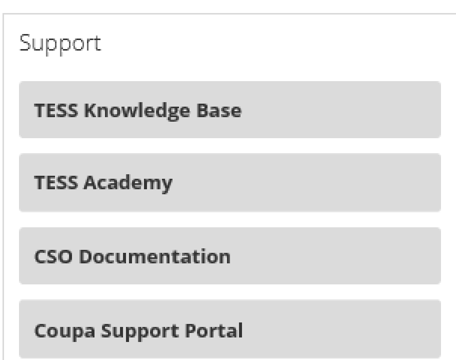


b)

Handling of large data tables

The CSO infrastructure has been further improved to be able to more efficiently handle large sets of data. This allows quick spend analysis and data cleaning prior to strategic sourcing events and facilitates visualization of data in graphs and dashboards.

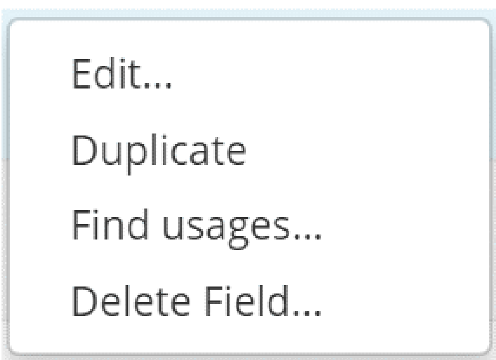
The field editor

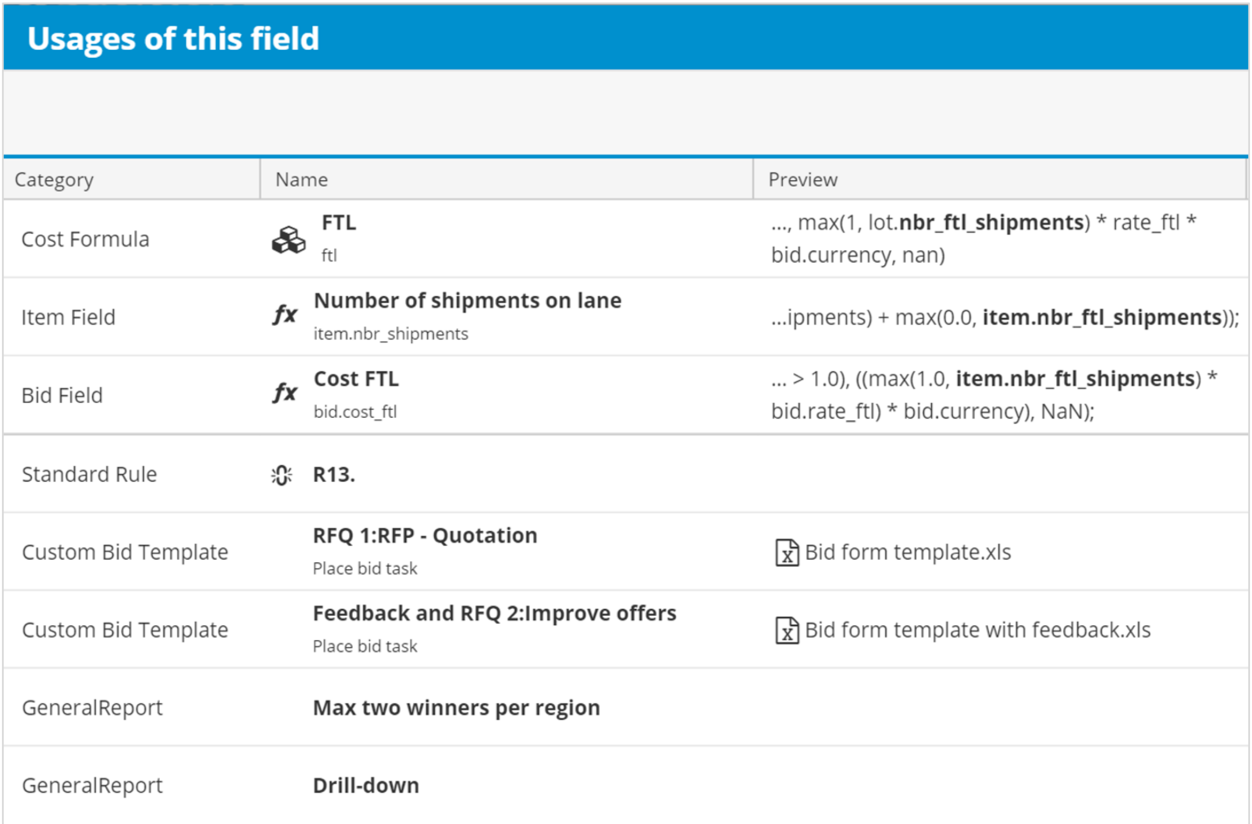
The ability to control the visibility of a field has been extended to apply to fact fields. The option **System field** hides the fact field from the online view. The field can be made visible by selecting it in the **View** menu > **Select columns**. Large fact sheets or fact sheets used for linking to other parts of the Coupa suite can be adjusted to present only the fields that are relevant to the user.

Fields can now be copied - select **Duplicate** in the right-click context menu for the field. You can change the data type for the new field but not the field type.

From the field content menu you can also **Find usages** of the field. The list includes not only formula fields and form templates but also cost formula fields, scenario rules, and general reports, as shown in the sceen shot below.

Online editing of multiple choice fields has been limited to 50 options due to browser limitations. Longer lists have to be edited off-line in the exported Excel field list.





Usages of this field

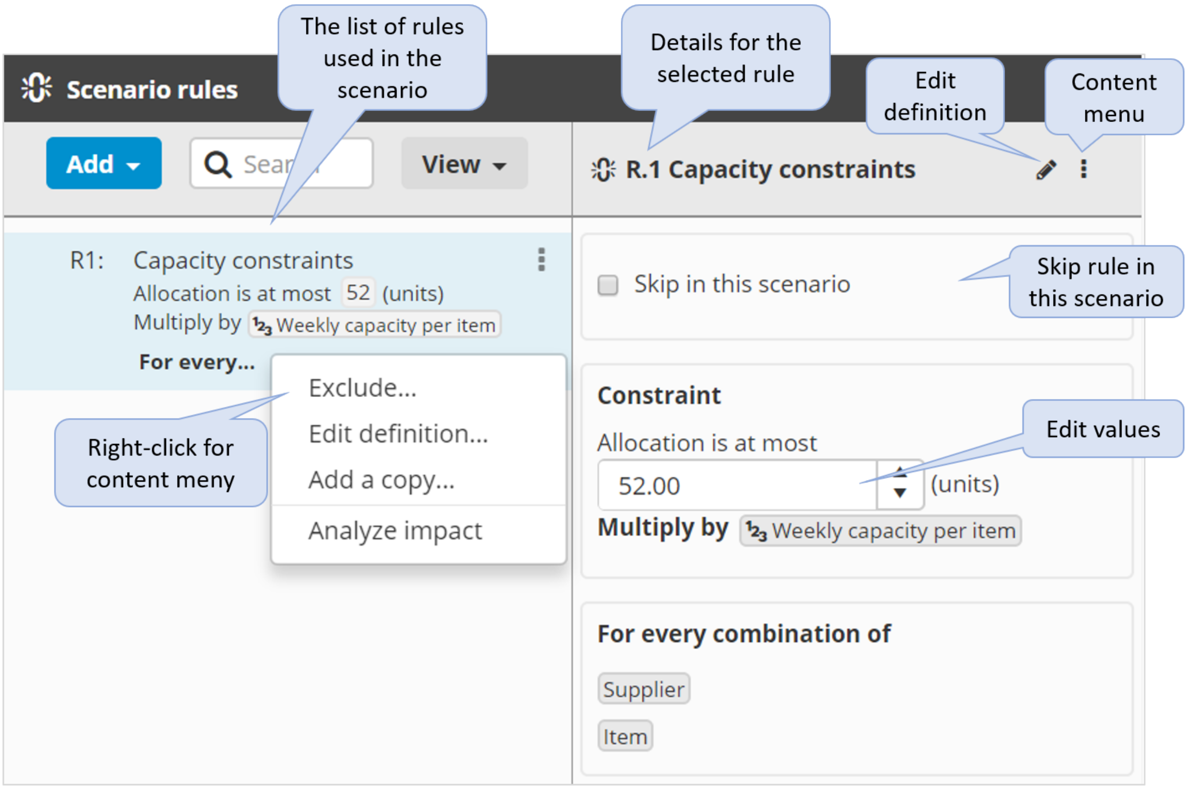
Category	Name	Preview
Cost Formula	**FTL** ftl	..., max(1, lot.**nbr_ftl_shipments**) * rate_ftl * bid.currency, nan)
Item Field	**Number of shipments on lane** item.nbr_shipments	...ipments) + max(0.0, **item.nbr_ftl_shipments**));
Bid Field	**Cost FTL** bid.cost_ftl	... > 1.0), ((max(1.0, **item.nbr_ftl_shipments**) * bid.rate_ftl) * bid.currency), NaN);
Standard Rule	**R13.**	
Custom Bid Template	**RFQ 1:RFP - Quotation** Place bid task	Bid form template.xls
Custom Bid Template	**Feedback and RFQ 2:Improve offers** Place bid task	Bid form template with feedback.xls
GeneralReport	**Max two winners per region**	
GeneralReport	**Drill-down**	

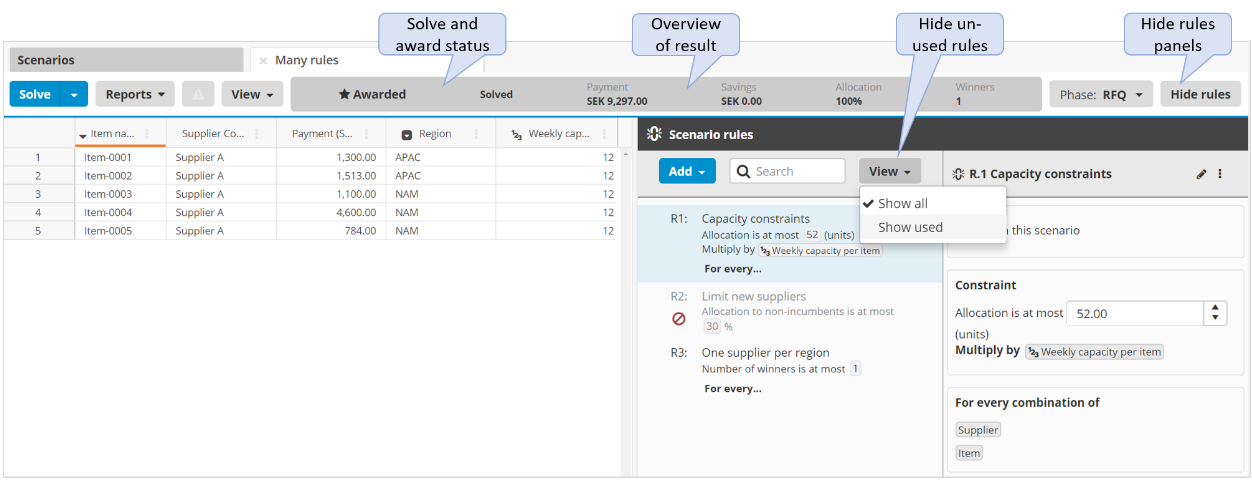
The scenario details page

A Rule details panel has been added in the Scenario details page. The panel allows you to see all details of the rule definitions for the Scenario at hand and also to edit numeric values or skip the rule for the Scenario directly without changing pages. For balance rules and sub-bid rules, the information displayed is more limited.

Select **Show used** in the Rules panel **View** menu to filter off rules that are skipped in the scenario. Click **Hide Rules** button to the right to hide the panels.

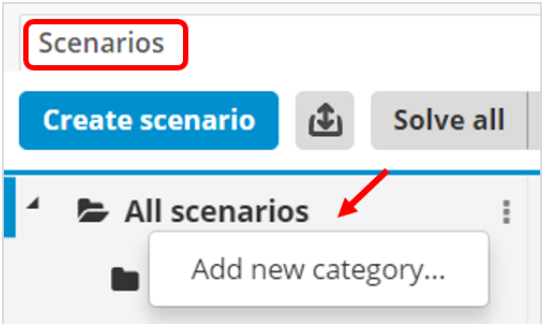
The overall result of the scenario, the same data as in the Scenarios overview page, has been added at the top of the data table for the overview. If the scenario is awarded, it is also shown here.

