



# Use Case: Coupa Sourcing

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# 1. Preparation

## 1.1. Outcome

Coupa enables the best sourcing opportunities to drive the most value for your business. With strategic sourcing you be able to run any type of sourcing event, from the most routine to the most complex. To turn negotiated savings into realized savings Coupa's strategic procurement solutions help you to minimize off contract spend via a completely connected buying process. Coupa helps you identify sourcing opportunities via complete visibility into PO, invoice and expenses spend.

With a 360 degree view you can make well informed sourcing decisions because of unprecedented visibility into all your companies spend. With Coupa's intuitive and user-friendly experience employees are empowered to collaborate anywhere on any device with everyone from global to the smallest supplier. Connect sourcing to purchasing by intelligent tracking all your business spends across contracts, travel and expenses, invoicing and procurement.

Within our demo we will guide you through the sourcing process starting with the creation of an RFP template, inviting suppliers and receiving bids for our request. We will analyze the event and award it to a supplier.

## 1.2. Characters

Name	User Role/ Personal	Login ID	Password
Demo User	Sourcing Manager	Demo User	demouser
Test Lieferant 1234	Supplier	Democoupa2021@gmail.com	coupademo2021

## 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 Sourcing	Coupa Sourcing event		

## 1.4. Steps before delivering a Coupa Sourcing demo

- Log-in as **Demo User** (Username: Demo User, Pw: demouser). <https://kpmg-ger-many.coupacloud.com/sessions/new> (use Google Chrome)
- 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: [democoupa2021@gmail.com](mailto:democoupa2021@gmail.com), Pw: coupademo2021). Ensure to use a different browser as your log-in at Coupa system. (use internet explorer).

## 2. Use Case: Sourcing Event

### Use case description:

The process of bringing together all the potential suppliers, defining the need such as quantity and related terms and conditions and leverage the company's purchasing power to generate more savings by competitive bidding is known as Sourcing Event. During this use case we show how to proceed if you want to source a new item from a potential supplier.

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

### Persona:

**Demo User – Buyer**

**Test supplier – Supplier**

### Demonstration Steps:

Frame	Narrative	Instructions
Logon and first step of create new event	<p>Log-in into Coupa</p> <p><a href="https://kpmg-germany.coupacloud.com/sessions/new">https://kpmg-germany.coupacloud.com/sessions/new</a></p> <p>The <b>Coupa Home screen</b> is the first picture we see</p> <p>If you want to start a sourcing event you have to select "Sourcing" in the menu bar.</p> <p>Afterwards you have to click 'create event</p>	<p><b>Use Google Chrome</b></p> <p>Logon as <b>Demo User</b></p> <p>Click <b>Create Event</b></p>
Settings for sourcing event	<p>First the sourcing manager must fill in the required basic settings for the new sourcing event.</p> <p>Therefore, set the event's name and currency.</p> <p>(Your buyer logo is visible for the supplier in the email invitation).</p> <p>Before starting a sourcing event you as creator must link your terms and conditions to protect your company's position.</p>	<p>Set the basic settings</p> <p>Enter a sourcing event name</p> <p>Set the currency</p> <p>Link your company's terms &amp; conditions</p>

	<p>To upload your T&amp;C click on 'file' to upload them and ensure you've ticked the box 'send to supplier'.</p> <ul style="list-style-type: none"> <li>➔ The T&amp;C's will be sent to the supplier by Coupa.</li> <li>➔ Before the supplier can take part of the sourcing event, he must confirm your T&amp;C's</li> <li>➔ The supplier can accept or decline the T&amp;C's</li> </ul>	<p>Upload T&amp;C as document, URL or as text</p> <p>Upload dummy file</p>
Set Timeline	<p>The event's creator must set a timeline for the sourcing event.</p> <p>Please enter a 'event time zone', 'starting time' and 'ending time'.</p> <p>You could start the event upon submit if you tick the 'start event upon submit' tick box</p>	<p>Choose a timeline for your sourcing event</p> <p>Set 'starting time'</p> <p>Set 'ending time'</p> <p>Select 'start event upon submit'</p>
Details	<p><b>Item creation</b></p> <p>It is recommended that, if needed, item-specific images and additional information that might be useful for the supplier to understand your requirements be attached in this section.</p> <ul style="list-style-type: none"> <li>➔ Therefore, you need to tick the 'send to supplier' box.</li> </ul>	<p>Click 'Add new'</p> <p>Select 'New item'</p> <p>Create items and fill in all mandatory fields</p>
Supplier	<p>Suppliers doesn't have to be in the system to add them.</p> <p>Click 'Add Supplier' and click on 'Add New'.</p> <p>Enter the suppliers company name, contact name and email address.</p> <p>Afterwards the supplier is added to the supplier list.</p>	<p>Add supplier</p> <p>Click 'Add Supplier'</p> <p>Select 'Add new supplier'</p> <p>Enter company name and contact name</p> <p>(Supplier name: <b>Test 1234</b>)</p> <p>Click 'save'</p>
Submit	<p>The last Step is to submit the event.</p> <p>Therefore click 'submit event'.</p> <p>Afterwards you will still have a chance to confirm your suppliers list and write a custom message to the suppliers.</p>	<p>Click 'Submit Event'</p> <p>Write an invitation to the suppliers and review your event information</p>

