

COUPA USER GUIDE

SOURCING SUPPLIER





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What is Coupa?



Coupa Software is a holistic spend management solution that enables the entire purchasing process to be managed automatically, centrally, and in connection with the organization's systems. Additionally, it serves as the solution for managing negotiations of goods and services with suppliers and handling procurement contracts across the region.

5.000+Customers

10M+ Supplier 125+
Countries

Multi Currency Multi Language

Rated #1 by top analysts



Spend Matters











RESPONSE TO A SOURCING EVENT - RFX

Sourcing is the module used by COUPA customers to conduct bidding events. Therefore, COUPA customers can invite suppliers to participate in RFI, RFQ, and RFP processes.

RFI

They are used to conduct market surveys that support the procurement process, for example, information about services, operations, geographic coverage, security or quality standards, etc..

RFQ

Used to request prices from suppliers.

RFP

Configure the event as an RFP if you wish to collect both prices (as in an RFQ) and additional general information (corresponding to an RFI).

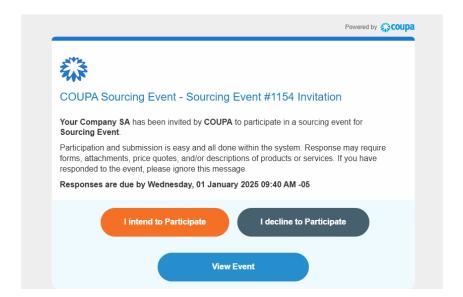
Invitation

When a bidding event is launched, suppliers receive an email containing the invitation to the event along with the response deadline. Additionally, the invitation includes the message sent by the event creator. In the event invitation, we find 3 buttons:

I intend to participate: By clicking this button, COUPA will immediately notify the event organizer that the supplier intends to participate in the event and will also direct them to the event.

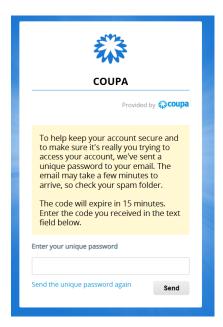






Decline to Participate: By clicking this button, COUPA will immediately notify the event organizer that the supplier does NOT intend to participate in the event.

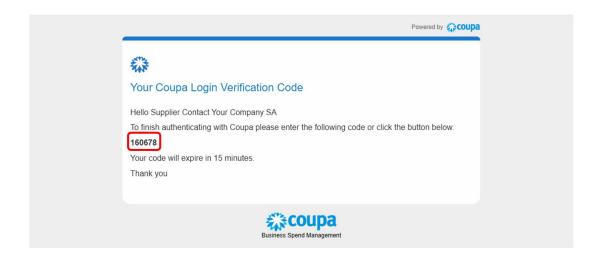
View Event: By clicking this button, the supplier will be directed to a page where they must enter an OTP (One-Time Password) to access the event view, where they can find information related to the event.



The supplier will receive this one-time password at the same email address and must copy and use it to access the event by clicking on Submit







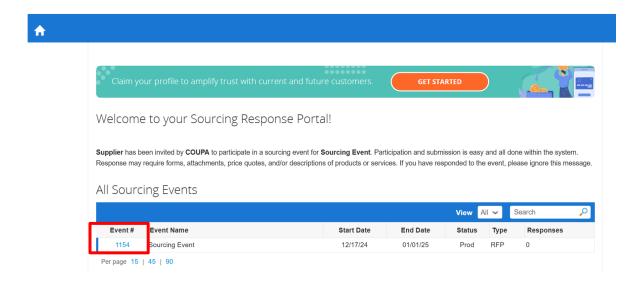


Event Information

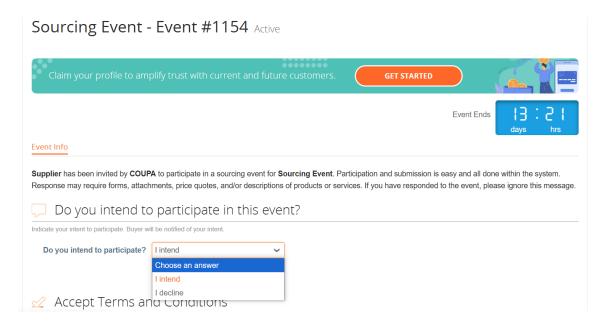
The supplier will be directed to a sourcing response portal where they can view all the events they have been invited to. To enter the event, click on the event number:







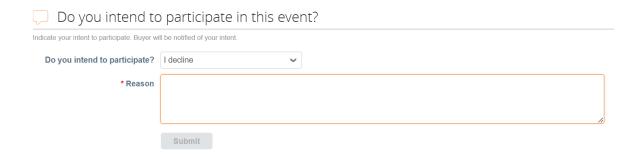
Intention to Participate: By clicking any of the buttons mentioned above, the supplier will be directed to the event information. If the first button is clicked, the "Do you intend to participate?" checkbox will already be checked, and the event creator will have been notified of the intention to participate. If the **"View event"** button is clicked, there will be the option to view the basic event information before confirming participation in the event.



If 'Decline' is selected, it will be necessary to provide a 'reason':

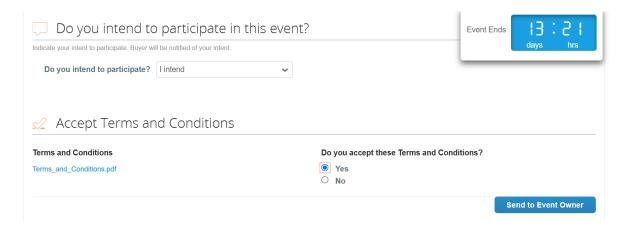






Select the corresponding option and click Submit.

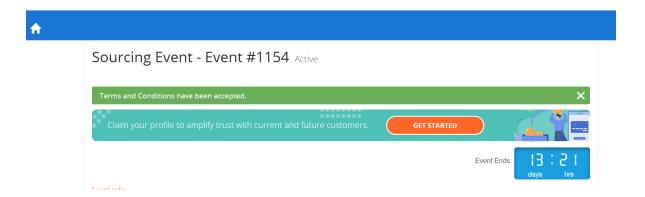
Acceptance of Terms and Conditions: This section contains the terms and conditions set for this event. These terms must be read carefully, and the 'Yes' box must be checked to proceed with submitting the response to the event creator. If the terms are accepted, the option to **Submit to the event owner** is automatically enabled. If the terms are not accepted, Coupa provides a box to leave a comment explaining the reason for not accepting the event's terms and conditions.



