

**Coupa | Supplier
Quick Reference Guide
Sourcing & Contracting**



SPEX

Supplier Quick Reference Guide for Coupa | Content



Getting you on the road

Get familiar with our Coupa project



Click here



Getting yourself set-up

Read more about how to set-up your Coupa login



Participating in the bidding process

Get familiar how to participate in a RfQ



How to enter bids

Find more information on how you can enter bids in Coupa



How to make changes in the contract

Learn how to edit and re-upload the contract to Coupa



How to communicate with Schaeffler

Learn how to send messages via Coupa



How to sign the contract

Learn how to sign and send the contract to Schaeffler

Getting you on the road



Exciting news for NPM Purchasing*

Starting November 4th Schaeffler will launch a new NPM Purchasing Platform (Coupa) with the aim for Purchasing to become more customer centric and user friendly in line with efficiently working together with their business counterparts. We strive for:

- **Intuitive and state-of-the-art system** for requestor and purchaser
- High potential for **self-service**
- **Real-time tracking of supplier** activities in Coupa
- **Global standards and aligned processes**
- **Efficiency and effectiveness in decisions** based on transparency & data

* **Non Production Material** = Indirect materials or indirect requirements include all goods and services that are required for the ongoing operation of a company but are not a direct component of the end products.



Coupa – working on one global platform

As a supplier you will find all the relevant information and access all necessary documents within one place. This will enable you to bid and interact with Schaeffler more effectively.

Getting yourself set-up with a new password

Once you have been asked to participate in a RfQ you will receive an invitation via E-Mail.

The E-Mail will contain the Link and a username to sign in into the system.

To continue please click on the link and proceed with the following steps.



Bruce Willis <do_not_reply@schaeffler-test.coupahost.com>
an schaefflercoupatest+user102 ▾

SCHAEFFLER USA - Consulting - 102020 (#430)

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.

You have been given an account on Schaeffler Group'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://schaeffler-test.coupahost.com/setup_password/842013329002d76de073220d6754b23297cccebd



Your username is schaefflercoupatest+user102@gmail.com



After setting your password, please login at https://schaeffler-test.coupahost.com/sessions/supplier_login to provide your responses.