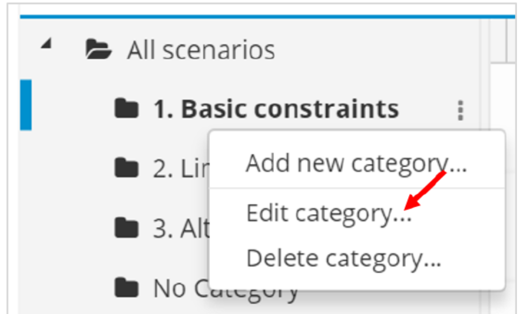




Edit categories for reports and scenarios

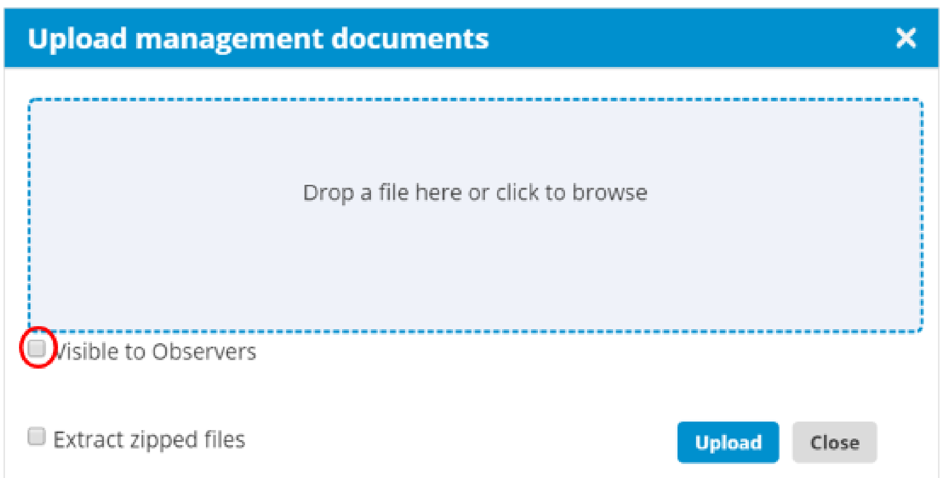
The **Edit categories** buttons in the Scenario, Rules, and Reports pages have been removed. To edit and order a category, right-click it in the left panel. Change the ordinal to reorder the categories.





Team documents for Observers

Observers can be allowed to see selected Team documents. In the import dialog box, check the **Visible to Observers** check box. If some documents are not to be available to Observers, they can be imported separately, with the checkbox unchecked.

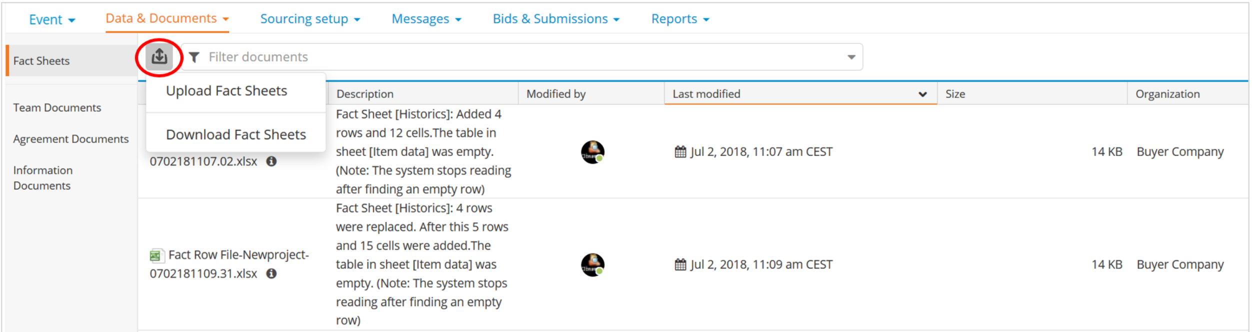


Fact sheets page for Observers

A Fact sheets page for Observers is introduced.

Provided that Observers are allowed access to Fact sheets (Event settings > Observers > Fact Sheets > Give Observers Access to Fact Sheet Upload and Download > **On**), they will see the Fact sheets page where they can submit and review their data through the **Import/Export** button. Each Observer can see and replace only the fact rows he/she has provided and the original imported files are listed in the page (a).

The event management can distinguish the data provided by Observers by adding the column **Owner** to the online view of the fact sheet (b).



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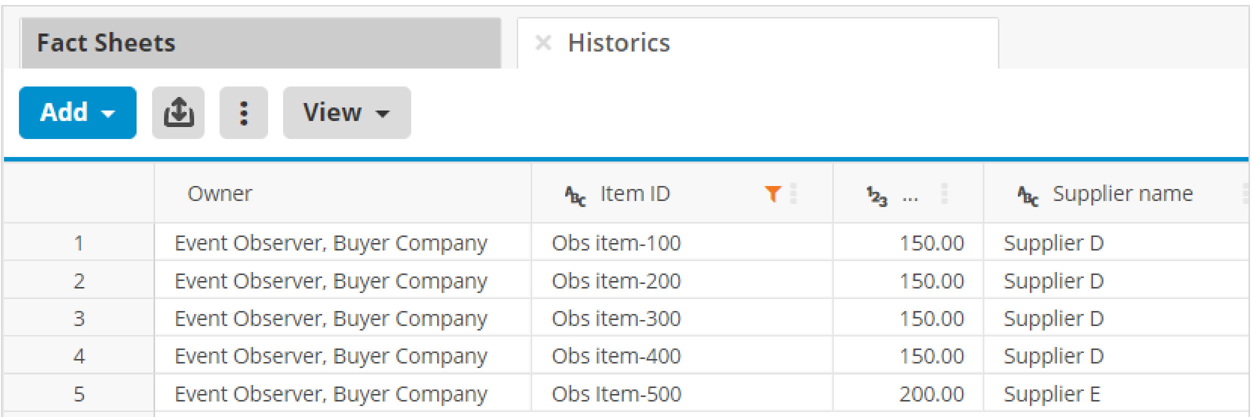
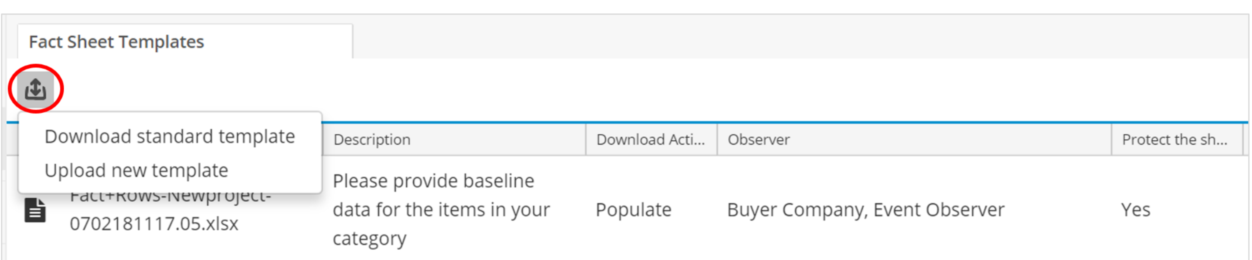


b)

Fact sheet templates

To make it easier for stakeholders to provide the required information, you may apply a form template to your fact sheets. The fact sheet template controls design and form structure in the same way as templates do for bid forms and questionnaires. The template does not apply when you export fact rows as an event manager.

Export the standard template, make your adjustments and import file as a **New Template** (a). Right-click the file and select **Edit** to add a brief instruction in the description field and assign it to the selected observer(s) (b).



a)

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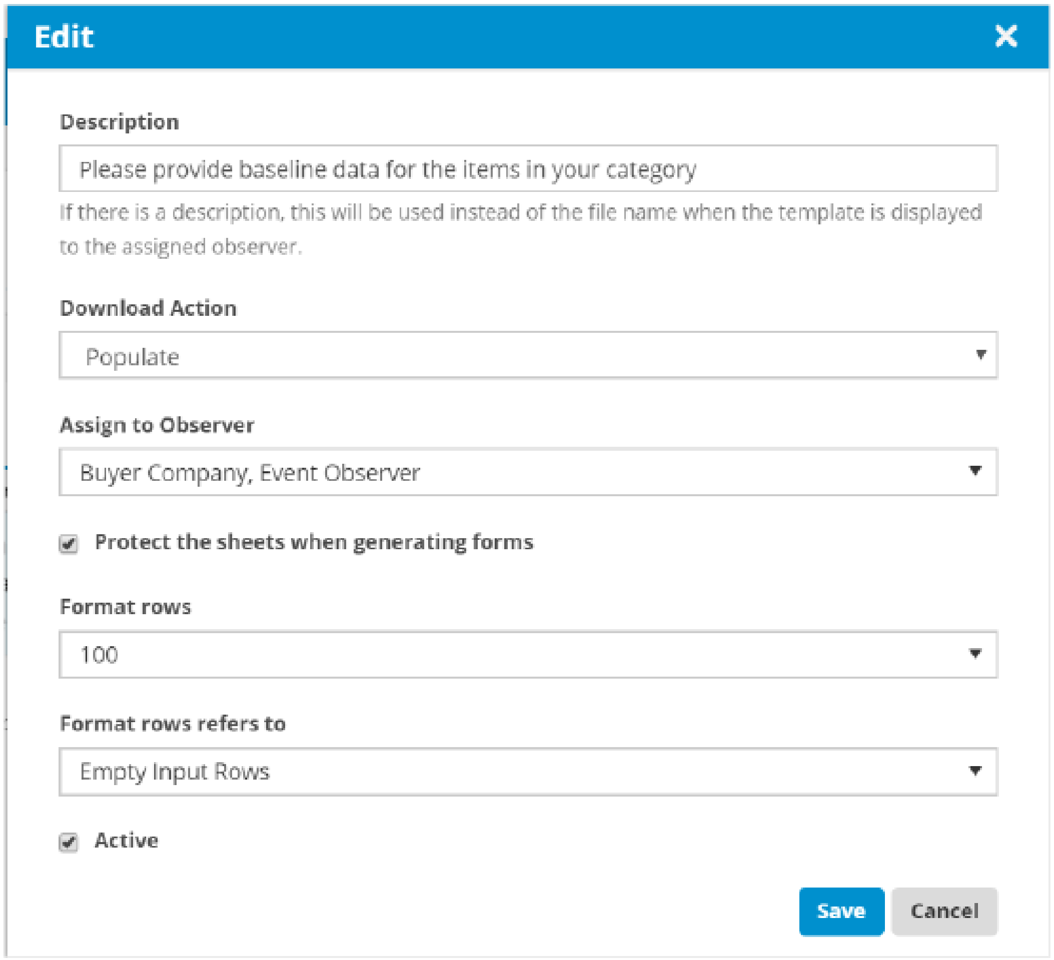
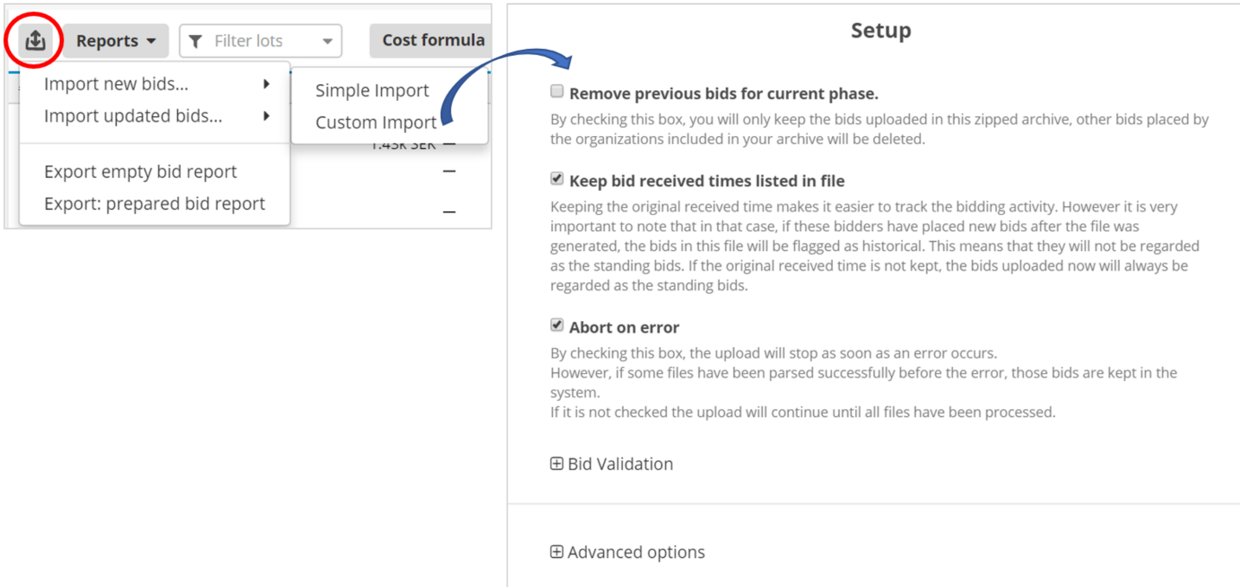


User group management

A sheet containing all users in the event has been added to the user group file to make it easier to assign users through Excel. Using this file, you may more easily copy-paste members into the sheets for the appropriate groups. As usual, some care should be taken when copy-pasting in filtered Excel sheets. Also, note that the user group file is tagged, i.e. the data table starts only in column B.

Import of bids

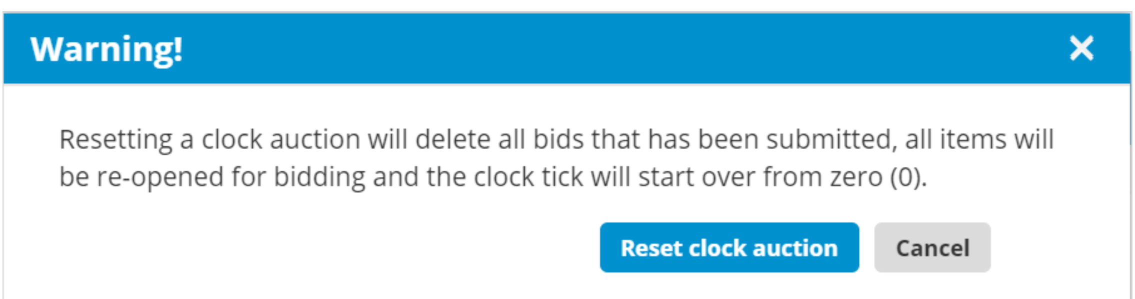
All options to configure and control the import of bids are now available in CSO. In the **Submitted bids** page, click the **Import/Export** button and select **Custom Import** if you need to adjust validation controls, number verification levels, import bids in csv format or configure your import in any other way.