 COUPA will confirm with a green message that the terms have been accepted and the event owner has been notified.





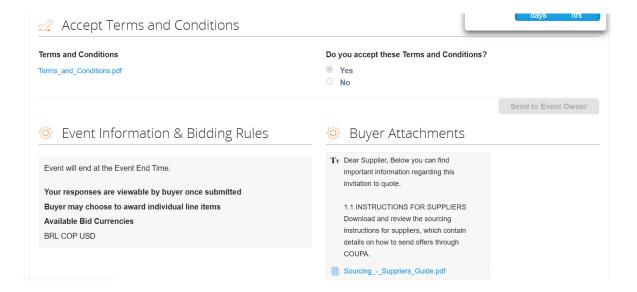


 After accepting the terms and conditions and selecting 'Submit to event owner,' the option to enter the response is enabled.



Note: If the terms and conditions are not accepted, the 'Submit response' button will not be enabled, and the proposal cannot be submitted.

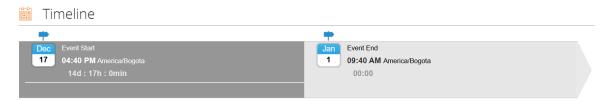
 In the Event Information, Bidding Guidelines, and Buyer Attachments section, the supplier will be able to view additional information about the event:"







 In the timeline section, the event's start date and time, as well as the event's end date, can be found.

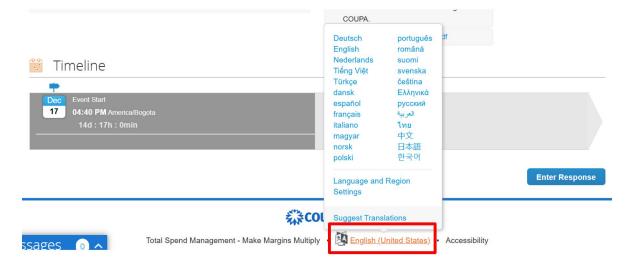


By clicking the **'Enter response'** button, COUPA will take you to a tab called 'My Response' where you will find 3 sections: **Attachments, Forms, and Items and Services.**



Change language

The supplier can change the interface language at the bottom center of the page:

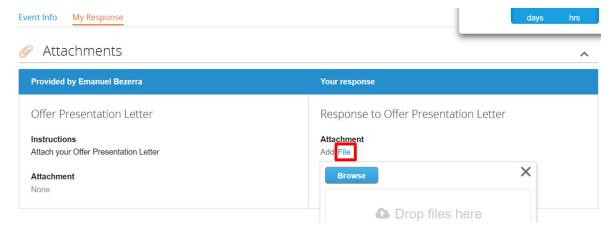






Attachments

Upon accessing the response tab, the supplier will first be able to view the Attachments section from the buyer. The requested documents by the buyer will be visible, along with the response area for the supplier, where the requested document must be uploaded. Coupa allows the supplier to identify which documents are mandatory and which are not, indicated by a '*' next to the 'Attachment' field."



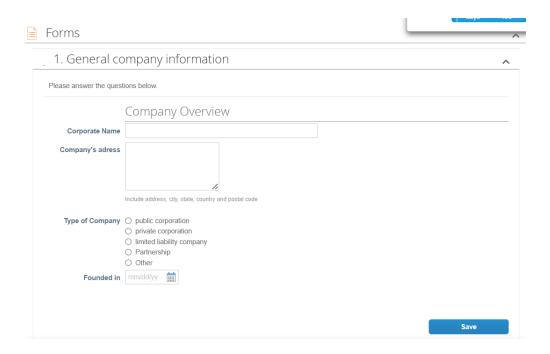
Forms

After completing the Attachments section, the next section is the Forms section.

The purpose of the forms is to collect more information from the supplier by asking specific questions. Some forms contain mandatory fields, while others do not. All mandatory fields must be filled out to submit the response. Additionally, the answers must be saved in each form to ensure a record is created, and the buyer can access them.





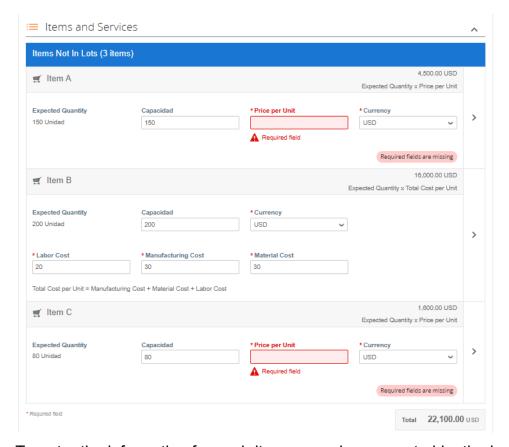


Items and Services

After completing the Attachments and Forms sections, the next section is **Items and Services**, where the amount to be offered to the buyer and the capacity of items that can be supplied are specified.



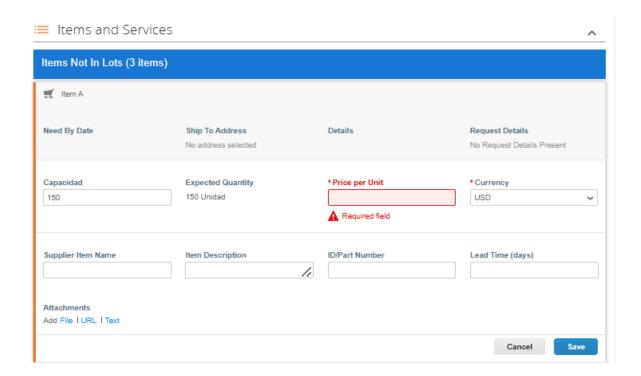




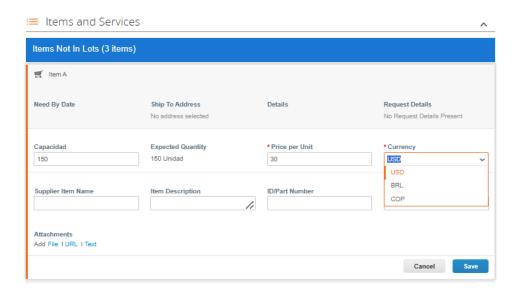
To enter the information for each item or service requested by the buyer, you must click on the arrow over the box to the right of the item or service to expand the window that allows you to add detailed information. Coupa allows the supplier to add, in addition to the offer price, more information about the item or service being offered and an estimated delivery time. Some of these fields may be mandatory, depending on the buyer's requirements.







