

# Sourcing Training for suppliers

Release 28

Disclaimer: This training material is for internal use only and is not to be distributed.

# Agenda

1. Introduction
2. Receive and Respond to a sourcing event
3. Checklist

# Introduction

## What is an RFI, RFQ and RFP?

- ❑ **Request For Information (RFI)** is a common procurement process to collect written information about the capabilities of various suppliers.
- ❑ **Request For Quote (RFQ)** requires the supplier to submit price quotes.
- ❑ **Request For Proposal (RFP)** solicit bids from qualified suppliers and then identify which supplier might be the best-qualified to complete the project requirements.

## What is different this time around?



# Receive and respond to a sourcing event

# Receive and respond to a sourcing event

The first time you receive a sourcing event invitation via email, you will be asked to set your password. Your username is your email address.

1. Click the first **link** in the email to open your browser and set your password.
2. Choose your password and retype your password in **Password Confirmation** field.
3. Click **Change Password**. You will then be taken to the Coupa login page to login.

**samancor<sup>®</sup> TEST** My Event (#22)

Powered by **coupa**

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.

**1** You have been given an account on Samancor QA's sourcing system to provide your responses for this Sourcing Event. Before you can login, you need to setup your new password at the following link: [https://samancorchrome-test.coupahost.com/setup\\_password/914583b76db2bcc852be0eb9952b2646f06731f6](https://samancorchrome-test.coupahost.com/setup_password/914583b76db2bcc852be0eb9952b2646f06731f6)

Your username is [supplier3@testing.s2pconsulting.co.za](mailto:supplier3@testing.s2pconsulting.co.za)  
 After setting your password, please login at [https://samancorchrome-test.coupahost.com/sessions/supplier\\_login](https://samancorchrome-test.coupahost.com/sessions/supplier_login) to provide your responses.

**IMPORTANT:** You must setup your password within 7 days of receiving this message.

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Welcome to Coupa!

Please enter your desired password, then reenter it for verification.  
 Your password must be at least 8 characters. Your password must contain both letters and numbers. It cannot be the same as your last 8 passwords.

**2** Password

Password Confirmation

**3** **Change Password**

**coupa**  
 Business Spend Management

# Receive and respond to a sourcing event

Login with your username – your email address and the password you have just set in the previous step.


Once logged-in you will see the event you've been invited to in the Sourcing Response Portal.

Click the **blue event number** to see the event.


Note:

This is different to the CSP (Coupa Supplier Portal). The Sourcing Response Portal is only used for responding to Samancor sourcing event.

Password was successfully updated. Please log in.



**Samancor QA**




Powered by 


Sign In

Username

Password

[Forgot username or password?](#)


THAM 




Welcome to your Sourcing Response Portal!

**Samancor QA** has invited you to the sourcing event: **My Event**. 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.

### All Sourcing Events

View All Advanced

Event #	Event Name	Start Date	End Date	Status	Type	# Responses
24	My Event	11/17/20	03/31/21	Test	RFP	0

# Receive and respond to a sourcing event

1. Confirm that you intend to participate.
2. Review Event information and Terms and Conditions (if applicable).
3. Click **Enter Response** to view bid details.
4. See Event timer for time available to respond.

## My Event - Event #22 Active

Intend to respond is saved. ✕

4

Event Ends **133 : 11**  
days hrs

### Event Info

Samancor QA has invited you to the sourcing event: **My Event**. If you intend to participate, review the event timeline and accept the Terms and Conditions for 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?

1

I intend to participate in this event

Event owner will be notified of your intent to participate.

Accept Terms and Conditions

There are no Terms and Conditions for the current event.

2

Event Information & Bidding Rules

Buyer Attachments

Event will end at the Event End Time.

**Responses are sealed until event closes**

### Timeline



3

Enter Response

# Receive and respond to a sourcing event

1. Give your response a name. This is helpful if you need to submit an alternative bid.
2. Complete the questions.
3. **Save** your answers as you complete the forms.
4. Use the **message board** in the bottom left of the event to communicate with the event owner.

The screenshot displays a web interface for responding to a sourcing event. At the top right, a blue timer shows 'Event Ends 133:11' with 'days' and 'hrs' labels. Below this are navigation tabs: 'Event Info', 'My Responses', and 'Supplier C - #13'. A form field labeled 'Name' with the value 'Supplier C' is highlighted by a red box and a circled '1'. Below this is an 'Attachments' section with a table comparing 'Provided by Sourcing Manager' (Attachment: None) and 'Your response' (Attachment: Add File). A 'Forms' section is partially visible below. In the bottom left, a 'Messages' panel shows a message from 'Supplier C a minute ago' asking for clarification on question 1.2, with a 'Send Message' button and a text input field. This panel is highlighted by a red box and a circled '4'. In the bottom right, a blue 'Save' button is highlighted by a red box and a circled '3'. A circled '2' is placed near the 'Attachments' section. At the bottom left, there is a 'HOME' button with a house icon. At the bottom right, the number '8' is displayed.



