

# 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

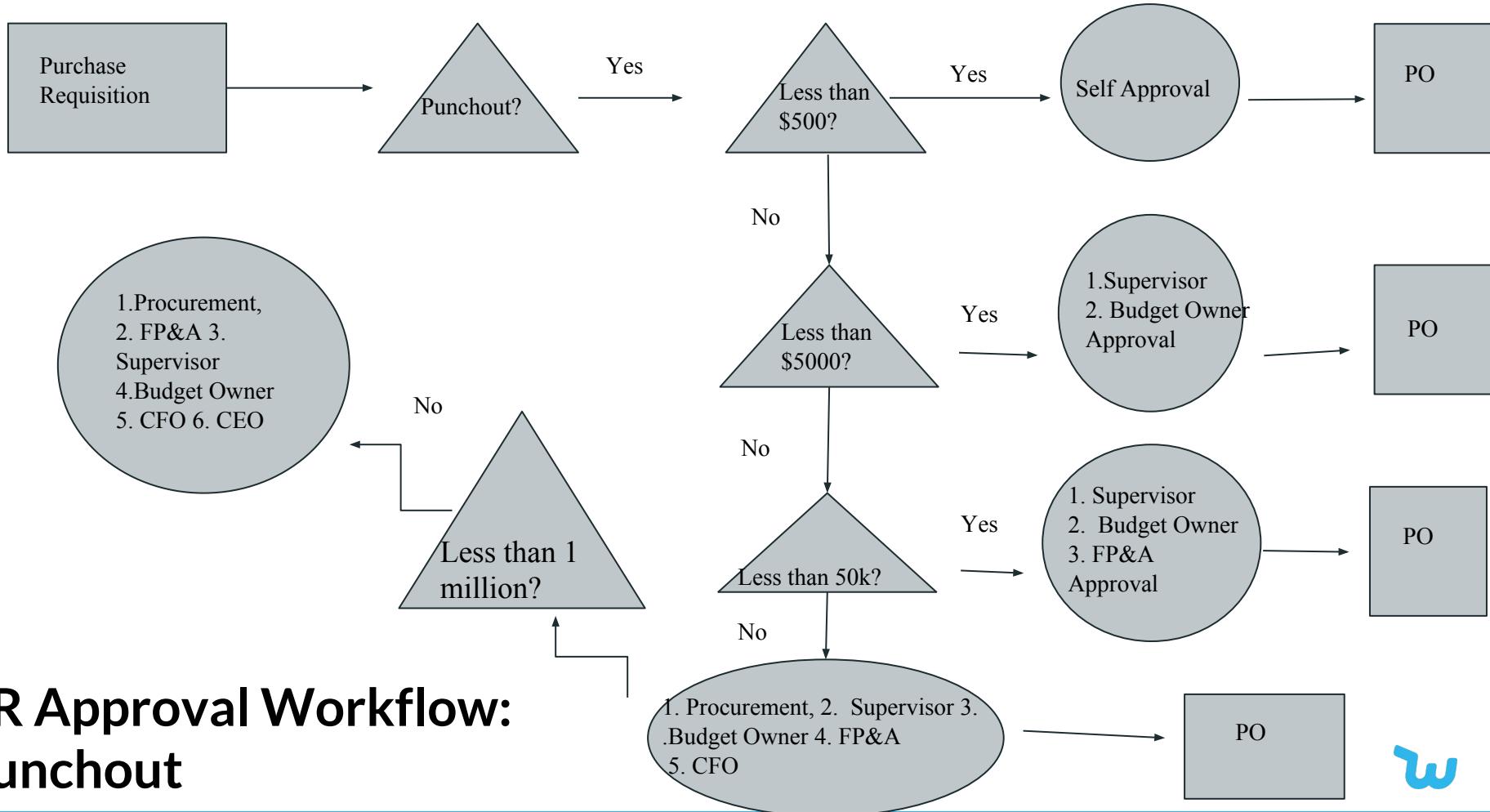
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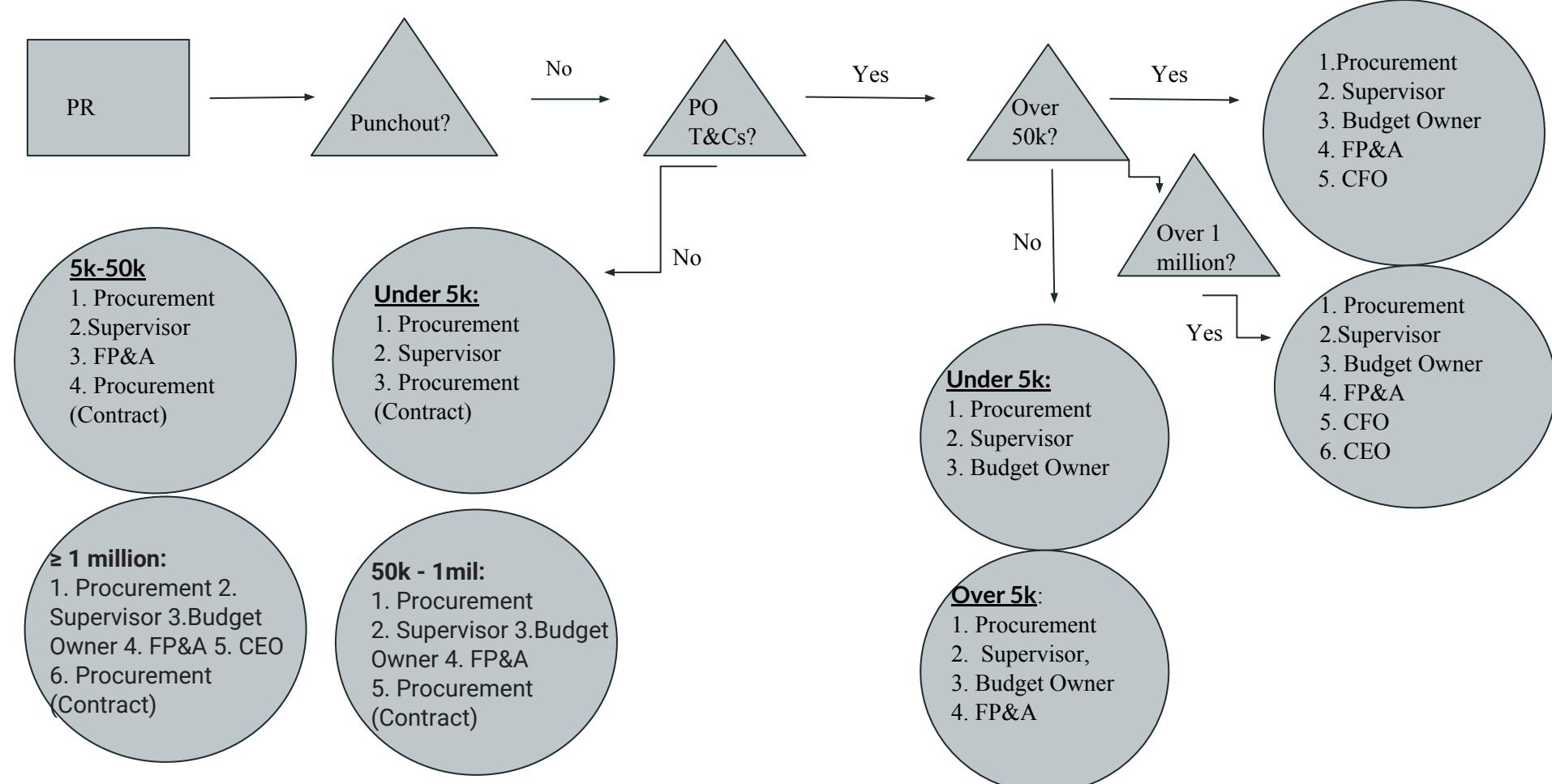
- **Requisition:** A request for goods and / or services from one or many suppliers (like when you are adding items into a cart when online shopping on Amazon). It is a request for spend/purchase for business purposes. A requisition can either be a Qty based (number of units X base price) or Amount based (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?

