



Use Case: Coupa Purchase-2-Pay

February 2021

Table of Contents

1.	Preparation	3
1.1.	Outcome	3
1.2.	Characters	3
1.3.	Products and Platform Features	4
1.4.	Steps before using Coupa Purchase-2-Pay	4
2.	Use Case: Coupa Purchase-2-Pay	5

1. Preparation

1.1. Outcome

Coupa Procure-to-Pay offers a single procurement software solution to procure all goods and services. You will achieve full visibility, control and management for procurement spend while save your employees valuable time. With Coupa Procure-to-Pay you simplify requisition and order processes and be able to track them in real-time. The procurement software guides your employees across the buying process, surfacing preferred products and services to alert employees to discounted pricing. With Coupa you can compare items across all of your suppliers for punchout and hosted catalogs. Speed up your approval process with email and mobile approvals. Everyone in the approval chain can check and approve the status of purchasing.

Within our demo we will guide you to through the entire P2P process. It will start with a requisition of a good, the approval of request and the approval of the supplier.

1.2. Characters

Name	User Role/ Personal	Login ID	Password
Demo User	Requestor	Demo User	demouser
Demo Lieferant	Supplier (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 P2P	Coupa Purchase-2-Pay		

1.4. Steps before using Coupa Supplier Management

- Log-in as **Demo User** (Username: Demo User, Pw: demouser) <https://kpmg-ger-many.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, Pw: demouser). Ensure to use a different browser as your log-in at Coupa system. (use Google Chrome).

2. Use Case: Purchase-2-Pay

Use case description:

Coupa Supplier Management helps buyers to achieve full visibility, control and management for procurement spend while save your employees valuable time. The procurement software guides your employees across the buying process, surfacing preferred products and services to alert employees to discounted pricing.

Let's look at how Demo User can use Coupa Purchase-2Pay to manage this process.

Persona:

Demo User – Requestor

Supplier – Demo Lieferant

Demonstration Steps:

Frame	Narrative	Instructions
Search a Product to Purchase	<p>Before using Coupa P2P you must log in as a buyer into your Coupa system (Username: Demo User, pw: demouser).</p> <p>To purchase a good in Coupa search for 'laptop' and click enter. Now you can choose the 'Standard Laptop – Lenovo T440'.</p> <p>Set Qty = 1 and add to cart</p>	<p>Log-In as Demo User (use Internet Explorer)</p> <p>Type 'laptop' in the search bar and choose 'standard laptop – Lenovo T440'</p> <p>Choose Qty =1 and click 'Add to Cart'</p>
Write a Request	<p>To write a request within Coupa you must click 'Write a Request' below the search bar</p> <p>You must fill in all mandatory fields (Name of product: charging cable, select Item, choose supplier: Demo Lieferant, unit price quantity etc.)</p> <p>Open your shopping cart to review your items</p>	<p>Click 'Write a Request'</p> <p>Fill in all mandatory fields</p> <p>Place your cursor on the shopping cart</p>

	<p>Set your shipping address in general info</p> <p>Set Billing: Choose Chart of Accounts: Company 100 Company: Us (100) AcctCat: Order</p> <p>To submit your order, click 'Submit for Approval</p>	<p>icon and click 'review Cart'</p> <p>Set shipping address while clicking on magnifier. Choose first entry of the list</p> <p>Set Billing</p> <p>Click 'Submit for Approval'</p>
Approve Requisition	<p>To submit the requisition of items open 'Requests' in the menu bar.</p> <p>You will find your request in the requisition list. To approve your order. Scroll down and click 'Bypass Approvals and Order</p>	<p>Click 'Requests' in menu bar</p> <p>Click 'Edit' (Pencil icon of your requisition</p> <p>Scroll down and click 'Bypass Approvals and order'</p>
Approve requisition (Supplier)	<p>Log-in into Coupa supplier portal (choose different browser as your Coupa Log in)</p> <p>(Email: testcoupa2021@gmail.com, pw: coupatest2021)</p> <p>Click 'Orders' to see your incoming orders and open the order with the order number</p> <p>Click the tick box 'confirmed' and click save. Review your approval</p>	<p>Log in into Supplier Portal (Use Google Chrome)</p> <p>Click 'order' and open the new order</p> <p>Click tick box 'confirmed' and click save</p> <p>Review your approval while clicking 'orders' and check if order is approved</p>
Requestor receive goods	<p>The requestor receives goods and must update this in Coupa.</p> <p>Therefore click 'orders' and search your order with its order number</p>	<p>Go back to Coupa and click 'orders' in the menu bar</p> <p>Search your order (search for order number)</p>

	Open your order and scroll down to click 'receive' and click save afterwards	Open order and scroll down to click 'received' and 'save' afterwards
Review status	To review the status of your order click 'Requisition' and search for your order	Click 'Requisition' Click your order number Double check if status 'receive'

Contact

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

aklesing@kpmg.com

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.