Quick Reference Guide: Sourcing Events for Suppliers

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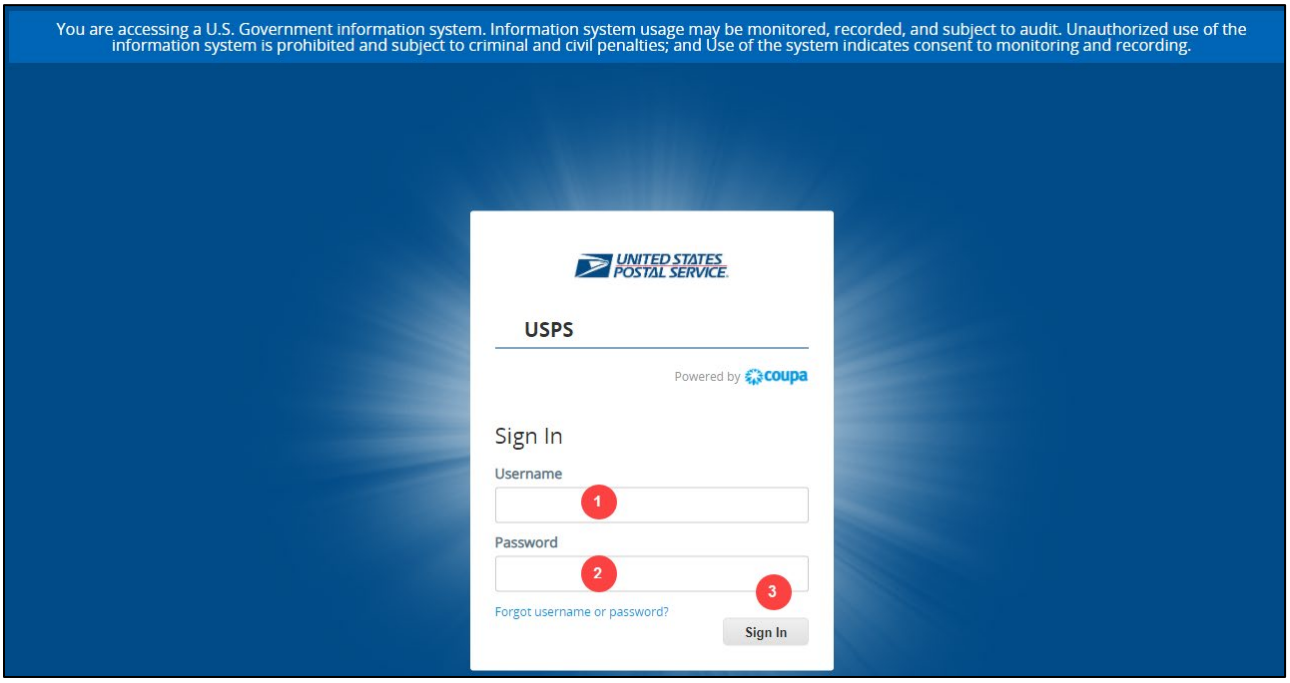
Sourcing Overview

The Coupa Sourcing Response Portal is a free tool for suppliers to access and manage USPS sourcing events. This guide will help walk through how to use, manage, and respond to an event. Please note that the information in this guide starts *after* access to the system has been established and user has a username and has created a password. Please note that there is an additional QRG explaining how to access the Sourcing Response Portal.

Logging in to the Sourcing Response Portal

From an invitation email, or directly using the URL: https://ebuyplus.coupahost.com/sessions/supplier_login log in to the Sourcing Response Portal



Use the information from the initial email (username) and the password you created to access the sourcing system

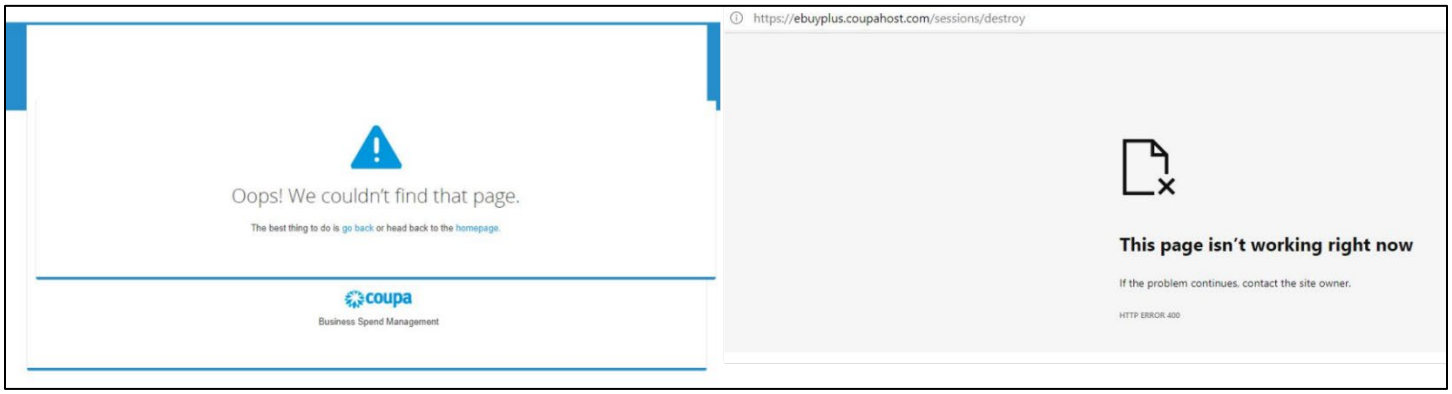
1. **Username:** The username in the invitation email.
2. **Password:** The password you created for in the previous step.
3. **Sign In:** Click the Sign In button to access the Sourcing Response Portal.

NOTE: You can access events in two ways:

Sourcing Events for Supplier

1. Directly from invitation emails where you will be taken directly into the Event Info page for that event.
2. By logging in through the URL:https://ebuyplus.coupahost.com/sessions/supplier_login where you will be taken to the Supplier Response Portal home page.

If you are able to successfully log on but receive errors similar to the below:



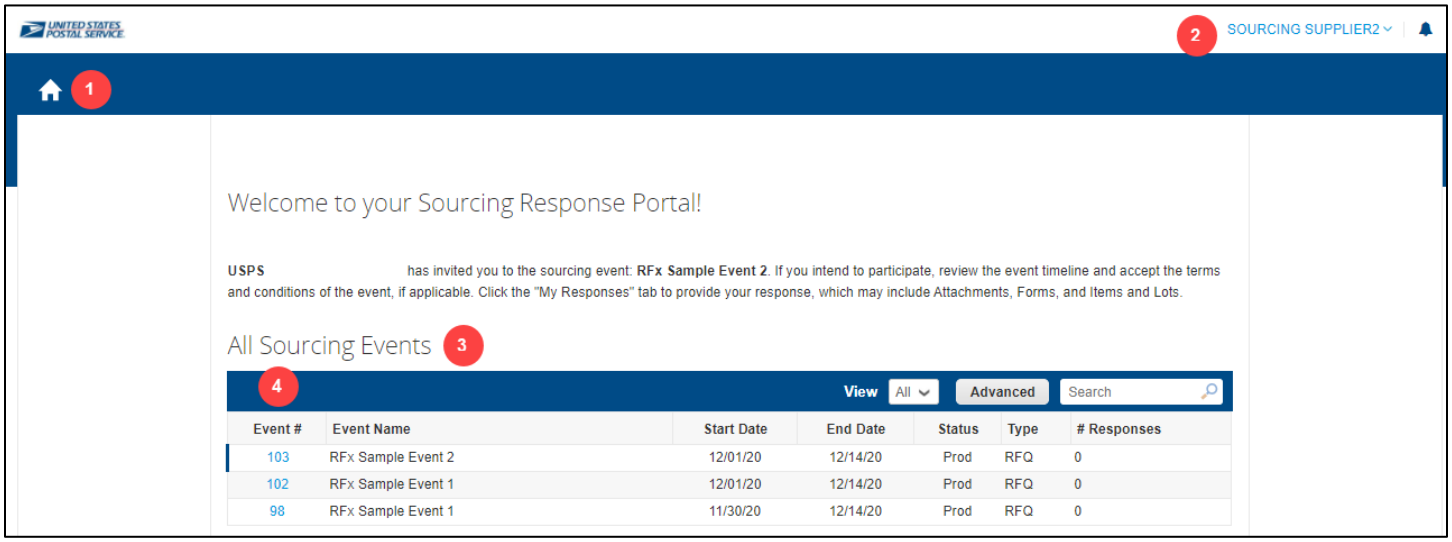
Sometimes browsers can retain login information that can cause issues logging into the portal.

Please attempt to log in using a new incognito window (if using Chrome) – just right click on the View Event button and the option will appear.

Or open it in a private (for IE) or different browser than being used for CSP, that should correct this issue.

Sourcing Response Portal

After logging in successfully, you will be routed to the Sourcing Response Portal home page or directly into the Event Info page.



The home page will contain high level information on all events you've been invited to. This include if you have submitted one or multiple responses.

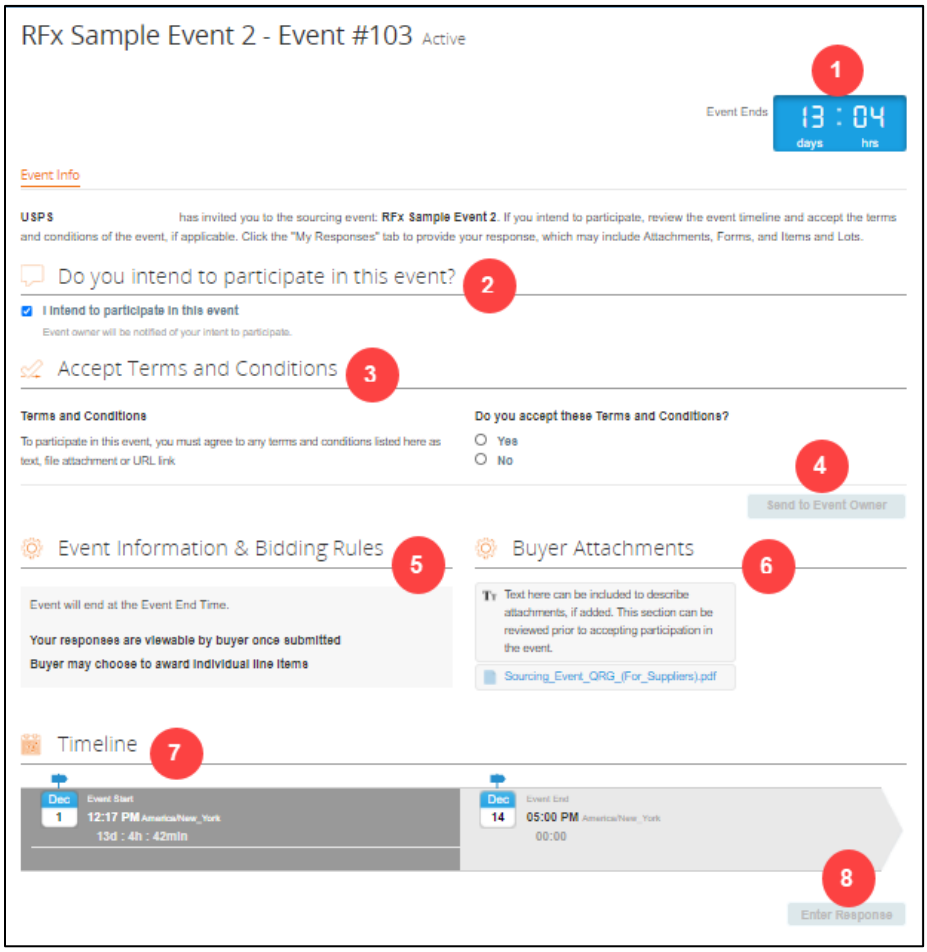
1. **Home Page Icon:** This will return you to the Response Portal overview page.
2. **Username:** The username in the invitation email will appear in the upper right-hand corner.
3. **All Sourcing Events:** You will be able to view all events you have been invited to.
4. **Event #:** Click the blue hyperlink event number to access event information.

Sourcing Events for Supplier

Sourcing Event Info

Event Info

When you access an event, certain information will be visible to you before you agree to participate in the event.

