



Couchbase Purchasing Guidelines

When engaging a vendor for the purchase of services or goods, submit a requisition through Coupa SW and include any relevant documentation (e.g. quote, contract, or SOW). If there are any questions regarding the submission process, please contact "Vendor Contracts" (vendorcontracts@couchbase.com).

If you do not have access to Coupa, you may ask the Executive Admin of your department to submit a requisition on your behalf. If you will be a frequent user, you may request access by emailing accounting@couchbase.com.

The requisition approval flow is automatic and built into the Coupa system based on management hierarchy thresholds. The process from start to signature by the final approver, may take anywhere from 3-10 business days to review, depending on current workload, so submit requests early. **Please note: Couchbase Legal will only conduct a review of the contract once FP&A has approved your requisition in Coupa.**

- **All spend over \$2,500, either one-time or in aggregate over the fiscal year, requires a purchase order (PO) as well as an executed contract (subject to Couchbase Legal review) and/or SOW.** It is Couchbase Policy to have the applicable contracts/SOWs executed on the company templates pre-approved by Couchbase Legal.
- Certain types of expenses even under the \$2,500 threshold may still require a contract if there is a chance intellectual property (IP) might be created or a license is involved. A couple of examples of this are photography at an event and software license purchases. Best practice is to contact Vendor Contracts for guidance on whether a contract is required.
- Contracts, including click through/online agreements shall only be signed by the **CFO, or a designate**. Anything related to Terms and Conditions (T&Cs) and/or request that you "agree to" (regardless of dollar amount) must be routed to Vendor Contracts prior to clicking. You will then be directed through the process.
- All vendor contracts should have an effective date of at least 30 days from the date of submission to allow the relevant Couchbase teams adequate time to facilitate the review and approval process (including, Legal and Finance). Vendor contracts will not be signed post the effective date of the contract or after services have been started or performed.
- It's the internal requestor's responsibility to ensure both a PO and contract/SOW is in place prior to services being performed or goods being purchased. **Accounting will not process/pay any invoices for which a PO is not referenced.** It is the requestor's responsibility to ensure a fully-executed copy of the contract is returned to Vendor Contracts within the same business day of receiving a signed document from the vendor.
- An additional requisition must be submitted in Coupa along with a Change Order request to Vendor Contracts if spend is anticipated to exceed \$2,500 of the original contracted amount. Internal requestors should track the invoices received against each contract/SOW to ensure there are sufficient funds to cover all invoices. Accounting will not pay invoices if there are no funds available against the PO.
- Office supply and/or IT-related purchases should be requested via email using: facilitiesrequests@couchbase.com (office supplies) and helpdesk@couchbase.com (computer peripherals).



- Expenses for anything other than T&E (as an example - expenses related to hosting Couchbase-sponsored events, or software purchases) must go through Coupa and paid through Accounting. These expenses **cannot** be paid out-of-pocket and put through an employee expense report.
- Please submit a **check request** (*via the 'Forms' drop-down within Coupa*) when an invoice cannot be submitted but payment is required, or if there is an urgent need for payment. The most typical circumstance is when a deposit is required upon signing a contract.
- Personal reward accounts must not be used when booking hotels for Couchbase-sponsored, contracted events. The Company has corporate rewards accounts to be used.
- Please ask vendors to reference the PO on each invoice and the payment terms per the contract.
- Whenever possible, U.S.-based vendors should transact within/submit invoices via the Coupa Supplier Portal. Vendors may still send invoices to accounting@couchbase.com, but must ensure a valid PO is referenced.

Questions related to purchasing may be directed to accounting@couchbase.com or vendorcontracts@couchbase.com.

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