# Receive and respond to a sourcing event

1. Under the Items and Lots section of the event, hover over an item and click it to see more item information.
2. Fill in your **price** and any other relevant item information.
3. Click **Save Item** to save the information you've added.

The screenshot displays the 'Items and Lots' section of a sourcing event. It features a table with columns for Name, Expected Qty, My Price, and Price x Expected Qty. The table lists two items: 'Lot: PPE Supplies' and 'Dust Mask FF1 - Pack of 20'. The 'Dust Mask FF1 - Pack of 20' item is selected, and its details are shown in a form below. The form includes fields for 'Your Item Name', 'ID/Part Number', 'Lead Time', and 'Description'. There is also an 'Add Image' button and an 'Attachments' section. A 'Save Item' button is highlighted in the bottom right corner of the form.

Name	Expected Qty	My Price	Price x Expected Qty >
Lot: PPE Supplies	1 Lots	x	= 0.0000 ZAR
Dust Mask FF1 - Pack of 20	1 per Lot (Pack)	x	= 0.00 ZAR

**Item Requested** Dust Mask FF1 - Pack of 20

**Item Description**  
Disposable dust mask FF1 for protection a variety of hazards at an affordable price.

**Expected Quantity** 1 Pack x **My Price \***  = **Line Total** 0.00 ZAR

**Your Item Name**

**ID/Part Number**

**Lead Time**  
Lead Time  Days

**Description**

**Add Image**  
Add image in GIF, JPEG, or PNG formats

**Attachments**  
[Click to view](#)

**Form**

[Cancel](#) [Save Item](#)

# Receive and respond to a sourcing event

At the bottom of the event page, you have some options.

1. **Export to Excel** to download the event as an Excel file. Depending on your browser, you may get a pop-up screen confirming you want to download.
2. **Import from Excel** to upload your responses.
3. **Load History** show you the changes you've made to your event.
4. Click **Save** to save your answers.
5. **Submit Response to Buyer** when all your information is complete.

The image shows a screenshot of a web application interface. At the top, a dialog box titled "My Event - Excel Upload" is open. It contains the following text:

**My Event - Excel Upload**  
 Steps for uploading your response in Excel

1. Download the [Response Template](#) (Note: This template will only work for this event)
2. Fill in or update the Excel file.
  - Fields marked with a "\*" are mandatory. Do not unlock/unprotect the Excel file if you plan to upload it.
  - Values in the uploaded file will replace anything currently saved to your response.
  - Once you click "Start Upload" values in the excel file will be saved, but not submitted.
  - Once upload is complete, review your response and click "Submit." Your response will not be sent until you do so.
3. Load the updated file
 

No file selected.

Uploading will only save your response. You must click "Submit" to send it to the buyer.

Below the dialog box, there is a horizontal bar with five buttons: "Export to Excel", "Import from Excel", "Load History", "Save", and "Submit Response to Buyer". A "History" dropdown menu is open under the "Load History" button, showing two entries: "Supplier C on 11/18/20 at 07:48 AM SAST" and "Supplier C on 11/18/20 at 05:56 AM SAST".

Numbered callouts (1-5) are placed around the interface to correspond with the numbered list on the left. Callout 1 points to the "Export to Excel" button. Callout 2 points to the "Import from Excel" button. Callout 3 points to the "Load History" button and its dropdown menu. Callout 4 points to the "Save" button. Callout 5 points to the "Submit Response to Buyer" button.

# Receive and respond to a sourcing event

On the Sourcing Response Portal, under My Responses you can edit your response while the event is open or submit an alternative bid.

1. Under **Actions**, click the Pencil icon to edit your response. Click the blue icon to view.
2. Click **Enter Response** to submit a new alternative bid.

The screenshot displays the 'My Responses' section of the Sourcing Response Portal. At the top right, a blue box indicates 'Event Ends 133:07' with 'days' and 'hrs' labels. Below this, there are tabs for 'Event Info' and 'My Responses'. A dark blue header bar contains 'View All', 'Advanced', and a search field. The main content is a table with the following data:

Response Name	State	Submitted At	Total	Actions
First Response	submitted	11/18/20	209,841.00	<b>1</b>

Below the table, it shows 'Per page 15 | 45 | 90'. At the bottom right, there is a blue button labeled 'Enter Response' with a circled '2' next to it.

# Checklist

# Checklist

1. Check your mailbox for '**invitation - Sourcing Event #**'
2. View the event information
3. Confirm your intention to participate in the event
4. Read and accept the '**Terms and Conditions**'
5. Use the '**Messages**' pop up to send a message to the buyer
6. Click on the '**Enter response**' button
7. Download attachments
8. Upload an attachment
9. Complete a form
10. Export to excel
11. Import from excel
12. '**Submit your response to buyer**'
13. View your event history