



Use Case: Coupa Supplier Management

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1. Preparation

1.1. Outcome

Coupa Supplier Management helps buyers to maximize the value of supplier relationships and mitigate third party risk. Give suppliers a single place to go from simple onboarding to deep assessment. Automatically follow up on missing information to streamline the back office. Also combine multi-domain/tier risk assessments, performance and community insight to spot threats and quickly respond by halting transactions as needed.

Coupa Supplier Management gives decision-makers across the company insights at the point of decision to buy from the right suppliers and optimized processes. It also enables automated email and paper invoice capture to an easy portal and cXML for the most strategic suppliers without any fees. Through AI you can monitor risk and performance continuously.

Within our demo we will guide you through the supplier life cycle process starting with the supplier registration update supplier information internally and request for supplier information.

1.2. Characters

Name	User Role/ Personal	Login ID	Password
Demo User	Requestor	Demo User	demouser
Demo User	Approver	Demo User	demouser
Test1234	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 SIM	Coupa Supplier Management		

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 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, Pw: coupademo2021). Ensure to use a different browser as your log-in at Coupa system. (use internet explorer).

2. Use Case: Supplier Management

Use case description:

Coupa Supplier Management helps buyers to maximize the value of supplier relationships and mitigate third party risk. Give suppliers a single place to go from simple onboarding to deep assessment. Automatically follow up on missing information to streamline the back office. Also combine multi-domain/tier risk assessments, performance and community insight to spot threats and quickly respond by halting transactions as needed

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

Persona:

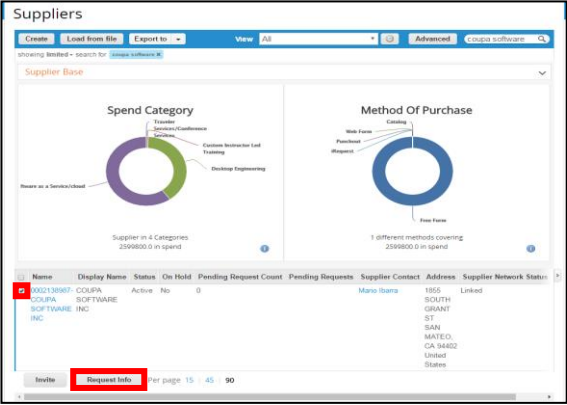
Demo User – Requestor

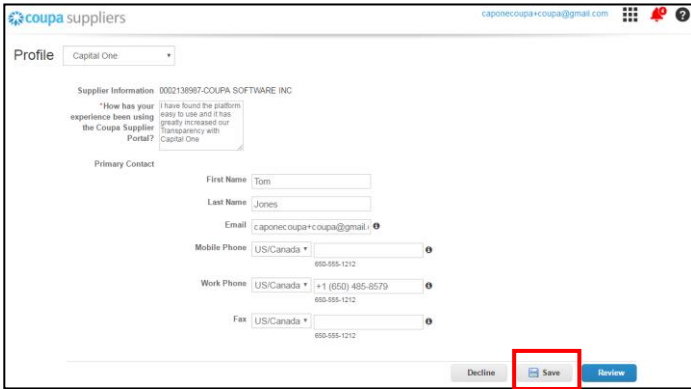
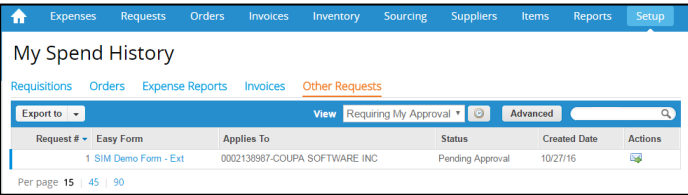
Demo User – Approver

Supplier – Test Supplier

Demonstration Steps:

Frame	Narrative	Instructions
Create and register new Supplier	<p>Buyers can create new suppliers and update their information in Coupa.</p> <p>To create a new supplier, follow the steps below:</p> <ul style="list-style-type: none"> - After Log-in into Coupa you click on supplier in the menu bar. <p>To create a new supplier, click supplier click 'create new supplier' (please note: you must create a new email address to create a new supplier)</p> <ul style="list-style-type: none"> - Fill out this form to create a new supplier. If all mandatory fields are filled in click 'save' <p>The supplier receives an email with a link.</p> <ul style="list-style-type: none"> - Log in as supplier <p>Click the link 'Join Coupa' to register in Coupa Supplier Portal</p>	<p>Log-In as Demo User (use Google Chrome)</p> <p>Click 'Supplier' in the menu bar</p> <p>Click 'Create new supplier'</p> <p>Enter supplier's data</p> <p>Click 'Save'</p> <p>Log-in into supplier email (use internet explorer)</p>

	<ul style="list-style-type: none"> - Enter your password for the Coupa Supplier Portal 	<p>Click the link in the email inbox</p> <p>Create Account in Supplier Portal</p>
<p>Update supplier information internally</p>	<p>Buyers are also able to update Suppliers internally and send update requests to the supplier.</p> <p>Internal Update:</p> <ul style="list-style-type: none"> - Click 'Supplier' in the menu bar - Select supplier you want to update - Click 'Edit' and update the supplier's information 	<p>Update Supplier information internally</p> <p>Click 'Supplier' in the menu bar</p> <p>Click 'supplier information'</p> <p>Select supplier (search for Test 1234)</p> <p>Scroll down and click 'Edit' and update supplier's information</p> <p>Click 'Save'</p>
<p>Requesting Information</p>	<p>Click on a Supplier</p> <ul style="list-style-type: none"> - Information requests are triggers just like Supplier portal invites, by selecting a checkbox next to the supplier name - You can send 90 requests at a time - Once suppliers are selected you must configure an email and choose the 'Easy Form' that you would like to send - The email serves as an invite to the Coupa supplier portal - Suppliers can <u>only</u> Submit information responses through the portal 	<p>Click on Supplier in the menu bar</p> <p>Choose a supplier you would like to request</p> <p>(supplier name: Test 1234)</p> <p>Click tick box next to supplier</p> <p>Scroll down</p> <p>Click 'request info'</p> <p>Select Supplier information Form: Group3_Supplier_Update_Ex</p>

	<p>(democoupa2021@gmail.com, Pw: coupademo2021)</p> <ul style="list-style-type: none"> - Supplier that are already on the portal can log in and see a notification prompting them to fill out the information request - Suppliers can choose to decline the request even if there are required fields. - The record would then show on the supplier info Form Response table with a status 'Declined' 	<p>Supplier will receive an email with a link to the Coupa Supplier Portal</p> <p>Log-in into supplier's email (internet explorer)</p> <p>Log-in into Coupa Supplier Portal</p> <p>Click 'Notification'</p> <p>Click 'Information request'</p> <p>Fill in your information</p> <p>Click 'Submit for approval'</p>
<p>Requesting Information and Approving</p>	<p>Users with access to the 'Supplier Info Form Response' table will be able to see the status of individual supplier information requests</p> <ul style="list-style-type: none"> - Approvals are configured for SIM exactly how they are configured for requisition and invoices - Approvers receive notifications on the home page, my spend history, and via email just like any other approval 	<p>Log-in as Demo User (Google Chrome)</p> <p>Message on the home screen shows up 'recent activity'</p> <p>Click 'Supplier Update'</p>

SIM Demo Form - Ext (Pending Approval)

Supplier Information: 0002138987-COUPA SOFTWARE INC

*How has your experience been using the Coupa Supplier Portal? I have found the platform easy to use and it has greatly increased our Transparency with Capital One.

Primary Contact

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Doug Poucher (10/27/16 11:21 AM) → Adm Smith

Approval Comments

Scroll down and approve supplier update

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