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

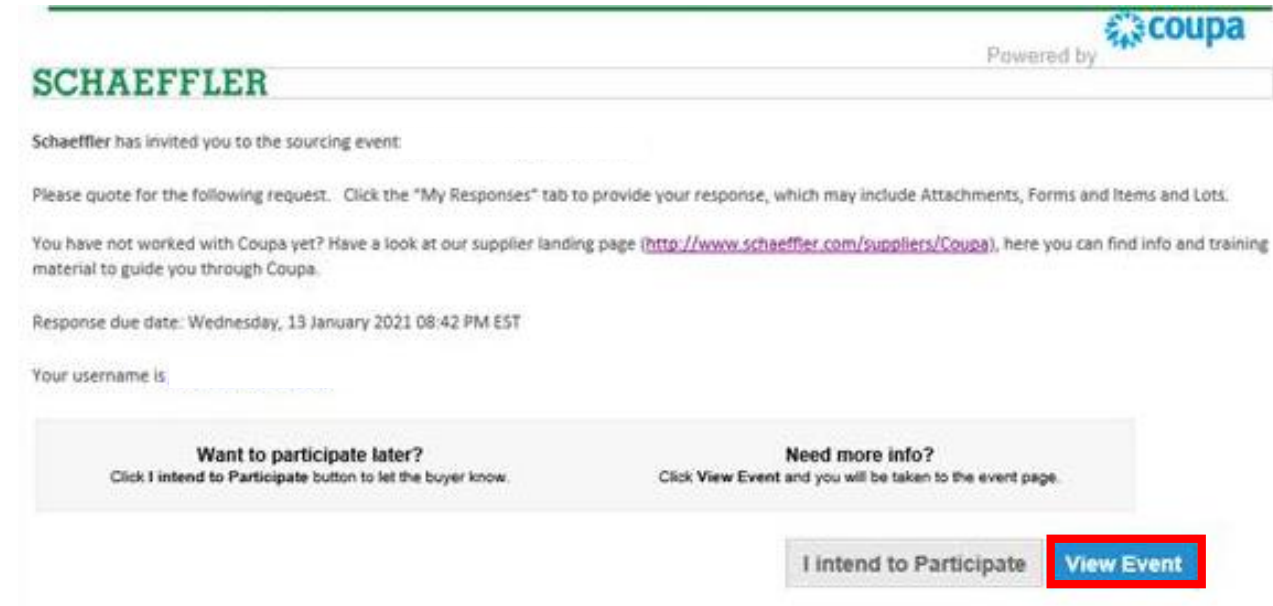


Bidding on events with existing username

Once you have been asked to participate in a RfQ you will receive an invitation via E-Mail.

If you already generated an existing username and password, please click “View Event” and follow the instructions.

If you have forgotten your password, please click on “View Event” and click on “Forgot username or password?” and follow the required steps.



Getting yourself set-up

- 1 Please select a desired password
- 2 Please log-in with your username and selected password



1 SCHAEFFLER

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 letters, numbers, and symbols. It cannot be the same as your last 3 passwords.

Password

Password Confirmation

2

SCHAEFFLER

Schaeffler Group

Powered by coupa

Sign In

Username

Password

[Forgot username or password?](#)

Sign In

Change Password

Participating in the bidding process

You will be taken to the Schaeffler Coupa page where you will see the events you are asked to bid on.

- 1 Please click on the event to continue



SCHAEFFLER

LUKE JR. WALKER |



Welcome to your Sourcing Response Portal!

Schaeffler Group has invited you to the sourcing event: **USA - Consulting - 11202026**. Dear Luke,

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.

Best,
Bruce

All Sourcing Events

Event #	Event Name	Start Date	End Date	Status	Type	# Responses
1 822	USA - Consulting - 11202026	26/11/2020	13/01/2021	Prod	RFQ	0

Per page 15 | 45 | 90

Participating in the bidding process



Now you are on the event page.

- 1 In the top right corner you will see how long the event will be open
- 2 Depending on the event you might be asked to accept Terms & Conditions
- 3 **Please note:**
Only after accepting the Terms & Conditions you **are able to see the RfQ and respond to the event.** To **decline** at this stage, please select **No** and add a reason. To decline your participation at a later stage, please send a message within the **message center** of the event.



LUKE JR. WALKER |



USA - Consulting - 112... - Event #822 Active

Event time →

Event Ends **48 : 05**
days hrs

Event Info

Schaeffler Group has invited you to the sourcing event: **USA - Consulting - 11202026**. Dear Luke,

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.

Best,
Bruce

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

Terms and Conditions

[Non-Disclosure_Agreement_\(Group\)_20190800_EN.docx](#)

Accept →

Do you accept these Terms and Conditions?

- Yes
- No

Send to Event Owner

Participating in the bidding process

- 1 After accepting the Terms & Conditions please click on “Enter Response” to continue to view event details. This will allow you to participate in the RfQ.

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Event Information & Bidding Rules

Event will end at the Event End Time.

Your responses are viewable by buyer once submitted
Buyer may choose to award individual line items

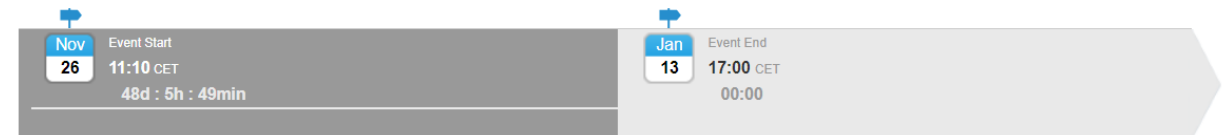
Buyer Attachments

T Dear Ladies and Gentlemen,
If you would like to participate in this sourcing event, we kindly ask you to review, complete and sign the requested forms.
Click the “My Responses” button to provide your response, including attachments, forms and conditions.
In case of questions please don't hesitate to contact us via this platform.
Kind regards
Schaeffler Group

[Coupa_Schaeffler_Supplier_Quick_Ref...](#)

Event Ends **48 : 05**
days hrs

Timeline



Click to enter bid

Enter Response **1**



Participating in the bidding process



Now you will be able to see all attachments and event details. To start please fill in your full name before you continue to scroll down.