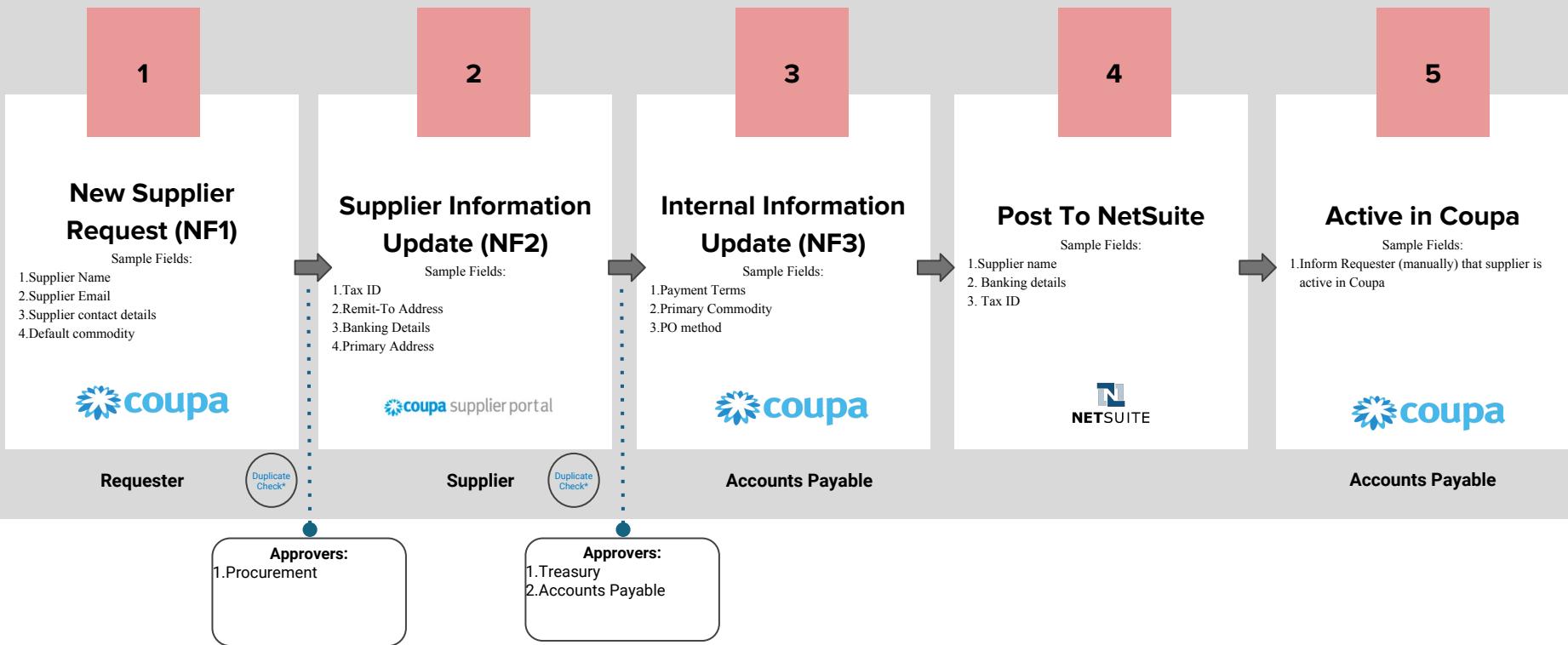
Process	Current State	Future State
New Vendor Onboarding	 <ul style="list-style-type: none"><li>Employee provides new vendor forms via email to <b>procurement@wish.com</b></li></ul>	<ul style="list-style-type: none"><li>Employee uses New Supplier Request form in Coupa</li></ul>
Request for Purchase	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







