

# Responding to a Sourcing Event

Thank you for joining the call. Your lines have been muted, we will start the call shortly.

There will be time for Q&A towards the end of the call.



## Course Disclaimer

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Screen captures within this course are intended for the purpose of general understanding and are deemed to be current and accurate at the time of course development. Actual processes may differ by LOB or financial systems.

# Agenda

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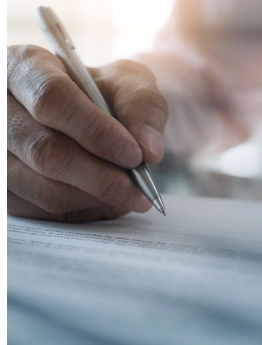
1. Overview
2. Email Notification
3. Action Button
4. The Event Landing Page
5. Completing the Sourcing Questionnaire
6. Edit Response
7. Instant Messages
8. Sourcing Response Portal Dashboard

# Overview

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### Simplified Access & Participation

Suppliers don't necessarily need a pre-existing account; they can often join an event directly via a secure "One-Time Password" (OTP) sent to their email



### Enhanced Communication & Transparency

Centralize communication through the Message Center to create a secure audit trail and reduce administrative delays. Suppliers stay on track with automated notifications for event invites, key deadlines, and real-time status changes



### Efficient Data Entry

Progress is saved automatically as they navigate the form, preventing data loss if their internet connection drops



### Fair & Competitive Environment

All suppliers receive the exact same information and questions, ensuring a level playing field. Suppliers can typically update and resubmit their bids as many times as they want until the event clock expires

# Email Notification

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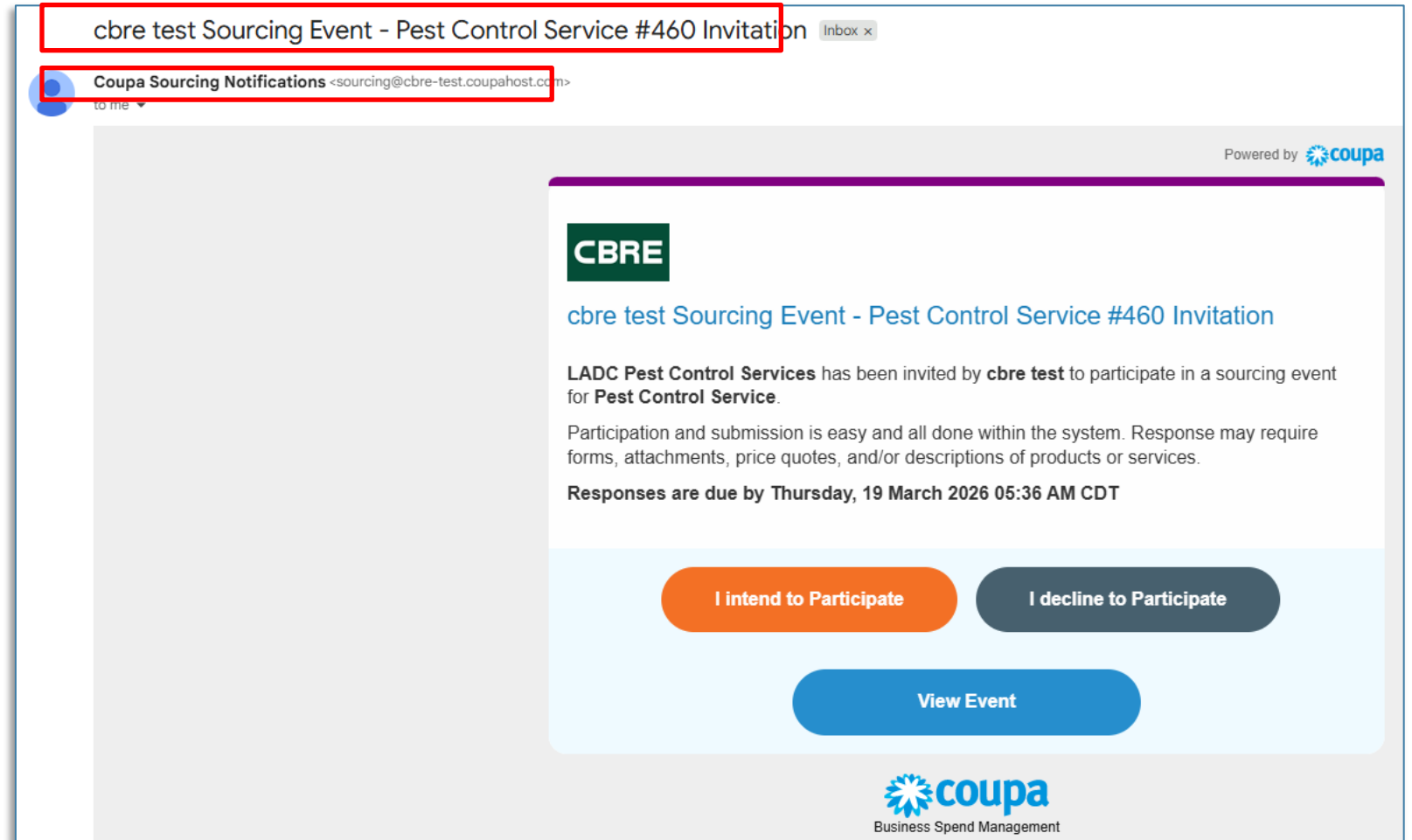
2