Please note: be aware that attachments marked with * are mandatory.

Enter Full Name →

USA - Consulting - 112... - Event #822 Active

Event Ends 48 : 05
days hrs

Event Info My Responses Luke Jr. Consulting Corp. - #344

Name

Attachments

Provided by Bruce Willis	Your response
<p>Master Service Agreement (ICT specific)</p> <p>Instructions Please review the MSA.</p> <p>Attachment Master_Agreement_IT_Project_Services...</p>	<p>Response to Master Service Agreement (ICT specific)</p>

Participating in the bidding process

Please fill in the questionnaire. All fields marked with * are mandatory.

Please note: the questionnaire may vary depending on the sourcing event.

Please complete



Event Ends 48 : 05
days hrs

2. Company Information Questionnaire Sourcing

Please answer the questions below.

Basic Information

* Supplier Name

* Street

House Number

Postal Code

* City

* Country x v

* Language x v

DUNS Number

Supplier contact information

* First Name

* Surname

Function

* Phone Number

* E-Mail

How to enter bids

To fill in the price for Lots & Items you have two opportunities.

- 1 Type in the price manually in the blank
- 2 Export an Excel sheet
 - fill in the information
 - upload to Coupa

Once you have filled out the information Please submit your response to Schaeffler.

Please note: bids can be updated any time until the event ends. In case you need to revise your bid, please upload everything again.



Items and Lots

Name	Expected Qty		My Price	Price x Expected Qty >
Items Not In Lots (2 items)				20,000.0000 EUR
Junior Consultant	10 (Hours)	x	1,000.00	10,000.00 EUR
Manager	5 (Hours)	x	2,000.00	10,000.00 EUR
				Total 20,000.00 EUR

Export to Excel Import from Excel Load History Save Submit Response to Buyer



How to enter bids

By clicking on an item you can expand further details e.g. manufacturing name, manufacturing part number or item description.

- 1 Please fill in all fields marked with *.
- 2 Feel free to add further information or attachments and click on **Save Item** once your input for this item is completed.

Please note:

The available information and mandatory fields may vary depending on the sourcing event.

Keep in mind to submit your response to Schaeffler after you have added your bid details.

The screenshot shows a web interface for entering bid details. At the top, a green header bar contains the text "Items Not In Lots (1 items)" and "0.0000 EUR". Below the header, the form is organized into sections: "Item Requested", "Ship To", and "Item Details". Under "Item Requested", there is a section for "Requested item 1" with fields for "Manufacturer Name", "Manufacturer Part Number", and "Item Description". A summary row shows "My Capacity" (1.000), "Expected Quantity" (1.000 each), "My Price *" (empty), and "Line Total" (0.00 EUR). Below this, there are fields for "Your Item Name" (with placeholder "Enter your item or service name"), "ID/Part Number" (with placeholder "Enter an ID or part number"), "Lead Time" (with placeholder "Lead Time" and "Days"), and "Description" (with placeholder "Enter your item or service description"). There is an "Add Image" button and a note: "Add image in GIF, JPEG, or PNG formats". At the bottom, there is an "Attachments" section with a "Click to view" link and a "Form" label. A "Cancel" button and a "Save Item" button are located at the bottom right of the form.



