COUPA

Fundamentals, Configuration, Integration, Projects & AI Overview

24-Hour Professional Training Curriculum

Total Duration	**24 Hours**
Learning Format	Instructor-led sessions with demonstrations, guided exercises and implementation scenarios
Coverage	Functional fundamentals, configuration concepts, integration, project lifecycle and AI overview
Level	Foundation to intermediate; suitable for new learners and professionals entering Coupa projects

Programme Description

This programme introduces learners to Coupa as a cloud-based Business Spend Management platform. It develops an understanding of Source-to-Pay processes, core functional areas, configuration concepts, integration approaches and the lifecycle of a Coupa implementation project. The final section introduces Coupa's AI direction and selected AI-enabled procurement and finance use cases.

Course positioning

The AI section is an introductory overview. It explains the use cases and capabilities learners should understand; it does not claim advanced hands-on development with Navi Agent Studio or access to licensed AI features.

Who Should Attend

- Fresh graduates and professionals interested in enterprise procurement and spend-management platforms.
- Procurement, sourcing, accounts payable, finance and supply-chain professionals.
- ERP, business analysts, functional consultants, application support and integration professionals.
- Professionals preparing to participate in Coupa implementation, support or transformation projects.

Recommended Prerequisites

- Basic understanding of business processes such as purchasing, approvals, invoicing or supplier management is helpful.
- Basic computer and spreadsheet skills.
- No prior Coupa experience is required.

Curriculum at a Glance

Module	Coverage	Hours
	Coupa fundamentals and platform orientation	3
	Source-to-Pay processes and core functional areas	4
	Coupa configuration concepts and administration	5
	Coupa integration concepts and data exchange	4
	Implementation projects, testing and support	5
	Coupa AI overview and business use cases	3
	TOTAL	24

Module 1 – Coupa Fundamentals and Platform Orientation (3 hours)

Detailed topics

- Introduction to enterprise spend management and Business Spend Management (BSM).
- Coupa platform overview, purpose, business value and typical enterprise use cases.
- Understanding Source-to-Pay (S2P) and Procure-to-Pay (P2P) lifecycle concepts.
- Overview of key Coupa areas: procurement, sourcing, supplier management, invoicing, expenses, payments and spend analysis.
- User roles and stakeholders: requester, approver, buyer, supplier, AP team, finance user and administrator.
- Navigation concepts, dashboards, search, notifications and user experience orientation.
- How Coupa fits into an enterprise application landscape alongside ERP and finance systems.

Learning outcome: Explain Coupa's role in spend management, identify major functional areas and describe the high-level Source-to-Pay lifecycle.

Module 2 – Source-to-Pay Processes and Core Functional Areas (4 hours)

Detailed topics

- Requisition-to-order process: request creation, catalog and non-catalog purchasing concepts.
- Approval workflows: approval chains, thresholds, delegation and exception handling concepts.
- Purchase orders: creation, dispatch, change management and receiving overview.
- Supplier management: supplier onboarding, supplier information and collaboration overview.
- Sourcing fundamentals: events, requests for information/proposal/quotation and bid comparison concepts.
- Invoicing and accounts payable: invoice capture, matching, exceptions and approval flow.
- Three-way matching overview: purchase order, receipt and invoice.
- Expenses, payments and spend analysis: functional overview and business scenarios.
- End-to-end process walkthrough: requisition → approval → purchase order → receipt → invoice → payment.

Learning outcome: Trace common procurement and finance transactions and explain how Coupa functional areas support the end-to-end business process.

Module 3 – Coupa Configuration Concepts and Administration

(5 hours)

Detailed topics

- Configuration versus customisation: platform configuration principles and governance.
- Company structure concepts: entities, business units, departments, locations and cost centres.
- User administration: user records, roles, permissions, groups and access principles.
- Approval configuration concepts: approval rules, conditions, routing, thresholds and escalation.
- Requisition and purchasing controls: policies, purchasing channels, catalogs and order controls.
- Supplier and transaction setup concepts: supplier records, payment terms, currencies and tax-related data.
- Accounting dimensions and chart-of-accounts mapping concepts.
- Form and field configuration concepts, required fields, validation and business rules.
- Notification and workflow behaviour: alerts, reminders and exception routing.
- Configuration migration and environment considerations: development/test/production, change tracking and release discipline.
- Guided configuration case: map a sample organisation, user roles and approval policy to a purchasing scenario.

Learning outcome: Understand the main configuration areas and explain how organisation structure, access, policies and approval rules influence Coupa transactions.