# Supplier Email Notification

The email is sent from a Coupa address ([sourcing@cbre.coupahost.com](mailto:sourcing@cbre.coupahost.com)). Sent automatically the moment CBRE "launches" the event.

**Subject Line** contains the Event Title and CBRE sourcing Event.

**Event Details:** Includes the event name, number, and a brief description of the commodity being sourced.





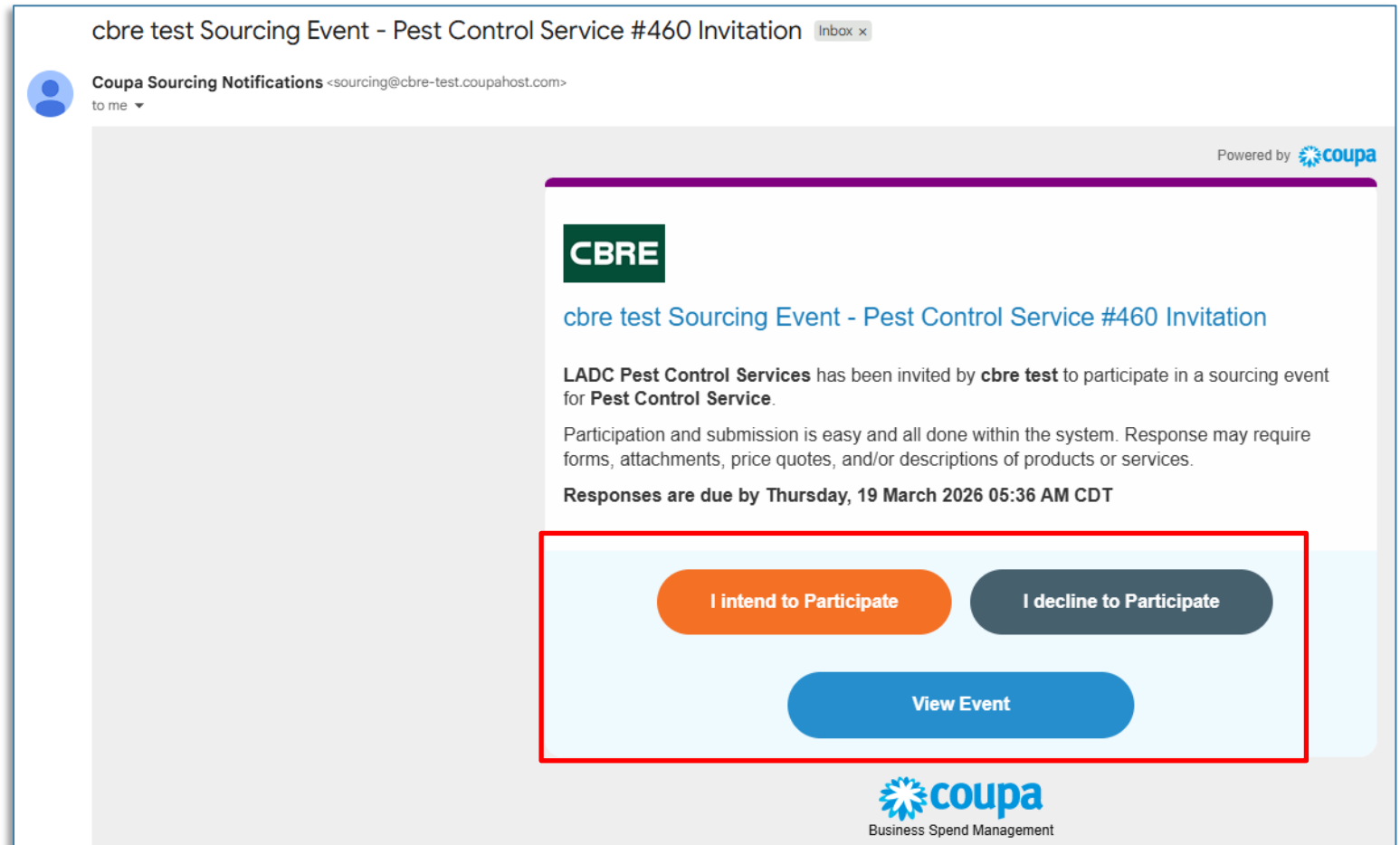


# Action Buttons

**View Event:** The primary link to access the event page directly.

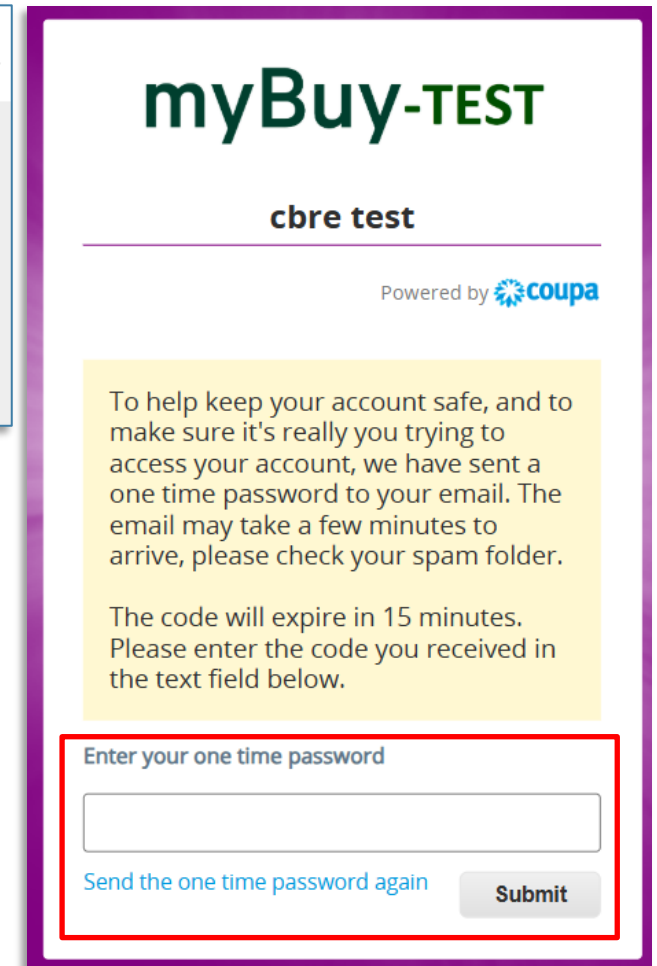
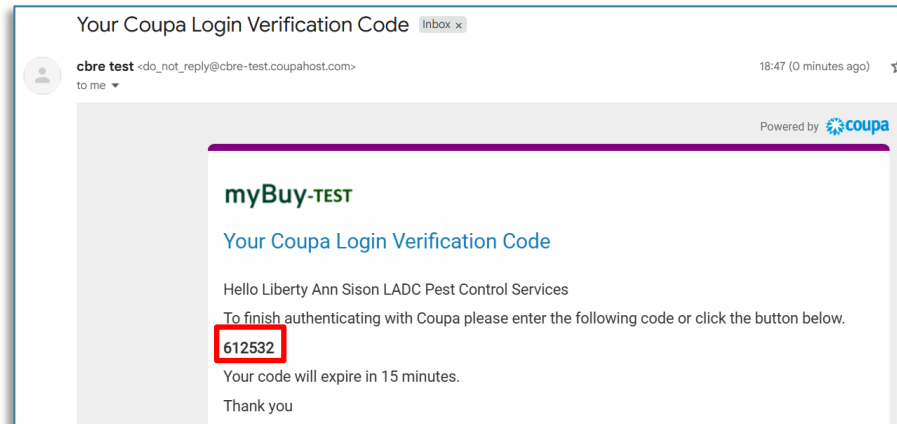
**I Intend to Participate:** Allows the supplier to quickly notify the buyer of their interest.