How to collaborate

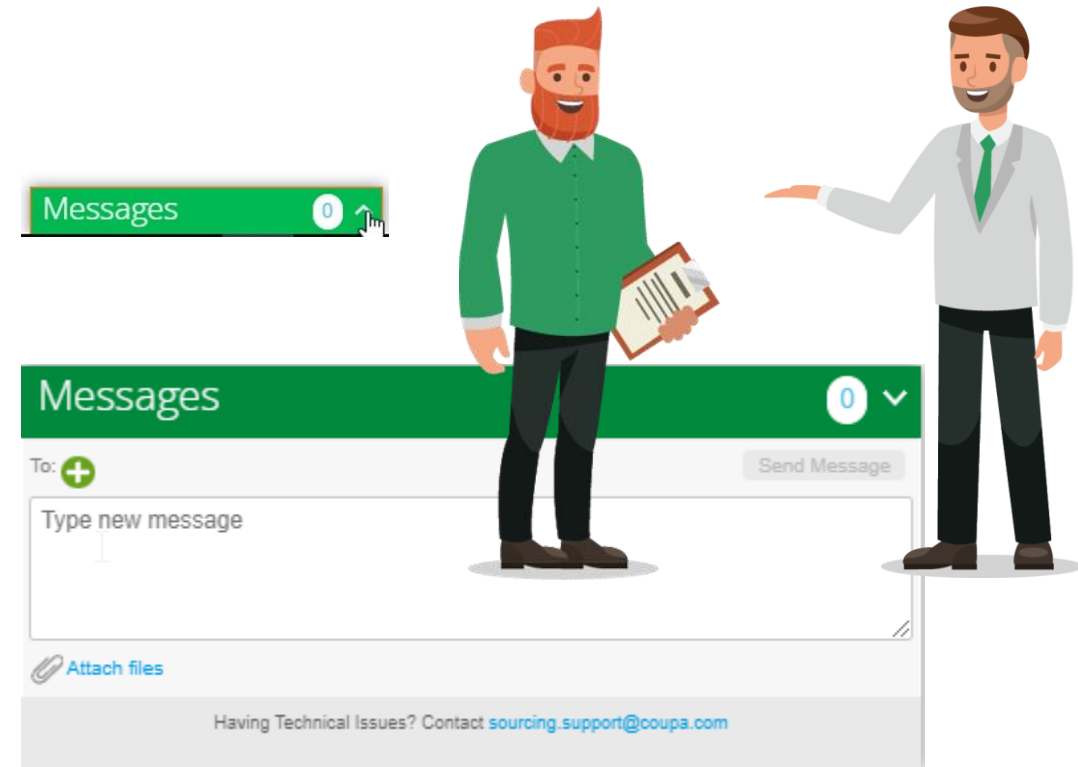
To decline your participation or to exchange further messages with us, please use the message center on the lower left corner. Click on the arrow to expand the message center.

- 1 Select recipient
- 2 Type a new message
- 3 Attach files if required (this option may be disabled depending on the sourcing event).
- 4 Click Send Message

Please note:

The history of all messages can be tracked within the message center. We recommend to use the message center for correspondence relating to the event instead of sending a mail.

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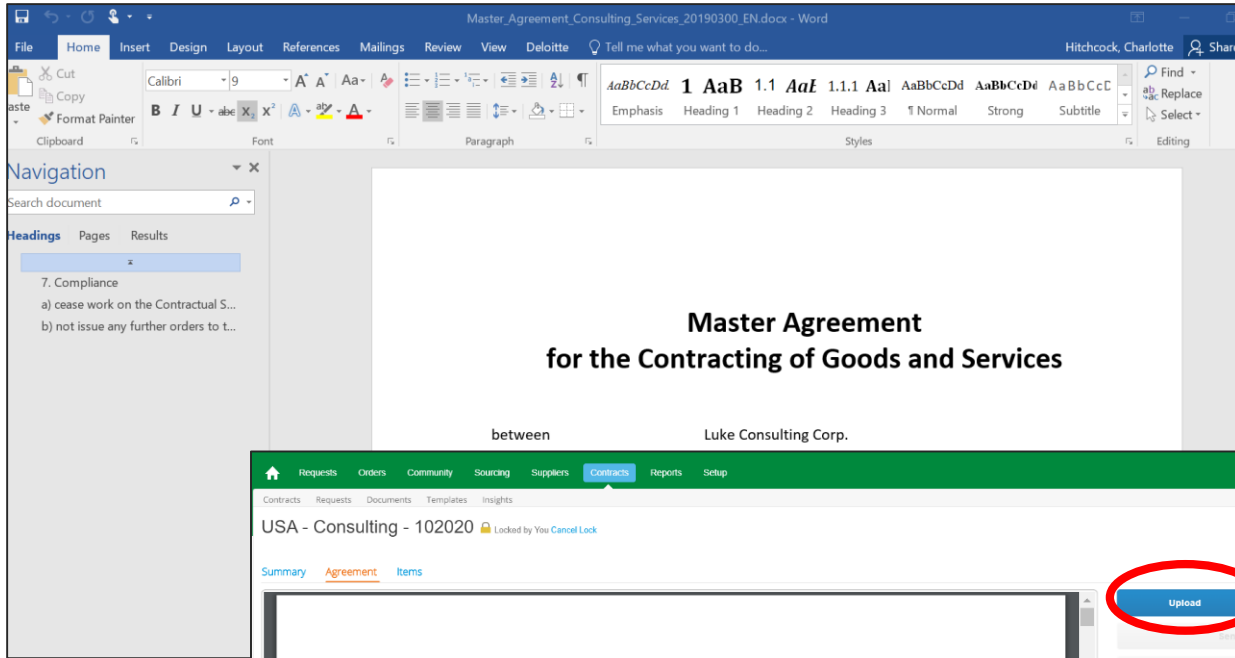
Contract edits and upload



