

February 2020

Coupa Requester Training



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Overall Goal of the Coupa Project

- To provide Wish employees with the tools to purchase goods and services in an efficient and cost-effective manner. These tools will support the workflow on a global basis and provide oversight for the company's expenditures from both a finance and business



Procurement & Expense Policy Update

Phase 1: Coupa P2P system for Indirect Purchase

- Indirect Purchases: Items or services that you need to do your job effectively e.g. laptop, office supplies, marketing materials, professional services, etc.
- Phase 1 - US & Canada
- All indirect spend must be processed (requested and approved) in Coupa from February 24th, 2020



Background

- Coupa is a Procure-2-Pay solution utilized for most indirect spend purchasing needs
- Coupa will be utilized for goods & service items such as laptops, swag, office supplies or professional services



Identify

Identify a good or service you need to purchase.



Create

Create a Purchase Requisition in Coupa and fill in relevant fields



Approve

Management reviews and approves



Issue

Procurement issues a Purchase Order directly to the supplier so



Approve

Requestor receives notice to approve in Coupa



Payment







Payment is issued to supplier after Invoice is processed and exported to NetSuite



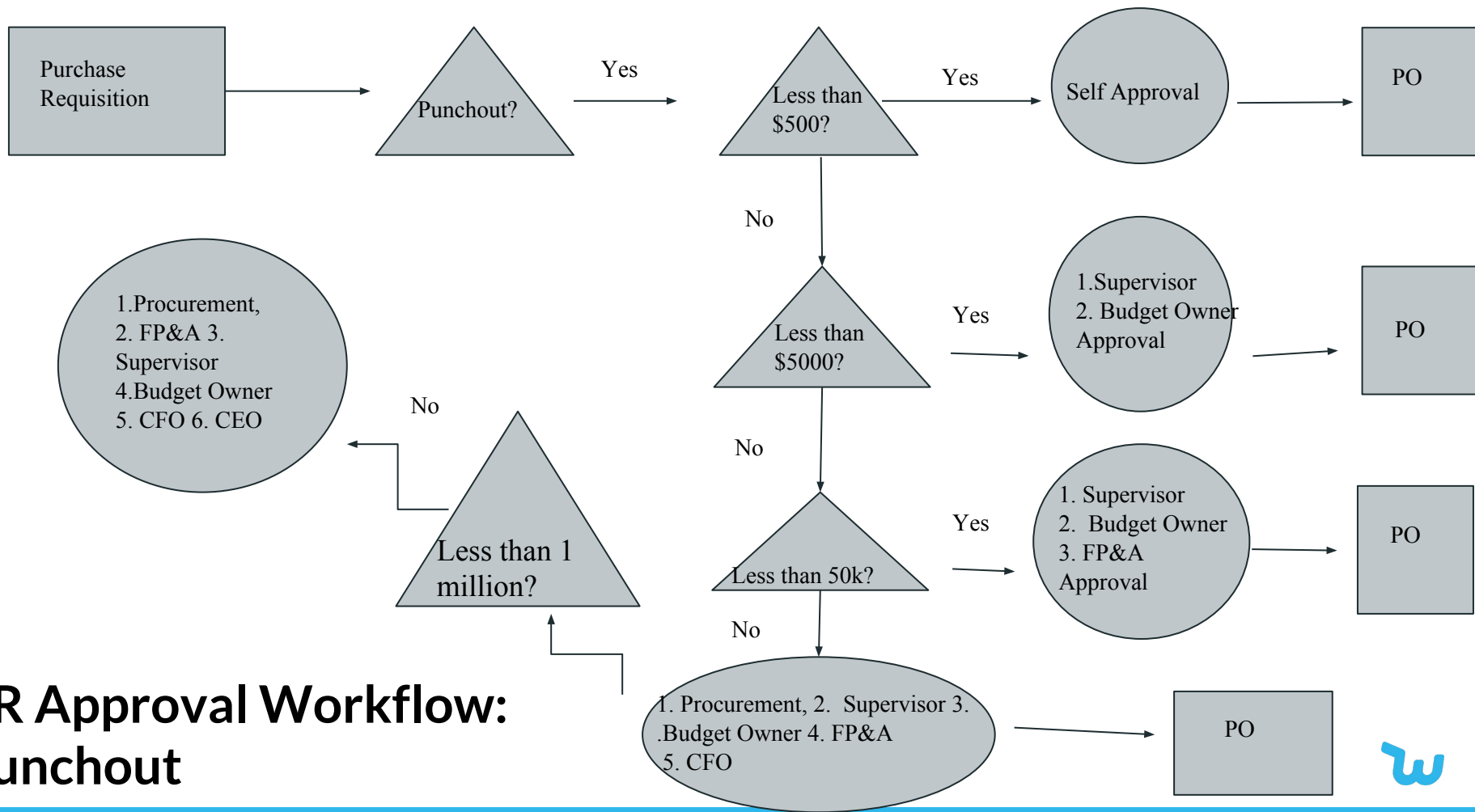
Definitions

- **Requisition:** A request for goods and / or services from one or many suppliers (like when you are adding items into a cart when online shopping on Amazon). It is a request for spend/purchase for business purposes. A requisition can either be a Qty based (number of units X base price) or Amount based (total amount)
- **Purchase Order (PO):** Once the requisition has been fully approved by all parties in the workflow, one PO will be issued per supplier.
- **Invoice:** The supplier will issue an invoice against the PO they received. An invoice can be partial or in full and may require approval.

What's Changing?

