

The background of the slide features a 3D rendering of several large, white industrial storage tanks. Each tank has a grey base and a white upper section. They are arranged in a row, with some having metal railings and ladders on top. The scene is set against a light blue sky and a dark blue ground plane. The overall aesthetic is clean and professional, typical of a corporate training document.

TRAINING GUIDE

COUPA RFP PLATFORM START GUIDE FOR SUPPLIERS


Presented by the Center of
Excellence – Procurement and
Supplier Relationship

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INVITATION & LOGIN

When the event is launched, suppliers receive an invitation mail which contains a unique link to the event, which brings the supplier straight into the event.



AGROPUR has invited you, Company XYZ to sourcing event RFP of X.

Your username is `sales@companyxyz.com`

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.

Please respond by Wednesday, 16 March 2022 05:00 PM EDT

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

View Event

INVITATION& LOGIN

To maintain information security, it is required that the suppliers log in. The invitation mail contains a link to a page where the suppliers can set the password, together with one to the supplier login page. Once logged in, suppliers are brought to a start page with a list of all events they are invited to. When click on an event link, suppliers can see the event details for that event.

The image shows an email invitation on the left and a login page on the right. The email text includes: "The event opens on Friday January 11 at 10:00 CET.", "Click **View Event** to learn about scope and conditions. Once you have accepted the requested information in the **My Responses** page.", "You have been given an account on Coupa 2.1's sourcing system to provide your response. Once you can login, you need to setup your new password at the following link: https://docs-test.coupadev.com/setup_password/9873423j34hjk34jk234h2234k198402ib3ib5ij", "Your username is alice@pomma.com", and "After setting your password, please login at https://docs-test.coupadev.com/sessions/supplier_login to provide your response." An important note states: "IMPORTANT: You must setup your password within 7 days of receiving this message." The login page on the right is titled "Coupa 2.1" and "Powered by Coupa". It features a "Sign In" section with "Username" and "Password" input fields, a "Forgot username or password?" link, and a "Sign In" button. A blue callout box with the text "Link to create log in user first time" has an arrow pointing to the password setup link in the email.

INVITATION & LOGIN

Landing page for logged in suppliers

Edit password and sign out

Settings

Sign Out

Welcome to your Sourcing Response Portal!

Invitation and notifications of possible changes

Coupa 2.1 has invited you to this sourcing event: **Fruit Supply January**. The event opens on **Friday January 11 at 10:00 CET**.

Click **View Event** to learn about scope and conditions. Once you have accepted the terms and conditions, you may submit the requested information in the **My Responses** page.

All Sourcing Events

List of the events you are invited to

Advanced search

Free text search

Expand table

Click to open event

Event #	Event Name	Start Date	End Date	Status	Type	# Responses
152	Fruit Supply January	01/14/19	01/24/19	Prod	RFP	0
148	Fruit Supply December	01/10/19	01/24/19	Auction	RFP	1
	Fruit Supply November	01/09/19	01/24/19	Prod	RFP	0
	Fruit Supply October	01/09/19	01/24/19	Auction	RFP	0
136	Fruit Supply September	01/08/19	01/25/19	Prod	RFP	0

EVENT INFORMATION

- ❖ The first page that the suppliers see in the event, the Event Info page, contains general information about the event. A countdown timer at the top right shows the time to closing.
- ❖ At the top, the suppliers see the invitation message again and the notification about any changes to the ongoing event that affect the suppliers as well. The suppliers can indicate their intent to participate directly from the invitation email, or in here in the Event Info page.
- ❖ The suppliers have to accept all the Terms and Conditions in order to gain access to next page where the responses are submitted. If a condition can not be accepted, the supplier clicks 'No' and gives a brief explanation in the mandatory comment field. Only once the supplier has accepted all of the Terms and Conditions, and submitted them by clicking Send to Event Owner at the bottom of the section, the Enter Response button becomes active.
- ❖ Note that while a 'No' may be changed into a 'Yes', an acceptance is binding, i.e. it is not possible to change a 'Yes' once it is submitted.