Clock auctions

As of R22, the clock auction features supporting Dutch and Japanese autions are generally available.

It is now possible to reset the clock in clock auction phases. Go to Tasks & Deadlines, right-click the clock phase in the phase panels to the left and select **Reset clock**. In a Japanese auction phase, all bids ("I accept") are deleted and all items are re-opened upon reset.



The auction dashboard

The auction dashboard now shows the list of the suppliers by default. Options to sort the lists by sum of bids, lowest cost and cost, respectively, has been added.

Supplier Information Management

This chapter contains the following topics:

Improved SIM Form Visibility through New Statuses, Aging, and Alerts

Feature overview

You can easily track the lifecycle of your forms, view more details about them, and remind your suppliers to respond to pending requests.

What we were thinking

After introducing sequential form mapping, which automated many of the requests, customers wanted more visibility into the statuses of these forms, and they needed the system to automatically provide reminders and close the forms gracefully.

Previously, it was not clear if form responses in Draft status were saved, worked on, or rejected, so to clearly differentiate the stages of form responses, we introduced the New status for newly created forms and Draft now indicates whether a form has been saved. We also added the Canceled status as a terminal state so that form responses do not stay in Draft indefinitely.

To ensure better visibility of form responses, we added new table columns to provide more information.

To ensure that suppliers respond to form requests, we now send them automated email reminders to fill out their pending forms and submit them, and form responses that are not submitted within a defined period of time expire automatically.

This feature was a top Coupa Community item.

How it works

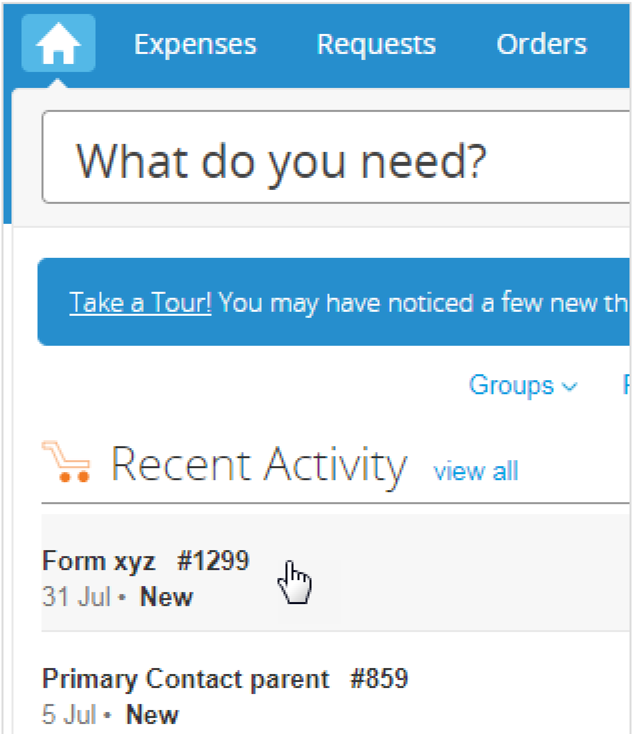
Statuses

Form responses have the following new statuses: canceled, new, and draft.

See New Form Statuses and Table Columns and Supplier and SIM Statuses for more info.

Recent activity

On the **Home** page under the **Recent Activity** (formerly: **Recent Orders**) section, you can see the latest forms that you submitted.

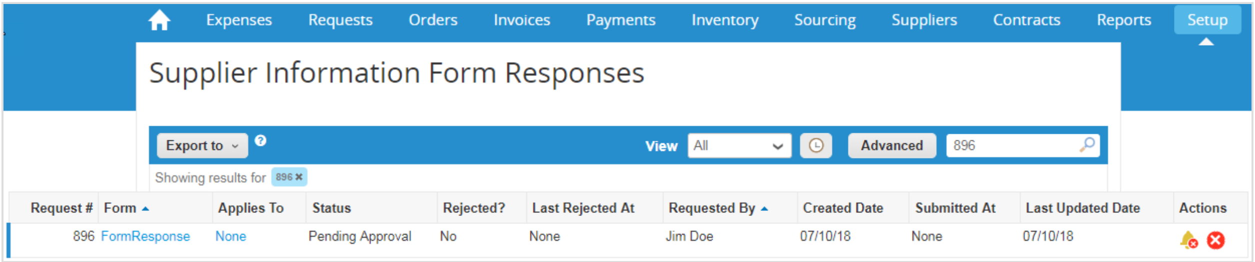


See Other Platform Improvements for more info.

New form response table columns

You can select the following new columns to view in form response tables, for example, in the **Supplier Information Form Responses** and **Supplier Review Form Responses** tables:

- Rejected?
- Last Rejected At
- Requested By
- Submitted At
- Last Updated Date
- Created By*
- Last Updated By*



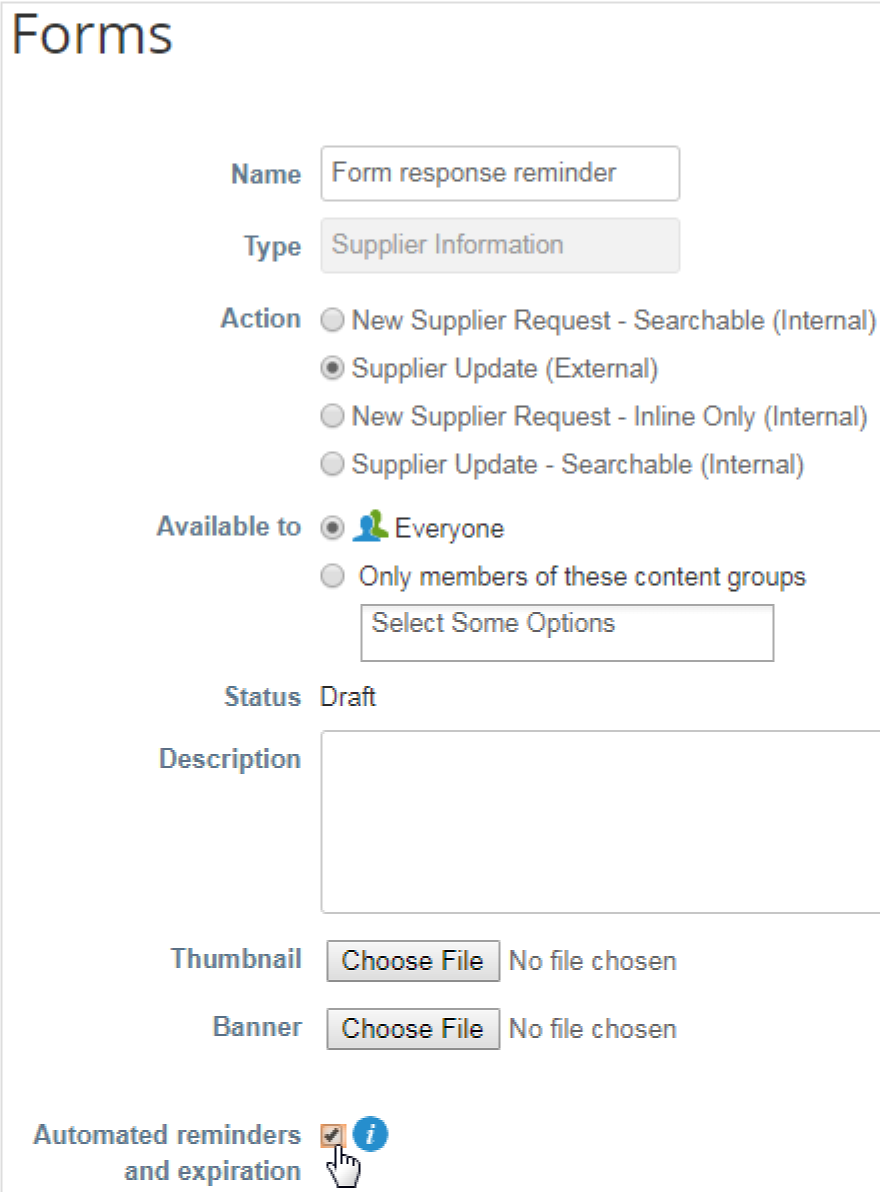
Note: The columns marked with an asterisk (*) are not in the table view by default.

These categories except for **Rejected?** are also searchable with the Advanced search and sortable. To view a list of rejected forms, select **Rejected** from the **View** dropdown.

See [New Form Statuses and Table Columns](#) for more info.

Form aging and alerts

You can decide to send reminders of individual forms by selecting the **Automated reminders and expiration** checkbox when you create or edit a SIM form.



This sends automated reminders to suppliers and cancels the request if no form response is submitted after 15 days.

Warning: This can be used only with Supplier Update (**External**) forms.

Forms that you want to send automated reminders for are marked with the **Cancel automated reminders and expiration** ( ) icon in the **Actions** columns.

If you do not want to send reminders for specific forms, click on the icon. Forms without the **Cancel automated reminders and expiration** icon do not age or expire.

Note: You cannot re-enable a reminder for a form.

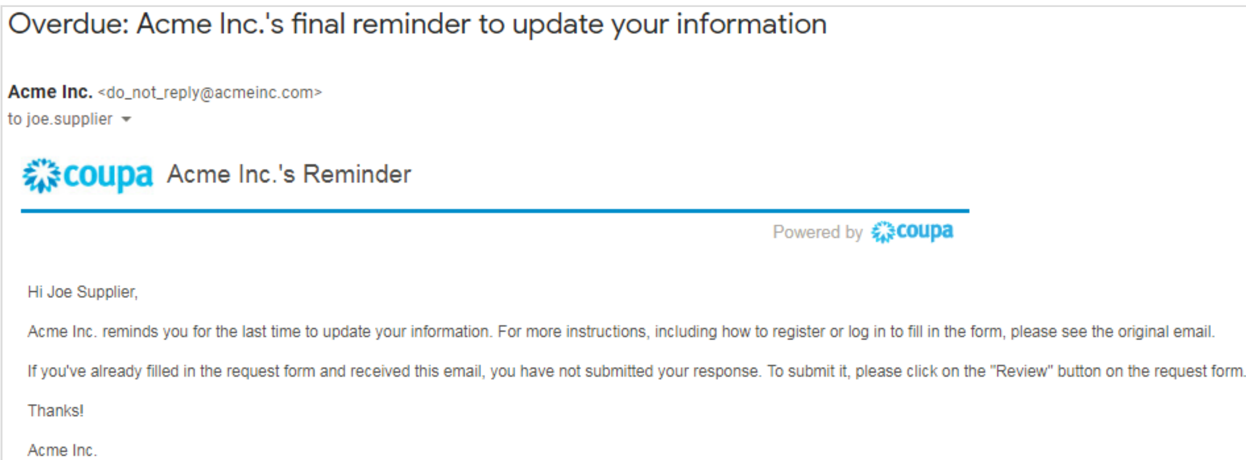
Suppliers are reminded online and through email notifications to submit their responses to a request for information update. Online and email notifications are on by default for **A form response needs your attention**, but suppliers can change their notification preferences in the CSP.

> **Note:** The notifications are sent for the latest form they received as the previous forms cannot be submitted.

The notifications are triggered two, five, ten, and fifteen days after sending the SIM form request if the response has not been submitted.

The first three notifications are reminders for suppliers to update their information. Suppliers that use the CSP are taken to the **Profile** page after clicking on the online notification in the CSP or on the **Review** button in the email notification. If they are not logged in to the CSP, they are taken to the **Log In** page.

The email reminders contain instructions on how to respond to the forms.


Overdue: Acme Inc.'s final reminder to update your information

Acme Inc. <do_not_reply@acmeinc.com>
to joe.supplier

coupa Acme Inc.'s Reminder

Powered by coupa

Hi Joe Supplier,

Acme Inc. reminds you for the last time to update your information. For more instructions, including how to register or log in to fill in the form, please see the original email.

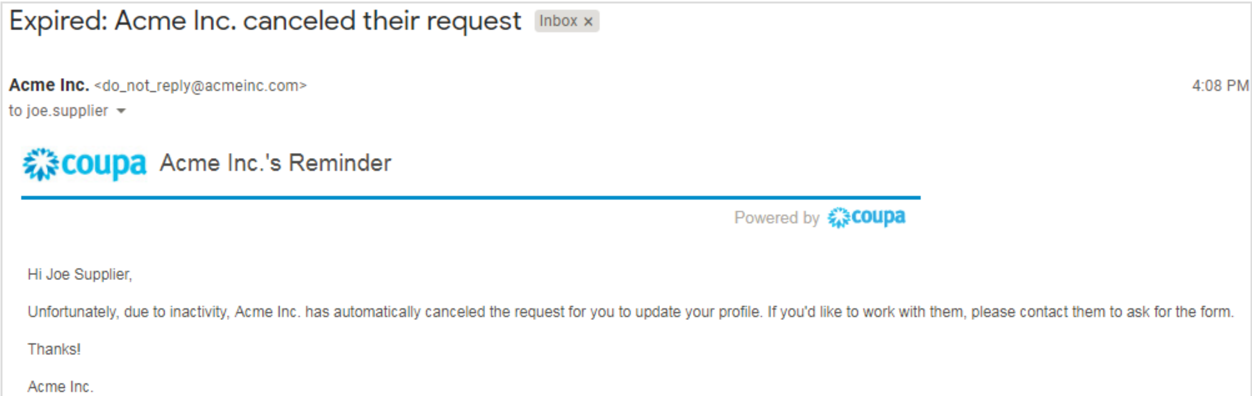
If you've already filled in the request form and received this email, you have not submitted your response. To submit it, please click on the "Review" button on the request form.