To edit the document

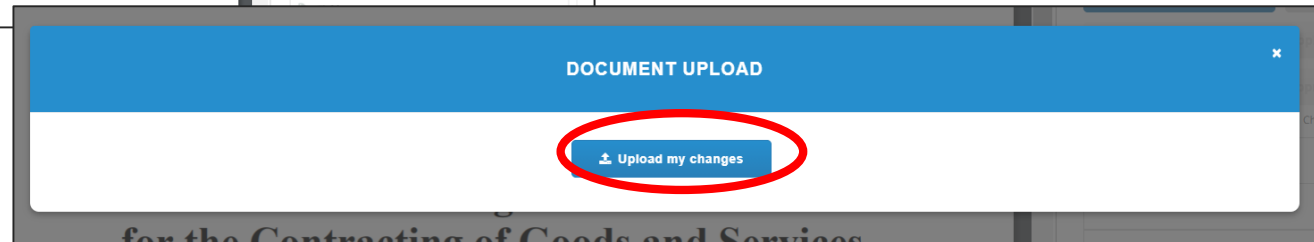
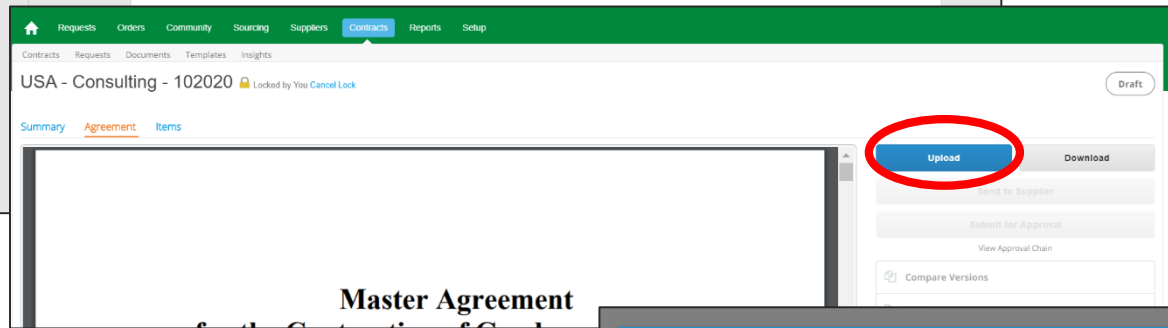
- (1) Click **Edit Document**
- (2) Click **Download for edit**
- (3) Open the downloaded Word file on your computer

Contract edits and upload



In the word document you have the opportunity to make edits and adjustments.

