A Supplier's Guide to Coupa Sourcing Optimization

Welcome to Coupa Sourcing Optimization, CSO

In this document you find instructions on how to log in to the site and participate in a sourcing event hosted on CSO.
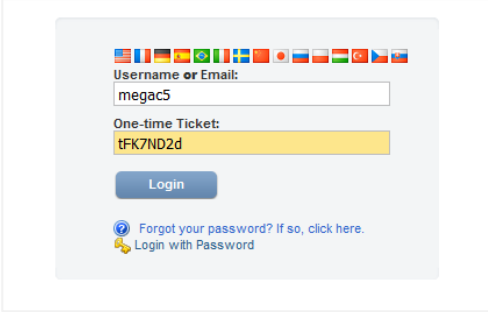
If you have any questions, you may post them on-line using the **Ask a question** functionality (see below) or contact the Project Management Team using the contact information provided in the invitation.

Instructions for general navigation

How to login to CSO

Go to the web address indicated in your login details and enter your username and your one-time password provided in the login ticket or invitation letter (a) or just click the link in the mail and Login (b). **Note** that the one-time ticket can be used only once. You may retrieve a new temporary one-time password by clicking the "Forgot your password?" link in the login page.

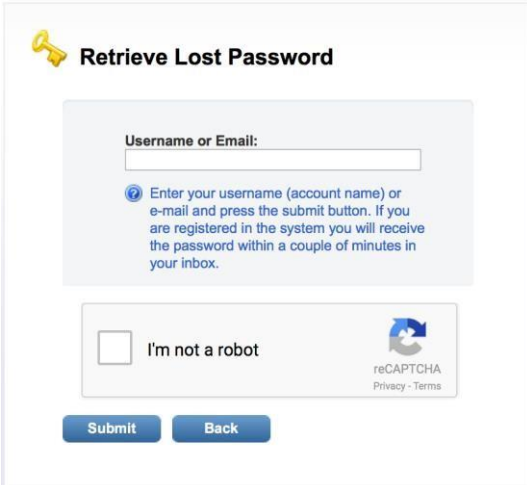a)   b)

If it is the first time you visit CSO, after logging in you will be asked to change your password into one of your own choice. The password must contain at least 8 characters whereof at least one digit, at least one lower case letter and at least one upper case letter. Once saved, the password you have selected will be the new permanent password for all subsequent visits to the site.

You will also be asked to review and update your personal contact information the first time you log in. Please make sure phone numbers are correct in case project management should need to contact you. Click the Save button to continue to the main page, do not click the Log out button.

Forgotten password

Should you forget your password, please use the link "Forgot your password? If so, click here". Enter your username and check the box "I'm not a robot". In some browsers, for instance Chrome and Safari, you will get an additional question to verify your entry. Click submit to request a new one-time ticket. The ticket is sent to your registered e-mail address and is valid for one log in during five days. You will be requested to change the temporary password once you log in.

Start Page

This is your start page in CSO where you can see the projects you are invited to and if you are required to do something at the moment.

Contact information and password

In this page you can complete and revise your account information, the information about your company (Organization) and also change your password by clicking the links in the blue boxes at the top of the page.

Example: Updating contact information

To update your contact information, click on the Edit button on the upper left. When you are done, click Save at the bottom of the page.

Use either the green arrow "Back" or the Home link in the upper part of the page to navigate back to the overview page.

Gating

You may be required to take part of some particular information prior to getting access to the project page in a gating step.

Clicking the project name in the start page will take you to the gating page. If there is no gating requirements for the project at hand, you will be taken directly to the Project Overview page (see next section).

Click the link to download the agreement documents and download all documents.

Click the Back arrow.

Check the box "I confirm that I have read…" and click the "Participate" button.

Should you wish to decline participation, you will be asked to give a brief explanation.

You will be asked to do the same procedure for Information documents if that is required.

