



# Use Case: Coupa Contract Manage- ment

February 2021

# Table of Contents

<b>1.</b>	<b>Preparation</b>	<b>3</b>
1.1.	Outcome	3
1.2.	Characters	3
1.3.	Products and Platform Features	4
1.4.	Steps before using Coupa Contract Management	4
<b>2.</b>	<b>Use Case: Coupa Contract Management</b>	<b>5</b>

# 1. Preparation

## 1.1. Outcome

Coupa provides an improving contract efficiency and gains portfolio wide visibility into commitments and spend against contracts with advanced data analysis. It accelerates sell-side contracts to shorten sales cycles and increase revenue while connecting buy-side contracts to your spend process to realized negotiated discounts. As Coupa also uses structured contract data for holistic risk management, including deep T&C insights and comprehensive risk scoring before signing and agile compliance a scale afterward.

Coupa comes with customizable smart templates and clause libraries power an intuitive, dynamic "interview" for fast secure creation. Companies accelerate post-award contracting by automatically pushing data from sourcing to contracts. Pass contractual line items into your purchasing systems to ensure employees are buying on-contract with selected vendors.

Within our demo we will guide you through the requisition and approval for a new procurement related contract. Define the contract based on a clause library and collaboratively define the final agreement with the supplier.

## 1.2. Characters

Name	User Role/ Personal	Login ID	Password
Demo User	Buyer	Demo User	demouser
Demo Lieferant	Supplier (Email-Account)	testcoupa2021@gmail.com	demouser
Demo Lieferant	Supplier (Coupa Supplier Portal)	testcoupa2021@gmail.com	coupatest2021

## 1.3. Products and Platform Features

List each of the products and platform features highlighted in the narrative.

Name	Description	Documentation or Video	SKU
Coupa Contract Lifecycle Management	Contract Lifecycle Management		

## 1.4. Steps before using Coupa Supplier Management

- Log-in as **Demo User** (Username: Demo User, Pw: demouser) <https://kpmg-germany.coupacloud.com/sessions/new> (use Internet Explorer).
- due to delayed response of the cloud server at the first login, it is recommended to load the Coupa demo environment at least 5 minutes before presentation.
- Log-in into your email account (email: [testcoupa2021@gmail.com](mailto:testcoupa2021@gmail.com), Pw: demouser). Ensure to use a different browser as your log-in at Coupa system. (use Google Chrome).

## 2. Use Case: Contract Management

### Use case description:

Coupa Contract Management helps buyers to improve efficiency and gains portfolio wide visibility into commitments and spend against contracts with advanced data analysis. Companies accelerate post-award contracting by automatically pushing data from sourcing to contracts. Pass contractual line items into your purchasing systems to ensure employees are buying on-contract with selected vendors.

Let's look at how Demo User can use Coupa Contract Management to manage this process.

### Persona:

**Demo User – Buyer**

**Supplier – Demo Lieferant**

### Demonstration Steps:

Frame	Narrative	Instructions
(If necessary you can create a new template)  Creation of contract Template	First Demo User must log-in into Coupa. (Username: Demo User, pw: demouser)  To create a contract template, navigate to 'setup' and scroll down to contracts.  Choose 'contract template' click 'create' to configure a and new template.  Open your draft and click 'edit'.  To insert a content to your template, navigate to 'template content' and upload your contract per copy and paste.  You can create required fields by selecting a word and click 'create field'. A pop-up window opens, and you must chose 'required'. Afterwards Click 'create'.  Click 'save template' if you want to complete this step	Log-in as <b>Demo User (Use Internet Explorer)</b>  Click 'setup' and scroll down to contracts.  Choose 'contract templates'  Name your template and click 'save'  Click 'edit'  Click 'Template Content' and insert content via copy and paste  Select a word and click '+Field'  