**I Decline to Participate:** A direct way to opt out and provide a reason for declining.



# Action Buttons

After clicking, you will be directed to a login page or the event details page. If you do not have a **Coupa Supplier Portal (CSP)** account, you may receive a follow-up email with a **One-Time Password (OTP)** to verify your identity before you can see full event details



The event  
landing page

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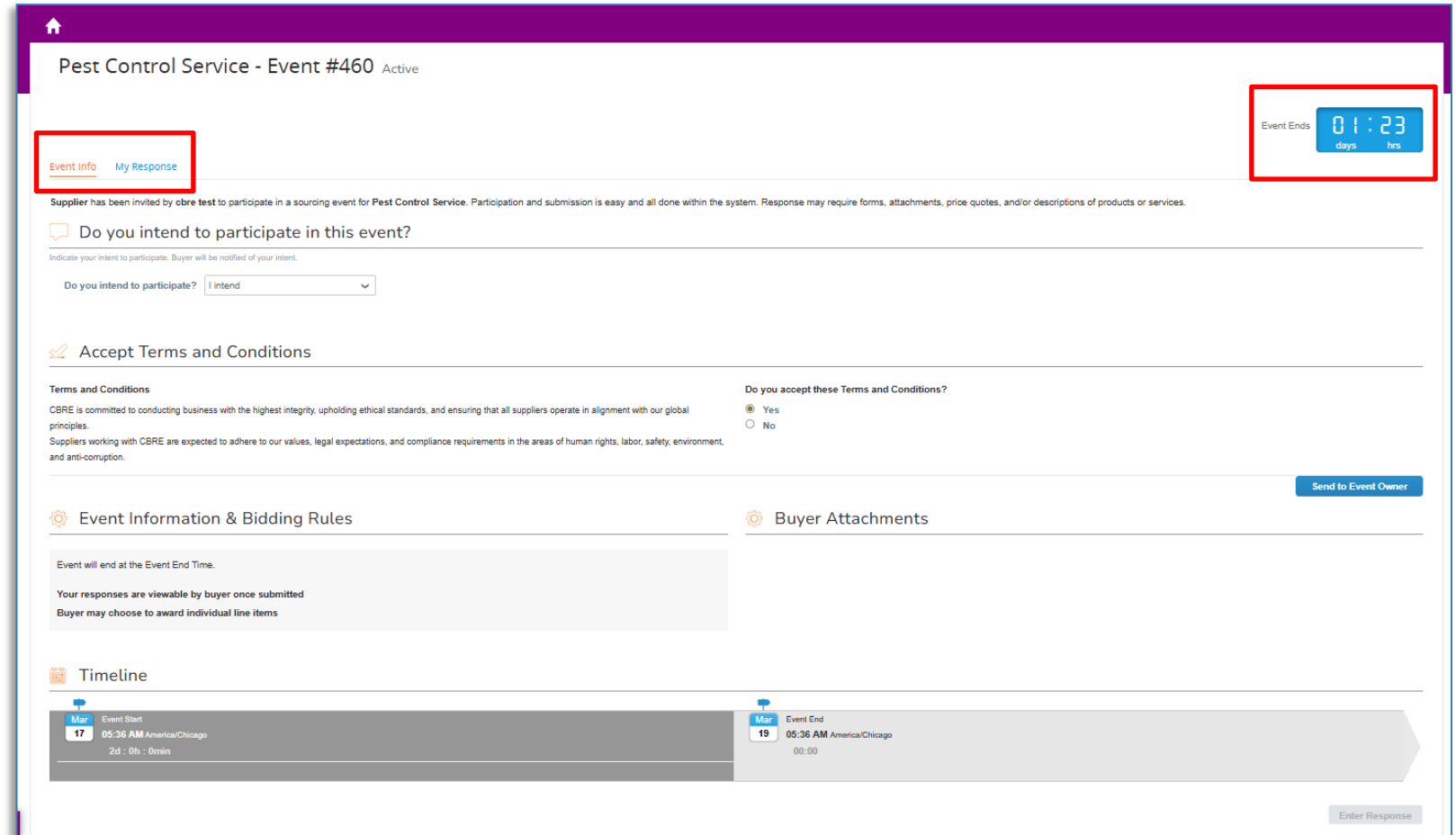
# View Event

Use this button to see the full scope of the event before making a decision or to start your formal response.

**Event Info** tab of a Coupa Sourcing event. This is the landing page a supplier sees after clicking "View Event" from their email.

**Countdown Timer:** Located in the top-right corner, showing exactly how many days and hours remain before the event closes.