Thanks!

Acme Inc.

If suppliers submit their form responses, the status of the forms changes to **Pending Approval** or **Approved** (depending on the conditions of the form response), and the **Cancel automated reminders and expiration** ( ) icon on the **Supplier Information Form Responses** page disappears.

The fourth notification is to inform suppliers that their SIM form request was canceled with information on the reason and what to do if they want to work with their customers. The status of the form response changes to **Closed**. See Supplier and SIM Statuses for more info.



Upgrade impact

Roles and permissions

We made changes to the following roles: **Admin** and **Supplier Manager**.

We added a new permission: **Supplier Information / Cancel Reminder for Form Response**.

See [Release 22 Role Updates] and [Release 22 Permission Updates] for more info.

Integrations

N/A

Availability

This feature is available to all customers who have a Supplier Information Management (SIM) license.

New Primary Contact Subform

Feature overview

You can customize the primary contact information on your Supplier Information Management (SIM) form by defining what fields to include and whether they should be required.

What we were thinking

Customers use Coupa to cover more and more areas of their spend management, so they need more complex SIM forms to collect more detailed information and to decide what type of information they want to request.

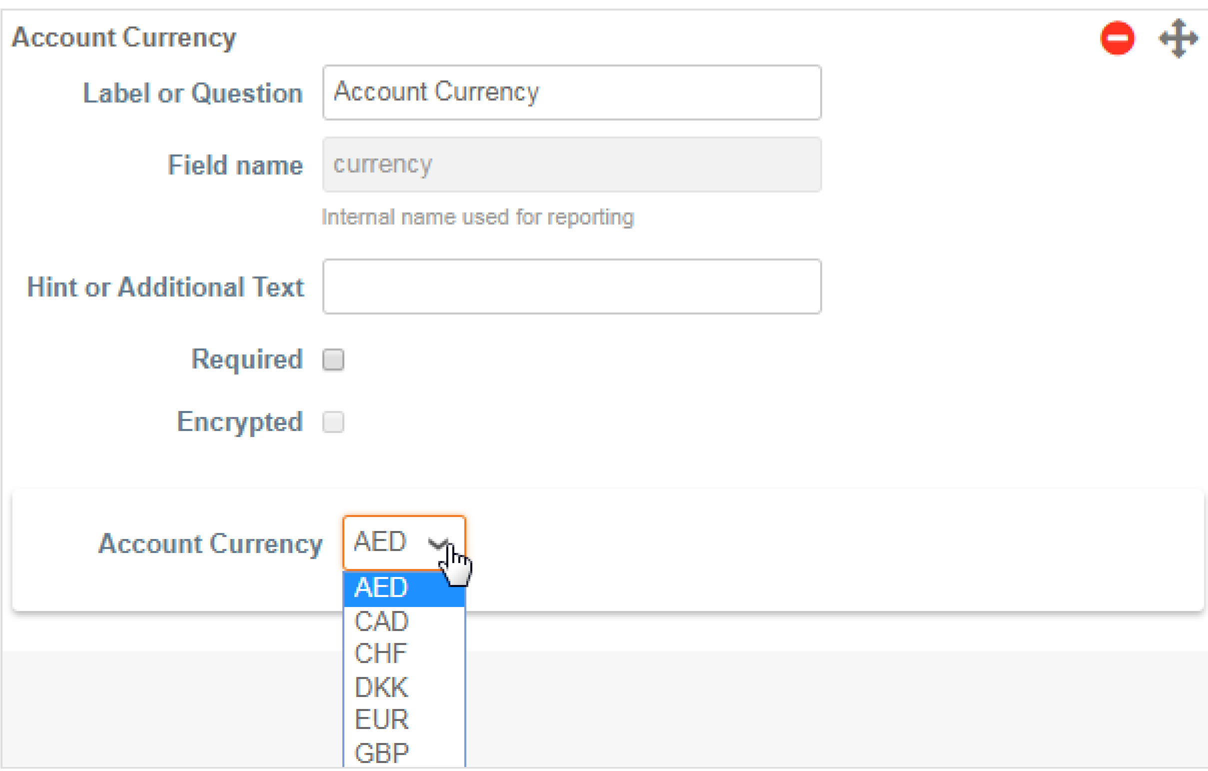
To enable customers to collect the information they need, in Release 18 we introduced Support for Multiple Remit-To Addresses on SIM Forms, which allows customers to choose their remit-to location fields by using remit-to subforms. In this release, we added a new field for account currency that can be used on remit-to subforms.

We also removed the field for primary contact from the fields for Supplier Information, and added a subform to allow customizing primary contact information fields on SIM forms.

This feature was a top Coupa Community item.

How it works

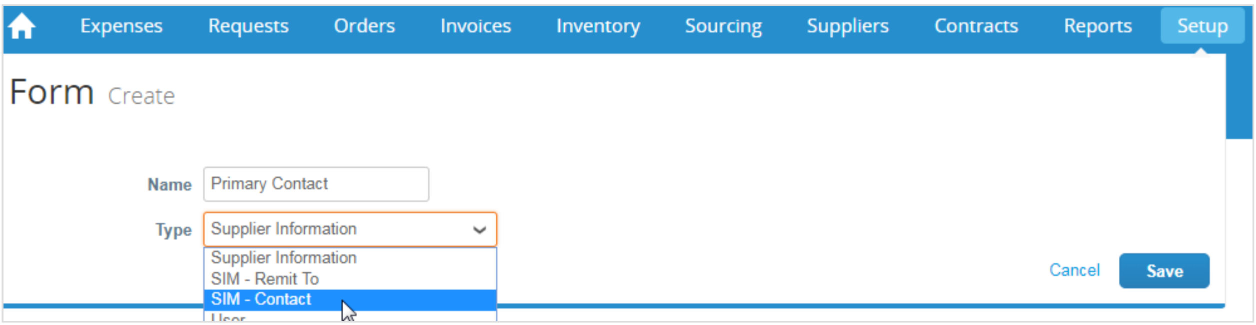
When you create a SIM - Remit-To subform, you can also add the following field: **Account Currency**.



See [Add Multiple Remit-To Addresses to SIM Forms](#) for more info.

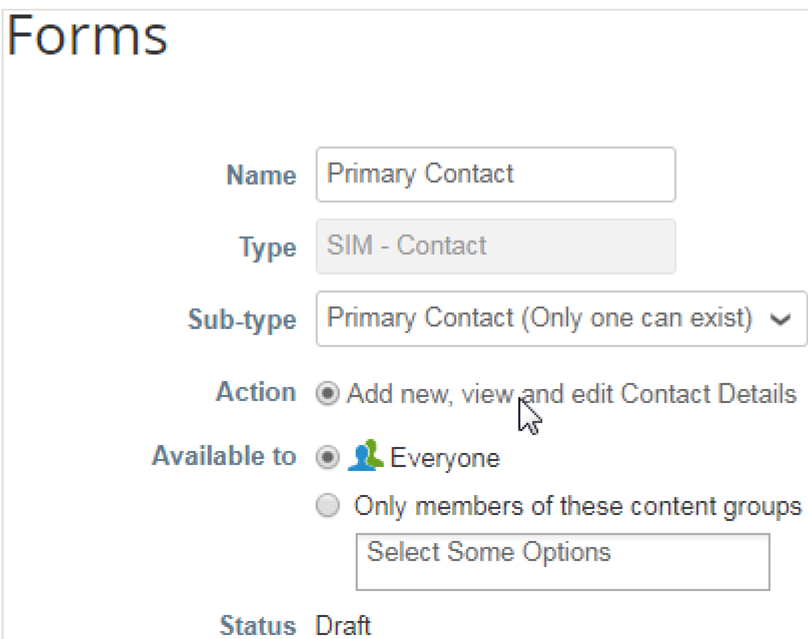
Similarly to creating a SIM - Remit-To subform, you can create a SIM - Contact subform and select the contact information fields that you want to be included in your parent SIM forms.

1. Go to **Setup > Platform > Forms** and click **Create**.
2. Name your form and from the **Type** dropdown, select the **SIM - Contact** option to create the Contact subform.



The subform currently has a subtype (**Primary Contact**), which is selected by default.

You can create a new Primary Contact subform or update existing contact details.



Note: You can have only one primary contact for a supplier, so you can add only one Contact subform to a SIM form.

3. After selecting design elements and general fields, select primary contact information fields from the following options: first name, last name, email address, mobile phone, work phone, and fax. Similarly to other fields, you can change their labels, add hints, and mark them required. See [Form Questionnaire Settings](#) for more info.

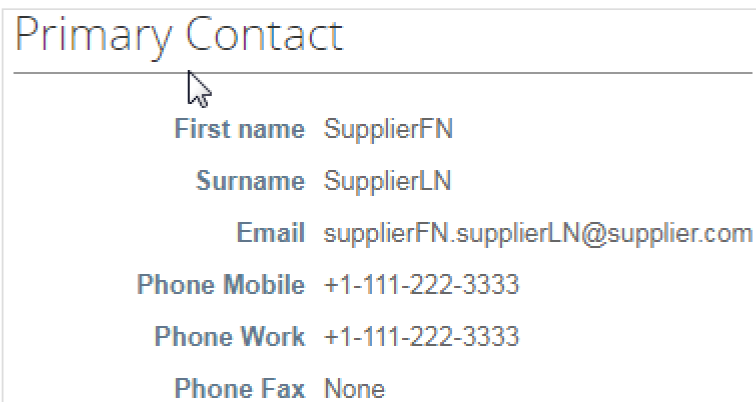
    > **Note:** The subform can be used only as part of the parent SIM form.

    Unlike the other subforms, the Contact subform (similarly to the Remit-To subform) is not searchable from the **Home** page.

4. After publishing the subform, go to **Setup > Platform > Forms** again and create a parent SIM form. See [Create a New Form](#) for more info.

5. From the available **Custom Sub-Forms to** fields on the parent SIM form, click on your newly created subform to add it.

6. Publish the parent SIM form. The fields you selected for the subform appear on the SIM form and the information is added to the details of the supplier record.



In **Edit** mode, the section title is **Supplier Contact**.

Note: The removed **Primary Contact** SIM field works on your existing forms, but you can see a recommendation to replace the field with the subform on those SIM forms.

Upgrade impact

Roles and permissions

N/A

Integrations

The `currency` field was added to the `Supplier Information Address` table in the inbound and outbound API and CSV export.

See Release 22 Inbound API Changes, Release 22 Outbound API Changes, and Release 22 Flat File (CSV) Export Changes for more info.

Availability

This feature is available to all customers who have a Supplier Information Management (SIM) license.

Original Requester Added as Approver or Watcher on SIM Forms

Feature overview

You can add the original requester as an approver or a watcher to approval lists for any Supplier Information Management (SIM) form response.

What we were thinking

Customers using SIM want to leverage sequential form mapping, so in Release 18, we extended the functionality to allow various mapping directions.

Also, previously, the requester that originally created the first form was not always carried forward as an approver or watcher or did not get notifications of subsequent forms. Since the requester of a form changes each time, it was hard to know who to add each time and it was a manual process. So, in this release, we added the ability to call the original requester in the approval list for form responses, and in subsequent forms that are triggered automatically.

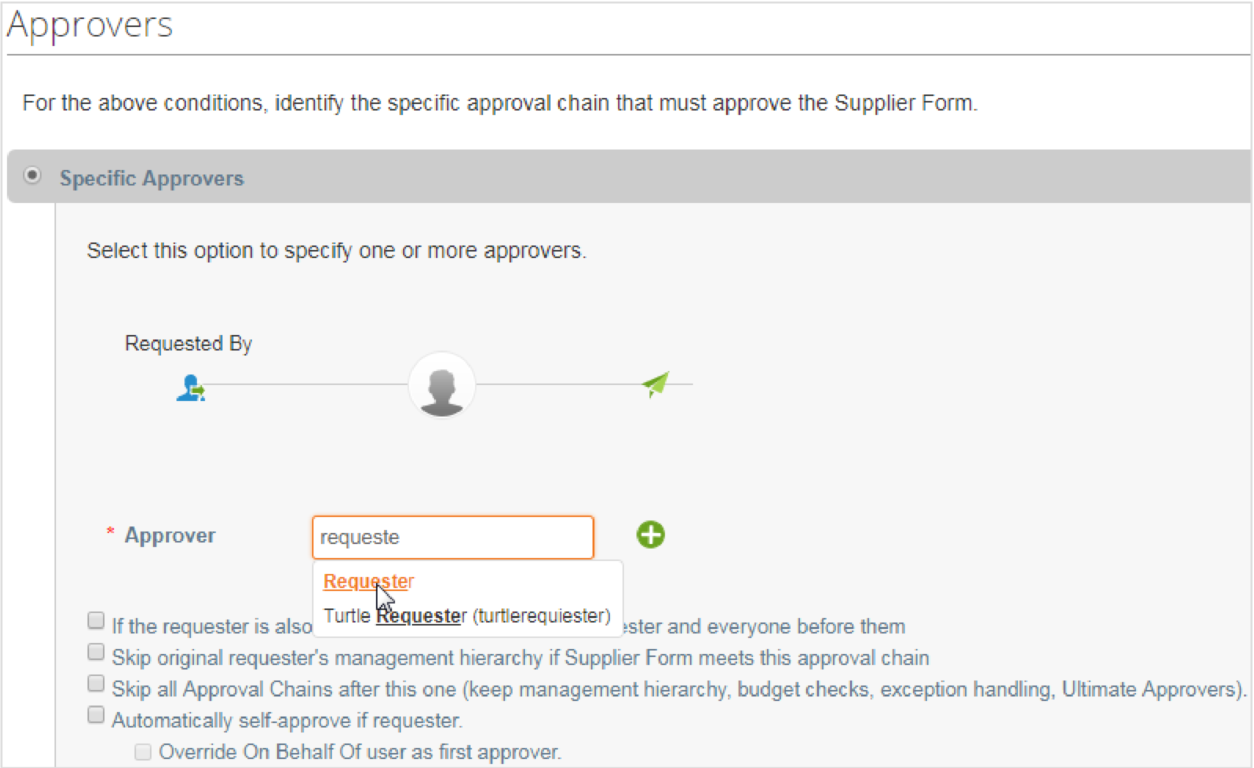
This provides better visibility for the original requester, ensures easier implementation of SIM sequential form mappings, and reduces the number of requests for administrators.