		Click 'save template' afterwards.
Creation of Contract request	<p>On Coupa home screen click 'Forms' and select contract request.</p> <p>Enter the contract name</p> <p>Enter Supplier and choose the contract's start and expiry date</p> <p>Choose contract owner (choose Coupa demo)</p> <p>Select your minimum spend (at least 50.000 because of approval chain)</p> <p>Select your maximum spend (max 100000 because of approval chain)</p> <p>Click 'review' to see your approval chain</p> <p>Afterwards you click 'submit for approval' to submit your contract request</p> <p>Go to Coupa home screen and click on your contract request.</p> <p>You can bypass the approval</p> <p>After clicking 'bypass approval' the approval chain turns green and your contract request is turned into an active contract.</p> <p>You can find your contract while click on 'contracts' in Coupa menu bar. Enter your contract name from above and find your contract</p>	<p>Click 'Forms'</p> <p>Select 'Contract Request'</p> <p>Enter contract name and supplier afterwards</p> <p>Select start and expiry date</p> <p>Enter 'Contract Owner' (Coupa demo)</p> <p>Click 'review' to see approval chain</p> <p>Click 'Submit for Approval'</p> <p>Click 'contract request' in recent activity</p> <p>Click 'bypass approval'</p> <p>Click 'Contracts' in Coupa menu bar and enter your contract name</p>
Connect your contract with a template	<p>To connect a contract with a template, click contracts and choose your contract (type in your contract name in the search bar)</p> <p>Afterwards open your contract and scroll down to edit your contract. Save without any changes (Necessary because of the approval chain)</p> <p>Click on contract number and scroll down and click 'author contract'</p> <p>To invite the supplier, you must click 'invite other party'. A pop-up window opens, and you have to fill in the supplier's name. Click 'save afterwards'</p>	<p>Click 'Contracts' in menu bar</p> <p>Click 'Edit'</p> <p>Click 'save afterwards'</p> <p>Click on Contract number and scroll down to 'author contract'</p> <p>Click 'invite other party'. Select your Supplier</p>

	<p>Click 'Send to Supplier' to send your contract to the supplier (use default settings)</p> <p>Upload or choose a template and click 'Submit for Approval'</p>	<p>Click 'Send to Supplier'</p> <p>Upload template (choose: Demo Blank Template) and click 'Submit for Approval'</p>
<p>Sign Contract (Requestor)</p>	<p>Open your contract one more time</p> <p>Scroll down to 'documents' to see your contract in PDF format</p> <p>Click 'Agreement' and sign the contract by typing Andreas Klesing and click 'sign' afterwards</p>	<p>Click 'contracts' in menu bar</p> <p>Open your Contract</p> <p>Click 'Agreements' and sign the contract by typing 'Andreas Klesing' and click 'sign'</p>
<p>Sign Contract (Supplier)</p>	<p>Log in into your email (change browser)</p> <p>(Login into gmail account: Email: testcoupa2021@gmail.com, Pw: demouser)</p> <p>Click on the link in the email</p> <p>Open the contract receiving from KPMG and click sign afterwards to sign the contract by typing 'Demo Lieferant'</p>	<p>Log in as Supplier</p> <p>Click on the email („KPMG Germany invited you to [...])</p> <p>Click on the link and click 'sign' to sign the contract</p> <p>Enter Demo Lieferant to sign</p>
<p>Review Contract</p>	<p>Change to your Coupa Browser window and click 'Contracts' and select documents to find your contract.</p> <p>you can click 'Full History' to see the full history of this contract</p>	<p>Click 'Contracts' and select documents</p> <p>Select your Contract and click on it</p> <p>Click 'Full History' to see the full contract history</p>
<p>Publish the Contract</p>	<p>Open the contract one more time</p> <p>To publish the contract click 'publish' and your contract can be used to 'write a request'</p>	<p>Select your contract</p> <p>Click 'Publish' to publish the contract</p>

## Contact

**Andreas Klesing**  
Manager, Value Chain Transformation  
**+49 221 2073-1266**

[aklesing@kpmg.com](mailto:aklesing@kpmg.com)

[www.kpmg.de](http://www.kpmg.de)

Die enthaltenen Informationen sind allgemeiner Natur und nicht auf die spezielle Situation einer Einzelperson oder einer juristischen Person ausgerichtet. Obwohl wir uns bemühen, zuverlässige und aktuelle Informationen zu liefern, können wir nicht garantieren, dass diese Informationen so zutreffend sind wie zum Zeitpunkt ihres Eingangs oder dass sie auch in Zukunft so zutreffend sein werden. Niemand sollte aufgrund dieser Informationen handeln ohne geeigneten fachlichen Rat und ohne gründliche Analyse der betreffenden Situation. Unsere Leistungen erbringen wir vorbehaltlich der berufsrechtlichen Prüfung der Zulässigkeit in jedem Einzelfall.

© 2020 KPMG AG Wirtschaftsprüfungsgesellschaft, ein Mitglied des KPMG-Netzwerks unabhängiger Mitgliedsfirmen, die KPMG International Cooperative („KPMG International“), einer juristischen Person schweizerischen Rechts, angeschlossen sind. Alle Rechte vorbehalten. Der Name KPMG und das Logo sind eingetragene Markenzeichen von KPMG International.