# Respond to a CSO Event (Suppliers)

**Coupa Sourcing Optimization** 

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## Purpose

This Quick Reference Card (QRC) explains how to **Respond to a Coupa Sourcing Optimization (CSO) Event**. It is intended to support incumbent and prospective Kimberly-Clark Suppliers while performing the following tasks in CSO:

- Task 1: Access the Coupa Sourcing Optimization tool
- Task 2: Update your Account Information
- Task 3: Respond to a Sourcing Event

If you have any questions while participating in the event, please use the Ask a Question functionality (shown below) or contact the Event Manager (Buyer) using the contact information they provided in the event invitation. If preferreed, you may also contact the Supplier Enablement Team at Kimberly-Clark for additional support.

### Log in to CSO

**Note:** When a CSO Event has been scheduled at Kimberly-Clark and you have been identified as a Supplier that should respond, you will receive an email invitation with instructions on how to access the upcoming event.

- 1. Navigate to your company email account, then search for and select the appropriate **Inbox** item.
- 2. Review the Event Invitation Message from Kimberly-Clark.
- 3. Click the appropriate hyperlink in your invitation email to access CSO.
  - a. **Critical:** You must access the link and set up your password within 7 days of receiving the event invitation. After 7 days, this link will expire.
  - b. If this will be your first time using CSO or you do not remember your user credentials, select the *Login with Ticket* functionality. The One-Time ticket will expire after 7 days. Should this happen, you can log in by resetting your password or you can contact the event owner to send a new invitation.
  - c. If you do not have an existing account in CSO, you will be required to create a new password to access and respond to the event.
  - d. Account creation is a one-time setup activity. All future event invitations will be linked to your account and will not require you to update a password.
  - e. **Critical:** Logging in through the ticket can only be used once per event. If necessary, use the *Forgot Password?* functionality to retrieve a new temporary password.

## Respond to a CSO Event (Suppliers)

All Unread By Date ∨ ↓ ∨ Wednesday	[EXTERNAL] 6/28 Demo Recording Login Information 628 Demo Recording <a href="https://www.extender.com/action/com/linearity/li</th> <th>← Reply</th> <th>Keply All</th> <th>→ Forward</th> <th>••• 3:48 PM</th>	← Reply	Keply All	→ Forward	••• 3:48 PM
Last Week     628 Demo Recording     [EVTERNAL 6/28 Demo Rec Tue 7/12	Dear Daniel , Welcome to Kimberly Clark CSO.				
Dear Daniel , Welcome to	Please change or set your permanent password with the below link:				

4. A new tab will open on your preferred internet browser and will take you to the Log In page for Kimberly-Clark's instance of Coupa Sourcing Optimization.

COUPA SOURCING OPTIMIZATION
<b>Username</b> Username or email
Password Password
Login Forgot password? Log in with One-Time Ticket

- 5. Enter your login credentials.
  - a. If this is your first time responding to an event through CSO, you will be prompted to create a new password after your initial login.
  - b. **Reminder:** If this is your first time attempting to log in and you do not have any user credentials, select the *Login with One-Time Ticket*

functionality. Logging in through a one-time ticket can only be used once per event.

- 6. Verify or select the appropriate Flag to update your preferred language settings.
- 7. Click Login.
  - a. If you have trouble signing in, please contact the Event Manager (Buyer/Category Manager) or the Supplier Enablement Team at Kimberly-Clark.
  - b. If you forget your password, click the *Forgot password?* link, enter your username or email associated with the account, select the *I'm not a robot* checkbox, then click submit to request a new one-time ticket. The ticket is sent to your registered e-mail address and is valid for 24 hours. You will be requested to change the temporary password once you log in.

#### **Update Your Account Information**

- 1. After logging in successfully, you will be routed to the **Supplier Portal** for Coupa Sourcing Optimization.
- 2. If this is your first time logging in to Supplier Portal, you will be asked to verify or update your **User Information** before participating in any events.
  - a. It is critical that your name, email, and phone number information are correct in case the Event Management team needs to reach you.
- 3. Click **Your User Information** to verify or update your account information, contact information, etc.
- 4. If desired, click **Your Company Information** to add or update information about your Company.
- 5. If desired, click **Change Your Password**. In this example, we will not update a Password.
- 6. If desired, click the **Flag** icon in the top right corner of the Home screen in order to update your preferred language in the system.
  - a. Updating your language will apply to all text / fields generated by CSO, but will not translate attachments that were originally created by the Event Management team.