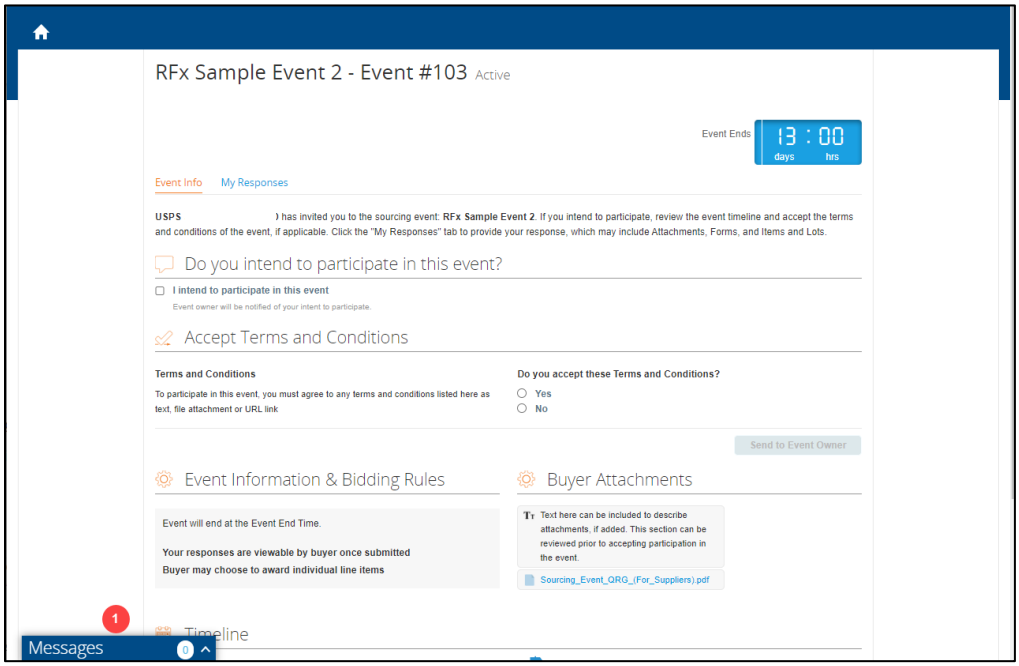


Review these key areas:

1. **Event Countdown timer**: This will provide a countdown for time left in the event.
2. **Do you intend to participate in this event?** If you choose to participate, ticking this box will notify USPS of your intention.
3. **Terms and Conditions:** Event Terms and Conditions must be accepted before you are able to participate in the event.
4. **Send to Event Owner:** One you click the radio button to Accept T&C, or Decline with comments, the Send to Event Owner button will activate. You must click this button before you can proceed into the event.
5. **Event Information & Bidding Rules:** Information for the event
6. **Buyer Attachments:** Information on the event (for example, a QRG), can be included to provide additional information on the event or how to navigate the platform.
7. **Timeline:** Indicates the timeline for the event.
8. **Enter Response:** When T&Cs are accepted and sent to event owner, the Enter Response button will activate.

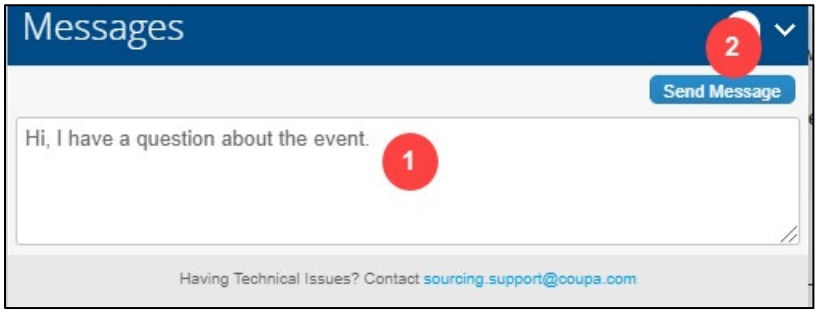
Message Center

Once you access an event, the Message Center will appear in the lower left-hand corner on each tab.



1. **Message Center**: The Message Center is a chat feature you can use within each event to communicate with the Event Owner.

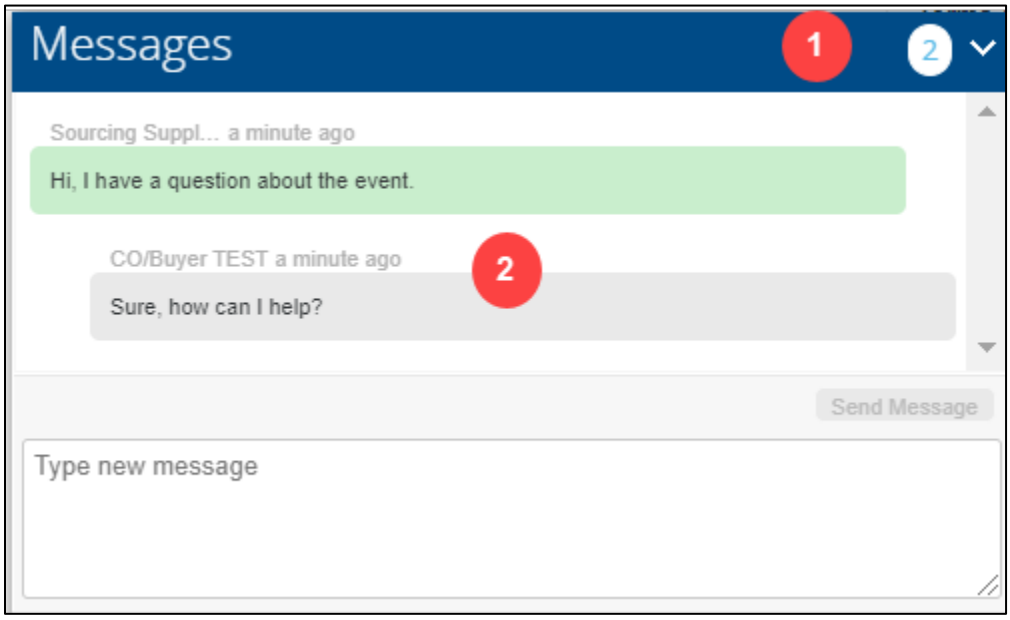
Expand the Message Center to type a message.



1. **Message Center Text Box**: Compose your message or question here.
2. **Send Message**: Click to submit the message.

Responses to the chat will update the Message Center.

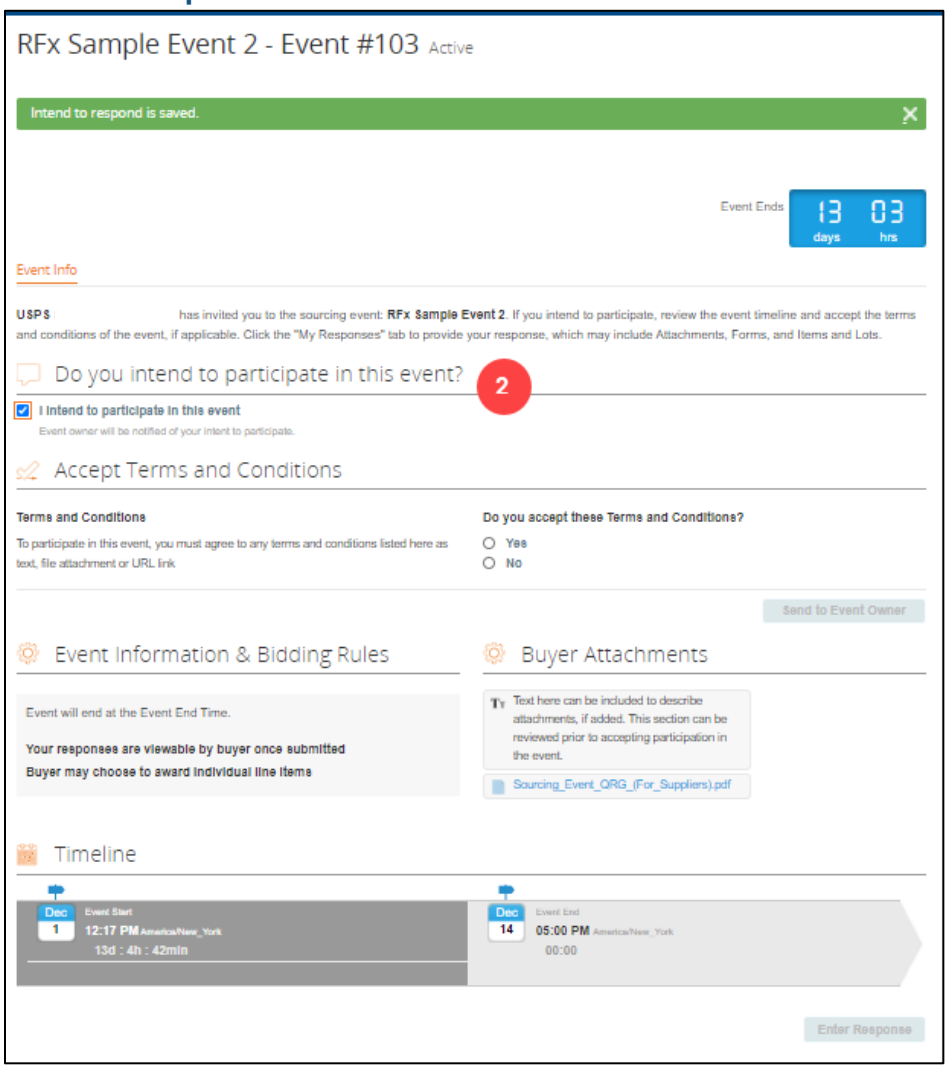
Sourcing Events for Supplier



1. **Message Center Count**: A count of messages sent and received.
2. **Chat History**: Messages sent and received will be tracked.

Note: You will receive notifications of updates in the Message Center via email. Messages you send will be sent only to the Event Owner, however the Event Owner can choose if they respond only to you or multiple/all suppliers.

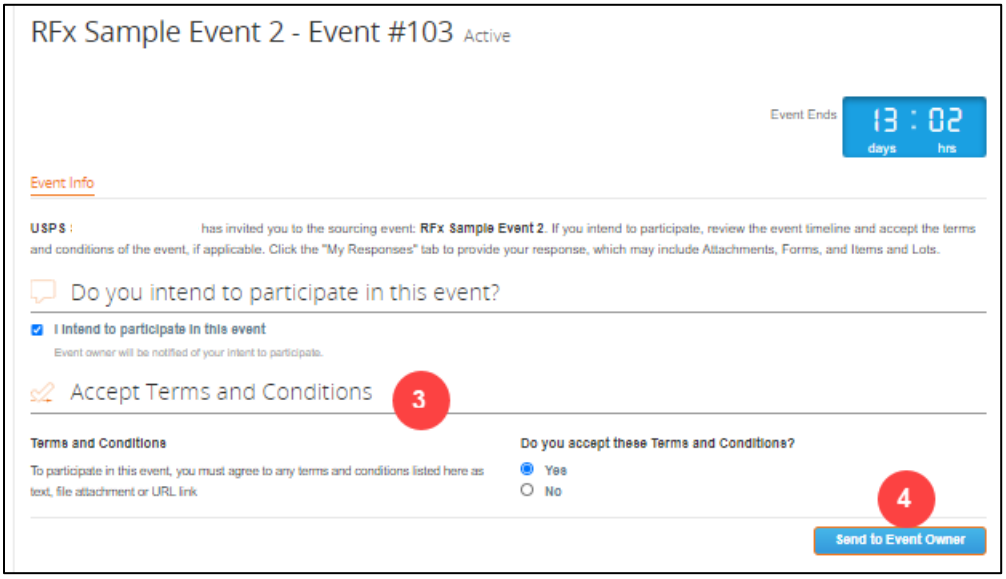
Event Info – I intend to Participate in this event



To let the Event Owner know you are going to participate in the event.

2. **Do you intend to participate in this event?** If you choose to participate, ticking this box will notify USPS of your intention. Note that a green banner at the top will notify you that this response is saved. You can untick the box if you decide to not participate.

