Contents

What are Bundled Solutions?

Coupa Bundled Solutions are standardized implementation packages for QuickBooks Online and NetSuite customers that incorporate best practices for maximizing value from the Coupa Business Spend Management platform. Additional ERPs to be added in 2022.

COUPA BUNDLED IMPLEMENTATION SOLUTIONS

intuit quickbooks Online

NETSUITE

Target Audiences & Coupa Modules

Coupa Bundled Solutions are designed for Corporate Services and Mid-Market customers who are interested in adopting standardized implementation packages based on best practices. These packages fit into three different bundles based on modules purchased by the customer.

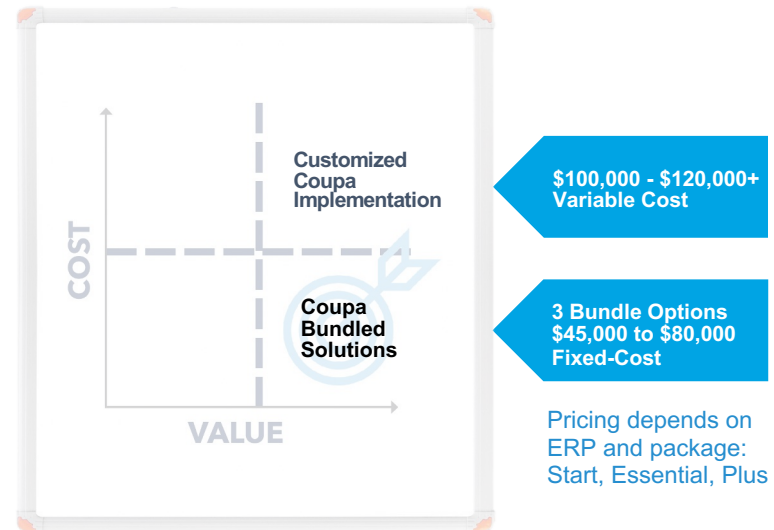| ⏻ START	⊞ ESSENTIAL	PLUS
Coupa Core (Includes Purchase-to-Pay)	Coupa Core RPMS Coupa Pay Digital Payments	Coupa Core RPMS Coupa Pay Digital Payments and Virtual Cards

4

Advantages for Customers

Fit-for-Purpose: Includes everything that 90% of new Coupa customers need to succeed.

Fixed-Cost: Standardized packages eliminate variable costs associated with customized implementations.

Faster: Get your Coupa platform up and running in 10-12 weeks, 4-6 weeks faster than most customized implementations.

COST

Customized Coupa Implementation

Coupa Bundled Solutions

VALUE

$100,000 - $120,000+ Variable Cost

3 Bundle Options $45,000 to $80,000 Fixed-Cost

Pricing depends on ERP and package: Start, Essential, Plus

Advantages for Coupa AEs

Shorter, Simpler Sales Process: Everything the customer needs, nothing they don't—with one, all-inclusive fixed price that includes Coupa Professional Services fees. SOW and MSA in 24-48 hours post Bundles-Fit Session. To ensure speed to market, SOW, MSA and Connector Agreement (if QuickBooks Online) must be accepted *as-is*.

Value-Engineered: Based on Shelby's use-case library and proven best practices to deliver the greatest value in the most cost-efficient manner.

Smarter Sales Support: Includes Shelby's deep procurement expertise at the point of sale.