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CSO 📕 Travel 📕 Coupa 📕	VSC 📙 Implementat	ions Si	🕈 Coupa Demo Site 📕 Personal	I Developm 🥱 Make It 📢	Google Maps 🐐 S2C Core instance	S CLMA Service Core VV HTML Color M	lames 🧧 Other bookmarks		Other boo	marks
Logged in as Kevin Never	i   📇 Supplier	- 1	.ogout						🛄 English	•
*										
Welcome Kevin Neve	eu	_								
Your User Informatio	n adit your user	8	Your Company Information	n he information	Change Your Password					
information (email add	ress etc.)		about your company.		password					
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Tour Events										
Event	Information	Phase	Status	Start Time *	Closing Time *					
6/28 Demo Recording		RFQ	Ø of 2 tasks completed.	Jul 13, 2022, 1:07 PM	Jul 24, 2022, 2:00 PM					
				jui 13, 2022, 1.07 m	Jui 24, 2022, 200 FM					
- All times are displayed in you	ir current unie zone.	Fucific De	yngne nime							

## **Respond to a CSO Event**

- 1. After logging in successfully, review the list of Your Events.
  - a. Your Events contains a list of all open events that you have access to in the portal.
  - b. If this is your first time responding to a sourcing event with Kimberly-Clark in CSO, you will only have one event available.
- 2. Click the appropriate **Sourcing Event**.
  - a. The most recent event will be displayed at the top.

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Logged in as Kevin Neveu   🔒 Supplie	r 🕶   Logout				📑 English 👻
Welcome Kevin Neveu					
Your User Information Click here to view and edit your user information (email address etc.)	Your Company Informati Click here to view and edit about your company.	on the information	Change Your Password Click here to enter a new password		
Your Events					
Event Information	Phase Status	Start Time *	Closing Time *		
6/28 Demo Recording	RFQ 🛛 🞯 0 of 2 tasks completed.	Jul 13, 2022, 1:07 PM	Jul 24, 2022, 2:00 PM		
* All times are displayed in your current time zon	e: Pacific Daylight Time				

- 3. If the event was created with any gating functionality, you may be required to complete an action item before being allowed into the event. An example of a gating step would be to download, review, and agree to event terms before participating.
  - a. **Tip:** If there are no gating requirements for the event, you will be directly routed to the Event Overview page.
- 4. If applicable, download and review the Agreement Documents.
- 5. If applicable, select the **Confirmation** checkbox if you have read and agree to all terms as stated in the Agreement Documents.
- 6. If applicable, click **Participate**.
  - a. If you choose not to participate in the event, you will be required to submit a reason for declining.

Click the link below to view. When you have read the do	d and read the agreement door and download the agreement door currents, fick the checkbox below	uments. oments. e to confirm that you have rea	t them.	
Glick here to o	ownload the agreeme	nt documents.		
I confirm that I have	read and agree to all of the ter	rms, as stated in the agreeme	int documents.	
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- 7. Once you reach the **Event Overview** page, review the current **Event Phase**.
  - a. The phase of the event will determine what you can see and do. In this example, the event is in a Request for Quote Phase so we will be able to submit a response. Once an event reaches the evaluation phase, you will no longer be able to submit a response of any kind.
- 8. Review the Mandatory Actions message, including the submission deadline date.
  - a. **Critical:** Any new or updated responses will not be accepted after the date and time of the deadline.
- 9. Review the Required Actions and Completion Status.
- 10. Review the **Options** menu.
- 11. If applicable, click **Decline to Participate** if you no longer wish to participate in the sourcing event. In this example, we will not decline to participate.
  - a. **Reminder:** You will be required to enter a reason or justification for declining to participate in an event.
- 12. If desired, click View Documents.
  - a. View Documents provides quick access to all documents provided by the event to be downloaded as well as all the completed forms that you have submitted in the current phase.
- 13. Click Ask a Question.

