SUPPLIER TRAINING GUIDE

Coupa: Responding to Sourcing Events

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Responding to Sourcing Events

Terms

Acronym	Description
RFI	Request for **Information**: RFI responses explore how a vendor might solve a problem or fill a need
RFQ	Request for **Quotation**: RFQ responses provide the cost of meeting a specific need
RFP	Request for **Proposal**: RFP responses evaluate the merits of each vendor compared to others
RFx	RFx is a catch all term that refers to requests for quotations and proposals.

View event

RFx Template review 23/07 invitation - Sourcing Event #48

Powered by **coupa**

THE FOSCHINI GROUP LIMITED has invited you to the sourcing event: **RFx Template review 23/07**.

If you intend to participate, review the event timeline and accept the terms and conditions of the event, if applicable. Click the "My Responses" tab to provide your response, which may include Attachments, Forms and Items and Lots.

Response due date: Monday, 31 August 2020 05:00 PM CEST

Want to participate later?	**Need more info?**
Click **I intend to participate** button to let the buyer know.	Click **View Event** and you will be taken to the event page.

[I intend to Participate] [**View Event**]

1

All questions should be asked using the event message board (bottom left of the event). Having technical issues? Contact sourcing.support@coupa.com
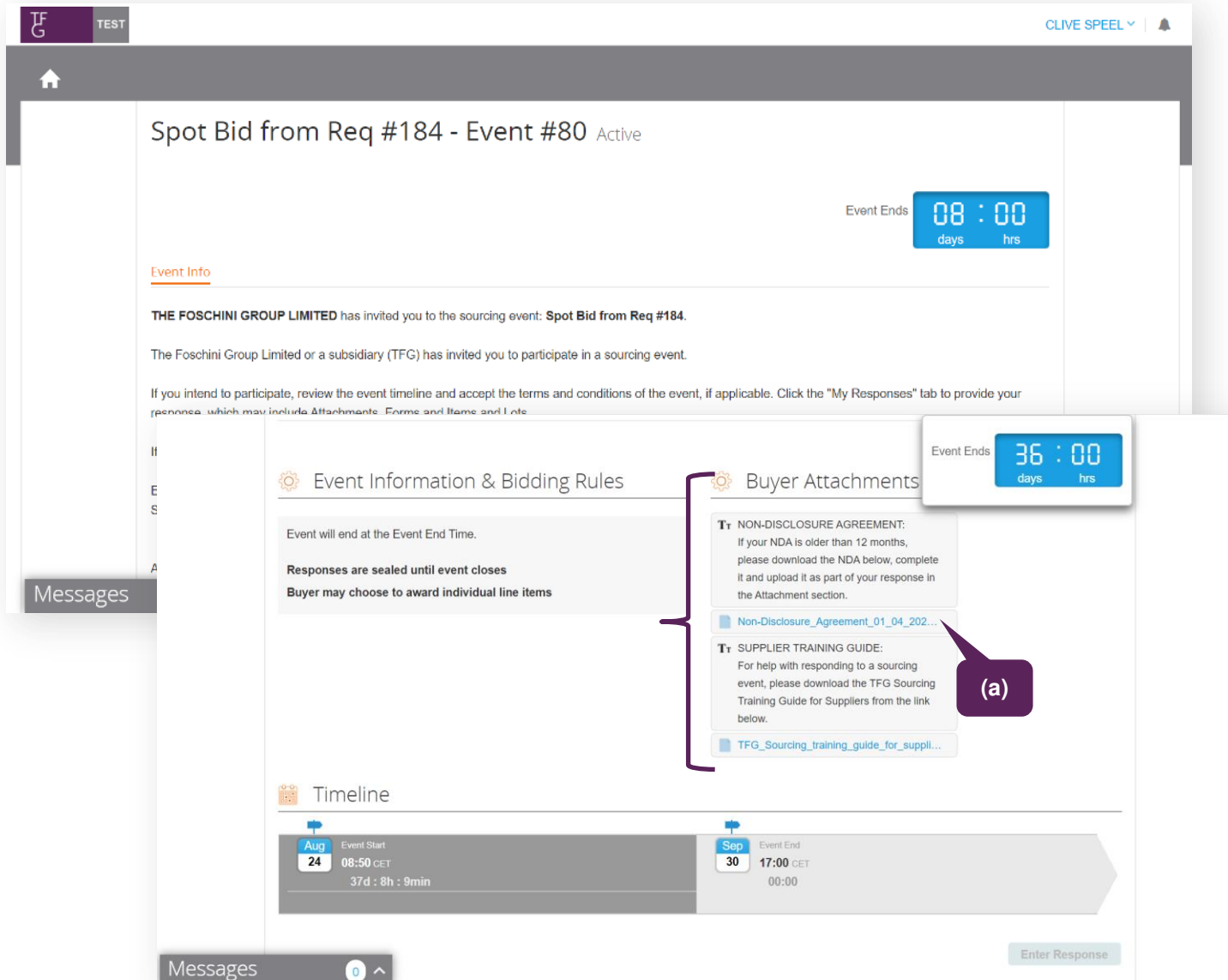
1	View event
From your sourcing event email invitation;	
1.	Click on the '**View Event**' button to view the event information details. **Note:** Clicking on this button will open the event in a web browser.