Expert Services

Platform Implementation

Software Modules
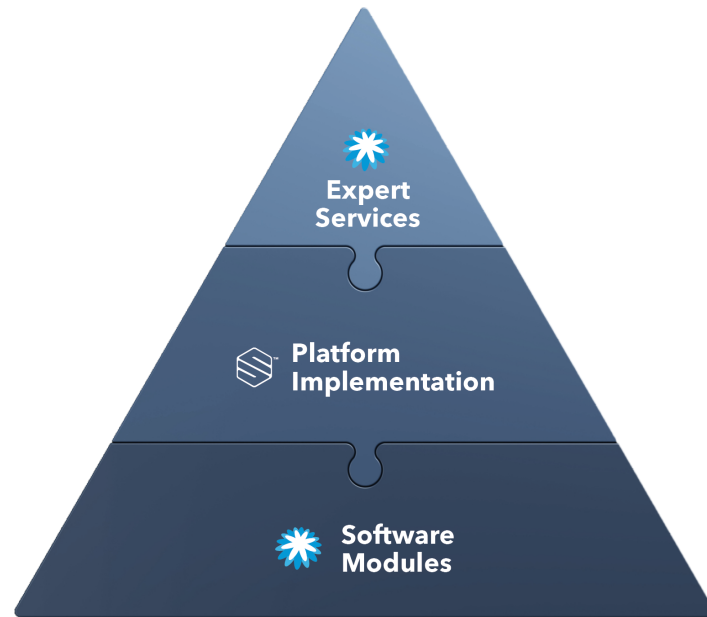
Bundled Solutions for QuickBooks Online

intuit quickbooks. Online

⏻ START

Begin your procurement transformation journey by automating invoice processing, ordering, approvals, receiving and supplier enablement with Coupa Core

$45,000

⬚ ESSENTIAL

Adopt best practices for procurement and streamline ordering with catalogs while leveraging RPMS and Coupa's Digital Payments

$63,000

PLUS

Transform procurement operations with advanced capabilities such as web forms, order list, 3 bids & buy, budget controls and Virtual Cards

$76,000

ERP Connector Subscription: $1,000/month, minimum 1 year commitment

Bundled Solutions for NetSuite

NETSUITE

⏻ START

Begin your procurement transformation journey by automating invoice processing, ordering, approvals, receiving and supplier enablement with Coupa Core

$65,000

ESSENTIAL

Adopt best practices for procurement and streamline ordering with catalogs while leveraging RPMS and Coupa's Digital Payments

$70,000

PLUS

Transform procurement operations with advanced capabilities such as web forms, order list, 3 bids & buy, budget controls and Virtual Cards

$80,000

ERP Connector: Leverages NetSuite's Suite Script Bundle

The Bundled Solutions Sales Strategy

SALES GOALS

- Simplify and streamline the decision-making process for platform implementation.

- Streamline and compress the sales cycle.

- Reduce requests for customized implementation requirements that will either not be used, add unnecessary costs or reduce time to value.

- Pre-factored Coupa Expert Services fees integrated into Bundles.

- Qualify customers with requirements that are not covered in a bundled solution for a customized implementation proposal.

SALES STRATEGY

- Don't ask the customer to choose a bundle. They don't have the expertise to determine best fit for their platform implementation.

- While Coupa module selection will determine the bundles package, Shelby will conduct a required bundles-fit session to educate the customer on each implementation component and further shape deal parameters.

- Present SOW within 24-48 hrs. of completion of the bundles fit session for customers that do not have customized implementation requirements.

Customers requiring multi-phase rollouts or other customized implementation requirements
will receive an SOW for customized implementation within 5 business days of completion of scoping.

Determining Best-Fit for Implementation

Bundled Implementation Solutions may not fit the needs of every customer.

Examples of Customized Implementation Requirements:

- Customer uses ERP other than QuickBooks Online or NetSuite
- Customer chooses to adopt current-state business rules or processes that do not conform to best practices for Coupa implementation
- Customer requires a multi-phase rollout by region or module
- Integrations required to other systems such as tax, budgets, HRIS, etc.

The Bundles-Fit Session

- The Shelby Team will walk the customer through a required **Bundles-Fit session.**

- This begins with a profile of the customer's ERP platform and operating region.

- The Coupa modules chosen by the customer will determine which of the three bundles they fit into.

- However, the Bundles-Fit session is an important process for educating the customer on what is included and what isn't in their bundled implementation package.

- This session is necessary to issue an SOW.

11

The Bundles-Fit Session

The Bundles Fit Session is an interactive process. The Shelby team will pose questions, discuss best practices, define what is included, and explain what customer responsibilities will be for implementation.