	eriy-	Logged in as Kevin Neveu	🚨 Supplier 👻	Logout				
A 6/28 Demo Record	ung - Event (	Overview						
	Event	Overview [6/28 Demo Recording]						
Options	The Eve	ent is currently in a Request For Quote Phase.						
Decline to participate	Review the mandatory actions below and complete them before Jul 24, 2022, 2:00:00 PM							
View invited colleagues								
ASK a QUESTION	Requir	ed Actions	Statu	s Complete	d on			
tatistics here are 3 items in this	2	Submit Pricing Sheet (required)	9	Not OK				
vent.		Upload Supplemental Documents		Not Yet Completed				
on make nor blaced any								

- 14. If applicable, click **Ask New Question** or **Download Questions** for support during the event.
  - a. The Ask New Question functionality would send a personal question to the Event Management team. The Event Manager would then be able to reply to you privately, and, if the question was pertinent to all participating Suppliers, the Event Manager could add the question and their response to a list Frequently Asked Questions (FAQs) to be shared with the whole group of participating Suppliers.
  - The Download Questions functionality is offered as a repository of all questions and answers (FAQs) that would benefit all participating Suppliers.
- 15. Click Back.

* Coupa Sourcing Optimization	× +				
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🛄 CSO 🛄 Travel 📕 Coup	a 🧾 VSC 📕 Implementations Si	i 💏 Coupa Demo Site 📙 Per	sonal Developm 🥱 Make It 🕴 🤅	Google Maps 🛛 💏 S2C Core instance	S CLMA Service Core
🕄 Kimb	erly-Clark	ogged in as Kevin Neveu	🚨 Supplier 👻   Logout		
6/28 Demo Recor	ding - Event Overview				
	Questions			🔶 Back	
Options Decline to participate	Question	Reply	Last Edited		
View invited colleagues Ask a Question	Ask new question	Download questions			
Statistics	* All times are displayed in y	our current time zone: <b>Pacific Da</b>	nylight Time		
There are 3 items in this event.					
You have not placed any bids.					

16. Click the appropriate **Required Action**. In this example, we will select Submit Pricing Sheet.

tions       The Event is currently in a Request For Quote Phase.         line to participate v invited colleagues       Review the mandatory actions below and complete them before Jul 24, 2022, 2:00:00 PM	
cline to participate w invited colleagues Review the mandatory actions below and complete them before Jul 24, 2022, 2:00:00 PM	
Required Actions Status Complexity	eted on
tatistics Submit Pricing Sheet (required) Solo Not OK	
here are 3 items in this vent. Upload Supplemental Documents  Upload Supplemental Documents  Not Yet Completed  Not Yet Completed  Statemental Documents  Statem	

- 17. Review the Time to Next Closing for the Bidding Phase.
  - a. **Reminder:** Any new or updated responses will not be accepted after the date and time of the deadline.
- 18. Click the **hyperlink** to download the attached **Excel Form**. In this example, we are downloading our Pricing Sheet (Bid Form).

6/28 Demo Recording - Event Overview	
ur Bidding in Phase [RFQ]	
Time to Next Closing (3 Items): 1 week 4 days (All bidding ends Jul 24, 2022, 2:00:00 PM Pacific Daylight Time)	
ou can place bids via Excel forms:	🔶 Back
Download the Excel form and save it on your computer.	
nter your bids in the form you downloaded and save it.	
And the second s	

19. Open the downloaded **Excel Form** for the event, then save it on your local computer with an appropriate naming convention.

Supplier -   Logout		🛄 English 👻
😚 6/28 Demo Recording - Event Overview		
Your Bidding in Phase [RFQ]		
Time to Next Closing (3 Items): 1 week 4 days (All bilding ends jul 24.2022, 2:00:00 PM Pacific Daylight Time)		
You can place bids via Excel forms:	🖕 Back	
🙀 💈 if the download did not start automatically click here		
Enter your bids in the form you downloaded and save it.		
Tupload the Excel form with your bids.		
	- @ <sup>14m</sup>	
Bid+Form-6_28Dexts ^		Show all

- 20. Enter your bids for all appropriate items. In this example, we will only need to enter **Unit Price**, **Capacity**, and **Server Condition** for three items.
  - a. **Note**: Refrain from editing the excel bid sheet format to avoid errors when uploading the completed bid sheet.