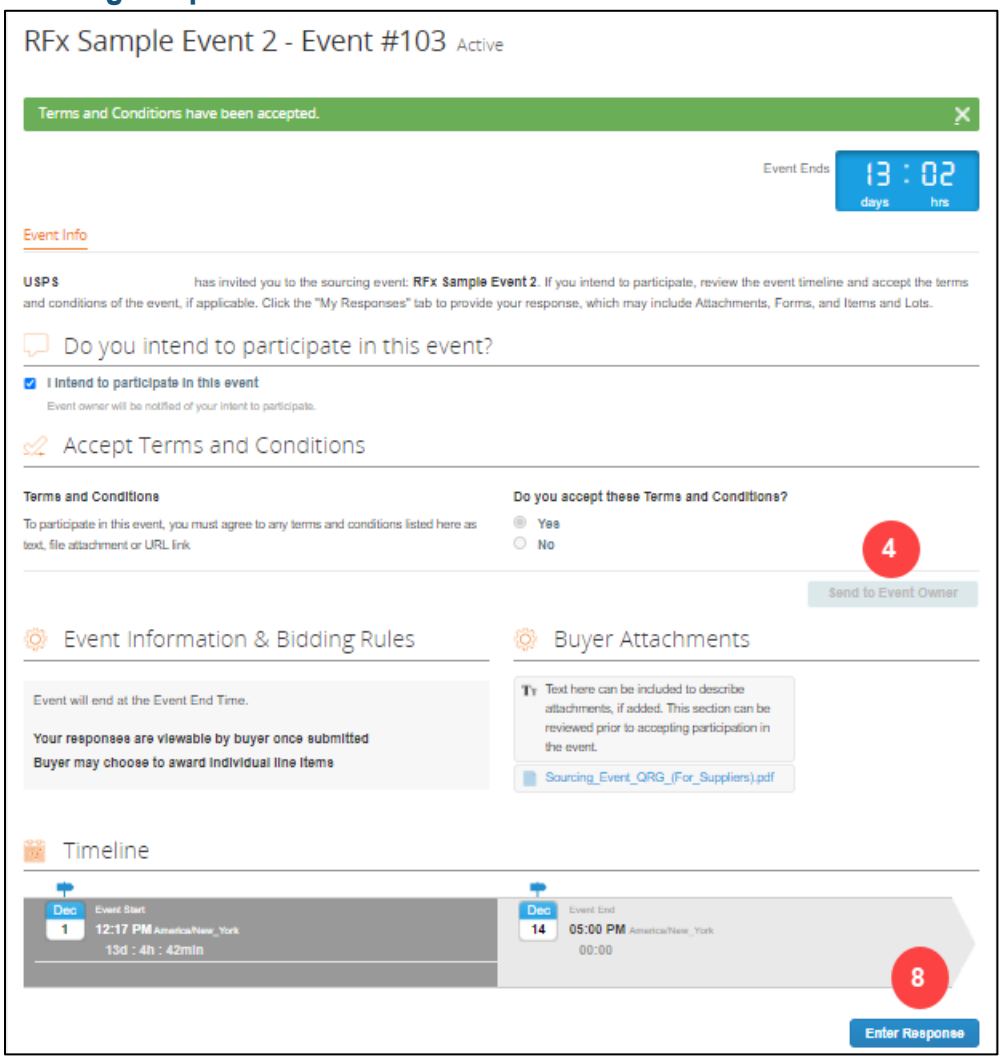
Event Info – Accepting Event Terms and Conditions



Ensure that you have read and agree to all event Terms & Conditions.

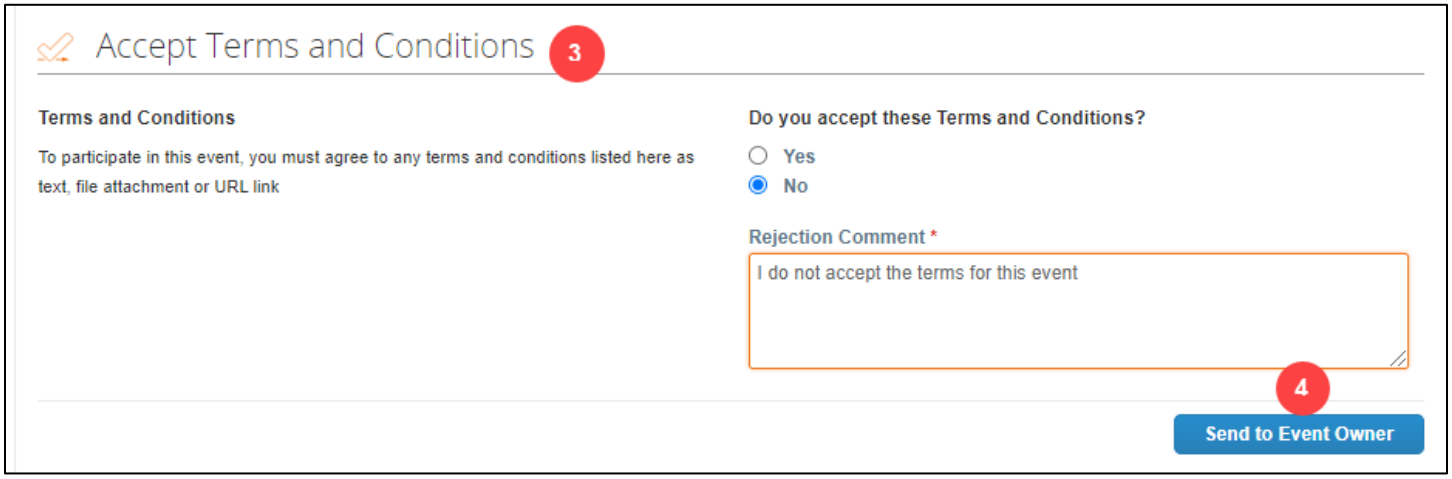
3. **Terms and Conditions:** If you agree to the Terms and Conditions, please check the Yes radio button. Event Terms and Conditions must be accepted before you are able to participate in the event.
4. **Send to Event Owner:** One you click the radio button to accept T&C, the Send to Event Owner will become active.

Event Info – Submitting Response to Event Owner



4. **Send to Event Owner:** When accepting T&Cs, click the Send to Event Owner button. You will see a green banner at the top notifying you the Terms and Conditions have been accepted. Please note that you cannot change your answer to the T&Cs to No once submitted.
8. **Enter Response:** When T&Cs are accepted and sent to event owner, the Enter Response button will activate. When you click this button, you will be taken to the Event Responses Page.

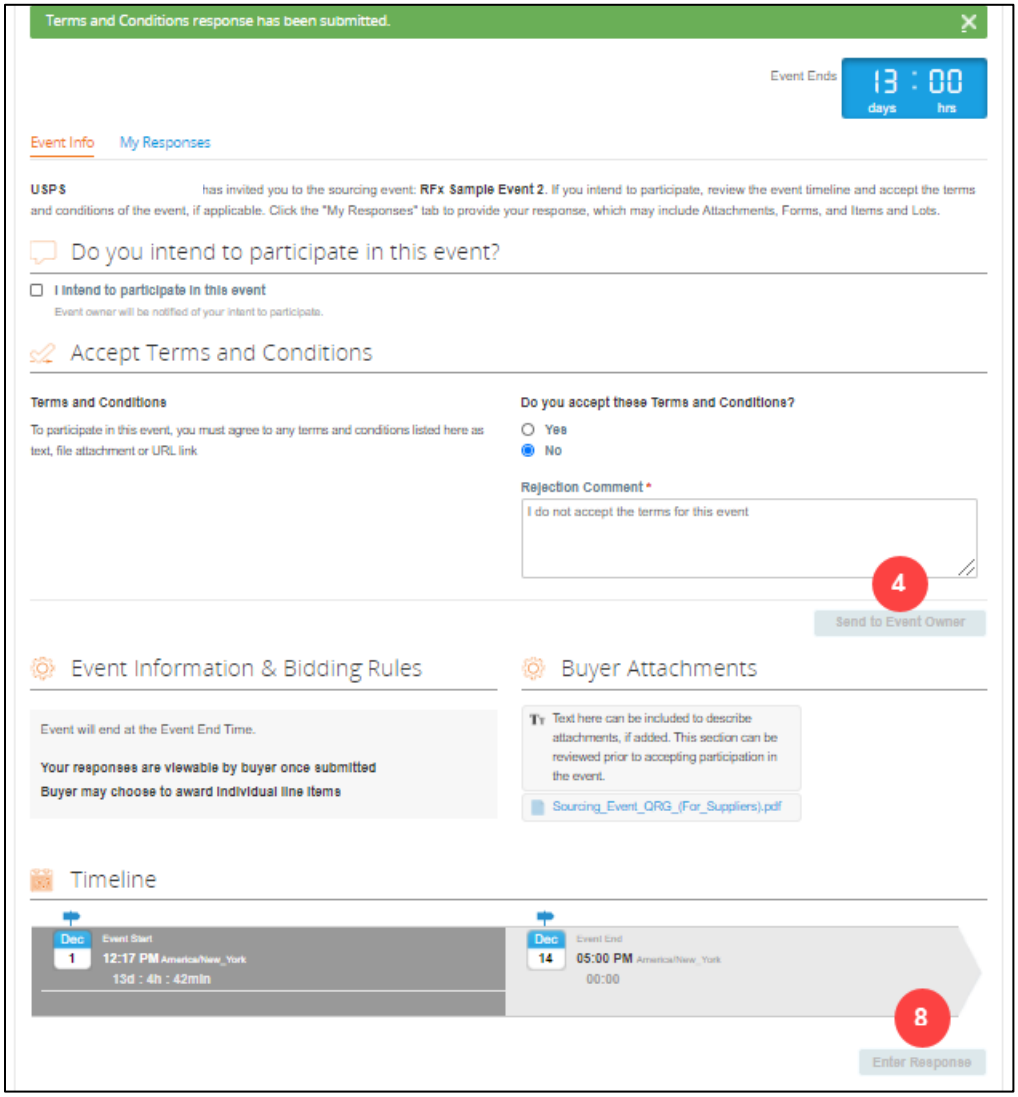
Event Info – Declining Event Terms and Conditions



Ensure that you have read and agree to all event Terms & Conditions.

3. **Terms and Conditions:** If you do not agree to the Terms and Conditions, please check the No radio button. You will need to include a rejection button.
4. **Send to Event Owner:** One you click the radio button to not accept T&C, the Send to Event Owner will become active.

Event Info – Submitting Response to Event Owner

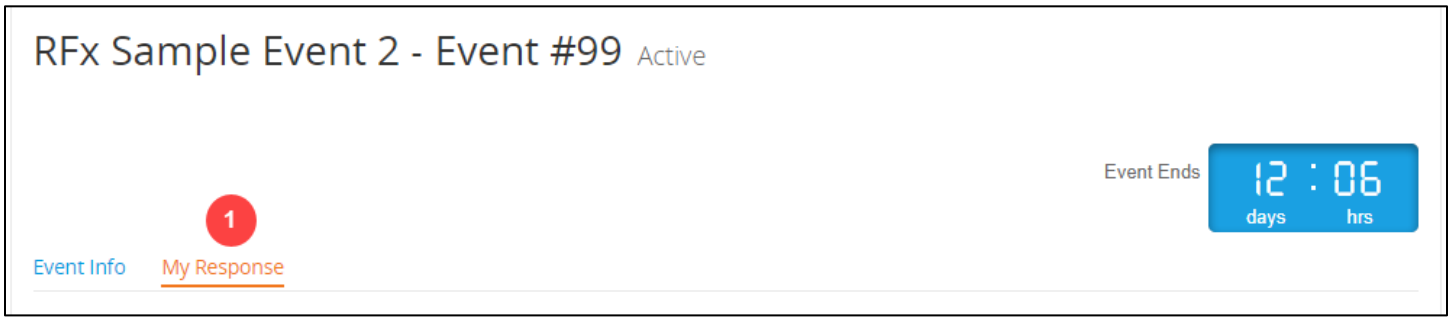


4. **Send to Event Owner:** After completing the required field to not accept the T&Cs, click the Send to Event Owner button. You will see a green banner at the top notifying you the Terms and Conditions have been submitted. Please note that you can change your answer to the T&Cs to Yes, if desired, once submitted.
8. **Enter Response:** When T&Cs are not accepted and sent to event owner, the Enter Response button will remain inactive and you will not be able to participate in the event.

Entering Event Responses

Event Details When Multiple Responses are Not Allowed

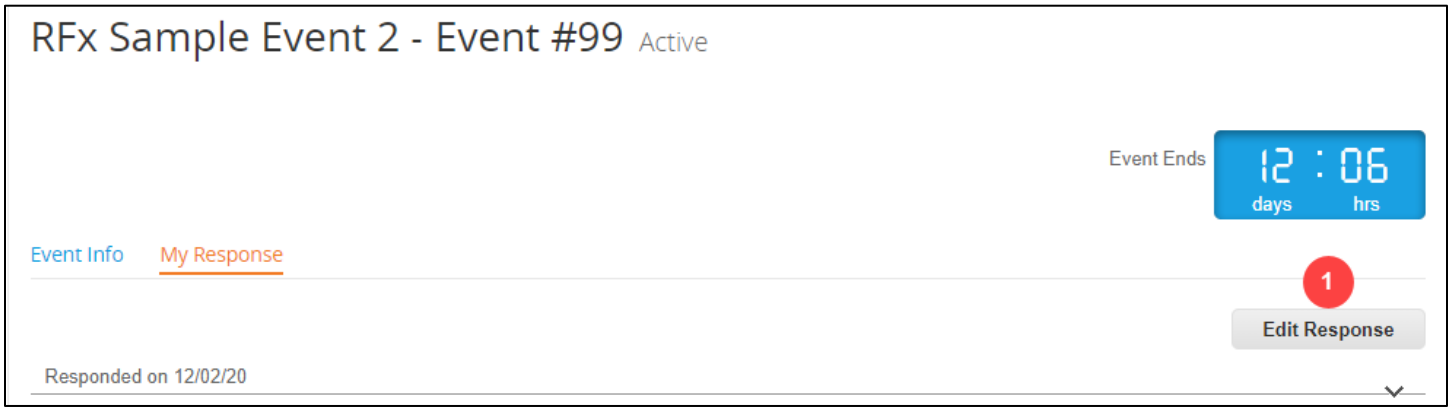
After clicking the Enter Response button, you will be routed to the details for your event. If you are allowed to submit only one response the details page will look like this:



1. **My Response:** Your response to the event.