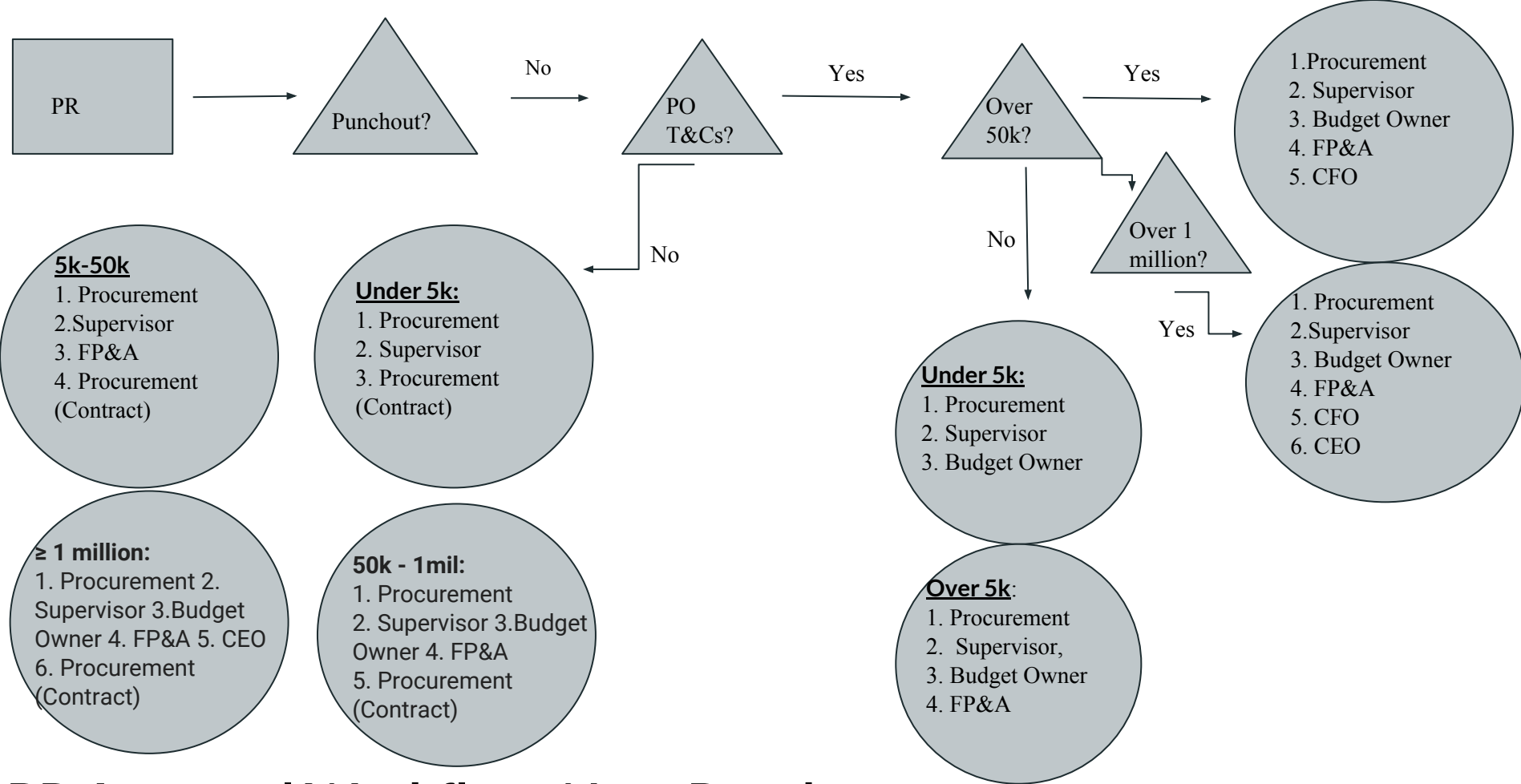
Process		Current State	Future State
New Vendor Onboarding		<ul style="list-style-type: none">Employee provides new vendor forms via email to procurement@wish.com	<ul style="list-style-type: none">Employee uses New Supplier Request form in Coupa
Request for Purchase		<ul style="list-style-type: none">N/A	<ul style="list-style-type: none">Requisition is created through Coupa for ALL indirect spend (within procurement policy)
PO Issued		<ul style="list-style-type: none">Purchase Order created after the fact to match invoice	<ul style="list-style-type: none">Purchase Order delivered to the vendor automatically when the requisition is approved
Supplier Invoicing		<ul style="list-style-type: none">accountspayable@wish.com receives invoice via email; manual entry into NetSuite	<ul style="list-style-type: none">Vendor submits invoice directly to Coupa using a supplier portal (free to use) or via email
Invoice Approval		<ul style="list-style-type: none">Employee approves via Email	<ul style="list-style-type: none">Employee approves in Coupa and vendor receives notice of approval
Supplier Payment Information		<ul style="list-style-type: none">Wish pays the vendors	<ul style="list-style-type: none">Wish pays the vendor - Coupa updates with payment date, status, and amount. Vendor receives notice of payment