How it works

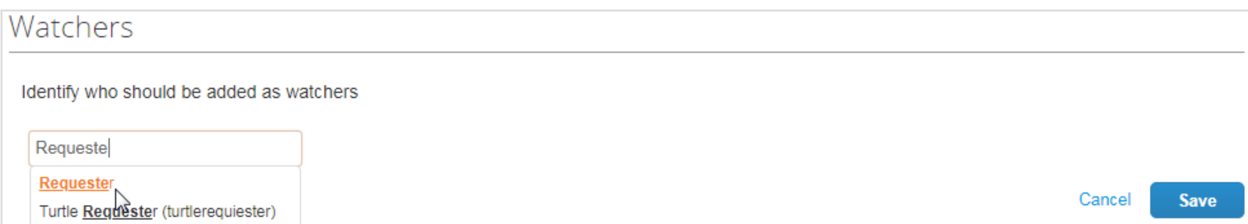
Go to **Setup > Approvals** and from **Create** under **Approval Chains**, select **Add Supplier Information Form Chain**. See SIM Approval Chains for more info.

On the appearing **Supplier Form Approval Chain** create page, go to **Approvers** and in the **Specific Approvers** section. Click on the green **Plus** icon and select **Requester** from the **Approver** dropdown.

> **Note:** You can add an original requester to an approval chain only on this page.



To add the original requester as a watcher, select **Requester** from the **Watcher** dropdown.



Remember to save your approval chain.

When you add the original requester in the approval chain conditions for a SIM form as an approver or watcher, the original requester is added to the approval list when the approval list is created and submitted.

After submitting a form and having it approved, the original requester is added as approver or watcher on all subsequent forms; for example, when you create a mapping from an internal form to an external form, the original requester is carried over on the approval chain.

> **Note:** Original requesters that have been deactivated or deleted cannot be added to approval lists.

Upgrade impact

Roles and permissions

N/A

Integrations

N/A

Availability

This feature is available to all customers who have a Supplier Information Management (SIM) license.

Early Access Features

This chapter contains the following topics:

Coupa Open Buy

Coupa Open Buy turns your supplier's punchout sites into hosted catalogs available for search from directly within Coupa.

Spend Guard - Phase 2

Spend Guard now includes a Total Spend Profile page with expenses, requisitions, purchase orders, and invoices, and a detailed Employee Spend Profile page.

Virtual P-Card Payments

Coupa Pay Virtual P-Cards creates a virtual credit card with a charge limit and expiration date when a requisition is approved for selected suppliers.

Coupa Open Buy

Feature overview

Coupa Open Buy gives the possibilty to search punchout suppliers items directly within Coupa. This makes it easier for your users to find what they're looking for, without having to leave Coupa.

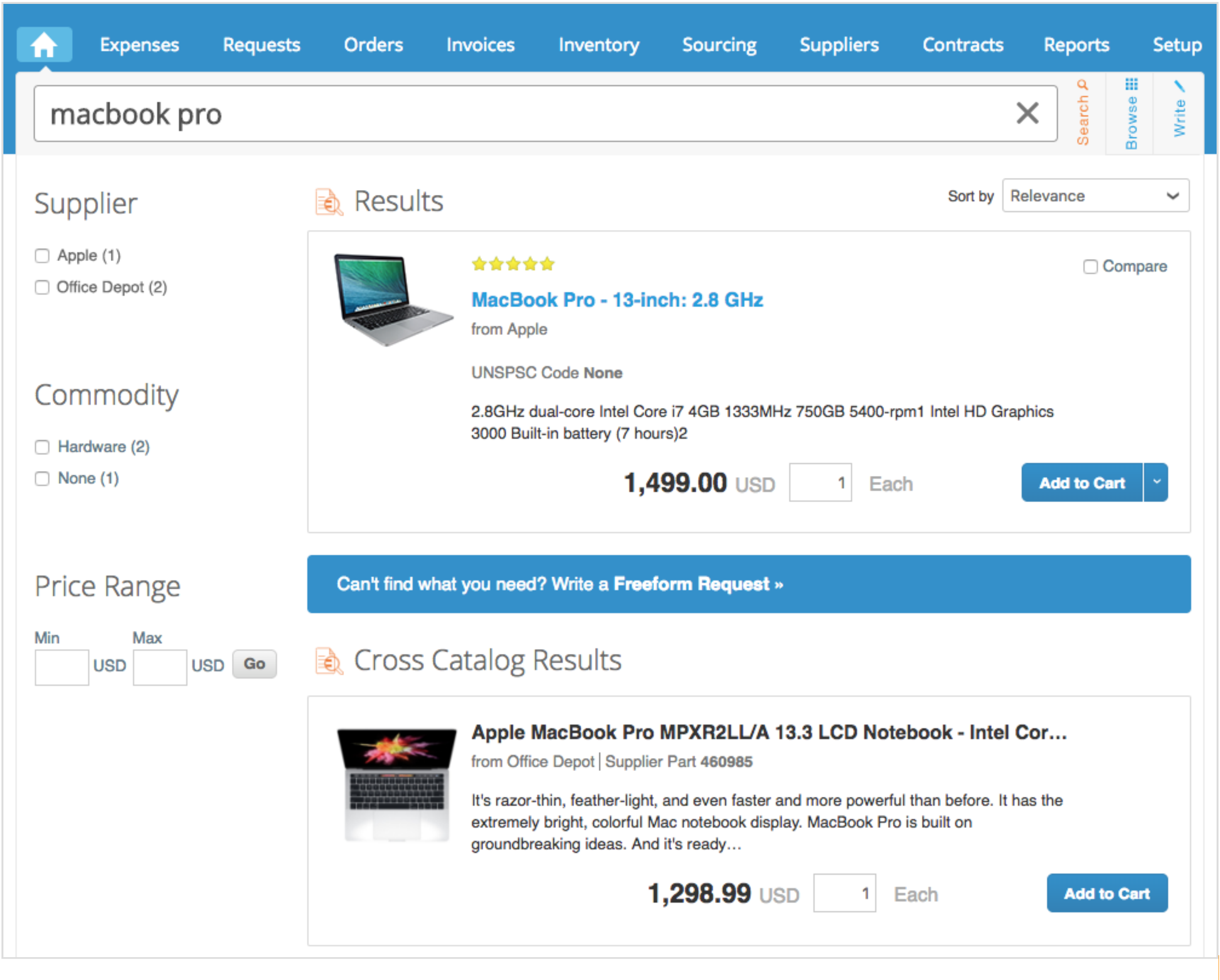
What we were thinking

While punchouts are a great idea and an easy way to make a large number of supplier items, they have clear disadvantages. Things like a disjointed and inconsistent shopping experience and the inability to compare items and prices across suppliers make punchouts less than ideal. What if we could integrate supplier punchouts into Coupa? Then users could search across multiple suppliers without the buyer or admin having to manage the catalogs for those suppliers.

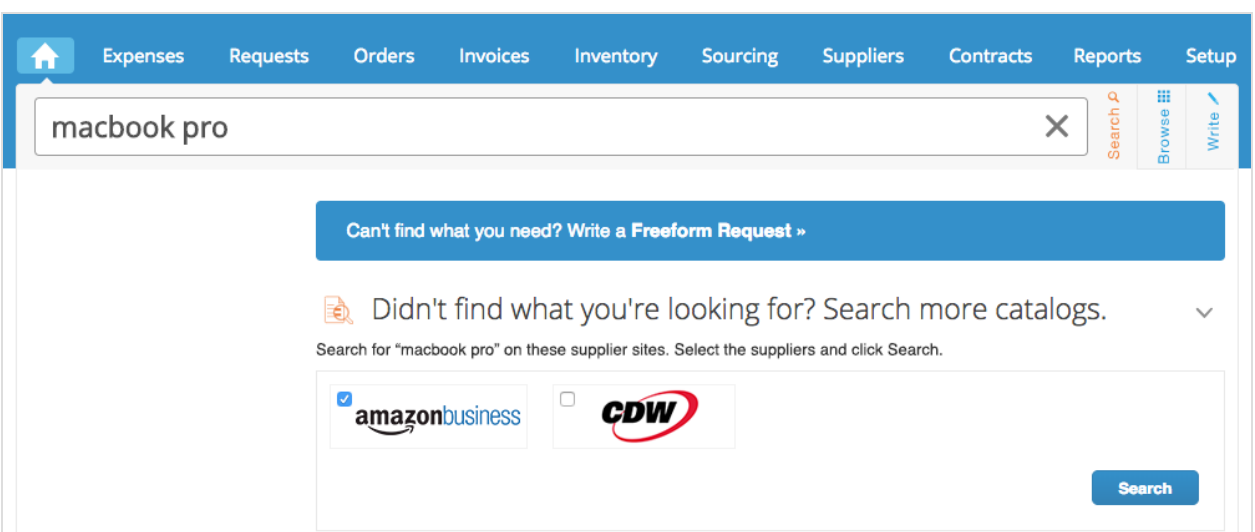
How it works

When someone looks for an item using the Coupa search bar, as an admin, you have the option of letting Coupa search both hosted catalogs and your supplier punchout sites. You can configure individual sites to be included automatically, or through a secondary search:

Search results for a punchout suppliers are automatically retrieved during the initial search.



Supplier punchout sites set up to only search if no results are found.



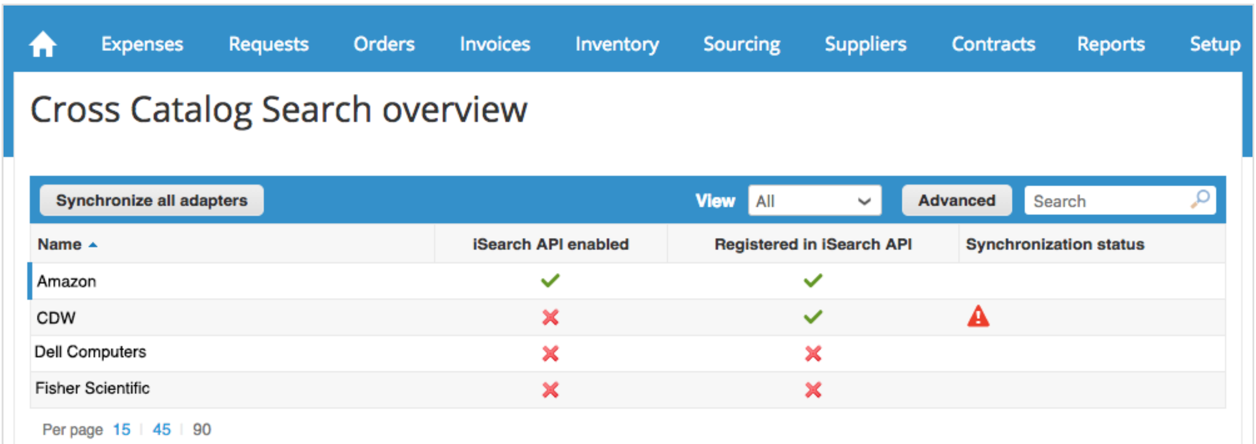
When the user chooses to search other catalogs, they just choose the site(s) they want to search and then click the **Search** button.

Enable Open Buy for your supplier punchouts

Not all supplier punchout sites are available for search integration through Coupa Open Buy.

Step 1: Discover punchouts that support Open Buy

1. To see which sites are available for Open Buy integration, go to **Setup > Procurement > Cross Catalog Search** where you'll see a list of your supplier punchout sites and the status of each.