**Navigation Tabs:** Below the title, you can switch between Event Info (general details) and My Response (where the actual bidding happens).



# I intend to participate

**I Intend to Participate:** using the drop down, update to I Intend or select the I Intend to participate directly in the email invitation.

**Accept Terms and Conditions:** This section contains CBRE's integrity and ethical standards.

Suppliers must select the "Yes" radio button to agree to these terms before they are permitted to proceed with the bid.

**Send to Event Owner:** A button to submit these preliminary acknowledgments.

**Pest Control Service - Event #460** Active

Event Ends **01:23**  
days hrs

Event info My Response

Supplier has been invited by cbre test to participate in a sourcing event for Pest Control Service. Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services.

**Do you intend to participate in this event?**  
Indicate your intent to participate. Buyer will be notified of your intent.

Do you intend to participate? I intend

**Accept Terms and Conditions**

**Terms and Conditions**  
CBRE is committed to conducting business with the highest integrity, upholding ethical standards, and ensuring that all suppliers operate in alignment with our global principles. Suppliers working with CBRE are expected to adhere to our values, legal expectations, and compliance requirements in the areas of human rights, labor, safety, environment, and anti-corruption.

Do you accept these Terms and Conditions?  
 Yes  
 No

Send to Event Owner

**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**

**Timeline**

Mar 17 05:36 AM America/Chicago 2d : 0h : 0min  
Mar 19 05:36 AM America/Chicago 00:00

Enter Response

# I intend to participate

## Event Information & Bidding Rules

**Rules Panel:** Summarizes how the event will be managed (e.g., "Event will end at the Event End Time"). This confirms that responses are only viewable by CBRE once they are submitted.

**Buyer Attachments:** Resource Section: Any supporting documents, technical specifications, or site maps provided by CBRE would appear here for the supplier to download.

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Do you accept these Terms and Conditions?

Yes

No

Send to Event Owner

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

Timeline

Mar 17 05:36 AM America/Chicago 2d : 0h : 0min

Mar 19 05:36 AM America/Chicago 00:00

Enter Response

# I intend to participate

**Timeline:** Visual Schedule: A gray bar at the bottom showing the Event Start and Event End dates and times (specifically marked for March 17th to March 19th in this example).

**Action Footer:** Enter Response: A button in the bottom-right corner (currently grayed out). This becomes active only after the supplier has accepted the Terms and Conditions and indicated their intent to participate.

Pest Control Service - Event #460 Active

Event Ends 01:23 days hrs

Event info My Response

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Do you intend to participate in this event?

Indicate your intent to participate. Buyer will be notified of your intent.

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Do you accept these Terms and Conditions?

Yes

No

Send to Event Owner

Event Information & Bidding Rules

Buyer Attachments

Event will end at the Event End Time.

Your responses are viewable by buyer once submitted

Buyer may choose to award individual line items

Timeline

Mar 17 05:36 AM America/Chicago 2d : 0h : 0min

Mar 19 05:36 AM America/Chicago 00:00

Enter Response

# I decline to participate

A direct way to opt out and provide a reason for declining. Select the I decline to Participate button within the email invitation.

Input your reason for declining in the text field and click **Submit** to inform CBRE.

The screenshot shows a web interface for an event titled "Pest Control Service - Event #460" with a status of "Active". In the top right corner, there is a countdown timer for "Event Ends" showing "01 23" days and hours. Below the header, there are two tabs: "Event Info" (selected) and "My Response". A notification message states: "Supplier has been invited by cbre test to participate in a sourcing event for Pest Control Service. Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services." The main form area is titled "Do you intend to participate in this event?" and includes the instruction "Indicate your intent to participate. Buyer will be notified of your intent." There is a dropdown menu for "Do you intend to participate?" with "I decline" selected. Below this is a text input field for "Reason" containing the text "Tight deadline". A blue "Submit" button is located at the bottom right of the form area.



# Completing the Sourcing questionnaire

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# Enter response

The screenshot displays a 'Timeline' section with two event markers. The first marker is for 'Event Start' on March 17 at 05:36 AM America/Chicago, with a duration of 2d : 0h : 0min. The second marker is for 'Event End' on March 19 at 05:36 AM America/Chicago, with a duration of 00:00. A blue 'Enter Response' button is located at the bottom right of the timeline area, enclosed in a red rectangular box.


**Enter Response:** To participate in this event, you must click the Enter Response button located at the bottom right of the screen.