EVENT INFORMATION

[Event Info](#) [My Responses](#)

AGROPUR has invited you to the sourcing event: RFP XYZ. Agropur is a major player in the Canadian dairy industry. We process more than 6.5 billion liters of milk annually through our plants in Canada and the United States. Over the years and after many acquisitions, we have diversified our product lines which now includes milk, fine and industrial cheeses, milk powder, butter, and ice cream.

Agropur would like to provide suppliers with an opportunity to show how it can provide the greatest value for RFP SUBJECT.


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.

 Do you intend to participate in this event?

I intend to participate in this event

Event owner will be notified of your intent to participate.

 Accept Terms and Conditions

The suppliers have to accept all the Terms and Conditions in order to gain access to next page where the responses are submitted.

Terms and Conditions

[Appendix_A_-_Notice_of_Intent_to_Participate.pdf](#)

Do you accept these Terms and Conditions?

- Yes
 No

Terms and Conditions

Please fill out and sign the Appendix A-Notice of Intent to Participate, and return via message center by March 28th, 3 PM.

If the supplier fails to meet such requirement, he may be disqualified of this RFP.

Do you accept these Terms and Conditions?

- Yes
 No

Terms and Conditions

[RFP_Policies_and_Conditions.pdf](#)

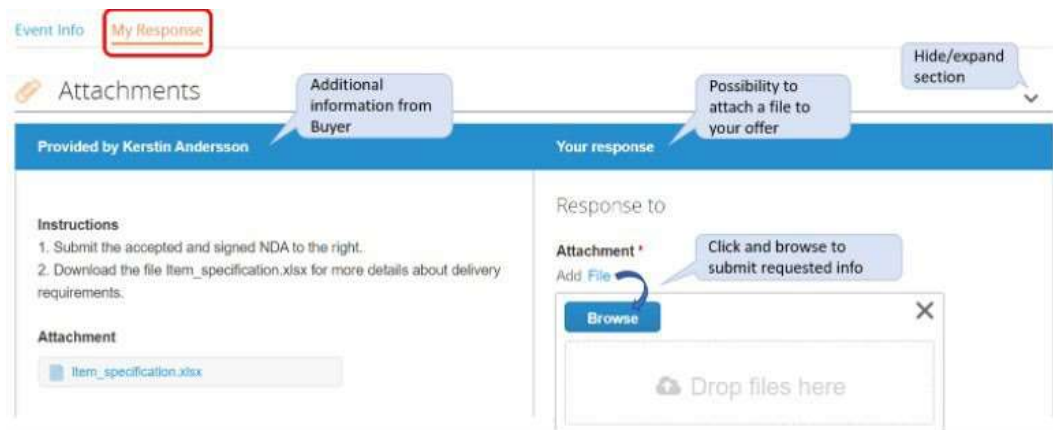
Do you accept these Terms and Conditions?

- Yes
 No

[Send to Event Owner](#)

MYRESPONSES PAGE - ATTACHEMENTS

- ⌘ Depending on the events, suppliers may be required to review and fill out some documents, this is where they can download and upload these documents as attachment;
- ⌘ Mandatory information is labeled by a red asterisk. If not completed, the supplier will receive an error message upon submission and the response is not accepted;
- ⌘ Suppliers can click the File link in the Your Response part to the right to browse for the file in the Attachment section. The file is submitted once it is selected. To remove it, the supplier puts the marker over the attachment and clicks the red delete icon. Several files may be attached one by one or as a zip archive.



- ⌘ In some RFPs, the bid sheet is part of the documents to be uploaded, in other cases, the bid sheet might be found in the Items and Lots section;
- ⌘ After submitting the bids in the response section, the suppliers may update their responses until the event ends.

MYRESPONSES PAGE- FORMS

In some RFPs, the suppliers may be required to answer some questionnaires, they can answer the questions online in the Forms section. If there are several questionnaires, the supplier can use the Hide/Expand arrows in the right margin to facilitate overview. Supplier can export the questionnaire into Excel to fill in the response and upload once completed.