In the Item Settings button, the supplier can choose the currency in which they want to submit their offer. This option only applies if the buyer has confirmed the possibility of receiving offers in more than one currency.



At the bottom of the page, the supplier will find some available buttons:







Import Excel: Data from the response template, which can be downloaded, can be attached. More information on this option will follow.

History: By clicking this button, the supplier can view the entire event history from their perspective, including notifications of event status changes, such as pauses or completion.

Save: Allows the supplier to save the offer information to continue editing it later. It is not sent to the event owner.

Submit Response: By clicking this button, the response is sent to the event owner/buyer.

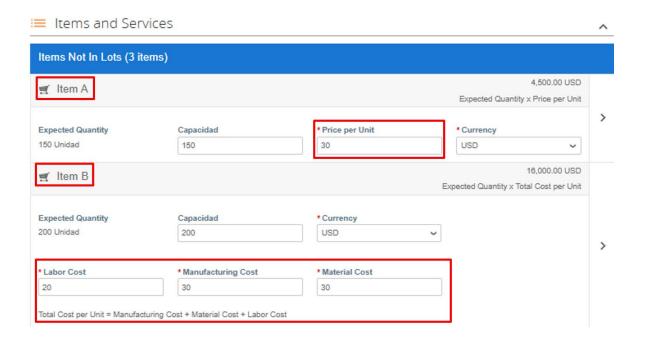


Items and Services with Total Cost Formulas

If the buyer has configured a total cost formula for the item/service, the supplier must complete the cost according to each cost element configured:





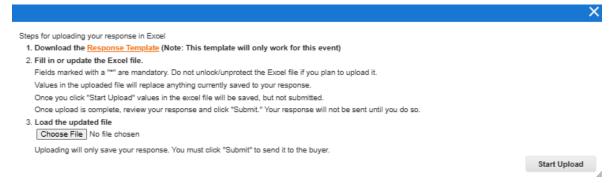


Mass upload for responses

After completing the event, suppliers will find the **'Import Excel'** button, which will allow them to download the template to work on and then upload it.



Se desplegará una Ventana con instrucciones de como descargar la plantilla para llenarla y posterior cargarla desde esa misma ventana adjuntando el.



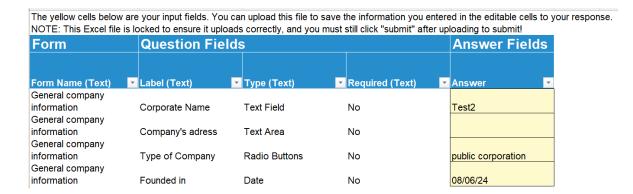
The template may have three sheets to work with: Forms, Items and Services, and Batches. If there are forms to complete in the event, the template will contain all the





fields to be filled out and the space for suppliers to include their responses (Your Responses). For each question, the template will indicate if it is mandatory and provide any suggestions or additional information provided by the event organizer.

All the fields to be filled out are set up by columns, and the information must be entered by rows, as shown in the following image.



For the items and/or services of the event, they will be listed on the **Items and Services** sheet. Some fields will be visible that cannot be modified, as they are the requirements.



And other fields where information must be filled in order to submit the response.



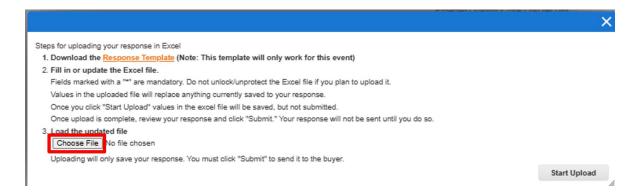
Once the file is complete, with at least the mandatory information, suppliers must save the changes and return to the internet browser (Chrome, Edge, Safari, etc.) where the event is open. Suppliers must use the **'Import from Excel'** button.



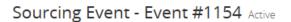




This will take the supplier to the window where they must first select the file and then proceed to upload it.



By clicking **'Start Upload,'** the data from the file will be processed and incorporated into the responses within the event.





In the window, suppliers can confirm when the data has been updated, and as indicated in the message, they must ensure that all required information is completed, including the attachments. Once everything is ready, suppliers will be able to submit their response.

They can verify the data in the different sections or load the history to view the details of the changes made, based on the file or any other method.

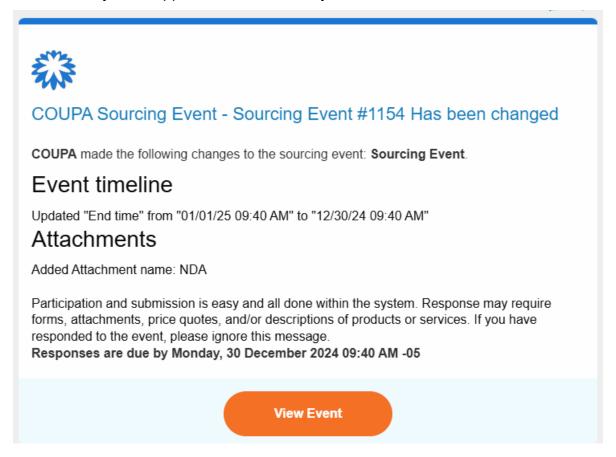




Notification and Acceptance of changes

When the event owner/buyer makes changes to the event, Coupa will notify the supplier as follows:

1. Initially, the supplier will be notified by email.

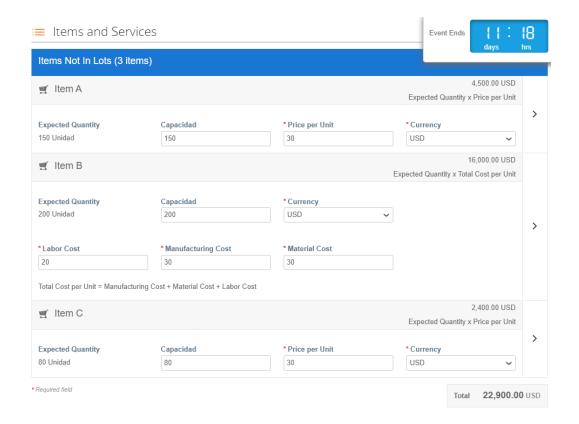


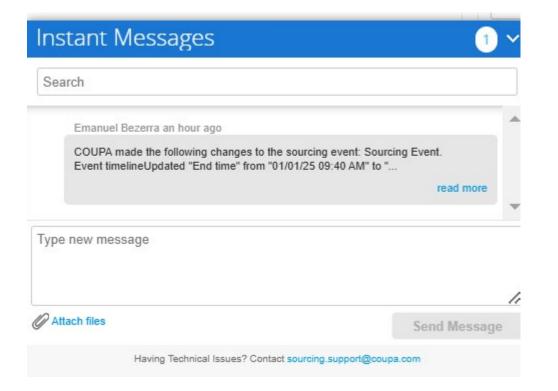
2. In the response section, a yellow flag will indicate the changes made, and Coupa will also display a summary of these changes.









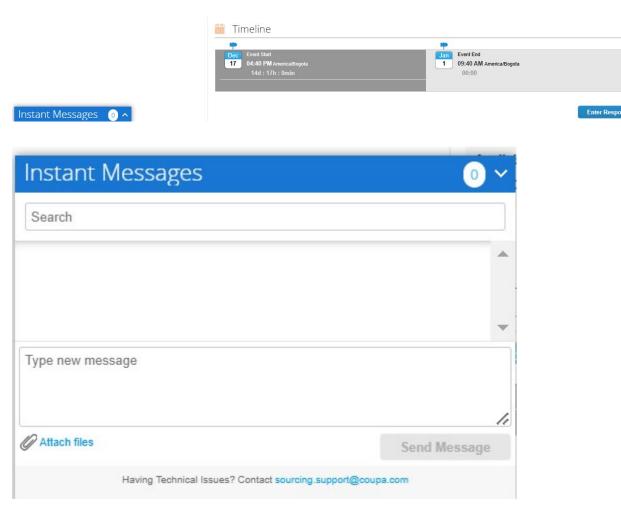






MESSAGE CENTER

To facilitate communication between suppliers and buyers in a sourcing event, Coupa offers a Message Center located at the bottom left, with the ability to attach documents. This allows you to share, for example, frequently asked questions with participating suppliers or additional event information without creating a new event revision. You can also allow suppliers to respond with attachments.



The Message Center is an exclusive communication channel between the buyer and the supplier; other suppliers do not have access to messages sent by other suppliers.

To attach files, click on the 'Attach Files' link at the bottom of the Message Board and browse for the document to upload. Until the message is sent, you can delete the attachment by hovering over it to display the delete icon. Attachments can be up





to 250 MB each, and you can attach a maximum of 20 documents per message. All common file types are accepted, but zip files cannot be processed. You can send an attachment without any additional text.

Recipients receive an email notification about the new message. The notification does not contain the attachments, but the recipient must enter the event, open the Message Board, and click on the attachment to download it.

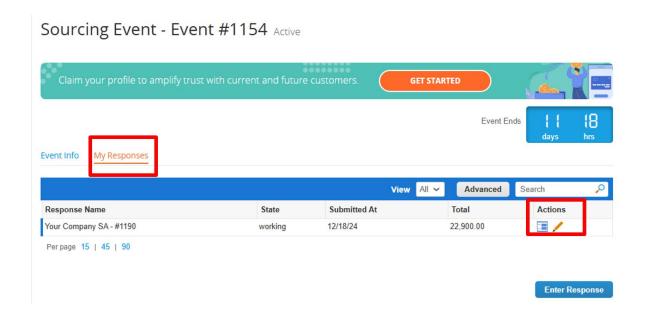
MULTIPLE RESPONSES

In some cases, the buyer may enable a supplier to offer alternative solutions: similar products or services at better prices, or the same product or service with different specifications, such as a better price due to a longer delivery time. If that is the case, the event may be open to multiple responses, meaning each supplier can submit more than one permanent offer.

When the supplier clicks the 'Enter response' button, a separate page for the response opens. The supplier will be able to enter a name at the top to distinguish possible alternative offers. After completing all mandatory information and clicking 'Submit response to buyer,' the supplier is taken to the 'My Responses' page, where the submission appears along with other alternatives. The supplier can add more responses or edit the ones already submitted until the event ends.

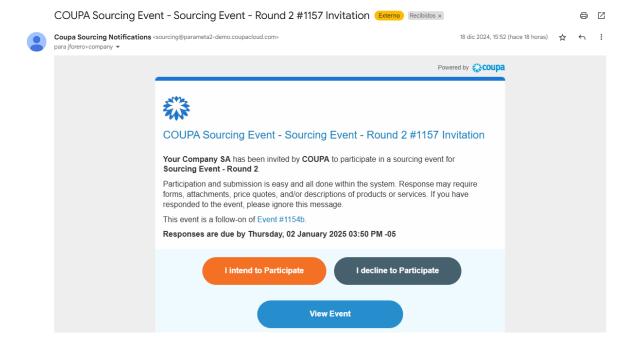






FOLLOW-UP EVENTS

In some cases, the buyer may conduct a follow-up event (additional rounds of negotiation). This event can be configured by the buyer with new information and the ability to renegotiate. Suppliers from the original event will receive notifications with a link to the new event.