Coupa Bundled Solutions Fit Session — 1

Your Profile		
ERP Platform	○ quickbooks Online	
QuickBooks Online Platform	○ Start / ○ Essentials / ○ Plus	
All Legal Entities in US?	○ Yes / ○ No	
Coupa Modules	○ Coupa Core / ○ RPMS / ○ Coupa Pay Digital Payments / ○ Virtual Cards	

Next

Coupa Bundled Solutions Fit Session — 2

Your Bundled Solution

Ordering	○ Advantage Punchout Catalog or Free Form / ○ Order from Hosted Catalog
Ordering Add-Ons	○ Contract-Backed Orders / ○ Web forms, Order List, 3 Bids & Buy
Accounting/ COA Structure	○ 1 COA – Single Level GL / ○ Accruals – Coupa Generated Report
Accounting/ COA Structure Add-Ons	○ Multi-Level with Sub Accounts / ○ Multi-Level with Projects / ○ Budgets

Next

Coupa Bundled Solutions Fit Session — 3

Your Bundled Solution

Invoice Processing	○ Process supplier-submitted or AP-created invoices / ○ Up to 2 custom header fields in Coupa
Tax Processing	○ Tax codes loaded to Coupa; Assigned by supplier or AP during invoice processing
Approvals and Workflow	○ Management hierarchy approvals / ○ 5 non-financial approvals
Approvals and Workflow Add-On	○ 10 non-financial approvals

Next

Coupa Bundled Solutions Fit Session — 4

Your Bundled Solution

Commodity Codes	○ Standard commodity codes
Commodity Codes Add-On	○ Customer-provided commodity codes
Receiving	○ Standard desktop receiving
Receiving Add-On	○ Advanced receiving with approvals
Supplier Enablement	○ 3 suppliers enabled for ordering/invoicing: 1 CXML, 1 CSP, 1 SAN

Next

Coupa Bundled Solutions Fit Session — 5

Your Bundled Solution

Supplier Enablement Add-On	○ Punchout: Two non-Coupa Advantage suppliers
Project Management	○ Shelby Project Manager to manage all Shelby-led tasks
Training Templates	○ Shelby provides templates; Customer provides training
Change Management Templates	○ Shelby provides templates; Customer executes CM

Next

Coupa Bundled Solutions Fit Session — 6

Your Bundled Solution

Testing Support	○ Shelby provides templates and Coupa-side issue resolution; Customer executes testing
Move to Production	○ Shelby executes MTP; Customer validates
Hypercare	○ Shelby supports post go-live issue resolution

Review

The Bundles-Fit Session

- Once the Bundles-Fit session is complete, the customer will be presented with a summary of their bundled implementation components and pricing.

- Customer chooses the bundle understanding that it a standardized fixed-price, fixed scope-solution.

- If a customer wishes to explore the other bundle options for their ERP, the Shelby team will review these and highlight the differences.

- Shelby will also review supplemental add-on services available for training, change management, additional integrations and specialized approvals.

- Customers with unique implementation needs or add-on services will receive a custom SOW within five business days.

Bundled Implementation Solution		Coupa Modules	Plus*
			Coupa Core, RPMS, Coupa Pay Digital Payments and Virtual Cards
ACCOUNTING STRUCTURE	Single Level GL, Customer, Class, Employee		X
	Multi-Level GL - Support Subaccounts		X
	Advanced GL - Department / Location, Customer, Project-Based		X
AP	Process any invoice		X
ORDER	Advantage Punchout Catalog or Free Form		X
	Order from Hosted Catalog		X
	Contract-Backed Orders		X
	Web forms, Order List, 3 Bids & Buy		X
APPROVALS & WORKFLOW	Financial Hierarchy Based Approvals		X
	Up to 5 Non-Financial Based Approvals		X
	5 Additional Non-Financial-Based Approvals		X
COMMODITY CODE	Standard Commodity Code Structure		X
	Customer Provided Commodity Code Structure		X
RECEIVING	Standard Coupa Receiving		X
	Advanced Receiving with Approvals*		X
SUPPLIER ENABLEMENT	3 suppliers enabled for Ordering/Invoicing: 1 cXML, 1 CSP, 1 SAN		X
	Punchout: Coupa Advantage Suppliers Only		X
	Punchout: 2 Non-Coupa Advantage Suppliers		X
	SIM-Based Supplier Onboarding*		X
	Risk Aware automation on SIM Data (RPMS)*		X
DIGITAL PAYMENTS	Coupa Pay Digital Payments*		X
	vCard*		X
CONTROLS & TRACKING	Budget Controls		X
	HCP Tracking		X
EXTRAS	Expense Module Package Compatible		X
	Free conversion to NetSuite in 24 months		X
All packages include training manual templates for documenting your business rules and change management communications for suppliers and users.			$76,000
ERP Connector Subscription (Required)			$1,000/month

*Implementation scope is based on modules purchased by the customer.