2. Click the **Synchronize all adapters** button to make sure you've got the most up-to-date list of sites that are registered in the iSearch API and available for Open Buy. After you've synced the adaptors, Coupa will show you the following information:

   - **Name**: the supplier punchout site that's been configured
   - **iSearch API enabled**: An adapter exists for the punchout but the punchout is not yet available for Open Buy
   - **Registered in iSearch API**: the punchout is Open Buy enabled and items are searchable from the Coupa homepage search bar
   - **Synchronization status**: explicitly calls out punchout sites that can be included in Open Buy, but currently aren't

3. Note the names of the punchout sites that you want to be included in Coupa Open Buy

Step 2: Update the settings for supported punchout sites

1. Go to **Setup > Suppliers > Punchout Sites** and edit the site you want to add to Open Buy

2. Scroll down to the **Open Buy** section and choose the behavior of the punchout site in Open Buy. You can choose from:

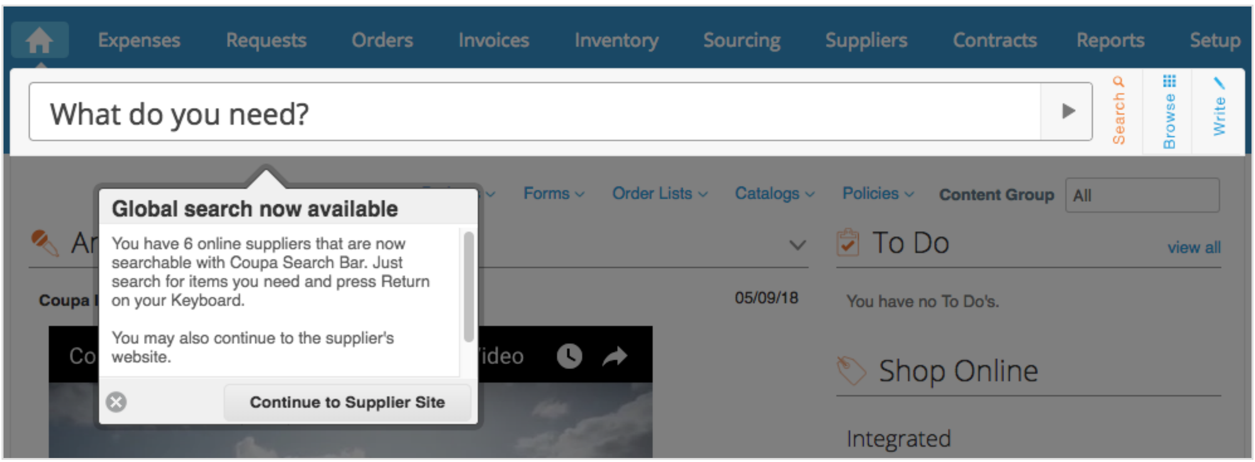
   - **Always** show items from the supplier's punchout site in search results
   - **Only show if no catalog items are found** and you want to fall back on the supplier with the punchout site.

> **Note:** If you don't see the Cross catalog Search section, verify that the site is registered in the iSearch API (step 1 above)

3. At the bottom of the page, click **Save** when you're done.

Visit an Open Buy punchout site

Now, when someone tries to visit a punchout site that's Open Buy enabled, Coupa suggests that they use the Coupa search bar instead. If they want to continue to the punchout, the just need to click **Continue to Supplier Site**.



Upgrade impact

Roles and Permissions

- New controller: [iSearch adapters overview]
- New permissions for the [Admin] role

Integrations

New fields on the [Item API In] and [Item API Out].

Notifications

None

Availability

Since this feature is part of the Early Access Program, you need to be an existing Procurement customer and have approval from our PM team before you can begin using Coupa Open Buy in your instance.

Spend Guard - Phase 2

Feature overview

The Spend Guard module now includes a global dashboard that highlights suspicious spend across expenses, requisitions, purchase orders, and invoices. Spend Guard users now have visibility into high-risk employee spend, at both a suspicious behavior pattern level and in the context of all of their Coupa spend.

What we were thinking

With Spend Guard module, customers gain automated risk detection and resolution across all their business spend. In Release 21, we introduced Coupa Spend Guard with a focus on detecting suspicious spend with Travel and Expenses. In Release 22, we've expanded it to include employee-level behavior patterns across all of your BSM spend.

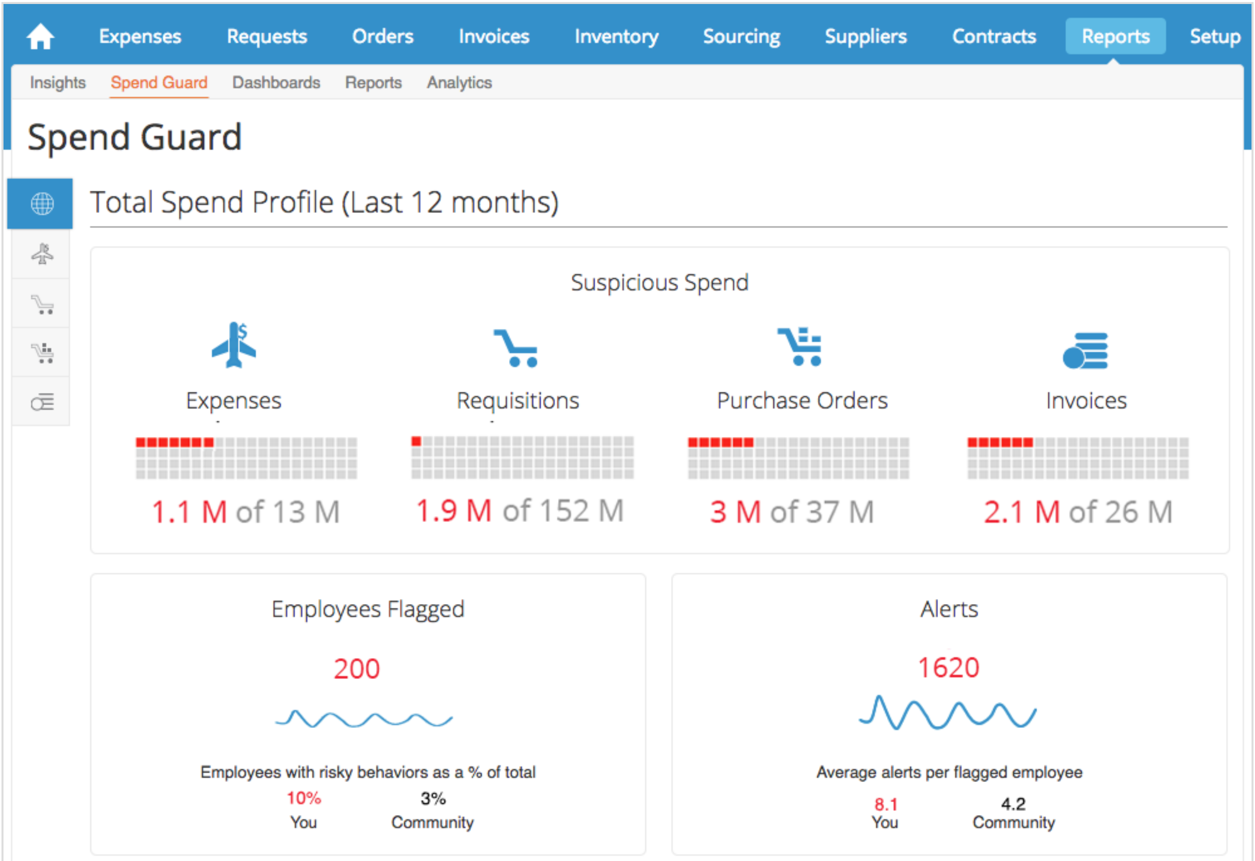
This gives greater insight into the spend behavior of high-risk employees no matter where in Coupa they are transacting.

How it works

Users with the standard **Dashboard** role can go to **Reports > Spend Guard**, you'll see the **Total Spend Profile** page. Using the left-hand menu, you can choose to navigate to each of the following document type's breakdown of spend: expenses, requisitions, purchase orders, and invoices.

Total spend profile

We've provided automated detection of potential fraud and high-risk employees throughout the Coupa platform via dashboards, Employee alerts, and drill down data sets.



Suspicious spend calculation rules

These are the rules used by the Suspicious Spend section of the dashboard.

Report type	Suspicious spend	Total spend
Expenses	Total of all unique expense lines within reports in *Approved for payment*, *Scheduled for payment*, and *Paid* statuses that are flagged by the fraud detection engine, just under the receipt limit, and lines within reports that were flagged as being under a self-approval limit.	Total of all expense reports in *Approved for payment*, *Scheduled for payment*, and *Paid* statuses (same as Analytics totals).
Requisitions	Total of all unique requisitions in *Partially received*, *Received*, or *Ordered* statuses that are flagged as being under the self-approval limit.	Total of all unique req lines in *Partially received*, *Received*, or *Ordered* statuses (same as Analytics totals).
Purchase Orders	Total of all unique purchase orders in *Closed*, *Soft closed*, or *Issued* statuses that are flagged as having a high number of changes.	Total of all unique PO lines in *Closed*, *Soft closed*, or *Issued* statuses status (same as Analytics totals).
Invoices	Total of all unique non-backed invoices in *Approved* status that are flagged as being under the self-approval limit.	Total of all unique invoice lines in *Approved* status (same as Analytics totals).

Employees Flagged

The **Employees Flagged** section shows the total number of unique employees flagged over the last 12 months. The graph shows the number of flagged employees for each month. Employees are only counted once per month, regardless of how many times they're flagged in the month. Finally, Coupa breaks down the number of flagged employees as a percentage of your total employees and compares it against the wider Coupa Community.

Alerts

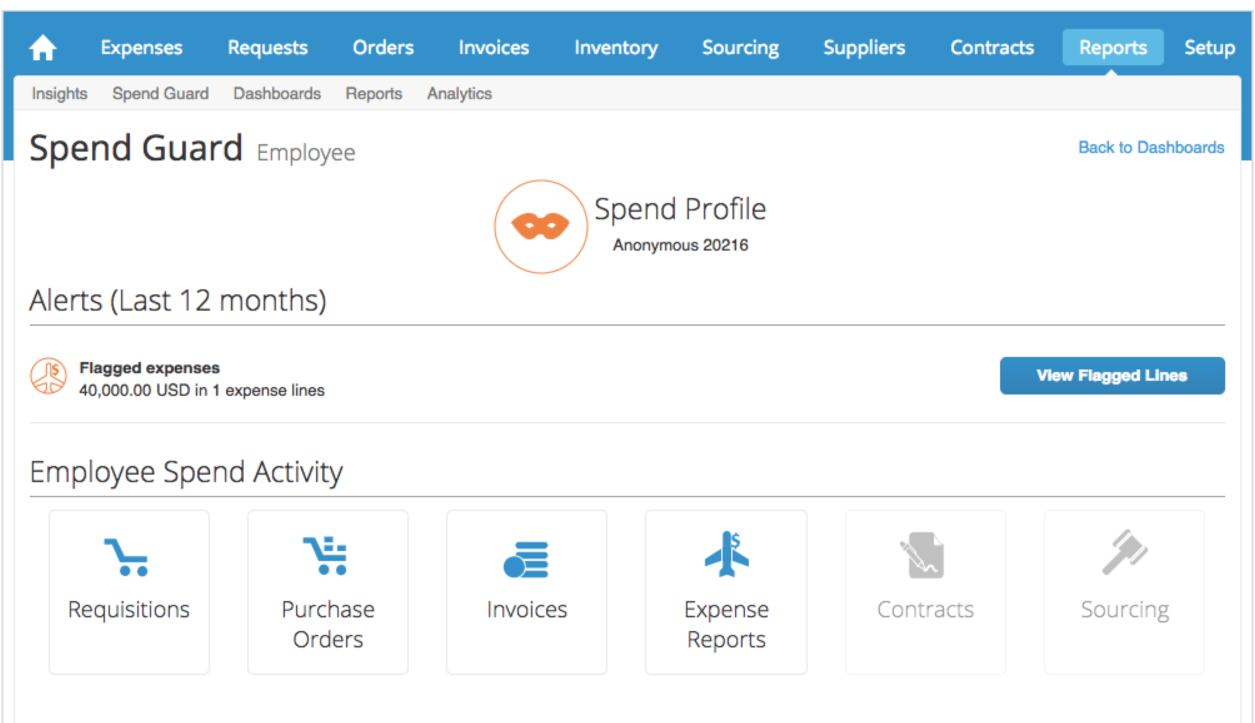
The **Alerts** section shows the total number of alerts across all employees in the last 12 months and compares that against the community. The graph shows the number of alerts per month. The average number of alerts for flagged employees are flagged (i.e. having at least one alert) is compared against the community, rounded to one decimal.

Employee spend profiles

On the **Reports > Spend Guard** page under the **Suspicious Spend By Employee** section, the table in the **Employee** column, specific employees (listed anonymously) are now clickable. When you click the employee, you're brought to that employee's Spend Profile page. The profile page includes **Alerts** for the last 12 months and **Employee Spend Activity** tables.

Each user's profile page includes alerts for suspicious spend behaviors as well as visibility into the Employee's non-flagged Spend Activity throughout the Coupa platform. Only the alert tables show only flagged transactions.

If an activity icon is gray, it means you haven't enabled that product. If you click an activity icon that's blue, and there's no data in the table, it means the user doesn't have any activity for that document type. This is the same behavior as a user's own Spend Activity table.



Alerts are created when an employee's spend matches any of these conditions:

- Spend under the employee's self-approval limit for expenses, requisitions, and invoices
- Purchase orders with a suspicious number of changes
- Expense spend under the amount requiring a receipt

> **Note:** Employees can use any parts of Coupa that they have access to, and there may be other employee activity that's beyond the alerts that Spend Guard finds. Keep this in mind when reviewing employee behavior.