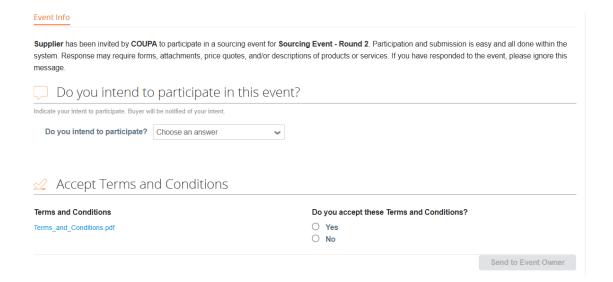






Then, they can indicate whether they intend to participate in the next event, accept the Terms and Conditions, view the link to the original event, and review the rest of the event information.

Once the Terms and Conditions are accepted, they can submit their responses for Items and Lots. The supplier's original responses are transferred to the new event as drafts visible only to the supplier.



To confirm that this is a follow-up event, you can check the 'Follow-up Event Information' section:







RESPONSE TO A SOURCING EVENT – AUCTION

Sourcing is the module used by COUPA clients to conduct bidding events. Therefore, COUPA clients can invite suppliers to participate in 3 different types of auctions.

English Rev.

It is a sourcing event that is characterized by dynamic feedback to suppliers about their position in the competition. The lowest bid at the end of the auction is marked as the winner on the item or lot. To ensure that the price is developed fairly and efficiently, bidding rules are applied to avoid very small increases or improvements to the prices offered.

Dutch Rev.

It's a watch auction. The buyer gives each item an initial price that is lower than the expected purchase price. Once the auction begins, the price increases continuously over time by a predefined amount. The supplier who first accepts the sales price is marked as the winner.

Japanese Rev.

It's a watch auction. The buyer sets an initial price that is higher than the expected purchase price and Suppliers must accept the sales price at each stage. The last remaining active bidder is marked as the winner. The model is like an English like can be more efficient as participants must be active to remain.

Reverse English Auction

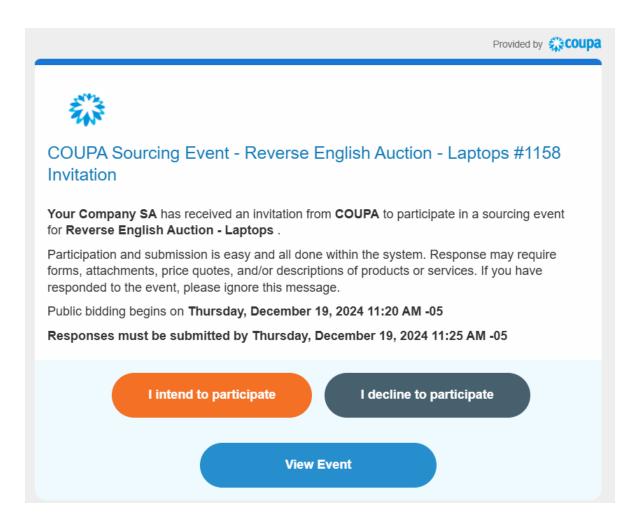
As in RFx events, in auction events, an email notification is made to the suppliers, where an invitation message is presented by the event organizer, accompanied by the competitive listing start date, this date It is key to start the bid, as well as the expiration date to deposit the responses, since once the event is over, the event is considered finished to receive responses from the suppliers.

Additionally, the invitation includes the message sent by the event creator. In the event invitation, we find 3 buttons:

I intend to participate: By clicking this button, COUPA will immediately notify the event organizer that the supplier intends to participate in the event and will also direct them to the event.





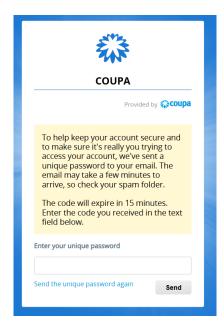


Decline to Participate: By clicking this button, COUPA will immediately notify the event organizer that the supplier does NOT intend to participate in the event.

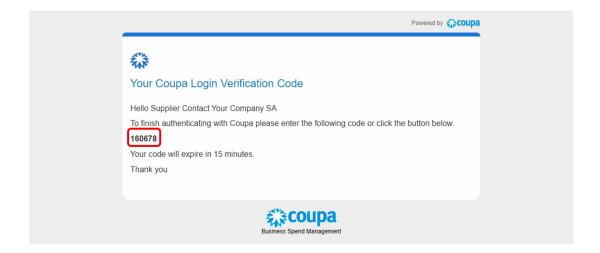
View Event: By clicking this button, the supplier will be directed to a page where they must enter an OTP (One-Time Password) to access the event view, where they can find information related to the event.





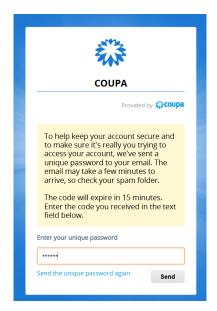


The supplier will receive this one-time password at the same email address and must copy and use it to access the event by clicking on Submit









Acceptance of Terms and Conditions: In this section you will find the terms and conditions established for this event. These terms must be read carefully and the "Yes/" field must be marked to proceed to send the response to the creator of the event. If the terms are accepted, the option to enter the response is automatically enabled. If the terms are not accepted, Coupa provides a box to leave a comment about the reason why the terms and conditions of the event are not accepted.

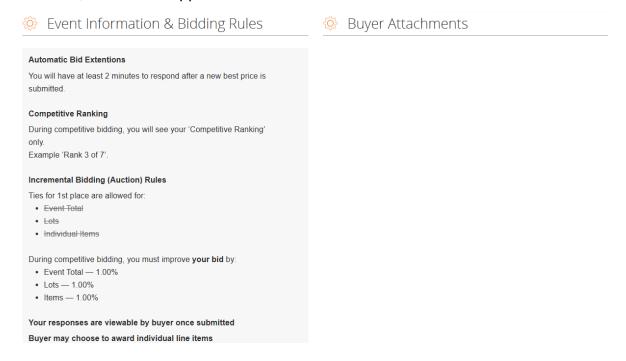
				Prebidding Countdo	wn 85	: 15 secs	
Event Info							
Supplier has been invited by COUPA to participate in a sourcing event for Reverse English Auction - Laptops. Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services. If you have responded to the event, please ignore this message.							
Do you intend to	participate in this e	event?					
Indicate your intent to participate. Buyer wil	ll be notified of your intent.						
Do you intend to participate?	Choose an answer	~					

Event information and Bases for bidding: From there you can view all the



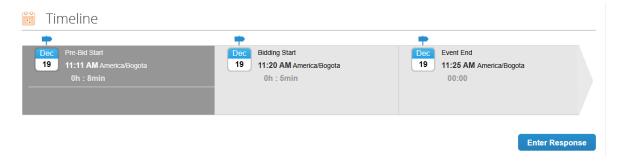


parameters that the organizer proposes for the English Reverse Auction listing scenario, where the supplier is informed:



- Automatic quote extensions: Referring to the time limit you will have to respond, after a new best price is sent.
- **Competitive ranking:** Referring to the type of feedback you will receive during the auction.
- Gradual Increasing Bid Rules (Auction): The degree of increase to which your bid must decrease.