Implementation Approach

Kick-Off
- Approach and Methodology
- Roles and Responsibilities
- Project Administration
- Project Governance

Use Case Analysis
- Standard Use Case Alignment
- Leading Practices

Configuration
- System Configuration Aligned with Standard Use Cases
- Requisitions, POs, Invoices, etc.
- Approval Rules

Supplier Enablement
- Coupa Advantage Suppliers
- 2 Non-Advantage Punchout Suppliers

Integrations
- Coupa Connecter Implementation Methodology
- Leverage Existing Coupa/Shelby Connector with ERP
- Master Data and Transactional Data

Testing
- System Integration Testing
- User Acceptance Testing
- End to End Unit Testing
- Shelby Provides Templates, Customer Executes Testing

Change Management
- Provide Change Management Strategy guide
- Shelby Provides Templates, Customer Executes Testing

Training
- Standard Training Materials (PPT)
- Training Materials Review and Education
- Shelby Provides Templates, Customer Executes Training

Go Live
- Deployment Planning
- Go-Live
- Post Production Support

During implementation, any unique requests not covered in a bundle will be quoted at additional cost

Coupa Expert Services

- Coupa CSP team developed the Coupa Expert Service Oversight Estimates

- Estimate Model Assumptions include:
  - **Simplified Design Oversight**
    - Bundles assumes Customer's acceptance of pre-defined standard use cases
    - Oversight is only verification of compliance to standards
  - **Economies of Scale** - Assumption of Concurrency where multiple projects can be handled concurrently to minimize overhead activities (e.g. status meetings, ARBs, MTP)
  - **Scheduling Efficiencies** resulting from higher volumes

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BY THE SHELBY GROUP

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Bundled Implementation Solutions		Coupa Modules	Start	Essential*	Plus*	Advanced
			Coupa Core	Coupa Core, RPMS, Coupa Pay Digital Payments	Coupa Core, RPMS, Coupa Pay Digital Payments and Virtual Cards	Full Coupa Suite
ACCOUNTING STRUCTURE	Single Level GL, Customer, Class, Employee		X	X	X	Includes all services in Plus Bundle with Customized Implementation Training & Change Management Support
	Multi-Level GL - Support Subaccounts			X	X	
	Advanced GL – Department / Location, Customer, Project-Based				X	
AP	Process any invoice		X	X	X	Multiple Scope/Site Support:
ORDER	Advantage Punchout Catalog or Free Form		X	X	X	• Content Visibility Controls
	Order from Hosted Catalog			X	X	• Supplier Visibility Controls
	Contract-Backed Orders			X	X	• Contract Visibility Controls
	Web forms, Order List, 3 Bids & Buy				X	
APPROVALS & WORKFLOW	Financial Hierarchy Based Approvals		X	X	X	Tax Engine Integration
	Up to 5 Non-Financial Based Approvals		X	X	X	Contract System Integration
	5 Additional Non-Financial-Based Approvals			X	X	
COMMODITY CODE	Standard Commodity Code Structure		X	X	X	External Demand Integration
	Customer Provided Commodity Code Structure			X	X	API Based Automations
RECEIVING	Standard Coupa Receiving		X	X	X	Custom UAT Materials
	Advanced Receiving with Approvals*				X	
SUPPLIER ENABLEMENT	3 suppliers enabled for Ordering/Invoicing: 1 cXML, 1 CSP, 1 SAN		X	X	X	Custom Training Materials
	Punchout: Coupa Advantage Suppliers Only		X	X	X	Custom Supplier Enablement Materials
	Punchout: 2 Non-Coupa Advantage Suppliers			X	X	
	SIM-Based Supplier Onboarding*			X	X	Custom Change Management Support
	Risk Aware automation on SIM Data (RPMS)*			X	X	
DIGITAL PAYMENTS	Coupa Pay Digital Payments*			X	X	$100,000+
	vCard*				X	
CONTROLS & TRACKING	Budget Controls				X	
	HCP Tracking				X	
EXTRAS	Expense Module Package Compatible			X	X	
	Free conversion to NetSuite in 24 months				X	
All packages include training manual templates for documenting your business rules and change management communications for suppliers and users.			$45,000	$63,000	$76,000	
ERP Connector Subscription (Required)			$1,000/month	$1,000/month	$1,000/month	