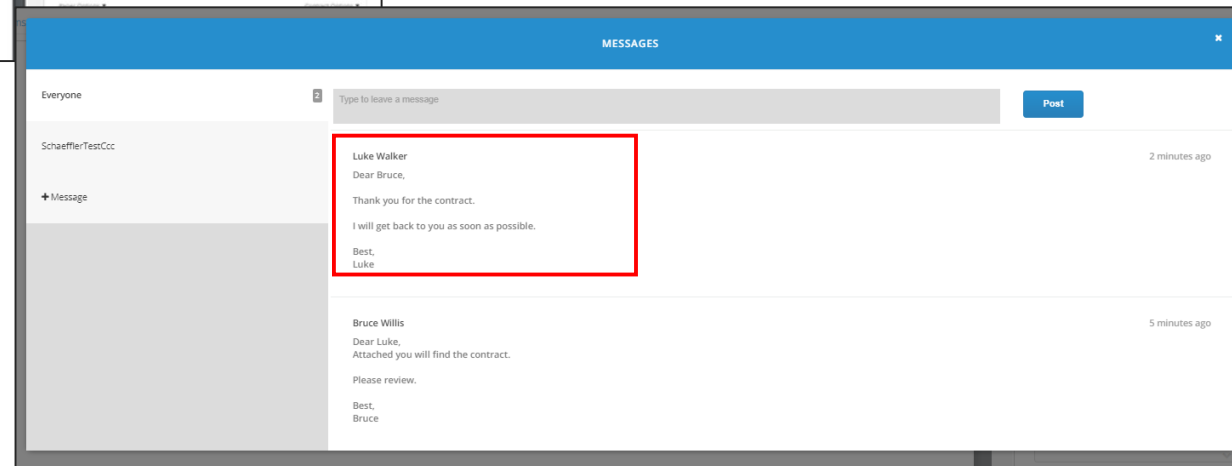
- Once you have completed the edits
- (1) Save the document
- (2) Upload back into Coupa



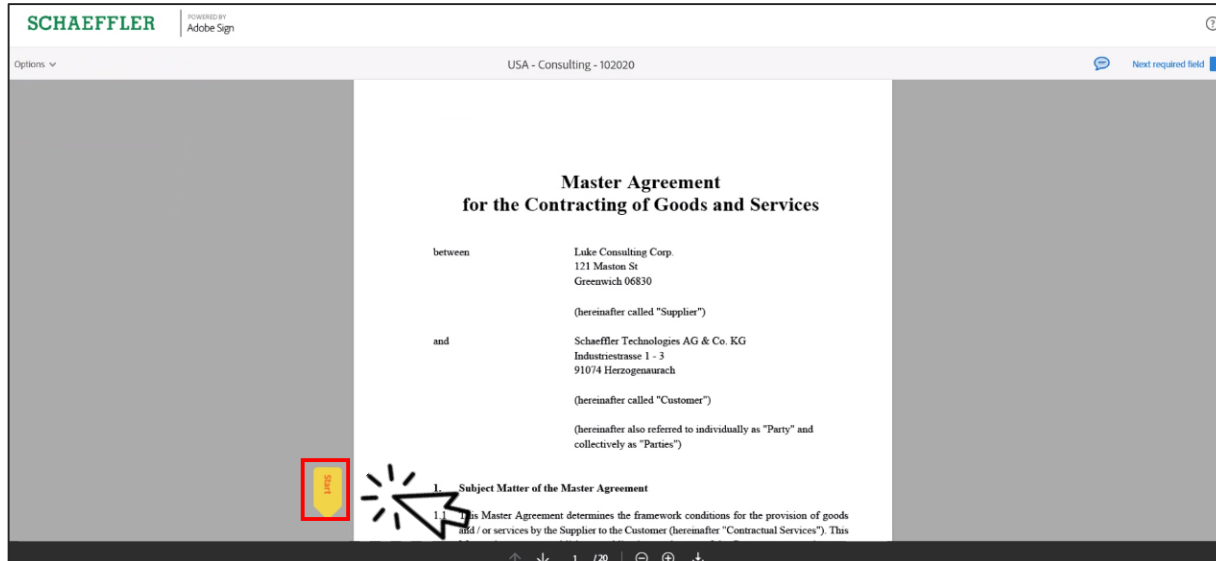
How to communicate with Schaeffler



Besides using the messaging function in Coupa, you can also communicate with Schaeffler via the **Message** function in the Contract Manager.