Event information

View event information

Details of the event are listed below;

- **Event timer**: When the event will come to an end.

- **Intention to respond**: Confirmation of your intent to take part in the event.

- **Event information and bidding rules**: Information on the event as well as rules for bidding and quoting.

- **Terms and conditions**: TFG's terms and conditions for participating in a sourcing event.

Buyer Attachments

Attachments for your read-through from the buyer.

(a) For suppliers participating in an RFx: If your NDA is older than 12 months, please download the NDA by clicking on the hyperlink, complete it and upload it as part of your response in the '**Attachments**' section.

'Accept Terms and Conditions (RFQ Only)

2	**I intend to participate in this event**
Indicate your intention to participate in the event by:	
2.1	Clicking on the check box.
2.2	Upon clicking on the check box, a message will display at the top of the page that reads '**I intend to respond is saved**'. In addition, the buyer will be notified of your intention to participate in the sourcing event.

3	**Accept Terms and Conditions**
Read TFG's terms and conditions for participating in the sourcing event.	

'Accept Terms and Conditions (RFx Only)

2	**I intend to participate in this event**
Indicate your intention to participate in the event by:	
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3	**Accept Terms and Conditions**
Read TFG's terms and conditions for participating in the sourcing event.	

'Accept Terms and Conditions' (RFx only)

3	Accept the terms and Conditions
To accept TFG's Terms and Conditions to participate in the sourcing event:	
3.2	Click on the '**Yes**' radio button to accept ALL the terms and conditions.
3.2	Then click on '**Send to Event Owner**'. The event owner will be notified that you have accepted the 'Terms and Conditions'.

'Accept Terms and Conditions' (RFx only)

Terms and Conditions

9. Confirm that neither you nor your company has incurred any fines or settlements related to anti-competitive business practices in the last 2 years?

Do you accept these Terms and Conditions?

○ Yes

● No

3.3

Rejection Comment *

Provide a comment

3.4

Step 3	Accept the terms and Conditions
Should you not agree to the Terms and conditions	
3.3	Click on the '**No**' radio button to reject the Terms and Conditions.
3.4	In the '**Rejection Comment**' field provided, provide the reason for rejecting the Terms and Conditions. **Note**: Should you not accept the Terms and Conditions, you will not be permitted to participate in the event.

are required to accept these terms and in the Rejection Comment box provided, refer to the term number and supply a reason for each "No".

Event Ends **07 : 23**
days   hrs

⚙ Event Information & Bidding Rules

⚙ Buyer Attachments

Event will end at the Event End Time.