Event Overview Page

On the event overview page, you can see and access the various tasks you are required to fulfil at the time being. If the project is in an evaluation phase, i.e. you just have to wait, you will be informed about that as well.

The actions that are required from you are shown in the list (green box in the screen shot above). When the task is completed, its status is changed to OK with a happy smiley icon. Tasks that are not mandatory are marked as "Not yet completed".

To enter a given task, click either the blue "Go" button or the name of the task, see next section.

In the top left corner of the event overview page (red box in the screen shot above), there are links for information and questions (see further below).

Request for Quote/Request for Information

The procedure is the same for RFI Questionnaires as for RFQ Bid forms.

Click the link to the task in the project overview page, for instance "Place bids" in the example above. Click "Download" and save the empty bid form or questionnaire on your computer.
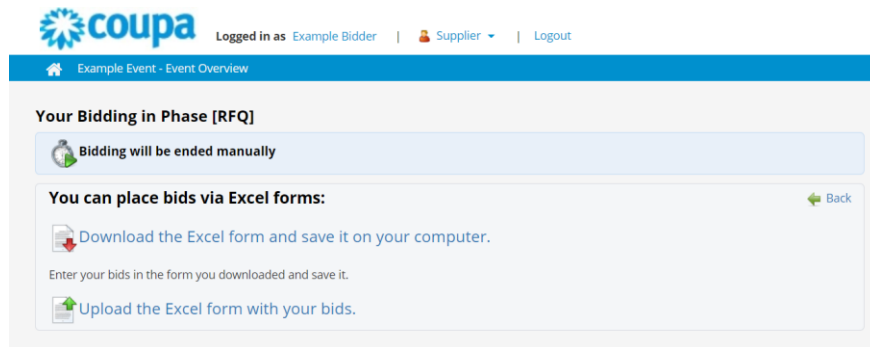
Complete the requested information and make sure all mandatory questions have been answered. Save the completed form, go back to CSO and click the "Upload" link.

Browse for the saved questionnaire or bid form on your computer and click "Submit". You will get a receipt that your answers have been properly submitted.
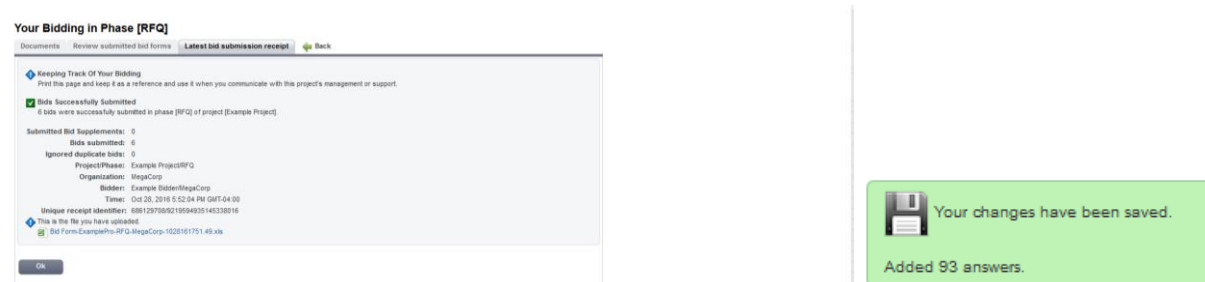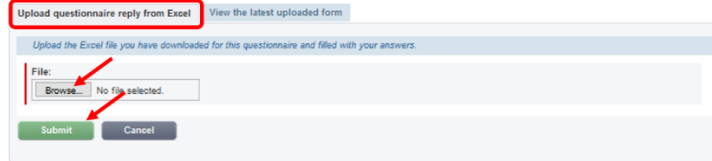
Error messages

If some mandatory information is missing or not correct, you will get an error message upon submission. The message will tell you which information is not accepted and why. In addition, the rejected form contains an additional sheet which lists the errors and points to the cells to be corrected.

The rejected form may be downloaded directly from the receipt page (red box in the screen shot (a) below) or from the "Upload" page (screen shot (b)).