How to sign a contract



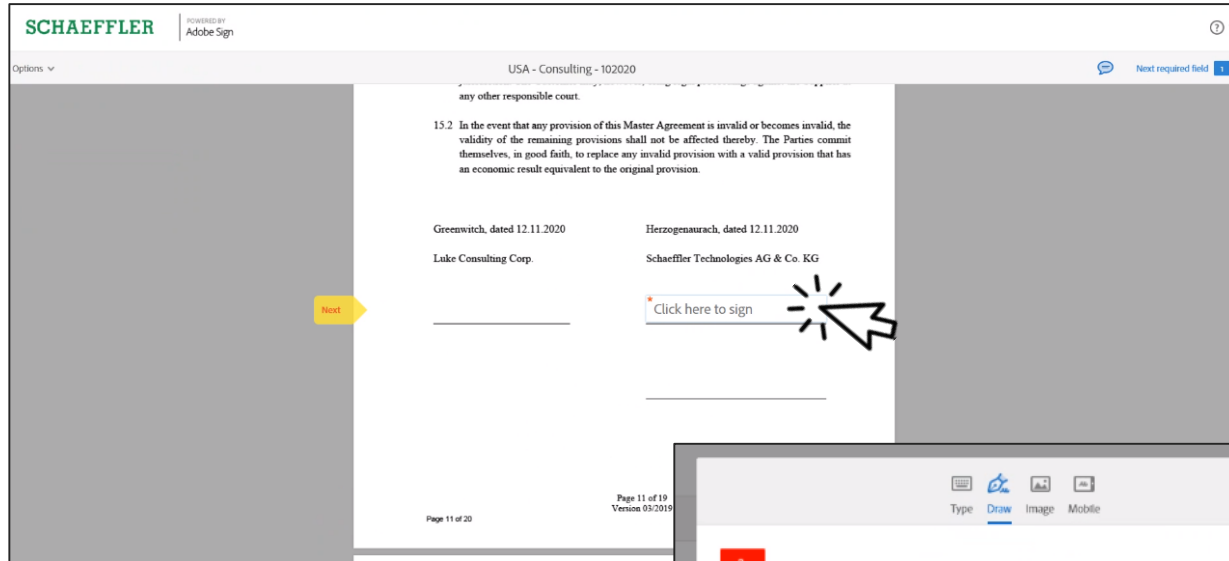
The signing process will stay the same.

You will have received a notification via mail and in Coupa that you have been requested to sign a contract via AdobeSign. You can sign without any costs or registration. Clicking on the link in your mail is sufficient.

To do so:

- (1) either click on **Start** and it will automatically take you to the Signature Fields
- (2) or scroll down to the Signature Fields

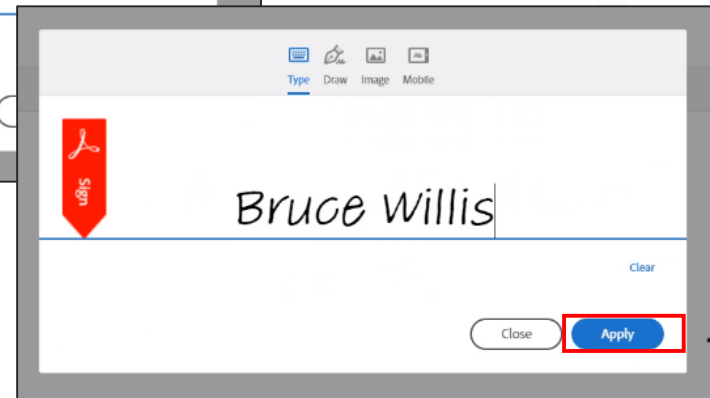
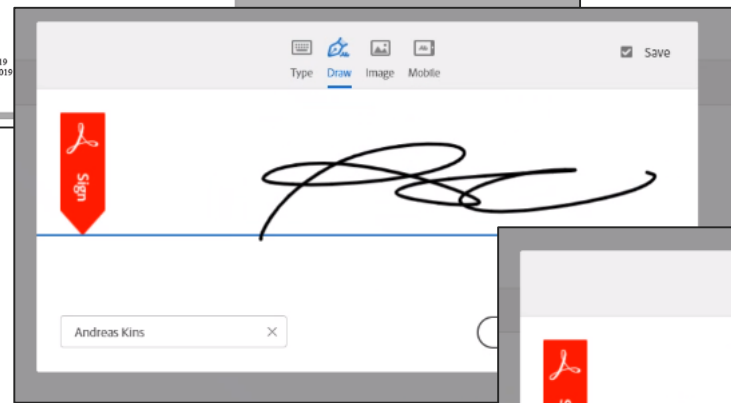
How to sign a contract