# SIM Process



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

The screenshot shows the Coupa homepage with several key elements highlighted:

- Top Navigation:** Requests, Orders, Invoices, Community, Payments, Inventory, Sourcing, Suppliers, Setup, More...
- Search Bar:** What do you need? (highlighted with a yellow circle)
- Header Buttons:** Write (highlighted with a yellow circle), Forms (highlighted with a yellow circle), Order Lists, Content Group All.
- Get Started:** view all (2) (highlighted with a yellow circle).
- To Do:** view all (highlighted with a yellow circle).
- Invoice Approval:** Invoice #12345 Approval for Abusix Inc, Total 15,000.00 USD, Approve button.
- Purchase Approval:** Purchase Approval for Anna Gao - Requisition #64, Approve button.
- Buttons on the left:** CLICK WRITE ABOVE TO START PURCHASE REQ, SUBMIT PROJECT REQUEST, ON-BOARD NEW SUPPLIER (highlighted with a yellow circle), UPDATE PROJECT REQUEST, UPDATE 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.

The screenshot shows the 'New Supplier Onboarding (NF1-v006)' form:

**ON-BOARD A NEW SUPPLIER**  
Submit a request to on-board a new supplier you already have in mind!

The New Supplier Form is a request to onboard a new supplier to Wish in order to do business with them.

If you have any questions, please contact coupahelp@wish.com

**Preliminary Details**

\* Supplier Owner:  Wish employee who will be the primary point of contact for supplier

\* Have you received a  Yes signed NDA from the  No supplier?



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

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The user is currently on the Profile page, which displays "Riot Games, Inc." in the dropdown menu. Below the navigation, there's a section titled "Supplier Information" with "Rhian Brewster Consulting" listed. Under "Preliminary Supplier Details", there are fields for Legal Name (Rhian Brewster Consulting), Display Name or DBA (Doing business as name), and Parent Company Name. A yellow box highlights the "Legal Name" field.

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

This part of the screenshot shows the "New Remit-To Address Details" section. It includes fields for Street Address, Street Address 2, Zip Code, City, State, and Country. Below this, there's a "Banking Details (International Suppliers Only i.e. Outside US & Canada)" section with a note about accepting electronic payments from non-US/Canada based suppliers. A yellow box highlights the "Street Address" field.

### 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 feed. At the top, there's a navigation bar with links for Requests, Orders, Invoices, Community, Payments, Inventory, Source, and more. A yellow circle with the number "1" is on the user profile icon. Below the navigation, there's a search bar with the placeholder "What do you need?". Under "Activity", there's a table of pending approvals. The first row shows a requisition from Anna Gao on 01/16/20, pending approval for Marketing Services from Archer's Mark International Limited for 10,000.00 USD. A yellow box highlights the "Forms" tab in the navigation bar. A yellow circle with the number "2" is on the "Status" column header. The table has columns for Req #, Requested By, Submitted On, Status, Items, Total, PO ID, and Actions.

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 <b>and</b> external requests
Declined	The form has been rejected.





# Coupa Demonstration

# Key Dates & Next Steps

Activity	Date
<b>End-user Training</b> Training sessions held in San Francisco, CA w/virtual sessions available and recorded	
<b>Coupa Go-live (Phase 1): US &amp; Canada</b> Any new request for goods or services effective Monday, February 24th must have a Purchase Request submitted in Coupa	
<b>Coupa Office Hours / Post-go-live support</b> 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