Alert types

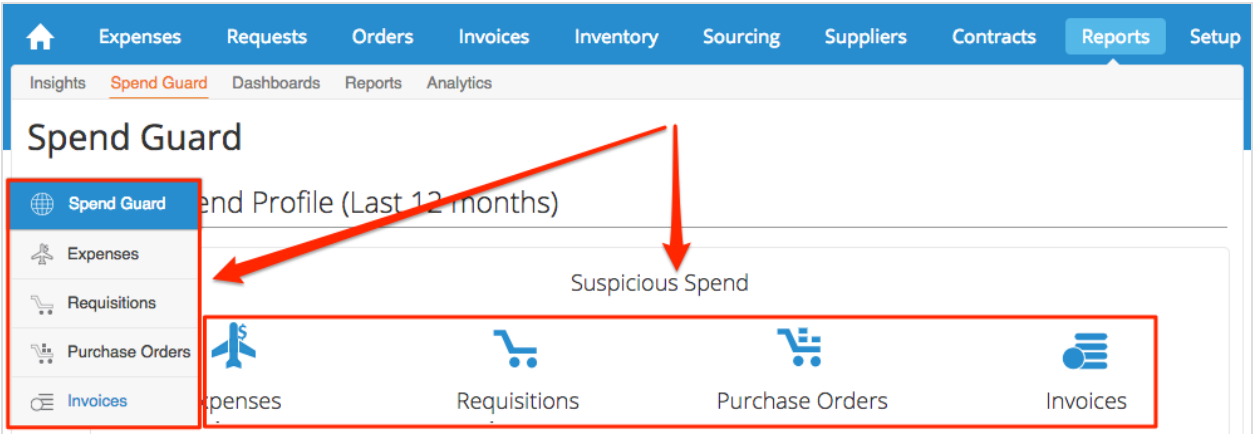
There are several types of alerts that the system generates, based on several different, evolving set of conditions:

Alert	Trigger Conditions
Self-approval for expenses	Where an employee, in the last twelve months, has a higher than normal amount of expenses reports submitted that are under the employee's self-approval limit.
Self-approval for requisitions	Where an employee, in the last twelve months, has a higher than normal amount of requisitions submitted that are under the employee's self-approval limit.
Self-approval for invoices	Where an employee, in the last twelve months, has a higher than normal amount of invoices submitted that are under the employee's self-approval limit.
POs with changes	Where an employee, in the last twelve months, has a higher than normal amount of changes on a purchase order.
Expense under receipt	Where an employee, in the last twelve months, has a higher than normal amount of expense lines submitted where the receipt amount is within 20% of the receipt required limit.
Expense lines flagged	An expense line is flagged by the fraud detection engine

> **Note:** Alerts are generated based on machine learning, so the specific trigger conditions will evolve over time. For example, self-approval alerts will trigger when an employee's amount and frequency of self-approvals deviates from a community average. The alert won't trigger every time someone spends under their self-approval limit.

Other spend profiles

In addition to the Total Spend profile, Expense Guard features spend profiles for expenses, requisitions, purchase orders, and invoices. Each profile is accessible from either the icons on the Total Spend profile page or from the left-hand navigation.



The expenses profile is the original Spend Guard report we introduced in R21. The requisitions, purchase orders, and invoices profiles provide a data table with flagged objects.

Upgrade impact

Notifications

None

Roles and Permissions

- New controller: Spend Guard
- New permissions for Admin and Dashboard standard roles
- Migration for custom roles with the Expenses/Expense Risk/Show permission

Integrations

None

Availability

Since this feature is part of the Early Access Program, you need approval from our PM team before you can begin using Coupa Spend Guard in your instance.

Virtual P-Card Payments

Feature overview

Coupa Pay Virtual P-Cards (Purchasing Cards) generates a virtual credit card after a requisition is approved to speed up payment and to enhance control of credit card spend. Each Virtual P-Card references an approved order. That credit card number is either sent directly to the supplier to pay for the order or it is sent to the requestor to manually expedite the purchase if the supplier is an ad hoc, one-off provider.

Virtual credit card numbers limit the risk of credit account exposure so that selected suppliers receive a temporary credit card number with a credit limit pre-determined by the amount of the approved PO plus an overage. The actual amount of the approved PO plus an overage percent allows for payment of shipping and other reasonable charges that might not be foreseeable at the time the requisition is submitted for approval.

The Virtual P-Card is further controlled with a short expiration date so that virtual account numbers are closed automatically after a short period. If circumstances change before the Virtual P-Card is used, the credit limit can be changed or the card can be expired which cancels payment from that source.

Appropriate accounting personnel or controllers get access to an improved interface showing all Virtual P-Cards linked to POs. The Virtual Cards page (**Payments** > **Virtual Cards**) displays credit both extended and used with expiration dates and other details. Each row shows the masked Virtual P-Card (last four digits) and the Order Header number referenced as links that make reconciliation easier for the auditor seeking details.

What we were thinking

You deserve faster turnaround once your requisitions are already approved and you should have better control of your credit card spend.

► **We started with four observations from customers using the physical P-card feature.**

1. Customers like the flexibility that P-cards provide for ad hoc transactions.
2. Customers like credit card rebate programs offered by some issuing banks.
3. Customers dislike the lack of control of spend in P-card programs.
4. Customers strongly dislike the existing reconciliation process required to validate and account for all transactions each billing cycle for their ERP.

► **Coupa Virtual P-Cards makes improvements for each of these four observations.**
Coupa Virtual P-Cards offers you greater flexibility, agility, control, and accounting for your enterprise credit card spend.

- Greater flexibility allowing requisitions from a simplified 'generic' supplier for ad hoc transactions where it does not make sense to formally enroll a supplier into the system with an agreement and full profile.
- Accelerated order payment once the requisition is approved:
  - generating significant AP process savings by eliminating the invoicing process and
  - potentially allowing for spend to be channeled through a credit card rebate program.

- Better controls than conventional credit cards. Extended credit on virtual cards is limited to approved requisition amounts plus an overage for a limited amount of time.
- Two separate summary lists that show all virtually generated cards with easy reference to the order details. You don't have to wait for the issuing bank to post a monthly statement for reconciliation because all the details are pulled together for easier control and verification.

After your requisitions are approved, your requestors and your selected suppliers will get the business end of Business Spend Management automation: a new, faster payment experience at the time of order.

How it works

Entitlement

The Coupa Pay Virtual P-card product is a separate entitlement that requires a signed Early Access Program (EAP) agreement before we can turn it on.

Behind the scenes, you will also need at least one approved payment partner to be associated with your Coupa Chart of Accounts, your Coupa instance will require some provisioning and it will need to be turned on by Coupa Support.

Once Virtual P-Card is enabled, your Coupa Administrator will select and configure suppliers that should be paid by Virtual P-Card.

Given those pre-requisites, generating a Virtual P-Card uses nearly the same requisition and approval process that you already know depending on how you choose to implement. How that Virtual P-Card is used once the requisition is approved depends on the type of supplier named in the requisition.

Generating a Virtual P-Card

Requisitions that specify a supplier, configured with Payment Method set to *Virtual Card,* generate an order and a Virtual P-Card when they are approved. Where that Virtual P-Card is sent depends on the type of supplier.

- If the supplier is an approved supplier, the Virtual P-Card is sent directly to the supplier with the order.
- If the supplier is a generic supplier, the Virtual P-Card is sent to the requester of the requisition so that person may complete the order and pay for it.

Reissue a Virtual P-Card

Users with the *Virtual P-Card processor* permission can perform corrective actions on the Virtual P-Card from active links on the Payment section of the order header.

- Retry Issue: available if there was a failure to generate card automatically on PO creation
- Retry Update: available if there was a failure to generate card automatically on PO update
- Reissue: available if a card has expired

Suppliers

Two types of suppliers can be set up to use Virtual P-Cards: approved suppliers and generic suppliers.

► **What are approved suppliers?**

Approved suppliers may be any supplier record in Coupa provided configuration. An administrator chooses which existing supplier accounts would be best used with Virtual P-Cards. Those suppliers with high volume, low-value transactions where paying at the time of PO is acceptable are some of the best candidates. Choose those suppliers where you can generate significant AP process savings by eliminating the invoicing process.

► **What are generic suppliers?**

Generic suppliers have minimal field entries and they are used as a placeholder supplier for transactions where you don't want to set up an actual supplier usually because it's a one-time, ad hoc supplier. A generic supplier has the PO Method set to *Buy Online* and the Payment Method is set to *Virtual Card*. When a generic supplier is set as the supplier for a requisition, approval of the order triggers generation of the virtual card and it is sent to the requester who is responsible for using that virtual card number according to the approved order.

Approved Suppliers

Administrators choose which existing suppliers may be paid by Virtual P-card.

To enable an existing Supplier to receive Virtual P-Cards:

1. Edit the Supplier record.
2. In the Additional Settings section, set the **Payment Method** to ***Virtual Card***.
3. Enter a **Virtual Card Email** for the Supplier. This is the supplier's email address where the virtual credit card number payment details are sent by direct encrypted TLS with the order. The virtual card image is encrypted as a PGP signed message protected from changes by a SHA512 hash.
4. **Save**.

After the Supplier Payment Method is set to ***Virtual Card,*** any future approved requisition for goods and services from that supplier will trigger creation and transmission of a new virtual card number with expiration and an order credit limit (plus overage) for payment of that order.

Generic Suppliers

Supplier records configured with the **PO Method** set to *Buy Online* and the **Payment Method** set to *Virtual Card* are considered generic suppliers. When a requisition specifies a generic supplier for an item or service, approval of that req generates a Virtual P-Card and that is sent to the requestor to pay for the order.

Any minimally configured supplier may be configured as a "generic" supplier. Your Coupa instance may be enabled with a web form that helps your users create a simple request for an item to be paid by a Virtual P-Card with one generic supplier record used as a placeholder for any and all transactions.

To create a Generic Supplier:

1. Create a Supplier with entries for all required fields, and
2. Set **PO Method** to *Buy Online*, and
3. Set **Payment Method** to *Virtual Card*.

When a requisition is created with a generic supplier the requestor receives the Virtual P-Card when it is approved.

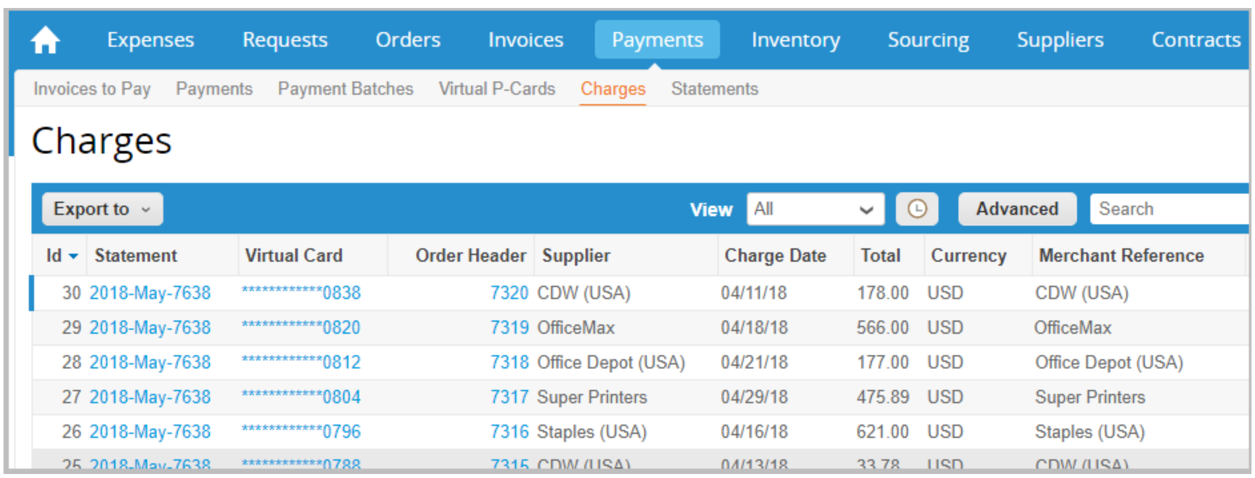
Note: Approvers, accountants, and auditors would generally prefer more information about the supplier and spend to aid in reconciliation of charges after the Virtual P-Card is used. Your business process can effectively control spend using the approvals process but your accounting may need to track large purchases by checking the order against the virtual card, amount used, supplier, and category of spend, which is the long way to say your generic supplier and your requisition may require more definition to aid in the accounting for the expenditure.

Caution: Do not create Suppliers with a PO Method set to *Prompt* and a Payment Method of *Virtual Card* with a Virtual Card Email setting because the Virtual P-Card will be sent to the supplier when the requisition is approved but without the order and order lines. The prompt setting disables the automatic PO delivery to that supplier so the requester or buyer can manually stage the order.

Consuming Charges

Go to **Payments > Charges** to see a list of charges against Virtual P-Cards that are recorded on a daily basis.

Active links in the list provide quick dives into the details about a corresponding statement (if one already exists for that charge), virtual card details, and order details. Of course, you can sort on columns or filter the display according to criteria you specify.