Event Details My Response tab

This tab will contain your response submitted for the event.



1. **Edit Response:** Your Response can be edited until the event ends.

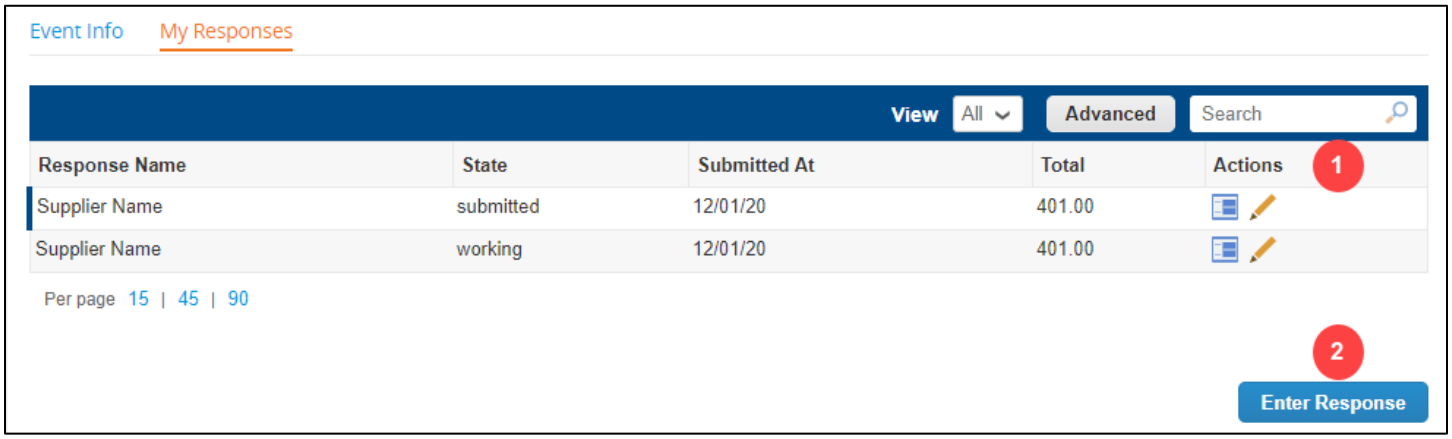
Event Details When Multiple Responses are allowed

After clicking the Enter Response button, you will be routed to the details for your event. If you are allowed to submit multiple responses the details page will look like this

1. **My Responses**: Clicking this tab will route you to an overview of all responses you've submitted for this event.
2. **Response tab:** The tab for your current response will contain your company's name and a tracking number.
3. **Name:** Populate this field with your name or unique identifier for this specific response. If you are editing an existing response, this field will populate with the existing name. If you are creating a new response, you will need to create a unique version of your name for tracking purposes.

Event Details My Responses tab

This tab will contain a list of all responses submitted for the event.

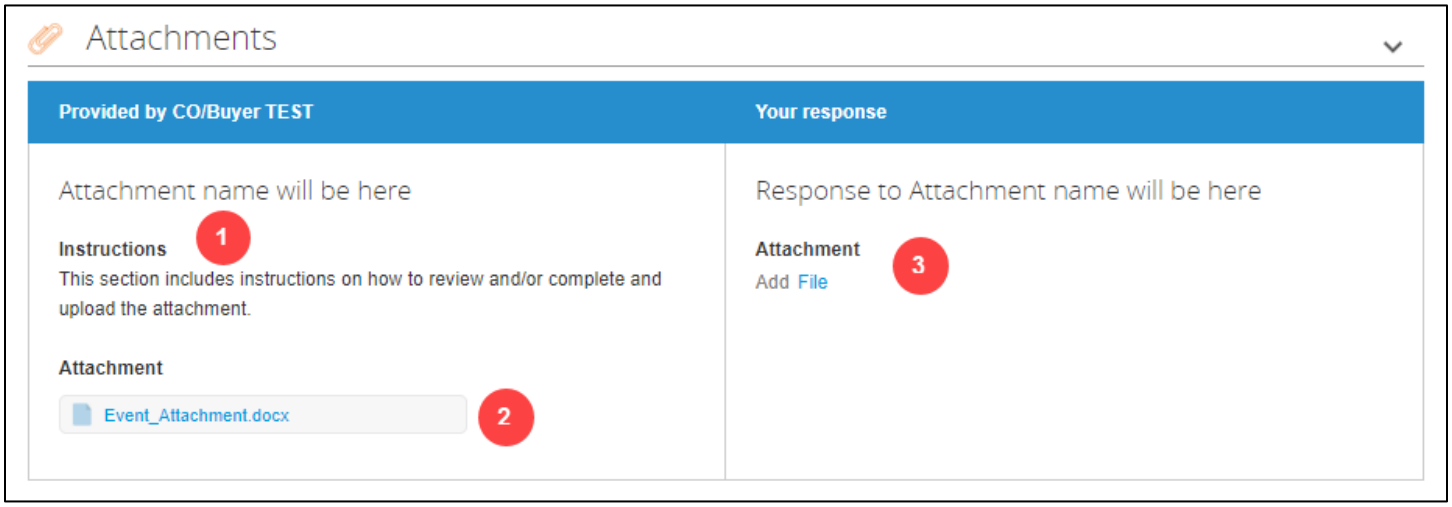


Your Response can be edited, and new responses created until the event ends.

1. **Actions**: You can view or edit existing responses. Edited responses will be listed as working copies of original response until submitted.
2. **Enter Response:** If an entirely new response to the event is desired, click the Enter Response button to create a new response.

Submitting a Response to Attachments

If your event has attachments, they will be included here.



Attachments can be included to inform or gather additional information from you. Informational attachments can be downloaded and reviewed. If the attachment is to be completed, you will download, complete, then upload under Your response in the Attachments section.

1. **Instructions:** Any instructions regarding the attachment will be listed
2. **Attachment:** Download the attachment from here.
3. **Your response Attachment:** Upload attachment responses (if needed) here. Note that if a response is required, a red asterisk (*) will appear in the section.

To upload attachments:

Click the blue File hyperlink under Attachment

Click browse

Locate the file to upload and click to populate the File Name field in the popup

Click Open

Continue to perform these steps to add additional documents and always confirm attachments are correct before submitting response.

Submitting a Response to Forms

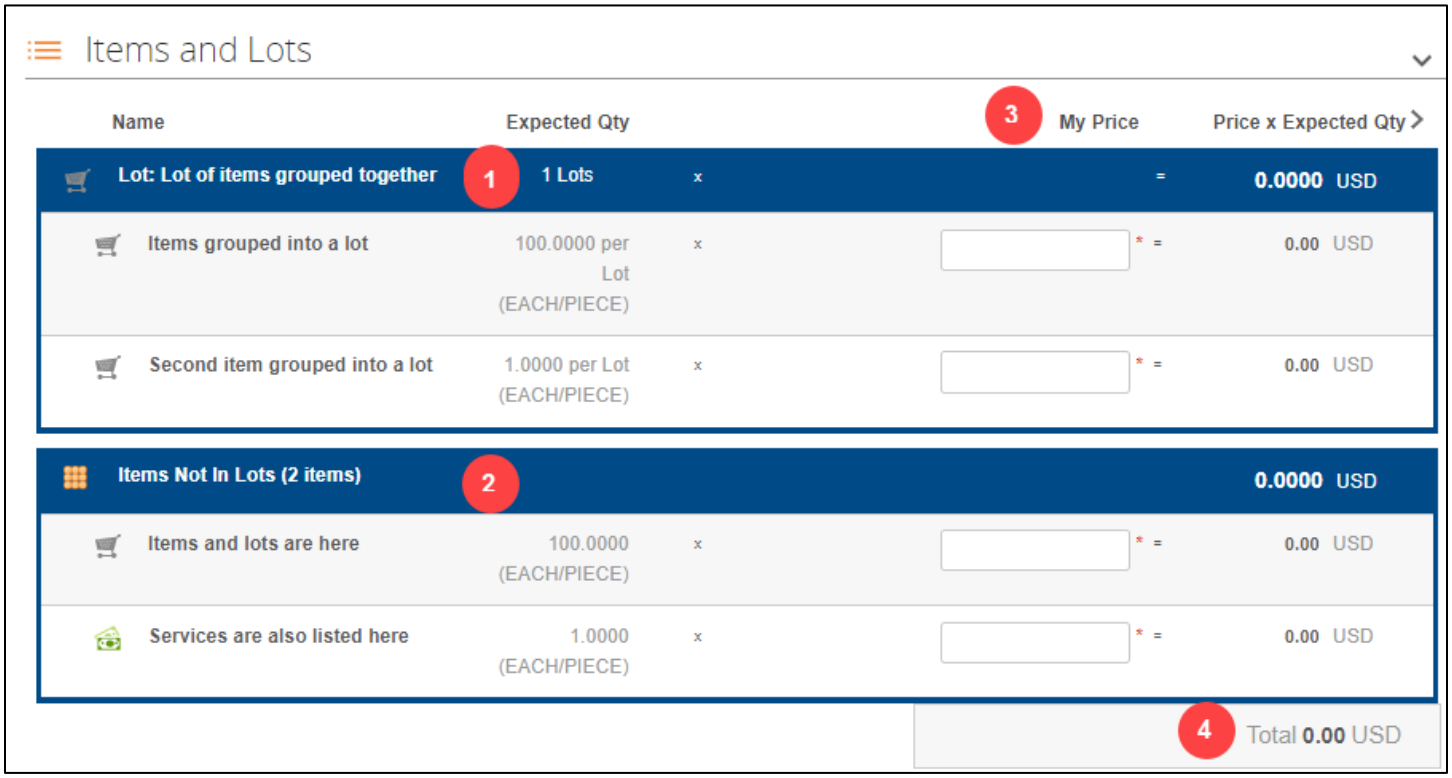
The forms section may include additional questions for you to complete

Forms can contain many different response options (Check box, drop downs, attachments, text field) and some can be conditional. Note that if a response is required, a red asterisk (*) will appear next to the field.

1. **Form Fields:** A collection of additional information being collected.
2. **Conditional Form fields:** Conditional fields will not appear unless a preceding question is answered in a way that requires more information. A conditional field will highlight in green when it is triggered.
3. **Save:** Save updates to your form when completed.

Submitting a Response to Items and Lots

All Items, lots, and services will be listed here.



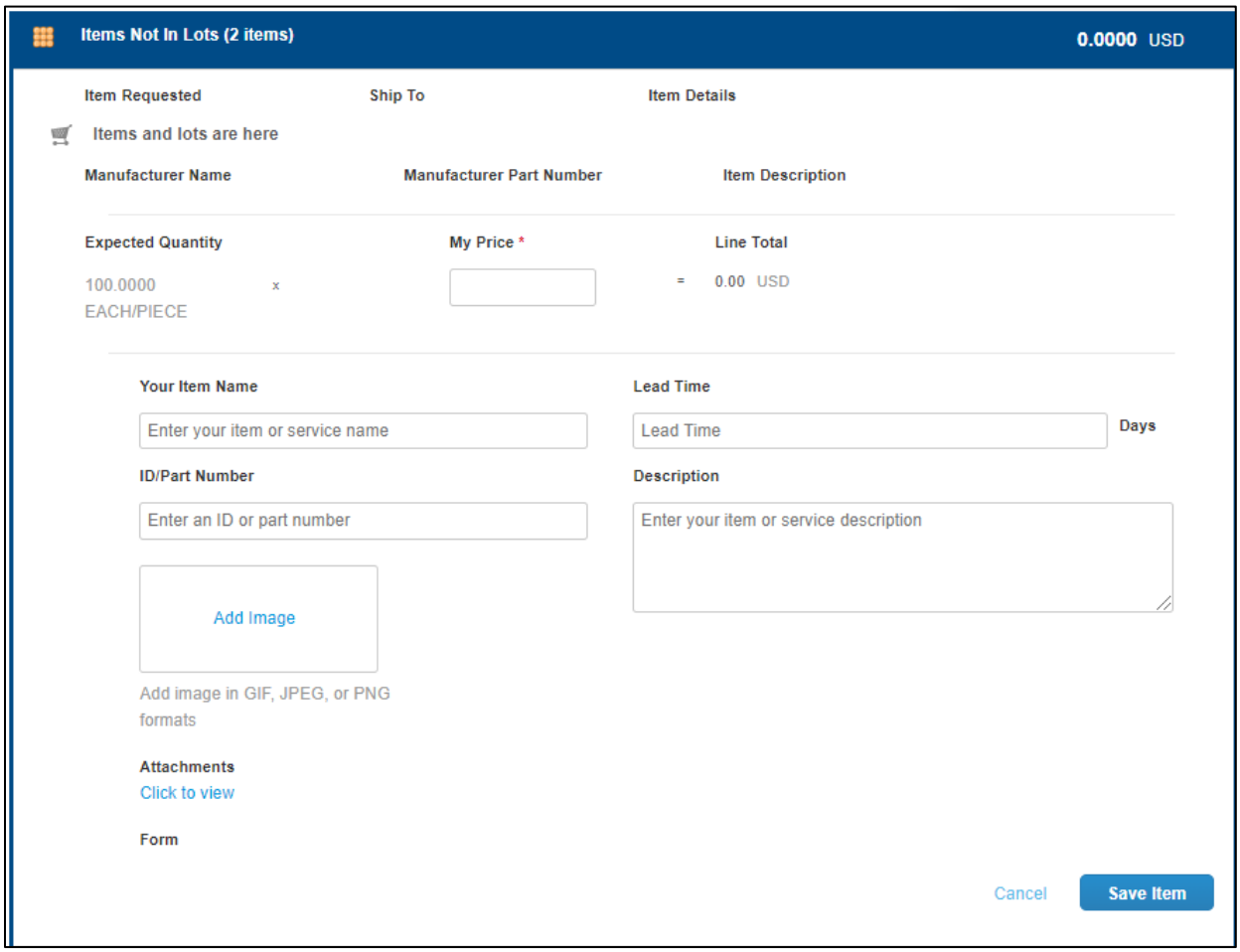
1. **Lots:** Items and services that must be bid on together as a lot are grouped together under the Lot name and identified by the header grouping.
2. **Items and Services Not in Lots:** Items and services that can be bid on individually.
3. **My Price**: Your bid for item or service.
   - Please ensure item (quantity-based lines) bids are for each unit. The system will calculate the total for you.
   - For service (amount-based lines) bids are for the entire value of the service (not hourly values).
   - For items you do not want to bid on, please put a zero in the bid or you will not be able to submit your response:

4. **Total:** The total amount of your response is calculated at the bottom of the screen.