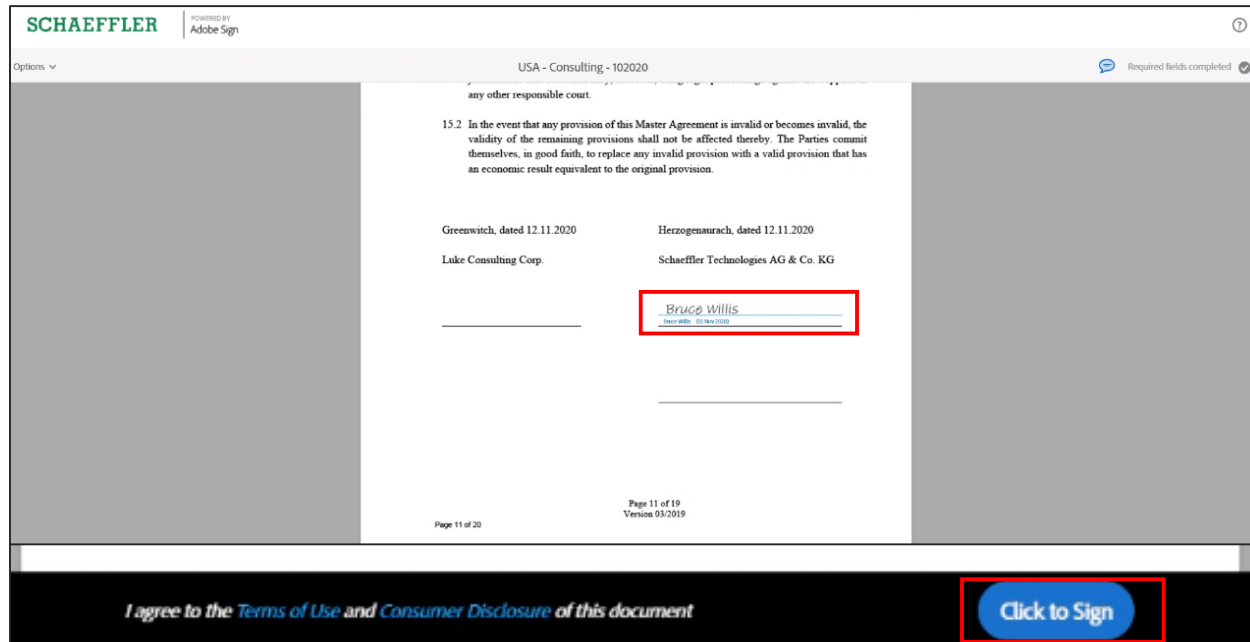
Please click to sign.

You can either draw your signature or type your signature.

Click **Apply** once you have completed your signature.



How to sign a contract



Your signature will now appear in the document.

Please **Click to sign.**

Thank you!



Thank you for participating!



In case of any specific information related to your RfQ or contract, please check the FAQ page on the [Coupa Supplier Portal](#) or the [Schaeffler Supplier Portal](#). If you still have further questions reach out the Schaeffler event owner through the Coupa messaging function.