PR Approval Workflow: Punchout

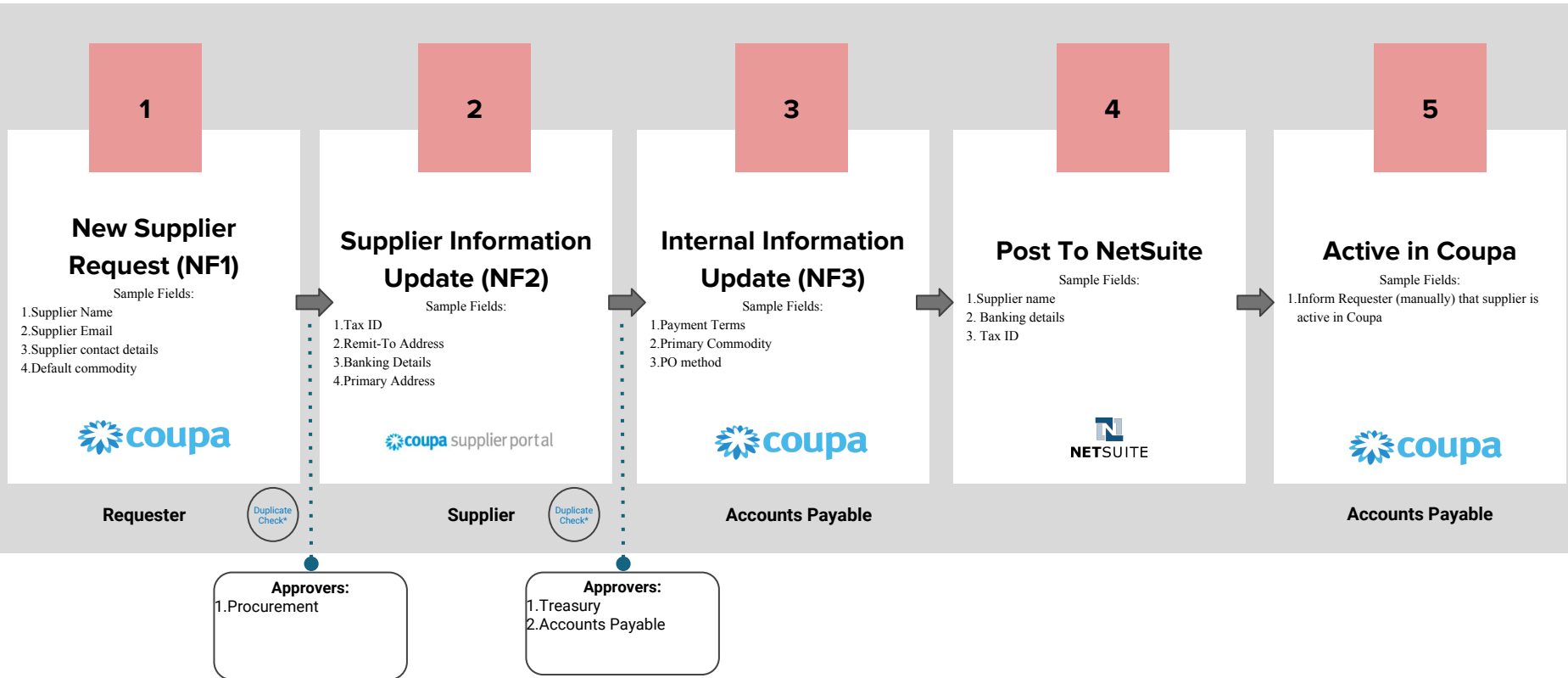




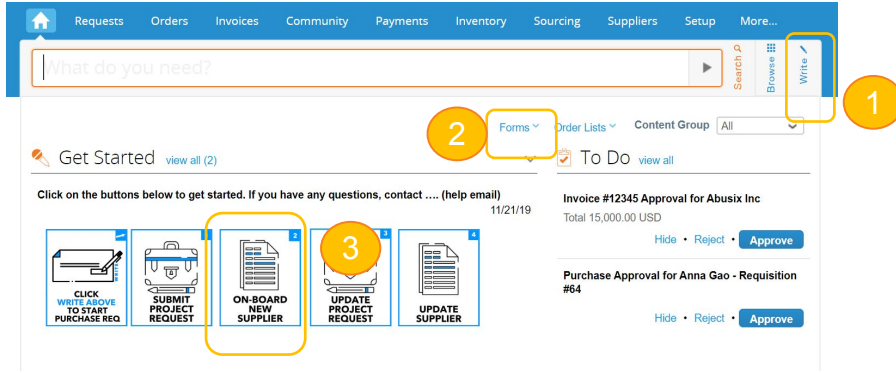
PR Approval Workflow: Non -Punchout



SIM Process



Step 1: Within Coupa use the homepage button to “On-board New Supplier”



1. Use the ‘Write’ button to start a new PR line. You can use this to determine if the supplier already exists in Coupa
2. There’s a ‘Forms’ drop down with all the Forms you need in Coupa including requesting a new supplier
3. On the homepage, there’s a button to “on-board new supplier” too!