Items and Lots Required Fields

Your event can have different required fields to be populated for each item, lot and service. To view which fields are required on screen, hover over any line and you will see a pencil icon

Clicking on the item will expand it and show all available fields.



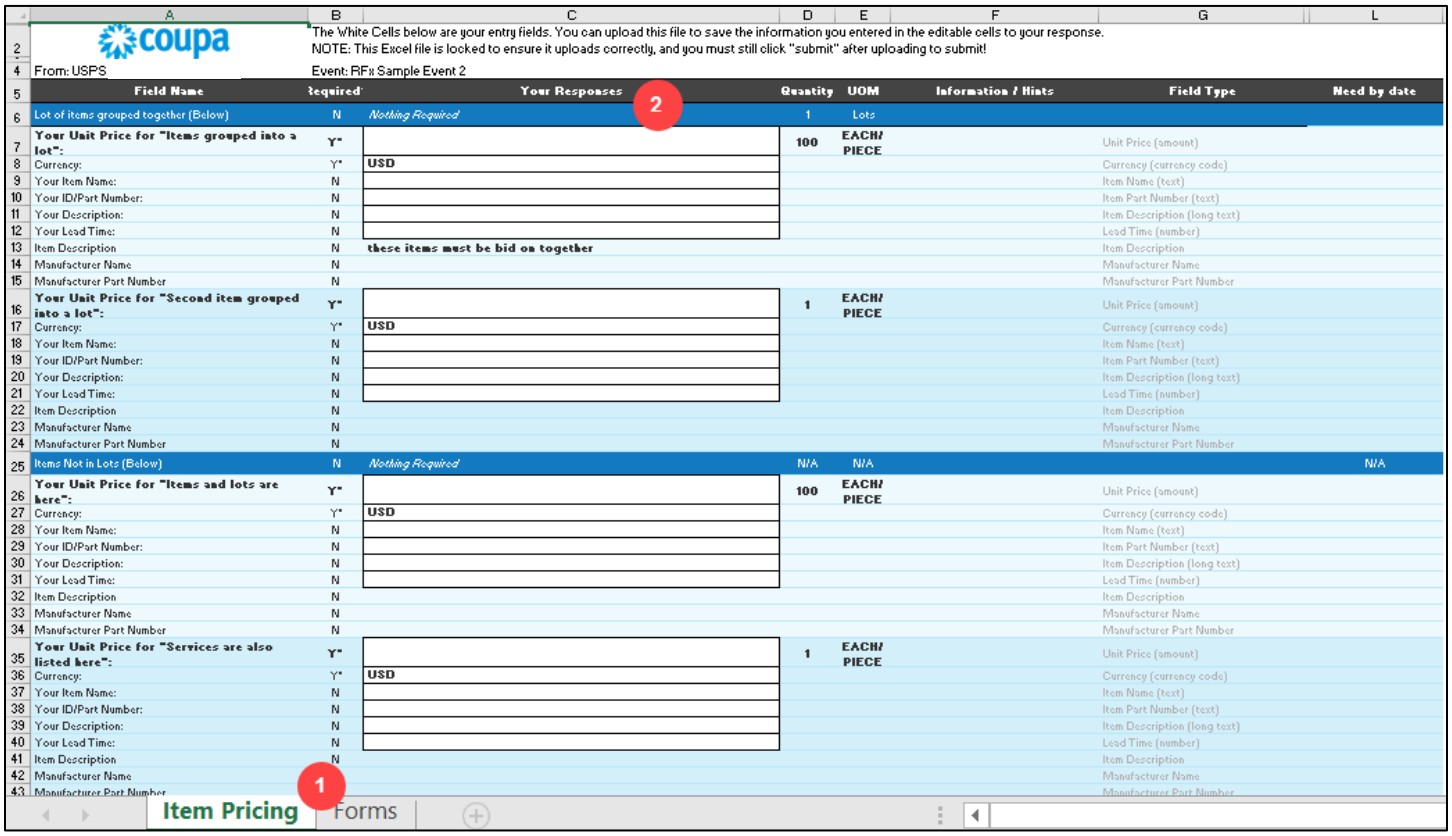
Information that you can add will be in a text box.

Note that if a response is required, a red asterisk (*) will appear next to the field. You can refine responses multiple times prior to submission.

Export Items and Forms to Excel

If you prefer to manage your responses to forms and items offline, you can download an excel template.

A template will open, and you can input all required and any additional information into the Excel file



The template will have read only sections in blue and editable white sections for you to provide your response. Ensure that you have clicked Enable Editing in you Excel file. Altering any part of the template structure will result in upload failures.

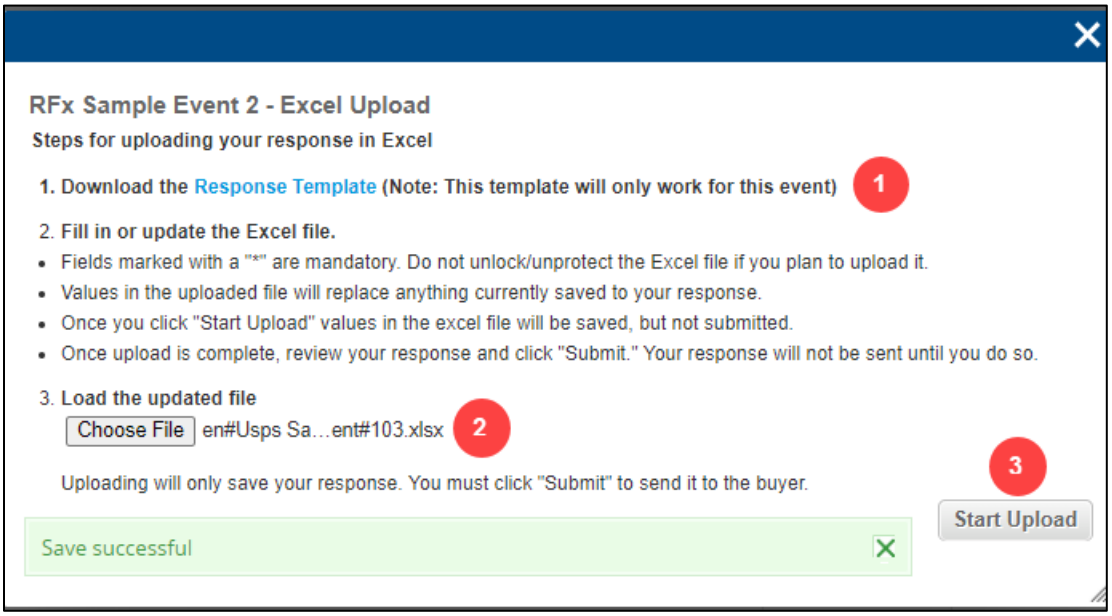
1. **Tabs:** You can enter information for both items and tabs in the Excel file.
2. **Your Responses**: This is where you'll enter your response information. if a response is required, a Y with an asterisk (*) will appear in the Required column next to the field. Please note that if you have already entered responses in the system, they will be included here.

Note: before attempting to utilize the upload, it's recommended to complete one item update on screen to ensure you know what data is required for the field.

Uploading the Item and Form Template

Once the Excel template has been completed, you can upload to the event.

Once you click the Import from Excel button you will be routed to an upload popup screen.



1. **Download Response Template:** This will download the same template as the Export to Excel button in case you are attempting to upload without using the formatted template.
2. **Choose File:** Click the button to upload your completed template.
   - Click Choose File
   - Locate the file to upload and click to populate the File Name field in the popup
   - Click Open
3. **Start Upload:** Click load the template to your event response page.

Note: You can upload multiple times if needed.

Note: If you experience issues uploading ensure that you have downloaded the template for the event (they will be unique), that all required information is included, and that values of the fields are correct.

Submitting a Response – Additional Functions

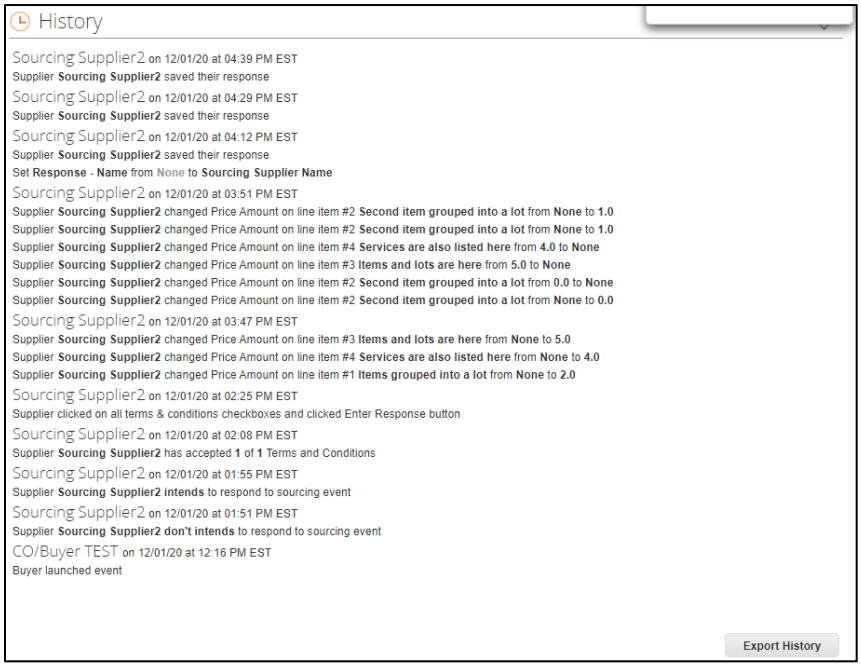
You can save partially completed responses and access history of the event.

To save your progress, click the Save button.

You will continue to stay on the response page after clicking.

If you want to review the event history, click the Load History button

The History section will expand for you to review.

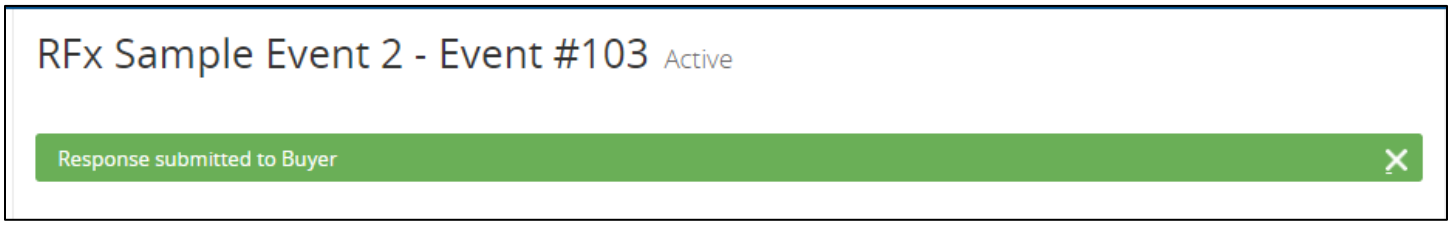


To export the history to an Excel file, click the Export History button at the bottom of the page.

Submit Response to Buyer

Once all required information has been completed, you can submit your response.

If all required information is included, a green banner will notify you the response was submitted.