Term: As the last section before entering the response, there are the deadlines for the auction scenario, where it marks the three moments in which the start prior to the quote is given, Start of the submission of quotes and the end of the event.

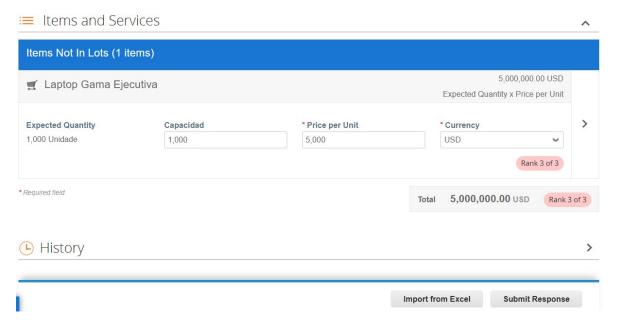






Enter the response: We proceed to enter the response to the buyer where the completion time and the competition status of the quote are taken into account.

At the same time, it again discriminates against the items and lots required in this auction scenario, where the lowest price x the expected quantity will be the winner of the bid before the price countdown ends.



Once the auction starts, submit your first bid by clicking the **Submit Quotes button**.



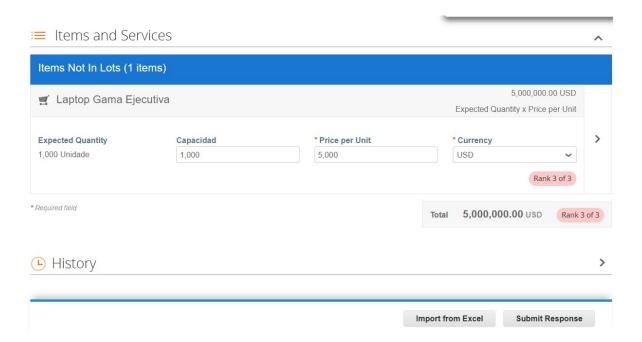
Current status of the supplier's position: While the suppliers register their responses, the supplier's classification may vary, so the dynamics of this auction scenario is to decrease the base price, adjusting it little by little in order to be able to compete with the proposed prices and reduce the base price to what is allowed by





the abilities and interests in the negotiation, and in this way be the winner in this type of auction.

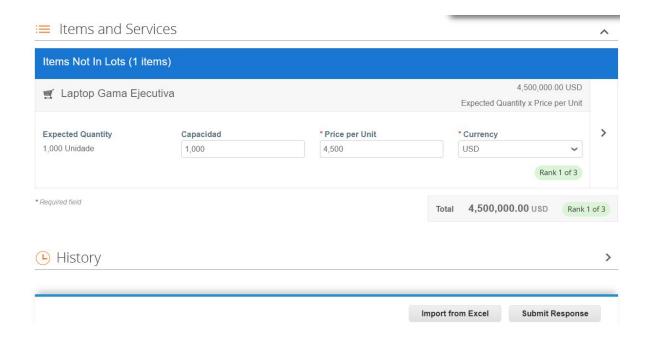
In this case there are 3 providers competing, where in the image it can be seen how it is lagging behind in the bid, so this provider will make a counteroffer.



In the following image you can see how the supplier makes the counter offer by editing the prices and pressing the send response button again, and immediately and giving feedback on the scenario, Coupa notifies the classification of this supplier, remember that Coupa will only notify on the screen the positions if the buyer has it configured initially, it can happen that only the best anonymous price is seen on the screen, or only the classification without denoting the number of participants.







Event Concluded: Upon entering this event conclusion state, the ranking will be notified, as it appears on the green and red banner, respectively, the first announcing the auction winner and the red announcing a non-victorious ranking, the time counter will disappear, and in turn the buyer will be able to notify in the message center if the supplier was awarded in the auction or not.

Reverse English Auctio... - Event #1158 Event has Ended

Reverse Dutch Auction

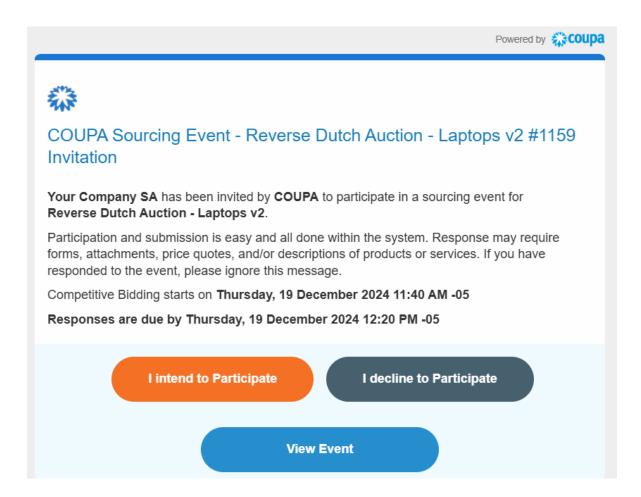
As in the previous event, an invitation message is received with the same characteristics, but this time the number of steps and the response time for each step are considered.

The invitation includes the message sent by the event creator. In the event invitation, we find 3 buttons:





I intend to participate: By clicking this button, COUPA will immediately notify the event organizer that the supplier intends to participate in the event and will also direct them to the event.