*Implementation scope is based on modules purchased by the customer.

Bundled Implementation Solutions

Bundled Implementation Solutions	Coupa Modules	Start Coupa Core	Essential* Coupa Core, RPMS, Coupa Pay Digital Payments	Plus* Coupa Core, RPMS, Coupa Pay Digital Payments and Virtual Cards
AP	Process any invoice	X	X	X
ORDER	Advantage Punchout Catalog or Free Form	X	X	X
	Order from Hosted Catalog	X	X	X
	Contract-Backed Orders	X	X	X
	Web forms, Order List, 3 Bids & Buy			X
APPROVALS & WORKFLOW	Financial Hierarchy Based Approvals	X	X	X
	Up to 5 Non-Financial Based Approvals	X	X	X
	5 Additional Non-Financial-Based Approvals	X	X	X
COMMODITY CODE	Standard Commodity Code Structure	X	X	X
	Customer Provided Commodity Code Structure	X	X	X
RECEIVING	Standard Coupa Receiving	X	X	X
	Advanced Receiving with Approvals*			X
SUPPLIER ENABLEMENT	3 suppliers enabled for Ordering/Invoicing: 1 cXML, 1 CSP, 1 SAN	X	X	X
	Punchout: Coupa Advantage Suppliers Only	X	X	X
	Punchout: 2 Non-Coupa Advantage Suppliers	X	X	X
	SIM-Based Supplier Onboarding*		X	X
	Risk Aware automation on SIM Data (RPMS)*		X	X
DIGITAL PAYMENTS	Coupa Pay Digital Payments*		X	X
	vCard*			X
CONTROLS & TRACKING	Budget Controls			X
	HCP Tracking			X
EXTRAS	Expense Module Package Compatible	X	X	X
All packages include training manual templates for documenting your business rules and change management communications for suppliers and users.		**$65,000**	**$70,000**	**$80,000**

Advanced

Full Coupa Suite

Includes all services in Plus Bundle and Customized Implementation Training & Change Management Support

Multiple Scope/Site Support:
• Content Visibility Controls
• Supplier Visibility Controls
• Contract Visibility Controls

Tax Engine Integration

Contract System Integration

External Demand Integration

API Based Automations

Custom UAT Materials

Custom Training Materials

Custom Supplier Enablement Materials

Custom Change Management Support

$120,000+

*Implementation scope is based on modules purchased by the customer.

EXPENSES

|	Start	Essential	Plus	Advanced
Coupa Modules		Digital Payment for Expense	Digital Payment for Expense	
Single Country / Single Unified Expense Policy	X	X	X	X
Single Booking Currency	X	X	X	X
Up to 20 Expense Categories	X	X	X	X
All Standard Defaults and Automations • Mobile App • Receipt Parsing / Automations • Per Diem Rules	X	X	X	X
All Standard Reports / Scoring	X	X	X	X
AP-Based Integration	X	X	X	X
Travel Card Integration		X	X	X
Travel Provider Integration			X	X
Custom Exchange Rates Integration			X	X
AP- or Payroll-Based Integration (if supported by Payroll Provider supports)			X	X
API Based Automations				X
Custom UAT Materials				X
Custom Training Materials				X
Custom Supplier Enablement Materials				X
Custom Change Management Support / Materials				X
Multi-Country Rollout				X
Multi-Phase Rollout				X
Tax Engine Integration				X
Includes training manual templates for documenting your business rules and change management communications for suppliers and users.	X	X	X	See above
	$25,000	$37,000	$50,000	$80,000+