Step 2: Complete the New Supplier Onboarding Form. After completing the form, a request for information will be sent to the supplier.

A screenshot of the "New Supplier Onboarding (NF1-v006)" form. The form has a blue header with the title "New Supplier Onboarding (NF1-v006)". Below the header is a red circle with the number 1. The main heading is "ON-BOARD A NEW SUPPLIER" in bold. Below the heading is a red text prompt: "Submit a request to on-board a new supplier you already have in mind!". Below this is a paragraph: "The New Supplier Form is a request to onboard a new supplier to Wish in order to do business with them." Below the paragraph is a text input field with the placeholder text "If you have any questions, please contact coupahelp@wish.com". Below the text input field is a section titled "Preliminary Details". Below "Preliminary Details" is a form field labeled "* Supplier Owner" with a "Select" dropdown menu. Below the dropdown menu is a small text prompt: "Wish employee who will be the primary point of contact for supplier". Below the form field is a question: "* Have you received a signed NDA from the supplier?" with two radio button options: "Yes" and "No".



Step 3: Supplier receives request for information and updates via Coupa Supplier Portal.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The 'Profile' tab is selected, and the user is logged in as 'RHIAN'. The main content area displays 'Supplier Information' for 'Riot Games, Inc.' and 'Preliminary Supplier Details'. The details form includes fields for Legal Name (Rhian Brewster Consulting), Display Name or DBA, and Parent Company Name. A red asterisk indicates required fields.

The screenshot shows the 'Remit-To Address Lines' form. It includes a section for 'New Remit-To Address Details' with fields for Street Address, Street Address 2, Zip Code, City, State, and Country. Below this is a section for 'Banking Details (International Suppliers Only I.e. Outside US & Canada)' with a field for Bank Name.

The vendor receives a request for information with required information such as:

- Relationship with Riot
- Contact information
- Address
- W9 attachment
- Federal Tax ID
- Remit to Address

Step 4: Accounts Payable will perform final review

Step 5: End Users get notice of request approval via Coupa comment on request form and can view status via Activity in Coupa

The screenshot shows the Coupa Activity page. The top navigation bar includes Requests, Orders, Invoices, Community, Payments, Inventory, and Sources. The 'Requests' tab is selected, and the user is logged in as 'LAUREN'. The main content area displays a list of requisitions. A red circle highlights the 'Forms' tab in the navigation bar. A red circle highlights the 'Activity Groups' dropdown menu in the top right corner.

Req #	Requested By	Submitted On	Status	Items	Total	PO ID	Actions
64	Anna Gao	01/16/20	Pending Approval	Marketing Services from Archer's Mark International Limited for 10,000.00 USD	10,000.00 USD		
27	Lauren Bennett	11/22/19	Pending Approval	Marketing Services from Lauren supplies for 250,000.00 USD	250,000.00 USD		
23	Sid Singh	12/11/19	Pending Approval	Test from Archer's Mark International Limited for 444,444.00 USD	444,444.00 USD		

Status	Description
Draft	Form has been saved, but not submitted to the supplier for information request.
Applied	Form has been delivered to vendor and is pending internal approval Please Note: This status can pertain to internal requests and external requests
Declined	The form has been rejected.





Coupa Demonstration



Key Dates & Next Steps

Activity	Date
End-user Training Training sessions held in San Francisco, CA w/virtual sessions available and recorded	
Coupa Go-live (Phase 1): US & Canada Any new request for goods or services effective Monday, February 24th must have a Purchase Request submitted in Coupa	
Coupa Office Hours / Post-go-live support The Purchasing and AP teams are available for questions or additional training at Wish's global headquarters in San Francisco, CA	



Help Resources

- Coupa Test URL: <https://wish-test.coupahost.com>
- Wish Coupa Wiki Site: TBD