2 Questionnaire

Collapse All | Expand All

* First Name >

* Last Name >

Phone Number >

* Email >

Role in Company >

Mandatory questions are marked by red asterisk

MYRESPONSES PAGE – ITEMS AND LOTS

- ❖ Additional specifications might be required;
- ❖ For multiple items, it might be easier to enter prices and specifications offline in an Excel form and submit the offers in bulk. The suppliers download the bid form by clicking the Export to Excel at the bottom of the page. Items/services as well as questionnaires are included in the file, mandatory information is marked by a 'Y'. Note that the name of the file which is re-imported has to be exactly the same as that of the original downloaded file. A green receipt indicates successful import, and the responses can be inspected online prior to submission.

Name	Expected Qty	My Price	Price x Expected Qty >
Lot: Stockholm site	1 Lots	750.00 EUR	750.00 EUR

Item Requested	Ship To	Item Details	Need By Date
Apple Granny Smith grade 1		Specification_Apples.xlsx	01/31/19

Expected Quantity	My Price *	Price per UoM for expected quantity	Line Total
500 kilo	1.50		750.00 EUR

Your Item Name: Enter your item or service name

ID/Part Number: Enter an ID or part number

Lead Time *: 3 Days

Description *: Granny Smith according to attached specifications, 20 kg/case

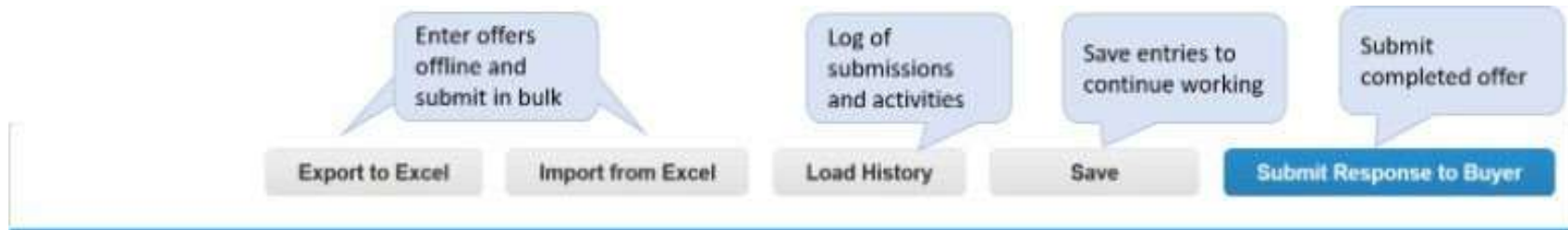
Attachments: Click to view | Add File | URL | Text | Greens_Veggies_-_Delivery_For_You

* Form: Additional specifications | Request for additional info

Buttons: Cancel, Save Item

MYRESPONSES PAGE – SUBMISSION OF RESPONSES

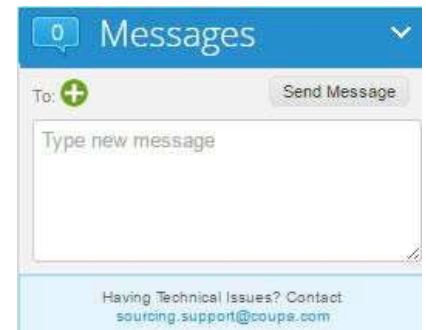
- ✧ When all required information in the three sections is completed, the supplier clicks Submit Responses at the bottom of the My Responses page;
- ✧ If mandatory information is not complete, the supplier will receive an error message upon submission, and no response is sent off ;
- ✧ The suppliers may update their offers as many times as needed until the event is closed.



COMMUNICATION

The Suppliers can communicate with Agropur procurement team through the Messages center on the bottom left. Depend on the event, the suppliers may also be allowed to send attachment through the Message center.

Questions from the suppliers are related to the Event Team and the supplier will get an email notification when an answer is posted. The answer is also shown in the supplier's Messages center, as are possible updates to the event information (also shown in the notification box at the very top of the supplier's Event Info page).



Agropur may publish feedback on the questions received and additional clarifications through the message center.

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L'EXTRA

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PROCUREMENT CENTER OF EXCELLENCE