18

ES - Supplier Enablement Emphasis

- Customers will be provided with a Supplier Analysis and Enablement Plan
    - Coupa will do all Pay Supplier Enablements (minimum CSP)
    - Shelby will include Supplier Enablement tasks within Project Plan to help emphasize the tasks and efforts for the customer to perform

- Customers will be driven (along with Coupa EM / CVM) to commit to the Enablement Plan with go live, 1-year and 2-year goals

- Supplement Supplier Enablement Add-On is always presented and encouraged if customer is unable to meet targets

How to Refer a Bundled Solutions Prospect

1. Confirm that the customer is a QuickBooks Online or NetSuite ERP user.

2. Contact your Shelby rep to register the customer and orchestrate next steps.

3. Stay up-to-date on the latest resources: https://www.theshelbygroup.com/coupabundleslogin
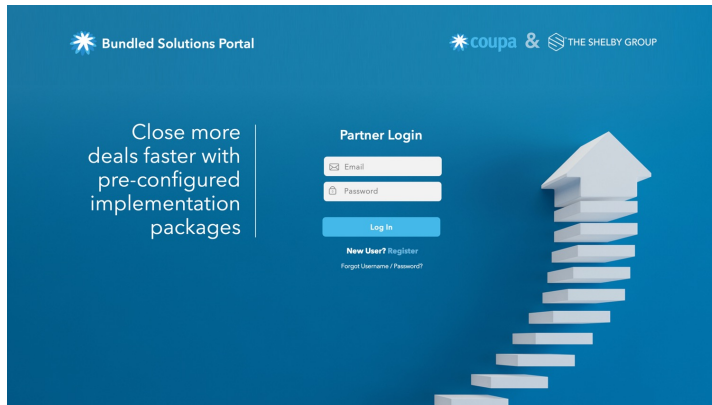
Shelby will notify you when new resources are added:
- New ERPs
- Latest wins
- Customer Stories
- FAQs

Why Partner with Shelby?

- Eliminate steps and complexity from the sales cycle

- Close more deals faster

- 240+ successful Coupa platform deployments

- Dedicated Corporate Services and Mid-Market account teams

- Shelby ERP connectors save time and money

Coupa
Bundled
Solutions
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APPENDIX

Supplemental Add-Ons

- Custom Training Material Development

- Shelby-Led Training Classes

- Customized Change Management Strategy & Materials

- Shelby-Led Change Management

- Additional Integrations not Covered by ERP Connectors

- Additional Specialized Approvals / Use Cases

- Additional Supplier Enablements (Supplement Customer Team)

Shelby ProcOps Customer Success

- **BPO Offering to supplement**
  - End User Support
  - Admin / Maintenance
  - Supplier Enablement / Support
  - Upgrade Support
- Monthly Ticket based Subscription OR Fixed Scope
- Perfect for customers who are not ready to build an in-house procurement team

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AT — Amanda Trippler <Amanda.Trippler@hain.com>   Today at 1:40 PM

To: Kelly Carpenter

Hi Kelly –

I hope you don't mind me writing a quick note to say how much I have enjoyed working with Carly and Tabitha on my supplier enablement rollout. They have answered all my questions (sometimes multiple times), they have done multiple trainings so I am aware of what the process is once they drop off the project and quite frankly they have been one of the best parts of this rollout.

I am very thankful for their help and partnership and wanted to let you know.

Thank you
Amanda

Amanda Trippler
Director – Indirect Procurement
The Hain Celestial Group
1111 Marcus Avenue, Lake Success, NY 11042
Phone: 214-801-3615| Email: amanda.trippler@hain.com

ERP Connectors

Core 4 Integration Points

- Supplier
- Accounting
- OK2Pay
- Payment Confirmation

Coupa Pay Integrations

Expenses Integration Points: AP Only

- OK2Pay
- Payment Confirmation

User Integration: Flat file or manual load

Availability

- QuickBooks Online (Now)
- Sage Intacct (Q1 2022)
- Dynamics GP (Q1 2022)
- SAP S4 (TBD)
- Oracle EBS (TBD)
- JDE (TBD)