Review the error message(s) carefully, revise/complete the information, save the completed form and re-submit it as described above.

Your Bidding in Phase [RFQ]

| Documents | Review submitted bid forms | **Latest bid submission receipt** | ⬅ Back |

◆ **Keeping Track Of Your Bidding**
　Print this page and keep it as a reference and use it when you communicate with this project's management or support.

❌ **You have encountered errors during submission. Download this marked up file.**
You will find a sheet named ERRORS AND WARNINGS, where all errors will be listed.

📗 Rejected Bid Form-ExamplePro-RFQ-MegaCorp-1028161749.38.xls
》 No bids were uploaded.

》 Your bid for lot [1001] in row 5, sheet [Single Bids] is invalid since it is missing mandatory data. If you do not want to
place a bid on this lot, you must leave all cells empty (first non empty cell found was R5, with the value [5.00]). The data missing from this bid is:
You must enter a value for the field [Bidder Equipment Type] in cell T5 of sheet [Single Bids].

[More replies exist. Display all replies]

◆ **No Bids Were Submitted**
　No bids were found in this submission.

Submitted Bid Supplements:	0
Bids submitted:	0
Ignored duplicate bids:	0
Project/Phase:	Example Project/RFQ
Organization:	MegaCorp
Bidder:	Example Bidder/MegaCorp
Time:	Oct 28, 2016 5:50:16 PM GMT-04:00

◆ You have encountered errors during submission. Download this marked up file. You will find a sheet named ERRORS AND WARNINGS, where all errors will be listed.
📗 Rejected Bid Form-ExamplePro-RFQ-MegaCorp-1028161749.38.xls

[Ok]

a)　Receipt for a rejected submission with link to rejected form.

| Upload bids from Excel | **View the latest uploaded form** |

Below you can click to download your latest accepted form, or your latest rejected form.
If you have a rejected form, it contains a sheet called "ERRORS AND WARNINGS" in which you can view the error/warning messages that arose when the system received the file.

Name	Received	Result
📗 Rejected Bid Form-Transporta-RFQ1-SupplierA-0209171813.53.xls	Feb 9, 2017 6:13:54 PM GMT+02:00	❌ Rejected
📗 Bid Form-Transporta-RFQ1-SupplierA-0405161855.48.xls	Apr 5, 2016 6:55:48 PM GMT+02:00	✅ Accepted

b)　Access to rejected forms from the "View the latest uploaded form" page in the "Upload" page.

Information and questions

In the "**Options**" box to the left in the project overview page, there are links for information and communication.

Decline to participate

If you should find yourself unable to take part in the project, click this link. Please give a reason for your decline.

After you have submitted information, you have to contact the project management to decline further participation.

View documents

Here you can retrieve all documents provided for download as well as all the forms that you have submitted in the current phase. The star indicates if there are documents available that you have not yet downloaded (including your own submitted forms).

Use the Back arrow to get back to the project page.

Ask a question/FAQ

Here you can contact project support if you have any questions concerning the event. Click the green button "Ask new question", describe your question as carefully as possible in the editor window and click "Submit question".

Ask new question

Project management will be notified about your question and you will receive an email when there is an answer.

Title

NDA

Question

Where do I find the Non-Disclosure Agreement?

Submit Question   Cancel

The answer will appear next to your question on the "FAQ" page. Click the question name to see the answer or click the "Download FAQ" button to download all questions and answers in an Excel file.

Frequently Asked Questions (FAQ)   ← Back

Question	Reply	Last Edited
NDA	Click the "View Documents" link in the "I Want To"-box to the left ...	2014-11-08 22:26
Where do I find the Non-Disclosure Agreement? Best regards,Demo Bidder		

Ask new question   ↓ Download FAQ

* All times are displayed in your current time zone: *Central European Time*

To navigate between pages, always use the green Back arrows or the home link on top of the page.