If response was not able to be submitted, a red banner will notify you of errors:

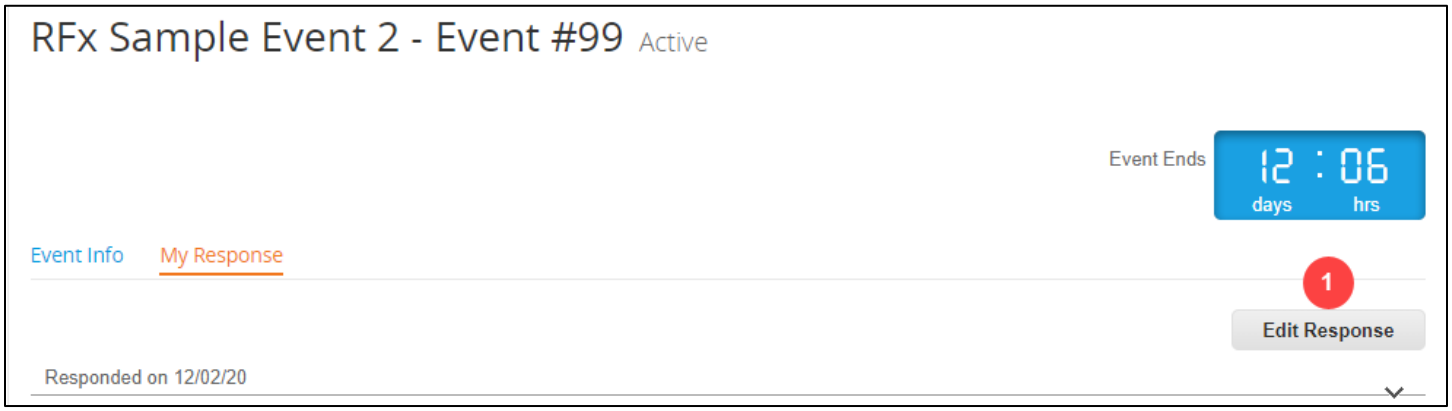
Please add a Name to your response.

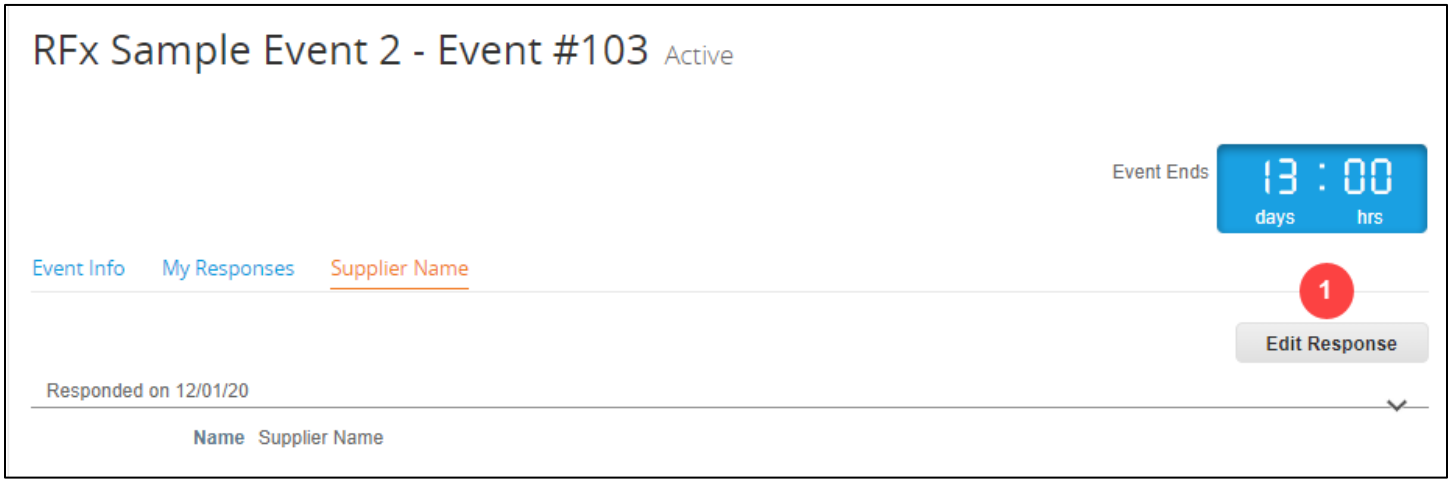
One or more required fields in the form is not filled out.

One or more required fields on the items is not filled out or the My Price field on the item is blank.

Editing Your Response

Clicking into an event response from the Sourcing Response Portal Home page will show the Edit Response button. You can edit your responses up until the event has ended.

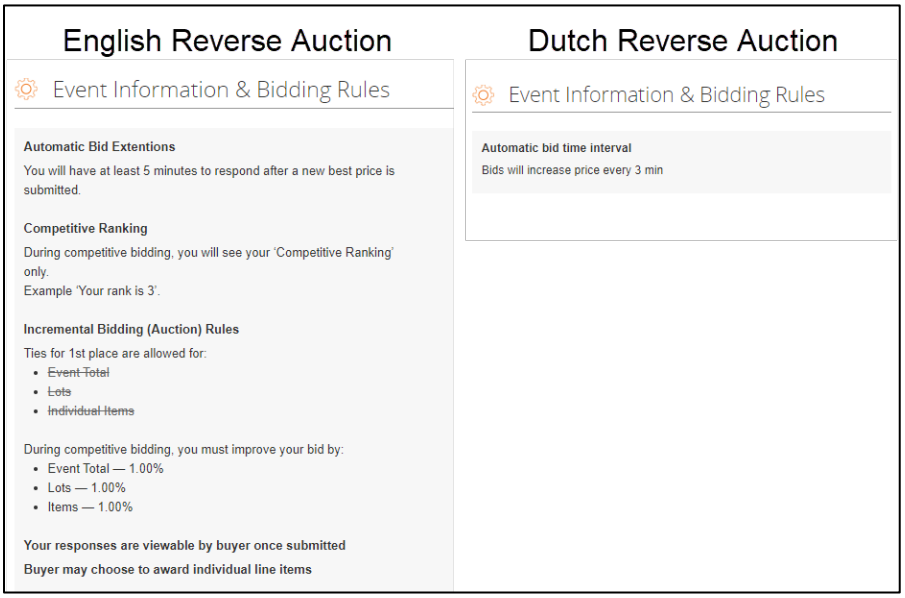




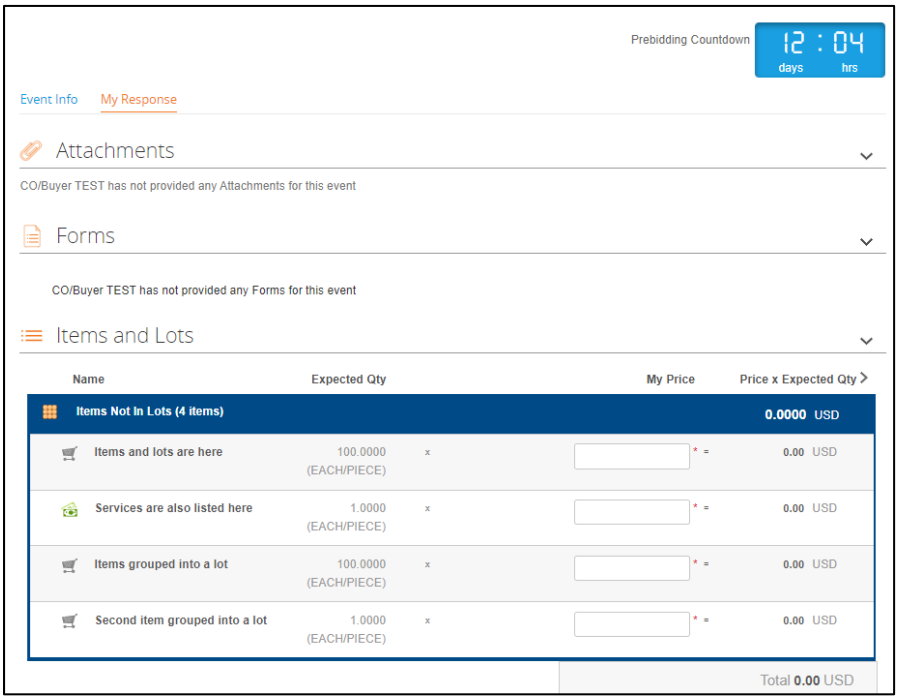
1. **Edit Response:** Clicking the Edit Response button will take you to the response and you can modify the information in it as needed and Submit Response to Buyer. You can edit your response as many times as needed until the event ends.

Bidding on an Auction Event

An Auction Event will contain bidding rules in the Event Info page:

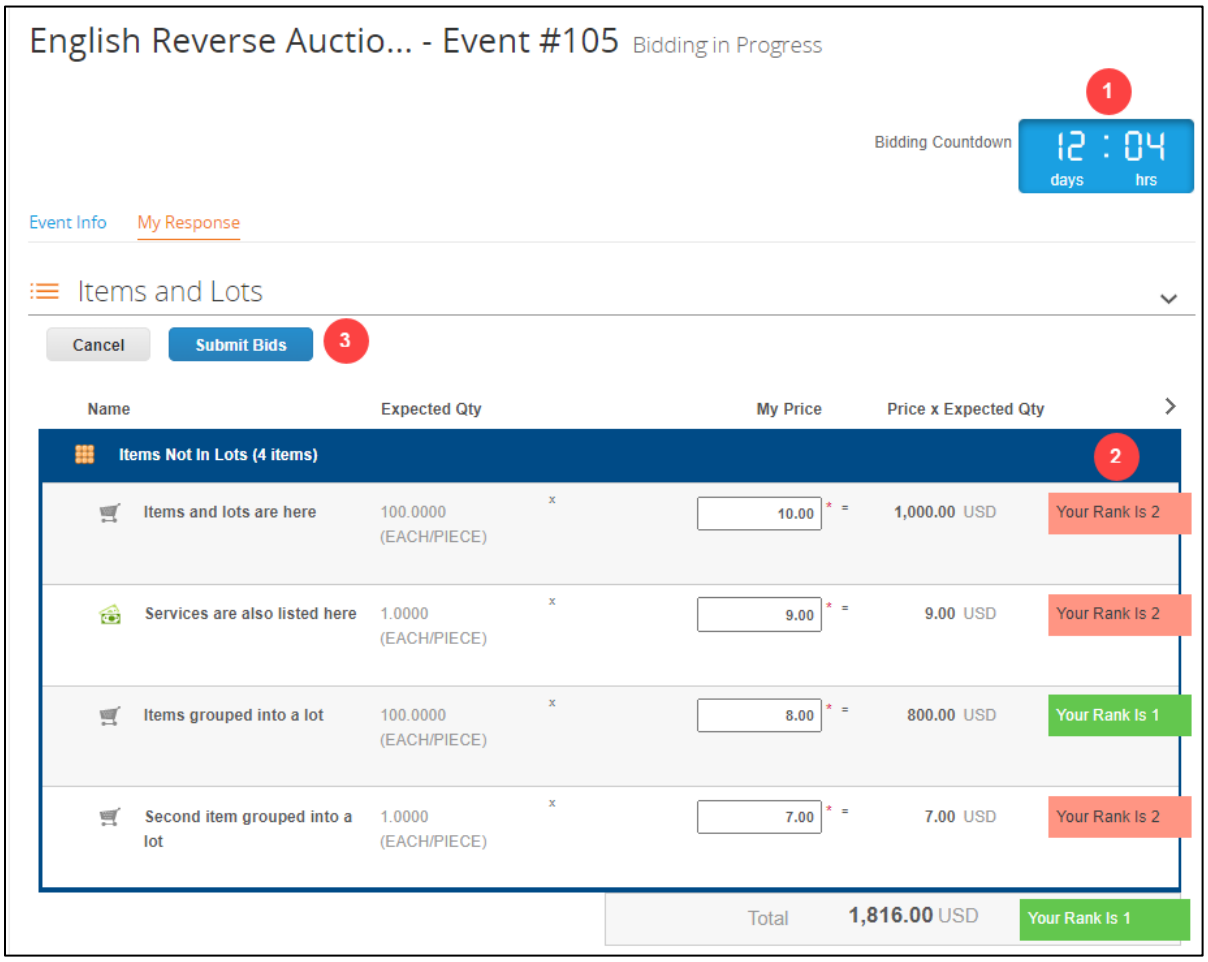


If applicable, you will have a countdown timer to submit bids during a pre-bidding period