Responses are sealed until event closes
Buyer may choose to award individual line items

Tᴛ SUPPLIER TRAINING GUIDE:
For help with responding to a sourcing event, please download the TFG Sourcing Training Guide for Suppliers from the link below.

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📅 Timeline

Aug 19 Event Start
11:12 AM CET
9d : 5h : 47min

Aug 28 Event End
5:00 PM CET
00:00

4.1

Enter Response

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Messages   0   ^

Business Spend Management • 🗺 English (South Africa) • Accessibility
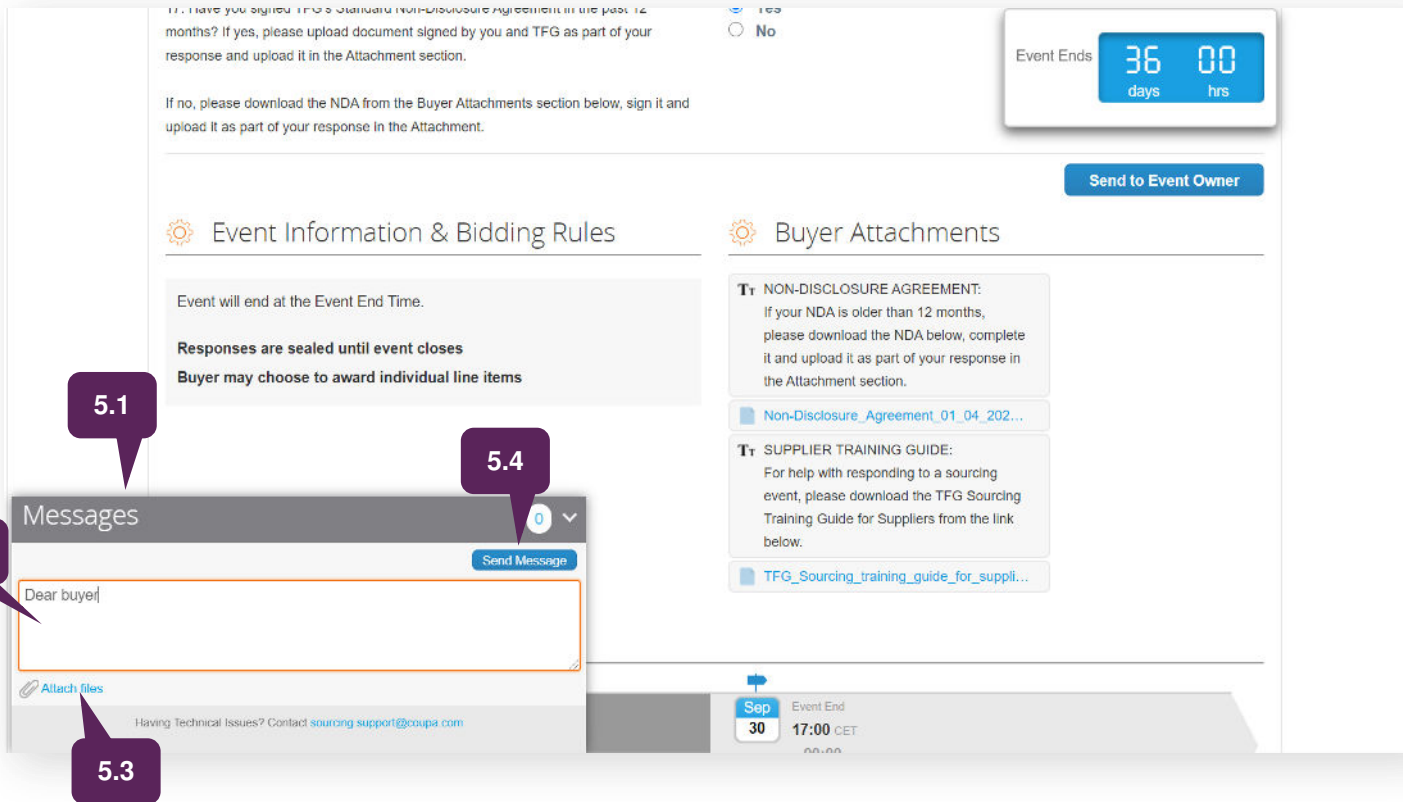
4	**Enter Response**
Proceed to respond to the sourcing event by clicking on the;	
4.1	'**Enter Response**' button **Note**: The enter response button will be greyed out restricting your ability to participate in the event if you did not accept the 'Terms and Conditions'