Module 4 – Coupa Integration Concepts and Data Exchange (4 hours)

Detailed topics

- Why Coupa integrates with ERP, finance, HR, supplier and identity systems.
- Integration architecture overview: source systems, target systems, middleware and Coupa.
- Common integration patterns: file-based exchange, APIs, middleware/iPaaS and scheduled data transfer.
- Master data integration concepts: users, suppliers, accounts, cost centres, entities, currencies and payment terms.
- Transactional data exchange: requisitions, purchase orders, receipts, invoices and payment status.
- Inbound versus outbound integrations and event/scheduled processing concepts.
- API fundamentals: endpoints, requests, responses, authentication concepts and payload formats.
- File-based integration concepts: CSV/XML, templates, data mapping and validation.
- Error handling, reconciliation, monitoring, retries and integration support.
- Integration scenario: outline a Coupa-to-ERP flow for supplier, purchase order and invoice information.

Learning outcome: Describe common Coupa integration patterns, identify key data objects and explain the basic flow of information between Coupa and enterprise systems.

Module 5 – Coupa Implementation Projects, Testing and Support (5 hours)

Detailed topics

- Coupa project lifecycle: discovery, requirements, solution design, configuration, integration, testing, deployment and hypercare.
- Project roles and responsibilities: business owner, functional consultant, technical/integration consultant, administrator, tester and project manager.
- Requirement gathering: process workshops, stakeholder interviews, fit-gap analysis and requirement documentation.
- Process design: current-state versus future-state mapping and approval matrix preparation.
- Configuration and integration workstreams: dependencies, ownership and design decisions.
- Testing strategy: unit testing, system integration testing (SIT), user acceptance testing (UAT) and regression testing.
- Test scenario and test case preparation; positive, negative and exception-path testing.
- Data migration and validation: data cleansing, mapping, mock loads and reconciliation concepts.
- Deployment readiness: cutover planning, communications, user enablement and go-live checklist.
- Post-go-live support: ticket triage, issue prioritisation, root-cause analysis, knowledge transfer and continuous improvement.
- Mini project: design a sample procurement rollout for one business unit, including process flow, configuration checklist, integration touchpoints and test scenarios.

Learning outcome: Understand the phases of a Coupa implementation and produce a basic project artefact set for a sample procurement scenario.

Module 6 – Coupa AI Overview and Intelligent Procurement Use Cases (3 hours)

Detailed topics

- Introduction to AI, generative AI and agentic AI in enterprise procurement and finance.
- Coupa's AI direction and the role of Navi in the Coupa experience.
- Conversational AI concepts: asking business questions and obtaining insights from spend and procurement information.
- AI-enabled procurement use cases: sourcing support, supplier bid comparison, requisition assistance and process guidance.
- AI-enabled finance use cases: spend insights, duplicate-payment identification, anomaly and fraud-risk signals.
- Agentic AI overview: specialised agents, task execution, human oversight, permissions and governance.
- Navi Agent Studio and agent ecosystem: high-level purpose and concepts; feature availability depends on subscription and environment entitlements.
- Responsible AI considerations: data quality, privacy, access control, explainability, human review and auditability.
- Use-case exercise: identify where AI could assist in a purchase request, sourcing event or invoice exception workflow.

Learning outcome: Explain Coupa's AI direction, identify relevant procurement and finance use cases, and discuss the governance considerations for enterprise AI.

Learning Outcomes

- Describe Coupa’s purpose and its position within enterprise spend management.
- Explain the Source-to-Pay process and the responsibilities of common business users.
- Identify key functional and configuration areas across procurement and finance workflows.
- Understand user access, approval, organisational and purchasing configuration concepts.
- Describe how Coupa exchanges master and transactional data with ERP and other enterprise systems.
- Understand the phases, roles, deliverables and testing activities in a Coupa implementation project.
- Recognise selected Coupa AI capabilities and assess suitable business use cases responsibly.

Suggested Practical Activities

Activity	What learners practise
	Draw a Source-to-Pay flow from requisition through invoice and payment.
Approval design	Prepare a sample approval matrix using business roles and spending thresholds.
	Map sample entities, departments, users, roles and accounting dimensions.
Integration mapping	Identify data objects and map a sample Coupa-to-ERP exchange.
	Prepare a fit-gap summary, test scenarios and a go-live checklist.
AI use-case assessment	Select a procurement or finance task and assess AI value, risks and human checkpoints.

Assessment and Completion

- Knowledge checks or short quizzes after key modules.
- Participation in process-mapping, configuration-design and integration exercises.
- Completion of the mini implementation case and AI use-case assessment.
- Suggested completion criterion: attend the programme and complete the assigned exercises. The training provider may define its own certificate policy.

Training Environment and Scope Notes

The curriculum can be delivered using instructor demonstrations, guided worksheets, sample process diagrams and case studies. Hands-on configuration or integration in a live Coupa tenant depends on the training provider having suitable sandbox access, permissions and licensed features. Coupa product screens, modules, APIs and AI capabilities may vary by customer subscription, release and tenant configuration.

AI scope clarification: This 24-hour programme includes an AI overview and use-case orientation. It does not represent a full developer course for Navi Agent Studio, nor does it guarantee access to Coupa AI features. A separate advanced course can be designed once the relevant tenant access and feature entitlements are confirmed.