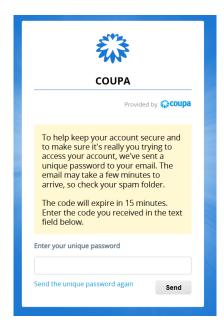


Decline to Participate: By clicking this button, COUPA will immediately notify the event organizer that the supplier does NOT intend to participate in the event.

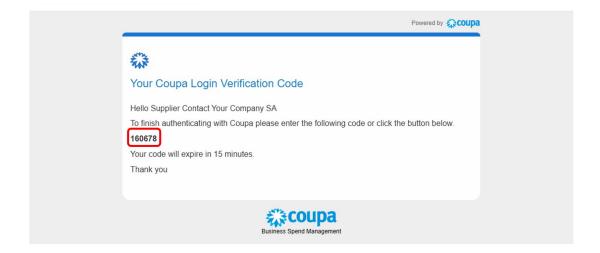
View Event: By clicking this button, the supplier will be directed to a page where they must enter an OTP (One-Time Password) to access the event view, where they can find information related to the event.





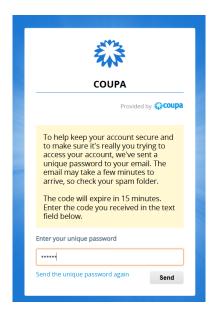


The supplier will receive this one-time password at the same email address and must copy and use it to access the event by clicking on Submit

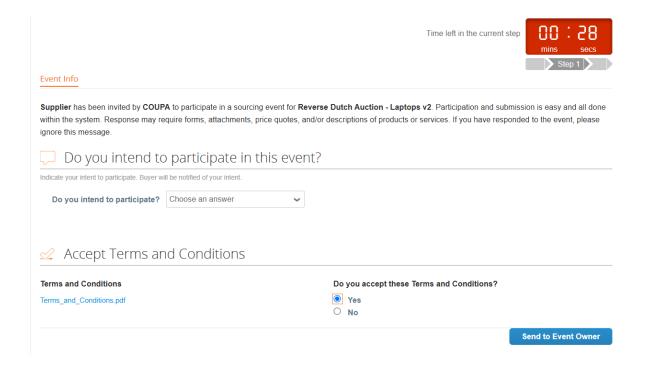








Acceptance of Terms and Conditions: In this section you will find the terms and conditions established for this event. These terms must be read carefully and the "Yes/" field must be marked to proceed to send the response to the creator of the event. If the terms are accepted, the option to enter the response is automatically enabled. If the terms are not accepted, Coupa provides a box to leave a comment about the reason why the terms and conditions of the event are not accepted.







Event information and Bases for bidding: From there you can view all the parameters that the organizer proposes for the English Reverse Auction listing scenario, where the supplier is informed:



• **Automatic bidding time interval**: Referring to the time interval in which prices will increase.

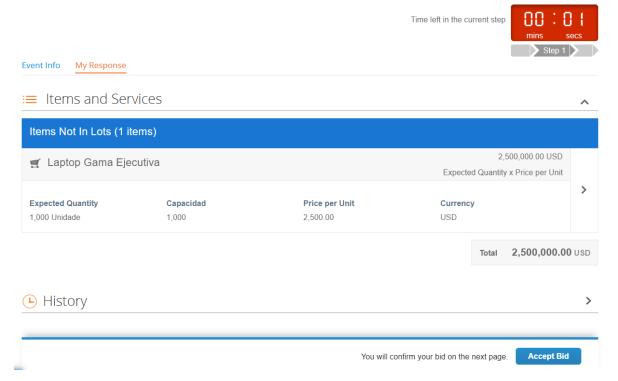
Term: As the last section before entering the response, there are the deadlines for the auction scenario, where it marks the three moments in which the start prior to the quote is given, Start of the submission of quotes and the end of the event.



Enter the response: We proceed to enter the response to the buyer where the completion time of each step is taken into account.

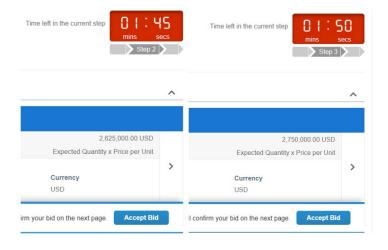






Once the auction starts, the supplier who first accepts the bid is the winner.

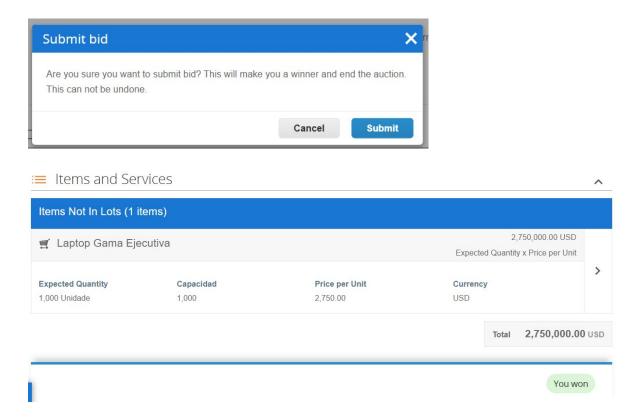
In the following image you can see how the total price of the offer increases by each step, due to the settings that the organizer of the event configured, since no provider accepts, it will simply notify the provider that the event is concluded without bringing no winner.







In case of clicking on the button, " **Accept bidding** ", this will immediately notify if the supplier wishes to send, after that and if no competitor does so before, this supplier will be given as the winner of the auction, in turn as in the Previous events can be notified about it by the message center.



Japanese Reverse Auction

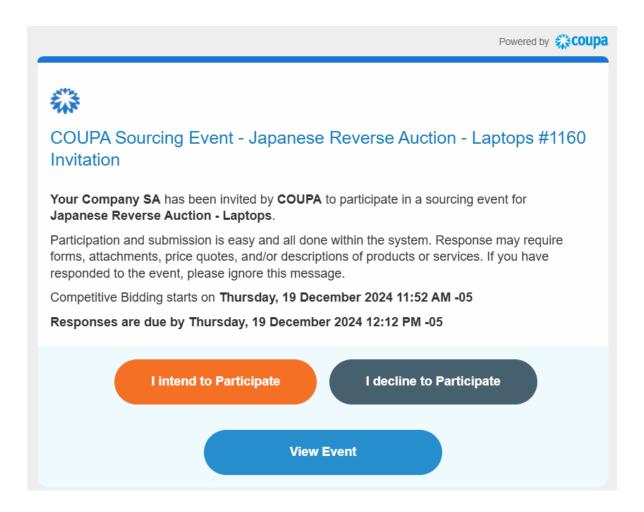
In the same way, the invitation to the reverse auction scenario is also received.