Messages to the buyer

5	**Messages to the buyer**
Located at the bottom left corner of your sourcing event screen is the '**Messages**' box.	
5.1	Click on the '**Messages**' box to expand it.
5.2	Proceed to type in your message to the buyer in the box provided.
5.3	Attach documents by clicking on the '**Attach files**' hyperlink.
5.4	Send message to buyer by clicking on the '**Send message**' button at the top right corner of the message box.

My Response

TFG
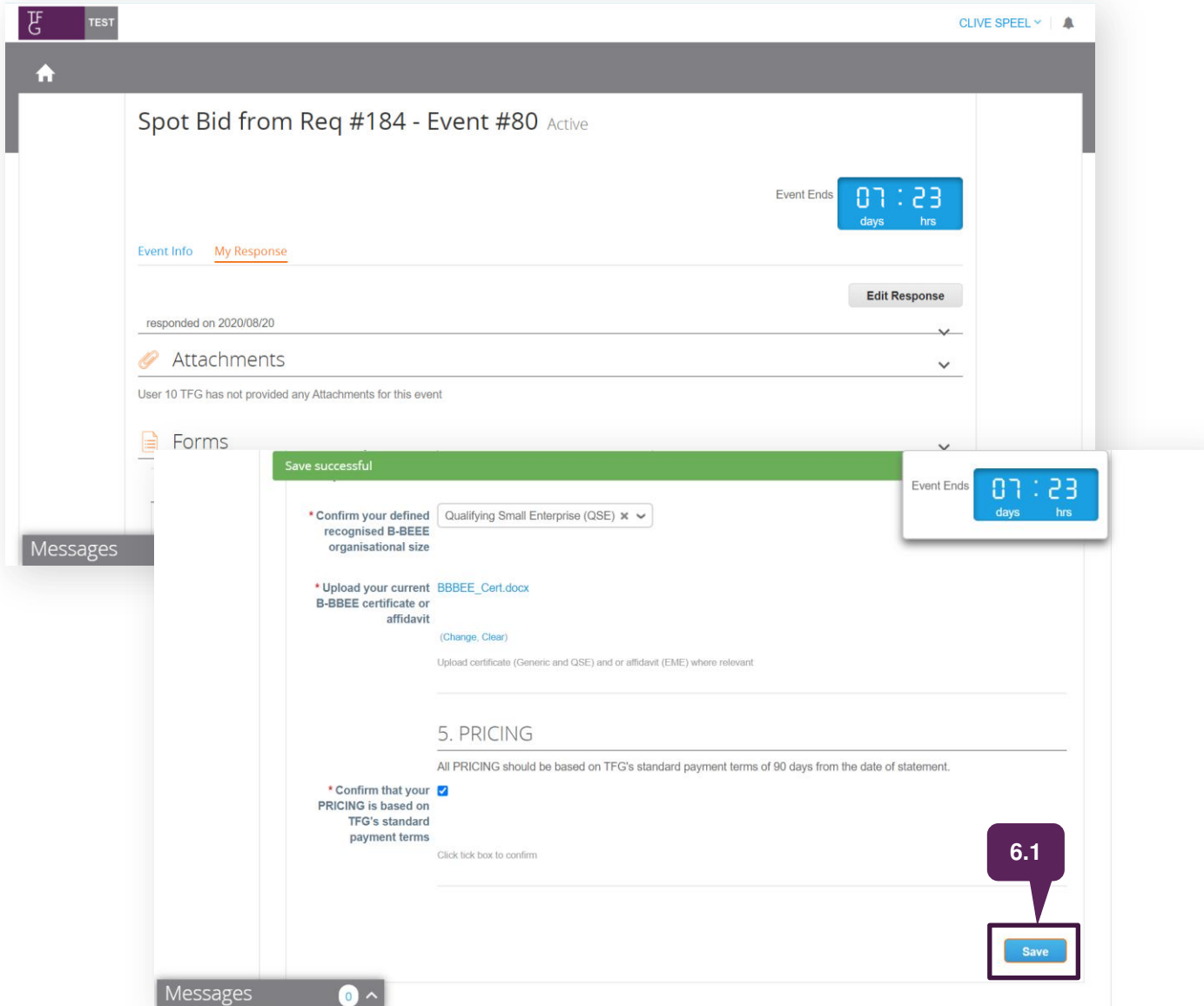
My Response

Section	Description
(a) Attachments	Files/documents that you receive from the buyer or files/documents that you complete and send back to the buyer. **Note**: Coupa Sourcing does not support .zip or .exe files for security reasons.
(b) Forms or Questionnaires	Questions that the buyer needs you to answer.
(c) Items and Lots	Pricing section.

Attachments and Forms

6	Attachments and Forms
Complete the attachments and forms section, then proceed to the '**Items and Lots**' section to enter your price quotation.	
6.1	Click on the '**Save**' button before proceeding to the next section.

Items and Lots

7	Items and Lots
In the items and lots section, you can enter you pricing for the items and lots in question.	
7.1	Hover over the line item with your cursor to display the '**pencil icon**'. Then proceed to click on the line item to display the details of the line item.