	<p>The next step is to write a custom invitation to the suppliers and reviewing the event timelines and the supplier list.</p> <p>Click 'Submit Event' to send a notification with the event invitation to all suppliers.</p>	<p>Click 'Submit Event'</p>
<p>Supplier receive event</p>	<p>Supplier receive an email from buyer with an invitation to participate in an upcoming RFI/RFQ/RFP event.</p> <p>Login as supplier to your e-Mail inbox. (<a href="mailto:democoupa2021@gmail.com">democoupa2021@gmail.com</a>, Pw: coupademo2021)</p> <p>The supplier can access the event through the invitation link by following the instructions mentioned after clicking the link.</p> <p>Once the supplier clicks on the invitation link, suppliers need to set up their password. (To set their password is only necessary if you login for the first time).</p> <p>Suppliers can use the same log-in credentials for further events.</p> <p>While log-in to your sourcing respond portal, you will find all your sourcing events.</p> <p>You can only respond within event start date and event end date.</p> <p>The supplier must tick the checkbox for either accepting or rejecting each terms and conditions document and provide a comment if rejected.</p> <p>The response can be amended until the event ends.</p> <p>Now the supplier can view the attachments.</p>	<p>Supplier receives invitation link via email</p> <p>Supplier log-in into email inbox (change browser)</p> <p>Click on the link from Coupa</p> <p>Create password or log-in with your log-in data</p> <p>Response Portal</p> <p>Click Accept T&amp;C's</p>
<p>Supplier responds to the event</p>	<p>The 'Enter Response' button will only become active after the supplier accept your terms and conditions.</p> <p>Suppliers can add multiple attachments to their responses.</p> <p>The attachments can be made mandatory by the buyer when submitting the event.</p> <p>Suppliers communicate with buyers via the message center and it's only possible while the event is running.</p>	<p>Click 'Enter Response'</p> <p>Add Attachments if necessary</p>
<p>Supplier submits response</p>	<p>Supplier can export response and enter the information into an Excel sheet</p>	<p>Export to Excel and enter your data</p> <p>Import from Excel</p>

	<p>To submit the response to buyer, the supplier can import from Excel.</p> <p>If the supplier clicks 'submit response to buyer' the system will notify the buyer of the supplier's response.</p>	<p>Click 'Submit response'</p>
<p>Award event</p>	<p>To see the response status as Buyer you must click 'Responses' in your sourcing event.</p> <p>Afterwards select 'create view' in the drop-down menu to create a new data table view. Drag and drop the right columns to 'selected columns. To award the event choose 'response status'.</p> <p>Afterwards select 'awarded ...' to initiate the awarding either for all items or selected ones, then click on their response to award.</p>	<p>Log-in into Coupa as <b>Demo User</b></p> <p>Click 'Sourcing' afterwards click 'response items'</p> <p>Create new data table view</p> <p>Drag 'Response status' to 'selected columns'</p> <p>Select 'Awarded...' to initiate the awarding</p> <p>Click on the supplier's response to award</p>
<p>Flip award into contract / etc.</p>	<p>The buyer needs to act on the awarded item by either:</p> <ul style="list-style-type: none"> <li>- Adding the items/goods/services to an existing requisition or new requisition</li> <li>- Adding to a catalogue</li> <li>- Adding to a catalogue with a new contact</li> </ul> <p>If selecting 'Add to Catalogue' or 'Add to Catalogue with Contract' Coupa will direct you straight into a contract record for completion.</p>	<p>Act on the rewarded item</p> <p>Click on drop-down menu and choose your next step</p> <p>Click 'Add to catalogue' or 'Add to catalogue with contract'</p> <p>The Item is added to the catalogue now.</p>



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