The invitation includes the message sent by the event creator. In the event invitation, we find 3 buttons:

I intend to participate: By clicking this button, COUPA will immediately notify the event organizer that the supplier intends to participate in the event and will also direct them to the event.





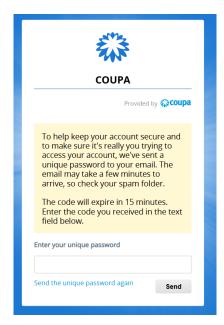


Decline to Participate: By clicking this button, COUPA will immediately notify the event organizer that the supplier does NOT intend to participate in the event.

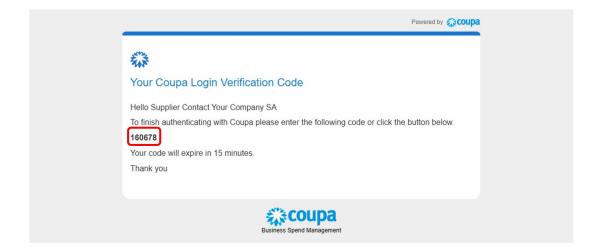
View Event: By clicking this button, the supplier will be directed to a page where they must enter an OTP (One-Time Password) to access the event view, where they can find information related to the event.





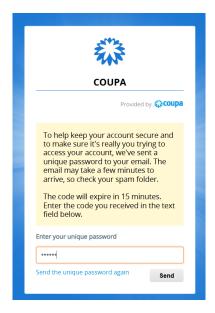


The supplier will receive this one-time password at the same email address and must copy and use it to access the event by clicking on Submit

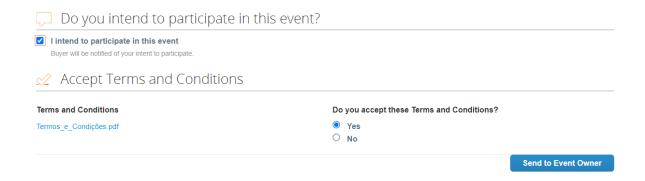








Acceptance of Terms and Conditions: In this section you will find the terms and conditions established for this event. These terms must be read carefully and the "Yes/" field must be marked to proceed to send the response to the creator of the event. If the terms are accepted, the option to enter the response is automatically enabled. If the terms are not accepted, Coupa provides a box to leave a comment about the reason why the terms and conditions of the event are not accepted.



Event information and Bases for bidding: From there you can view all the parameters that the organizer proposes for the English Reverse Auction listing scenario, where the supplier is informed:







 Automatic bidding time interval: Referring to the time interval in which prices will decrease.

Term: As the last section before entering the response, there are the deadlines for the auction scenario, where it marks the three moments in which the start prior to the quote is given, Start of the submission of quotes and the end of the event.

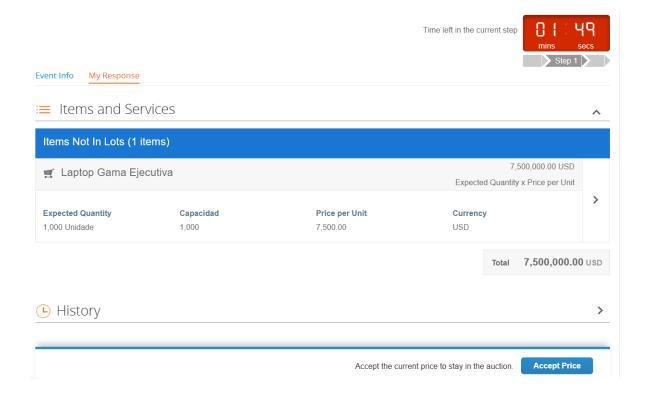


Enter the response: We proceed to enter the response to the buyer where the completion time of each step is taken into account.

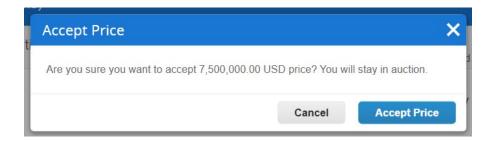
There is not much difference between the Dutch auction, on this occasion the dynamic consists of maintaining it until all the steps configured by the buyer are finished in the stipulated time, this gives an initial price which gradually decreases as configured, and in turn all competitors are accepting at every step.







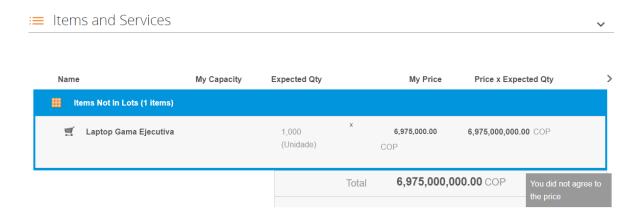
It is important to make it known that at each step the portal must be notified that the offer is accepted and that you want to stay in the bid, otherwise it means that the supplier does not want to stay in the bid, and the auction will end.



Otherwise, if you do not want to accept the offer, simply let the bidding time expire and it will notify you that your last accepted offer will be your final offer as a supplier, it will also inform you when the event will end.







It must be remembered that in a true Japanese auction, even if there is only one supplier accepting the steps of the scenario, the event will continue until the steps configured by the buyer are finished, however, in most Japanese auctions the bid ends at from the moment that a single supplier accepted the offer. Coupa will not notify you as in the previous auction that it was won automatically.

Since the system does not automatically notify the buyer, he can do it manually through the message center, as evidenced in previous quote scenarios, in turn it must be remembered that this same message will reach the email managed by the creator of the event.



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A new beginning, leading to the transformation