7	**Items and Lots**
Proceed to quote on the all the line items in the sourcing event.	
7.2	Enter all the required fields; marked with a red Asterix (*)
	Entering all the other fields is at the supplier's discretion;
	(a) Your Item Name
	(b) Lead time
	(c) ID Part Number
	(d) Description
	(e) Attachments
7.3	Click on the '**Save Item**' button, then proceed to the next line item until you have quoted on all the line items in the sourcing event.
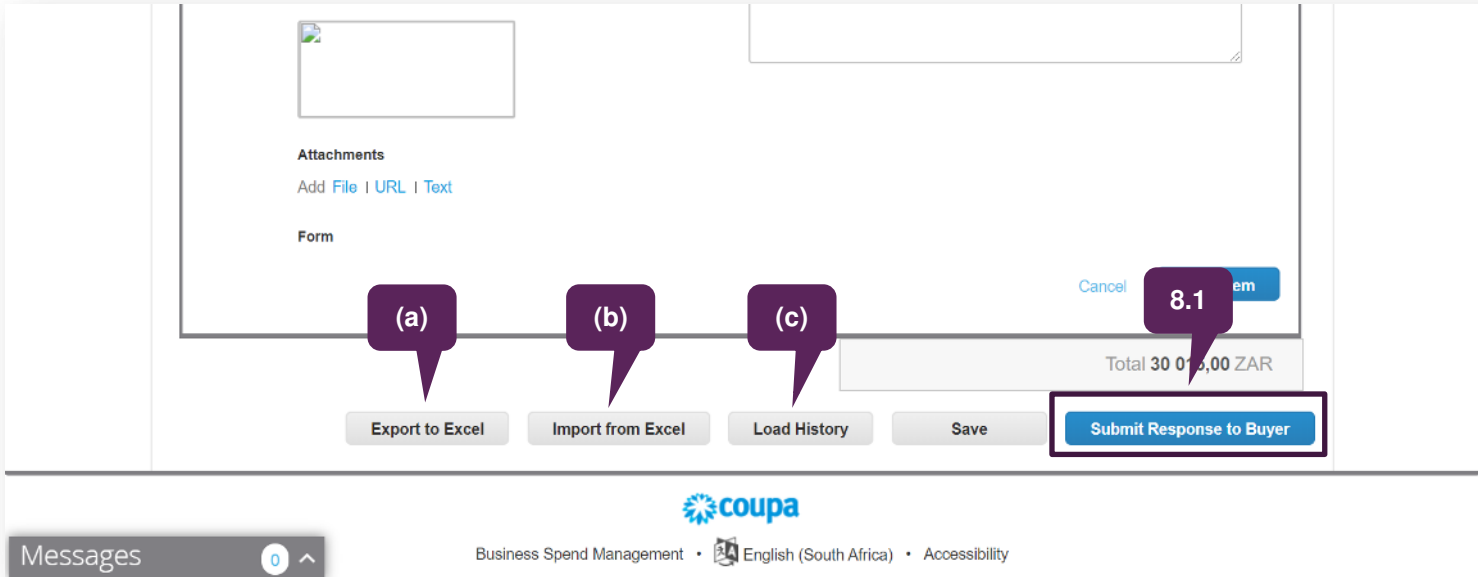
Submit response to Buyer
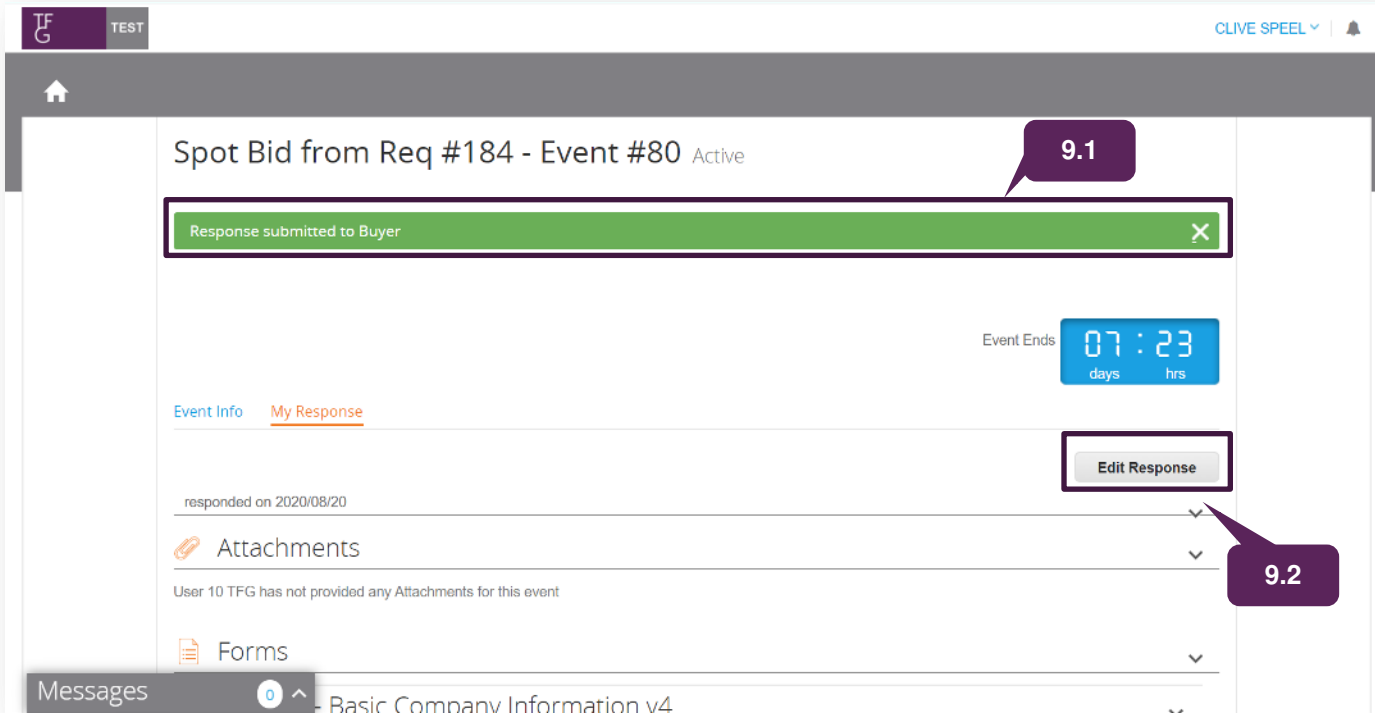
8	**Submit Response to Buyer**
Once you have quoted on all the line items and are satisfied with your response;	
8.1	Click on the '**Submit Response to Buyer**' button. You can change your response before the event has been timed out and resubmit.