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6	Item-000	2 3TB	Inte	el -		10		9	3				1
7	Item-000	3 4TB	Ap	ple		15							

21. If applicable, click the **additional worksheet tab(s)** at the bottom of the file. In this example, we will click the *RFP Questions* tab.



- 22. If applicable, answer all required **RFx Questions** with an appropriate response. In this example, we only need to provide one answer to address our Overall Capacity (how many units we can provide).
  - a. RFx is an inclusive acronym that refers to any RFI, RFQ, and RFP events / phases.
- 23. Review all response details (both bids and answers) for accuracy, then save the updated copy of your Pricing Sheet (Bid Form).

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7 8	RFO	Que	stion d	escripti	ons		
9 10 11 12	OVER Total	ALL CAP	PACITY: funits that of	can be provid	ded overall		

24. Return to the appropriate **Required Action** for the Event, then click the **hyperlink** to upload the completed **Excel Form** with your bids.



- 25. Click Choose File.
- 26. Search for and select the appropriate **Pricing Sheet** (Bid Form).
- 27. Click Submit.

🕄 Kimb	erly-Clark	Logged in as	Kevin Neveu	1 4	Supplier 👻	Lo;	gout		
🐴 🛛 6/28 Demo Reco	rding - Event Overview								
Upload Bids for 1	ask [Submit Pricing	Sheet] for	Company	/ [Coup	a]				
Upload bids from Excel	View the latest uploaded form								
Upload bids by using an uploading.	Excel Bid Form. The Excel Bid Form n	ust be downloade	ed from this phase	, filled out, a	nd uploaded. O	nly this pho	ase's Bid Form wil	ll be compatible for	
File: Choose File No file (	chosen								
Submit Cancel									

- 28. Verify that your bid was successfully submitted.
  - a. If any mandatory information was omitted or entered in an incorrect format, you will get an error message in a red box that indicates which entries were invalid and why. In addition to the message, you would receive an additional sheet in the rejected form (Excel File) that lists the errors and cells that need to be corrected prior to resubmission.
- 29. If desired, review your Submission details.
- 30. If desired, click the **Review submitted bid forms** tab to download and review the details of your response.
- 31. Click Ok.

Provide the second	verview				
ocuments Review submitted bid	forms Latest bid	submission receip	e 🖕 Back		
Keeping Track Of Your Bidding					
Print this page and keep it as a referen	ce and use it when you	communicate with thi	s event's management or	support.	
Bids Successfully Submitted					
1 bid was successfully submitted in ph	ase [RFQ] of event [6/28	Demo Recording].			
Submitted RFO Questions: 0					
Bids submitted: 1					
Ignored duplicate bids: 0					
Event/Phase: 6/28 Demo	Recording/RFQ				
Company: Coupa					
Supplier: Kevin Neve	/Coupa				
Time: Jul 13, 2022	1:40:27 PM Pacific Day	light Time			
Unique receipt identifier: 451754154	9220538828671575207				
This is the file you have uploaded.					
Bid Form-6_28DemoRe-RFQ-Coup	-0713221640.27.xls				
lk					

- 32. Return to the appropriate **Event Overview** page.
- 33. Review the updated **Status** and **Completed On** date for your Pricing Sheet Submission.
- 34. If applicable, complete any additional **Required Actions** to finalize your response. In this example, the additional action item is not required so our bid for the event is complete.
- 35. If desired, review the updated **Statistics** of the Event.

6/28 Demo Recor	ding - Event Overview		
	Event Overview [6/28 Demo Recordin	g]	
Options	The Event is currently in a Request For Quote Phase.		
View invited colleagues View documents 🚖 Ask a Question	Review the mandatory actions below and complete t	hem before <b>Jul 24, 202</b>	22, 2:00:00 PM
	Required Actions	Status	Completed on
tatistics	Submit Pricing Sheet (required)	🙂 ок	Jul 13, 2022, 1:40:27 PM
event.	Upload Supplemental Documents	🍘 Not Yet Co	mpleted

36. After the Evaluation Phase is complete, you will be notified by the Event Management team if you were awarded any of the items, lots, or services included in the event.

## **Change Version**

Version History								
Version	Date	Change Description	Author					
0.1	22-Jul, 2022	Original	Park,Sarah (KPMG)					
0.2								
0.3								
0.4								