Sourcing Events for Supplier

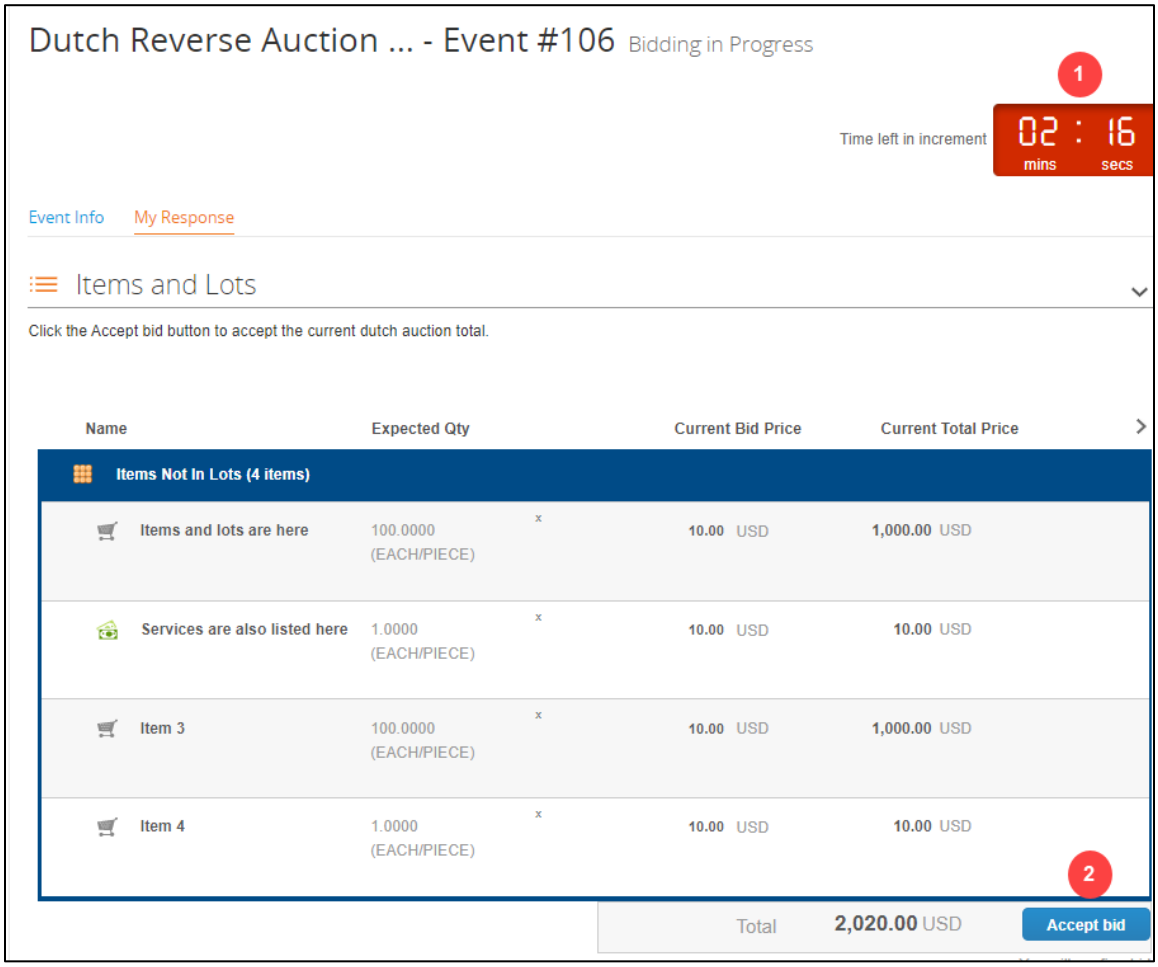
English Reverse Auction bidding. When the auction starts, you will be able to bid and track your ranking during the bidding. The improvement criteria for your bids will be listed on the Event Info page.



1. **Bidding Countdown:** Countdown timer showing time left in event.
2. **Ranking:** Shows you how you rank versus other supplier responses.
3. **Submit Bids:** Click Submit Bids to send your prices for items

Sourcing Events for Supplier

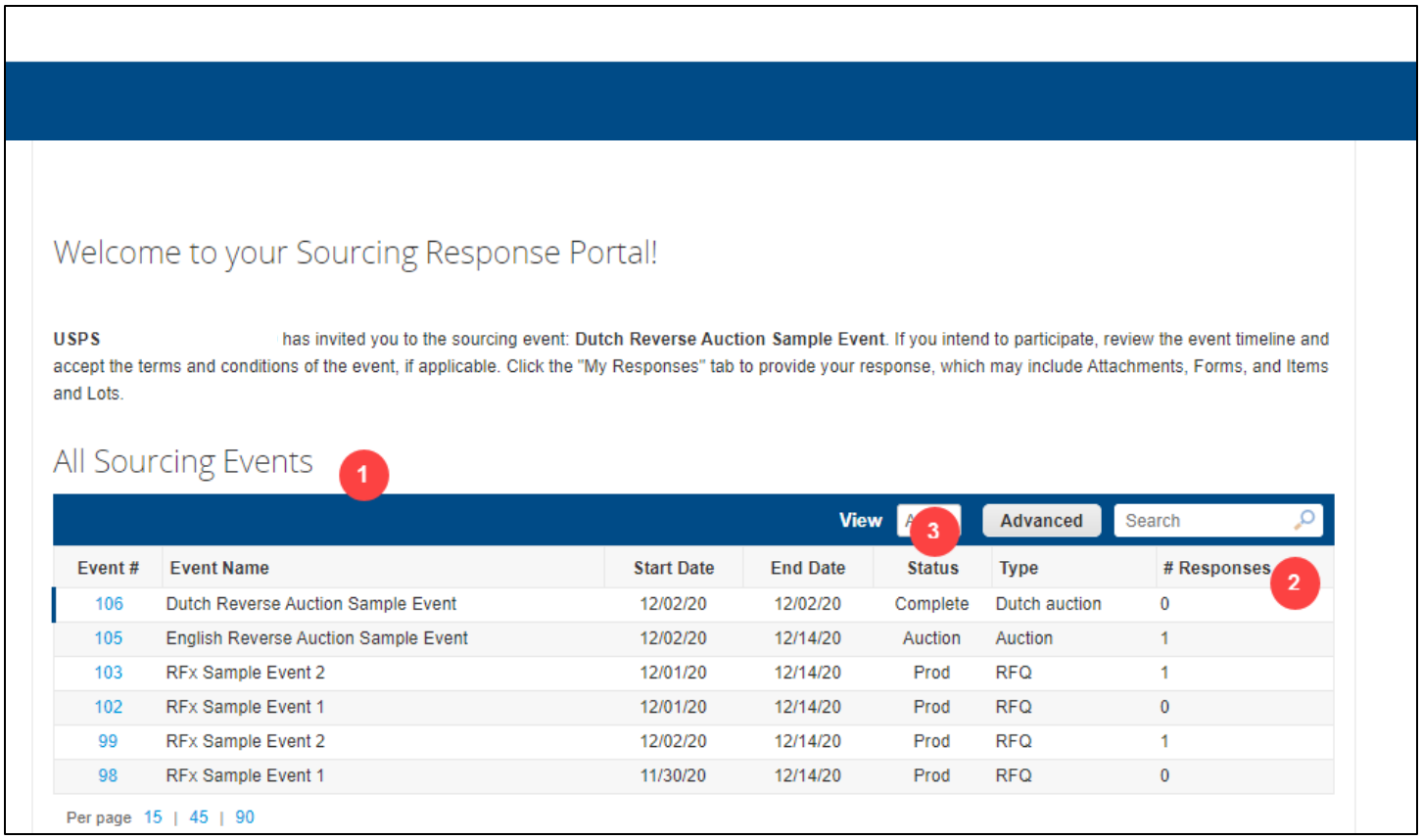
Dutch Reverse Auction bidding. When the auction starts, you will be given a time frame to submit your bid on the current prices.



1. **Time left in increment:** A countdown timer for time left to accept prices shown.
2. **Accept Bid:** Click to submit your bid for the items and prices shown.

Managing Events

The Sourcing Response Portal home page will allow you to see the information on all events you've been invited to. You can track your responses and see the state of the event.

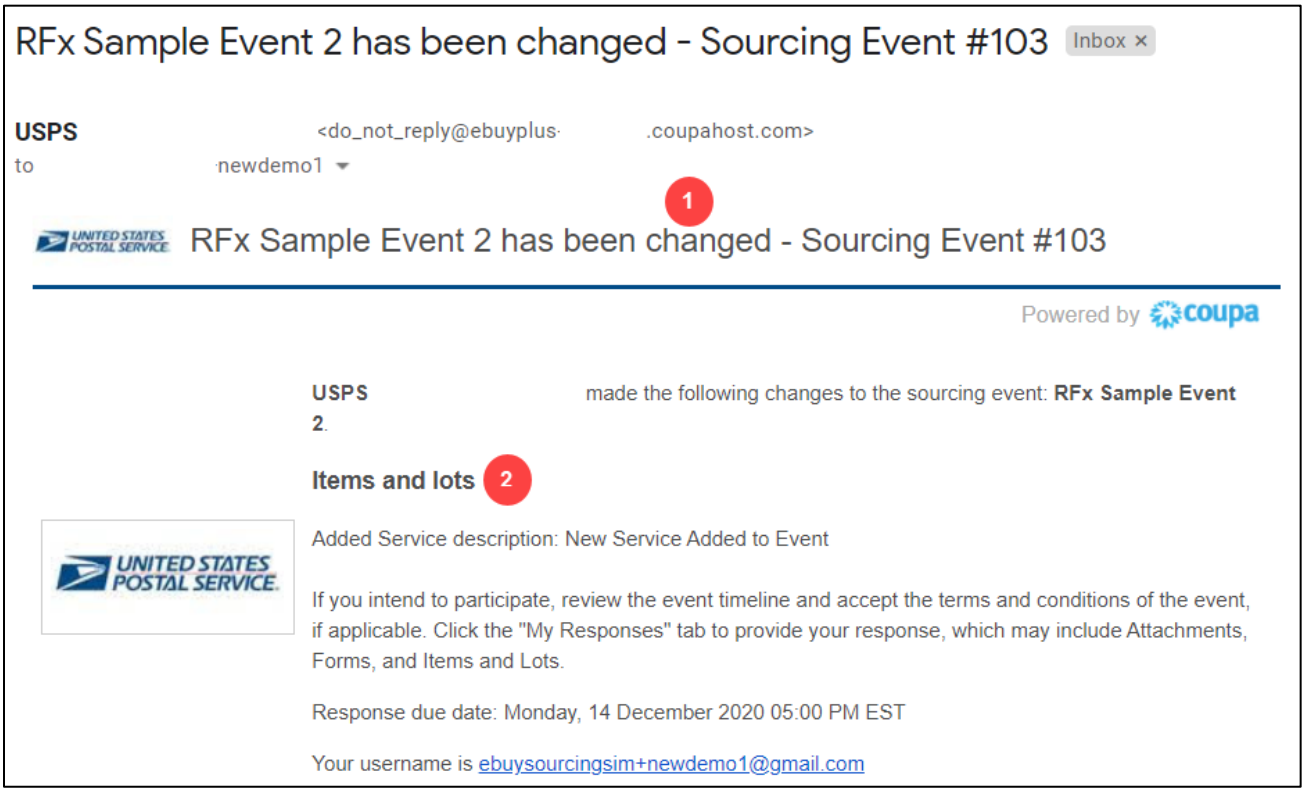


Event #	Event Name	Start Date	End Date	Status	Type	# Responses
106	Dutch Reverse Auction Sample Event	12/02/20	12/02/20	Complete	Dutch auction	0
105	English Reverse Auction Sample Event	12/02/20	12/14/20	Auction	Auction	1
103	RFx Sample Event 2	12/01/20	12/14/20	Prod	RFQ	1
102	RFx Sample Event 1	12/01/20	12/14/20	Prod	RFQ	0
99	RFx Sample Event 2	12/02/20	12/14/20	Prod	RFQ	1
98	RFx Sample Event 1	11/30/20	12/14/20	Prod	RFQ	0

1. **All Sourcing Events:** A list of all events you've been invited to. Clicking the blue hyperlink for the event number will allow you to access the event info and details/responses.
2. **# of Responses:** Tracks which events have a submitted response.
3. **Status:** Shows you which events are active (Prod or Auction).

Responding to a Revised Event

If the Event Owner has revised an event, an email will be sent to you to notify you of changes to the event.



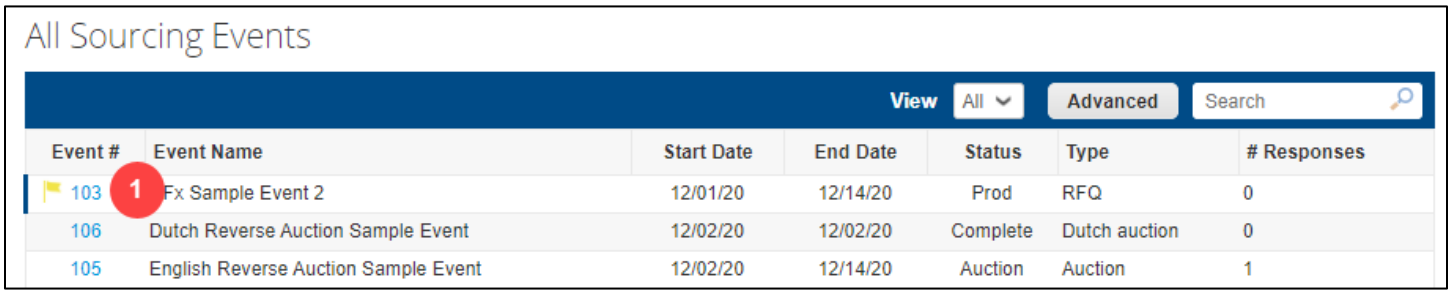
Information in the email will notify you of changes to the event:

1. **Subject Line:** Email subject line will indicate that the event has been changed.
2. **Changes:** The email will contain each section that contains a change, and details on what changes have occurred.