Payments > Statements

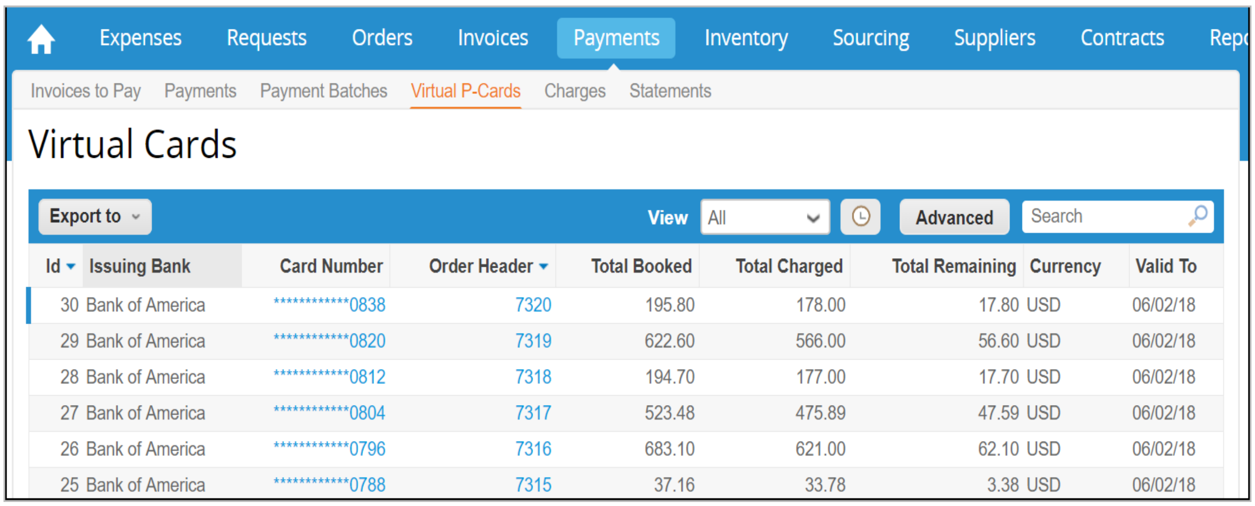
Go to **Payments > Statements** to see a list of charges against Virtual P-Cards cut into a monthly statement with aggregate totals. Individual statements have all of the same information displayed on the Payments > Charges page, plus a few more details like merchant category codes (Mcc) that are set by the consuming supplier and defined by the registering credit card networks. All Virtual P-Card charges for the period appear on this monthly statement at the end of your billing cycle.

This report will be a roll up of all charges in that billing cycle. The statement should help automate the reconciliation of your statement at the end of each billing cycle.

When statement lines have an Order Header (PO) number assigned to them, AP teams know (and can verify) that the charge was pre-approved. Because AP can more easily verify that the transactions are valid, the statement can be paid to the issuing bank with a greater degree of confidence and control.

Payments > Virtual Cards

To see all Virtual P-Cards in one display go to **Payments > Virtual Cards**.



All Virtual P-Cards generated are shown on the Virtual Cards page whether or not they have been used, consumed, or expired. Some additional information about the table:

Column	Description
Id	Id
Issuing Bank	Participating banks (payment partners) in the Virtual P-Card program include: • Barclaycard • AMEX • Silicon Valley Bank
Card Number	The last four digits of the virtual credit card number links to virtual card details including last update, valid dates, booked amounts, charge amounts and more.
Order Header	The purchase order number referenced to the Virtual P-Card. The order number links to order details including lines, order date, requisition number link to requisition details, named supplier, and more.
Total Booked	The amount of credit extended or credit limit for the Virtual P-Card. This is the amount approved on the requisition, plus an overage percentage (configurable on implementation) for all cards generated.
Total Charged	Amount charged to the virtual card account number by the merchant or supplier.
Total Remaining	The difference between Total Booked and Total Charged.

Column	Description
Currency	Currency
Valid To	Expiration date of the Virtual P-Card

Upgrade impact

Roles and Permissions

We added new controllers to three new roles to manage virtual card payments, as well as updated the :

- Virtual P-Card Admin
- Virtual P-Card Manager
- Virtual P-Card Processor

See Release 22 Roles and Permissions Updates for more information.

Integration

Integrating Charges back to your ERP

From the charges table data, Coupa will make the data available to integrate with your ERP to automatically create the necessary journal entries for these transactions. This data will be available via API or for file integration. All charges will be proportionally allocated to the PO lines with which they are associated, and those allocations will inherit the account segments of those PO lines.

There are two ways to integrate these credit card charges back to your ERP and the choice of strategy will depend on your business environment and requirements.

1. Daily sync would accrue the charges throughout the month, then integrated charges are sent back to the ERP on a daily basis and journal entries are created on a daily basis. Most likely, the supplier in these entries will be the issuing bank, but we will pass the actual supplier and merchant reference data so you can capture proper data for your spend analysis.

2. Monthly sync with the ERP based on periodic statements aggregated at the end of the billing cycle. All other details mentioned above will still apply.

Either method chosen requires some integration work to implement the solution.

Availability

Coupa Virtual P-Cards is available as an EAP offering in R22. Contact your Coupa Support Representative or Customer Success Manager to express interest in this feature.

Maintenance Updates

This chapter contains the following topics:

22.0 Release Notes

See the issues we resolved in R22, and any daily updates to the 22.0 release.

22.1 Release Notes

See the issues we resolved in 22.1, and any daily updates to the 22.1 release.

22.0 Release Notes

Overview

Coupa Release 22.0.x includes the latest security patches and resolved issues listed below. All releases are cumulative: the most recent daily update includes all the previous resolutions listed here.

Supported Browsers

We do extensive testing before each Coupa release, and the list here indicates which browsers were used for testing. Coupa Release 22 supports the following web browsers:

- Microsoft Internet Explorer 11
- Microsoft Edge 42
- Mozilla Firefox 61
- Google Chrome 67

Last Updated

August 23, 2018

22.0.3 Daily Update

August 23, 2018

Resolved Issues

Case Number	Component	Description
00262350	Invoicing	Resolved an issue where the invoice requester field was not visible when POs were created or edited.

22.0.2 Daily Update

August 21, 2018

Resolved Issues

Case Number	Component	Description
00243435	Approvals	Approval chains with the *total amount* approval condition no longer inadvertently include the currency when generating an approval chain.
00259838	Inventory	Fixed an issue that caused users with the Picker role to receive notifications that were not initially meant for them.
00172974, 00234038,	Invoicing	Resolved an issue that caused VAT to quadruple on invoice lines.

Case Number	Component	Description
00162271, 00226345, 00239216, 00242611		
00189210, 00194287 00248039	Platform	A user's P-card is now unmasked as expected when Coupa is configured to unmask it.
00228508, 00242942	Platform	Resolved an issue that caused some expired SSO sessions to redirect to the SSO timeout URL.
00232136 00244310 00253984 00216251	Various Components	Resolved a number of individually-reported customer tickets on various components.

22.0.1 Daily Update

August 16, 2018

Resolved Issues

Case Number	Component	Description
00167424 00203000 00208943 00257443	Invoicing	The Invoice number column has been adjusted to only save up to 40 characters.
00240074, 00245404, 00246289	Invoicing	The invoice Quick Entry has been fixed and is now able to render PDFJS previews in Internet Explorer.
00245194 00253084 00256816 00254254 00253858 00253227	Invoicing	Fixed an issue that caused some customers to no receive actionable_confirm_receipt notifications because of an exception.
00249966	Invoicing	Made changes to Tax code rules that were not triggering on cXML invoices because there were improper tax rate assigned to the tax lines. See Supporting Exempt, Reverse Charge in cXML for more information.
00216244	Invoicing	Resolved an issue that caused some customers to not to able to see a 0% tax rate in Canada and Czech Republic.
00193585 00227165	Platform	Removed superfluous URL info from the Attachments section of contract approval form email notifications.

Case Number	Component	Description
00134813 00160741 00161928 00180423 00180687 00191665 00209248 00211467 00239126 00239763 00241320 00244568 00255894 00255909 00257987	Procurement	Resolved an issue that prevented notifications from being removed from the To-Do list once an action had been taken on the notification.
00228261 00232462, 00246111, 00243494	Procurement	The commodity on a req line is no longer set to blank when changing to a supplier that does not have a default commodity.
00238664 00239929 00250475 00244328 00261181	Various Components	Resolved a number of individually-reported customer tickets on various components.

22.0.0 Resolved Issues

In major releases, we make the extra effort to address issues that you reported. The following list contains issues that were reported in previous releases and are fixed in Release 22.0.0.

Case Number	Component	Description
191492	Approvals	Resolved an issue where approval chains with conditions based c CSV file.
00210199 00211619	Approvals	Resolved an issue that could prevent changes made to approval c
00232638, 00243477	Approvals	Resolved an issue where the *On Behalf Of* user (requester) is a conditions are set: _If PO Change's total is within that user's self-a
00170268 00162450	Approvals	Resolved an issue that could prevent a downloaded approvals CS
00181621 00215239 00246545	Approvals	Resolved an issue that could allow requesters to approve their ow
134516	Catalogs	Resolved an issue that prevented items from loading when items v
00209810 00210805 00229515	Contract Collaboration	Resolved an issue that caused an error in the analytics dashboarc

Case Number	Component	Description
232081	Expenses	Exporting Expense Line Attendees now displays proper values fo
22,060,500,233,265	Invoicing	Resolved an issue that caused the Invoice SFTP Loader to error v
116697 00124730 00155252 00242055	Invoicing	Resolved an issue that caused invoices to remain in Pending Rec through cXML for 3-way matching.
00242104 00244251 00238689	Invoicing	Resolved an issue that caused buyer created invoices in *Draft* s
00232035, 00233561, 00232667	Platform	Resolved an issue where User-type and Approval Group-type cus these types of custom fields on custom objects.
00242220 00224822	Platform	Resolved an issue that could prevent the integration run statistics
212746	Platform	The selected inbox table view is now persistent. When navigating This behavior is consistent with other Coupa tables.
00246663	Platform	Tax CallOut parameters are no longer reset when Company Inforn
248526	Platform, Budgeting	Resolved an issue with split billing that prevented deleted splits fro
00236470, 00243267	Platform, Integrations	Resolved an issue that could result in duplicate invoices being ser
00210473 00189989 00189021 00222231 00186623 00194255	Procurement	Resolved an issue that caused images to not display properly whe
00115302 00060338	Procurement	Resolved an issue that could prevent a revised PO from being ser
00168937 00216307	Procurement	Resolved an issue that could prevent PO line attachments from be
00185735 00193445 00194383 00205296 00221046 00223767	Procurement	Resolved an issue that caused the PO status to remain in *Sched
215698	Procurement	Resolved an issue that caused requester to receive duplicate ema
106740	Procurement	Now, when a purchase order is copied as a new requisition, the u
00152315 00216294	Procurement	Changes to the standard PO boilerplate that include tables now sa
00229594 00238354	Procurement	Resolved an issue that could prevent cXML purchase orders from
00165995 00220297	Procurement	Resolved an issue that resulted in a draft contract being created w users are able to create contracts with the same number when a c Contract number uniqueness is changed to allow the same numbe
186957	Procurement	Changing the ship-to user during a change order request now add
108929	Procurement, Contracts	Resolved an issue that caused the update of Currency Codes to r
230190 00205876	Procurement, Contracts	Resolved an issue that caused content groups to default to everyo

Case Number	Component	Description
00232672 00239837 00241042 00237476 00236391 00230199 00238105	Procurement, Contracts	Resolved an issue that caused users to be unable to adjust prices revisions/change order request.
204869	SIM	Custom role upgrade. If your custom role has **Supplier Informati**
229722	SIM	Resolved an issue that prevented SIM update forms from referenc
00194777 00236813	Sourcing	Notifications to evaluators in a sourcing event are now removed a
210590	Sourcing	A buyer logo is now populated into a sourcing event created from
00246157 00251262	Sourcing	Some email messages sent from buyer to supplier showed some messages correctly.
00205709, 00224275	Sourcing	When no supplier logo is uploaded, the supplier name is displayed
00173152 00179742	Supplier	Resolved an issue that allowed suppliers to see views created by
00251268 00250840 00253813	Supplier	Resolved an issue that resulted in an error message when updati

22.1 Release Notes

Overview

Coupa Release 22.1.x includes the latest security patches and resolved issues listed below. All releases are cumulative: the most recent daily update includes all the previous resolutions listed here.

Supported Browsers

We do extensive testing before each Coupa release, and the list here indicates which browsers were used for testing. Coupa Release 22 supports the following web browsers:

- Microsoft Internet Explorer 11
- Microsoft Edge 42
- Mozilla Firefox 61
- Google Chrome 67

Last Updated

September 5, 2018

22.1.1 Daily Update

September 5, 2018

Resolved Issues

Case Number	Component	Description
00261597	Platform	The homepage **Groups** and **Projects** drop-down menus now switch to autocomplete search boxes and behave as expected when the instance has a large number of groups or projects.
00266864	Platform	Resolved an issue that prevented some notifications from being sent when the subject line included the percentage character (%).
---	Platform, Mobile	We fixed an issue that blocked SSO login to the Coupa Andoid app.

22.1.0 Maintenance Update

Deployment Dates

Sandbox: September 3, 2018
Production: September 7, 2018

Resolved Issues

Case Number	Component	Description
00248833 00257415	Approvals	The **Username > Activity > Requests** view **That I'm watching** through an approval chain.
00259011	Expenses	A new validation check ensures that mileage categories are crea
00249852	Expenses	We corrected an issue for the entry of Custom Rates for estimat
00245660	Expenses	We resolved an issue where a customer outbound export was im
00258512	Inventory	We made the behavior consistent for the users who are not perm receive the item into inventory (warehouse location) using the qu locations. For more info, see [Troubleshooting Quick Receipt and
00172454 00223557 00237298 00243264 00247731 00253689	Invoicing	Resolved an issue that could cause compliant invoices to stay in
00223973 00246372	Invoicing	The Total Extra Charge (%) invoice tolerance trigger now only fi currency's precision.
00244711, 00241820	Performance	Resolved an issue that prevented deactivated users from being
00182015, 00212096	Platform	The **Back** button now behaves as expected on the `/data_sources`
00242486	Platform	Emailed custom reports from the Req lines table no longer trunc full-width Unicode characters, like those used in Asian language
00226615, 00260956	Platform	Credit notes now add back to the budget as expected when the
00246383	Platform	Resolved an issue that prevented Coupa from ignoring automati
00128542 00227704 00254652 00257314 00258230 00262135 00261766 00258512 00230725 00211707 00257332 00254977	Various Components	Resolved a number of individually-reported customer tickets on

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