Section	Description
(a) Export to excel	Exports the questionnaires and the items and lots into Excel where you can fill in your response. **NOTE**: DO NOT CHANGE THE FORMAT OF THE QUESTIONNAIRE WHILE COMPLETING. DOING SO WILL RESULT IN FAILURE TO UPLOAD!
(b) Import from excel	Uploads your response to Excel.
(c) Save	Saves your response, but it does not submit it to the buyer.

Edit & re-submit response to buyer

9	Edit Response
You can edit and resubmit your response to TFG provided there is still time remaining in the event.	
9.1	After submitting your response, the '**Response submitted to Buyer**' notification is displayed on a green bar for approximately 5-10 seconds
9.2	Click on '**Edit Response**' to edit and resubmit your response.

Event history

10.1

10	Check event history
To double-check if your response was received and to check your actions against the event, check the History at the bottom of the page.	
10.1	Click on the '**Load History**' button to expand on the history of the event.

FAQ's

TFG

1. How do I access a sourcing event/RFQ?

You can access an event directly from your sourcing event email invite. You do not need to have a Coupa account or access to the Coupa Supplier Portal (CSP) to take part in sourcing events.

2. How can I avoid losing my data if the browser times out?

Depending on the time you need to fill in your responses, your browser might time out. To avoid losing your responses, enter them offline by using the exported csv file and import the file back into the event. If you decide to fill in your responses online, make sure you save your changes frequently.

3. How do I know if my response was submitted?

You can find out if your response was submitted from:
- The flash message that indicates if the response went through.
- The '**History**' button at the bottom of the event page that indicates the total amount, response name, and the time the response was submitted.

4. What is the best practice for entering responses?

Export to Excel, enter your response, and import the file. This helps you enter your responses offline. Do not change the format of the file nor the name of the file to ensure that you can upload it back with no problems encountered.

Note: If the event is closed for editing, the originally downloaded file cannot be uploaded and you have to download the file from the revised event.

5. How can I contact an event organiser?

You can communicate with the event organiser through the Message Centre on the bottom left corner of the sourcing event browser.

6. Why do I keep getting reminder emails?

You receive emails periodically reminding you that an event is about to end. If you haven't submitted your response, you need to respond within the last day of the event. If you have responded, ignore the reminder emails.

7. How can I add details to my line item other than the price field for each item?

Click on the line item to expand it and to see additional fields (for example, description), proceed to enter details.

8. What do I do when the 'Submit' button is greyed out?

If the event owner/creator has made changes to the event the submit button will be greyed out, you need to accept changes before you can submit your quote. The checkbox to accept changes is above the '**Submit Response to Buyer**' button.

9. What happens when an event is being edited?

If a buyer is changing an event, the event closes for editing. If you want to view the event, you can see the following notifications '*Event is being edited, you will receive a notification when the event opens again*'

When the buyer finishes making changes and submits the event, a new revision of the event is created, and you receive an email notification.

Clicking on the '**View Event**' button directs you to the revised event.

When you access the event, you have to accept the changes made by the buyer while entering your response.

10. What is the size limit when uploading files?

The file size limit is 100 MB per upload. The maximum number of attachments is 20 - 40.

THANK YOU

TFG