Notifications Within the Event

Any changes to the event will be listed at the top of the Event Info and Responses tabs. Yellow flag icons will also direct you to changes.

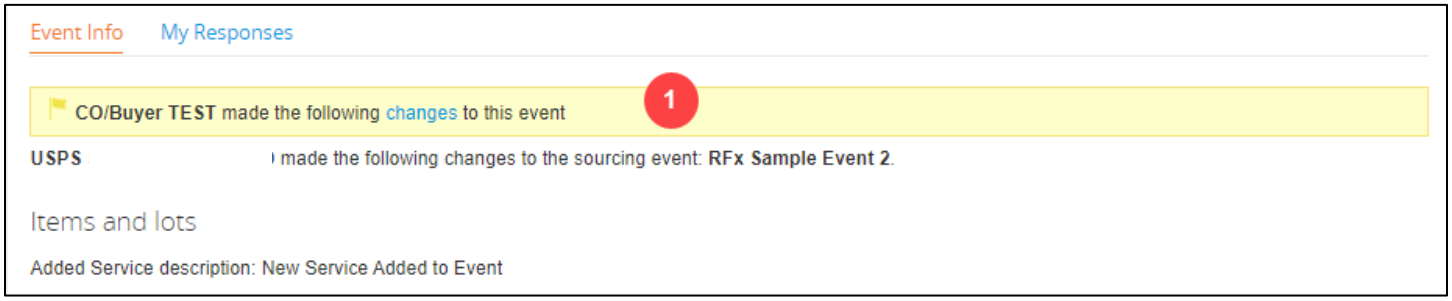
Sourcing Response Portal home page



The Sourcing Response Portal home page will show a yellow flag next to the changed event.

1. **Event #:** Yellow flag indicates this event has changed.

Event Info tab

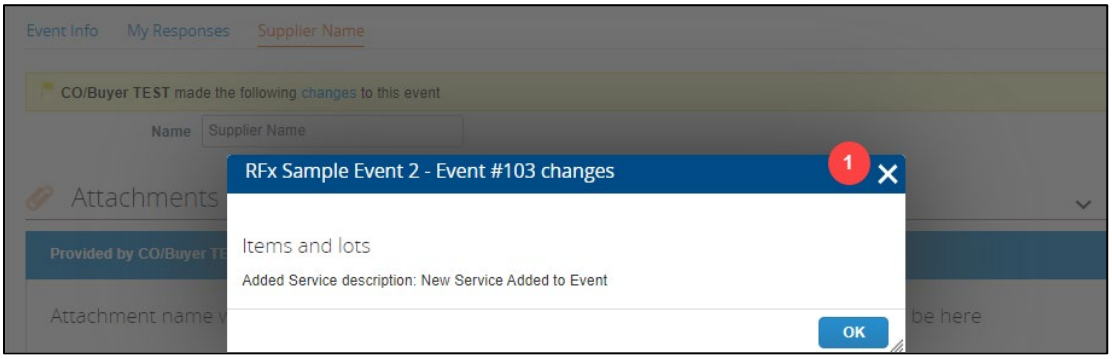


After clicking the blue hyperlink for the event from the Sourcing Response Portal home page, the Event Info tab will contain information on the event changes.

1. **Event Info:** A yellow banner will indicate that there are changes and the section(s) and detail(s) of changes are listed below.

Sourcing Events for Supplier

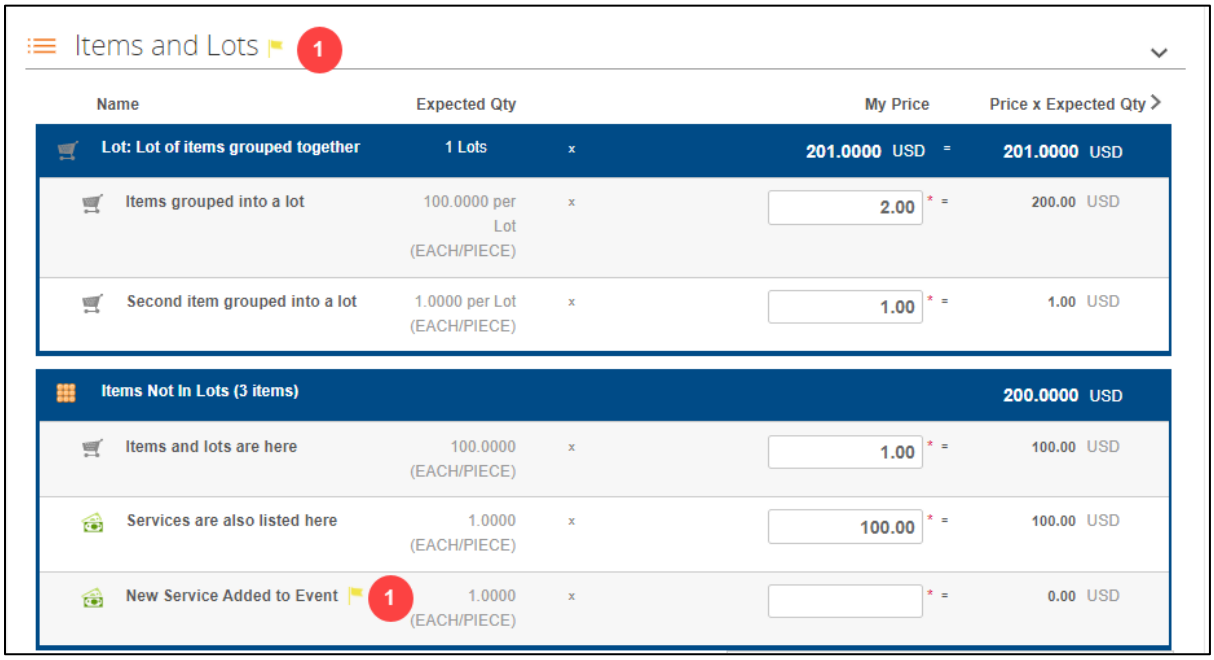
Response/Response Name tab



After clicking the blue hyperlink for the event from the Sourcing Response Portal home page, the Response/Response Name tab will contain information on the event changes.

1. **Response/Response Name Tab:** A yellow banner will indicate that there are changes to the event. Clicking on the blue changes hyperlink will route to a popup message containing the section(s) and detail(s) of changes.

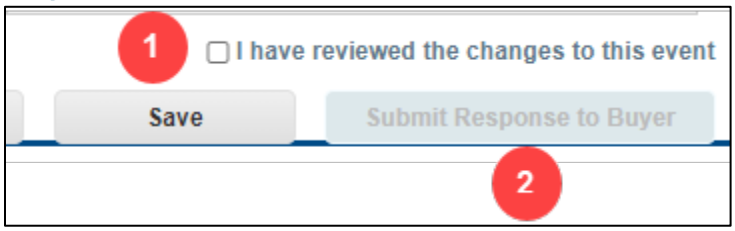
Event Details



Within the event both the section(s) and specific change(s) are indicated by a yellow flag

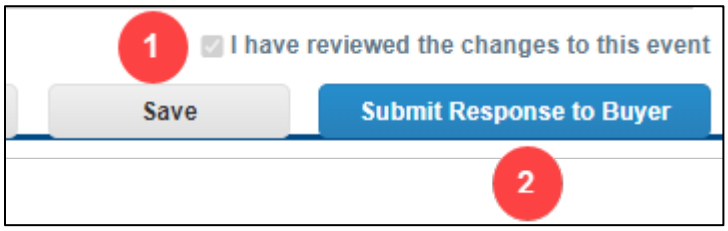
1. **Yellow Flags:** Identify changes to an event.

Submitting Response to Buyer



When submitting a response for an edited event, you must confirm you've reviewed changed before you can submit.

1. **I have reviewed the changes to this event:** When unticked (by default), the response cannot be submitted
2. **Submit Response to Buyer:** This button will remain inactive until the box for reviewing changes is ticked.



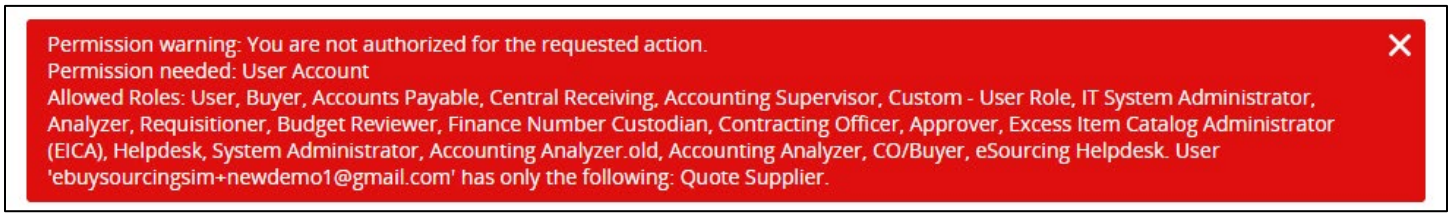
Once you've confirmed you've reviewed changes, you are able to submit.

1. **I have reviewed the changes to this event:** When ticked, the response can be submitted
2. **Submit Response to Buyer:** This button will activate once the box for reviewing changes is ticked.

Signing Out

When all activities are completed, you can Sign Out of the portal.

3. **Name:** On the upper right-hand side of any screen, you will see your name as a blue hyperlink. Hover over it to expand a drop-down.
4. **Sign Out:** Click Sign Out to exit the portal.



If you see the Permission Error above, it means you clicked on the blue hyperlink instead of hovering to expand the drop—down. This does not affect your response submission and just means you don't have access to other areas of the User Record within the application. Hover over your name in the upper right to expand the drop down and Sign Out.

FAQ's

1. **Why doesn't this QRG go through how to access the new platform or reset my password?**
   For ease of use. We wanted to have smaller, focused guides for specific issues. This guide has details on how to use the platform after you've successfully logged in, the other QRG will help with any access issues. The Accessing Sourcing Events (for Suppliers) QRG is embedded below for reference.

2. **I have filled in all my responses but the Submit Response to Buyer button is grayed out.**
   Please check directly above that button to see if there is a tick box next to I have reviewed the changes to this event. If there, this indicates that the event has been edited. If not ticked, tick that box and the button will activate. Please refer to the Revised Event section for more detail.

3. **I have been invited to a new event but responses I made to a previous event are already populated.**
   This is a normal function of a Follow-on event. These events are linked to the original event and thus inherit original responses. Your responses can be retained or modified as needed.

4. **Why am I not able to submit my response?**
   Please check for the following common issues:
   1. Confirm that all required fields are filled out – they will have a red asterisk (*) next to each required field.
   2. Ensure you scroll to the top of your event to see if there is a red banner with a notification of something required that is not included.
   3. If the red banner appears but is non-specific stating there was a validation error, please expand the items in the UI or export to Excel. There is a missing required field in the items.

5. **I keep getting a Validation Error that says I can only enter integers for a field.**
   For some fields, like Lead Time, you can only enter number values. You may need to ensure that no alphanumeric or spaces are in your response. It may be helpful to download to Excel and review the required fields to ensure that your responses contain only numbers

6. **Why is my Upload from Excel failing?**
   Double check that all required fields are filled in. Please note that some fields require only integer values. You can always test one item in the UI.

7. **What happens if I begin responding in the UI and then decide to complete in the Excel download?**
   The download will contain all the information you've already input. If you leave those sections blank and only update additional information, whatever you put in the UI will be retained. I

8. **Why can't I see my events in the Sourcing tab in CSP?**
   That tab in CSP is for *public* sourcing events. USPS does not participate in public events. The Coupa Supplier Portal is used to manage Orders and Invoicing. The Sourcing Response Portal is used only for events and is more tightly protected than CSP.

9. **Why do I get a Permission Error when trying to log out?**
   That means you clicked on your name instead of hovering over it to get the drop down. This means you don't have access to some features in the system and is normal behavior. This does not affect your response in any way.

Additional Coupa Resources

Coupa Sourcing Supplier FAQ:

https://success.coupa.com/Suppliers/For_Suppliers/Sourcing_Supplier_FAQ

USPS Accessing Sourcing Event (for Suppliers) QRG:

Please see attachments in pdf

Accessing Sourcing Events QRG (For Supp