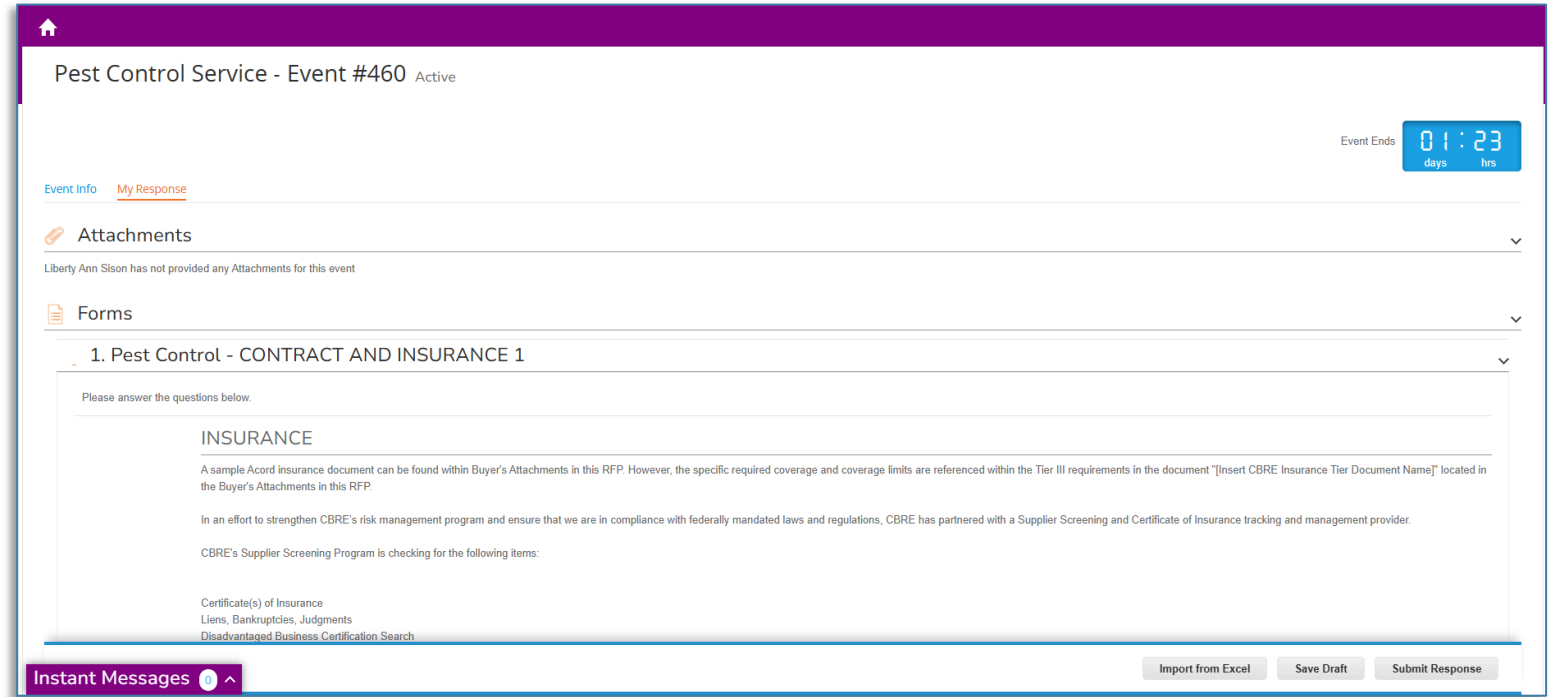
If the **Enter Response** button is not yet active, ensure you have first scrolled down to the Terms and Conditions section and accepted them by selecting **Yes** and clicking Send to Event Owner.

COMPLETING THE SOURCING QUESTIONNAIRE

# My responses

Address the Questionnaire: Once you click **Enter Response**, you will be taken to the **My Responses** page where you can fill out required questionnaires, upload attachments, and enter pricing for items.

You will also notice the  in the upper left corner. This is your RFP dashboard and will house all existing sourcing events a supplier has been invited to.



Pest Control Service - Event #460 Active

Event Ends 01:23 days hrs

Event Info My Response

Attachments

Liberty Ann Sison has not provided any Attachments for this event.

Forms

1. Pest Control - CONTRACT AND INSURANCE 1

Please answer the questions below.

**INSURANCE**

A sample Acord insurance document can be found within Buyer's Attachments in this RFP. However, the specific required coverage and coverage limits are referenced within the Tier III requirements in the document "[Insert CBRE Insurance Tier Document Name]" located in the Buyer's Attachments in this RFP.

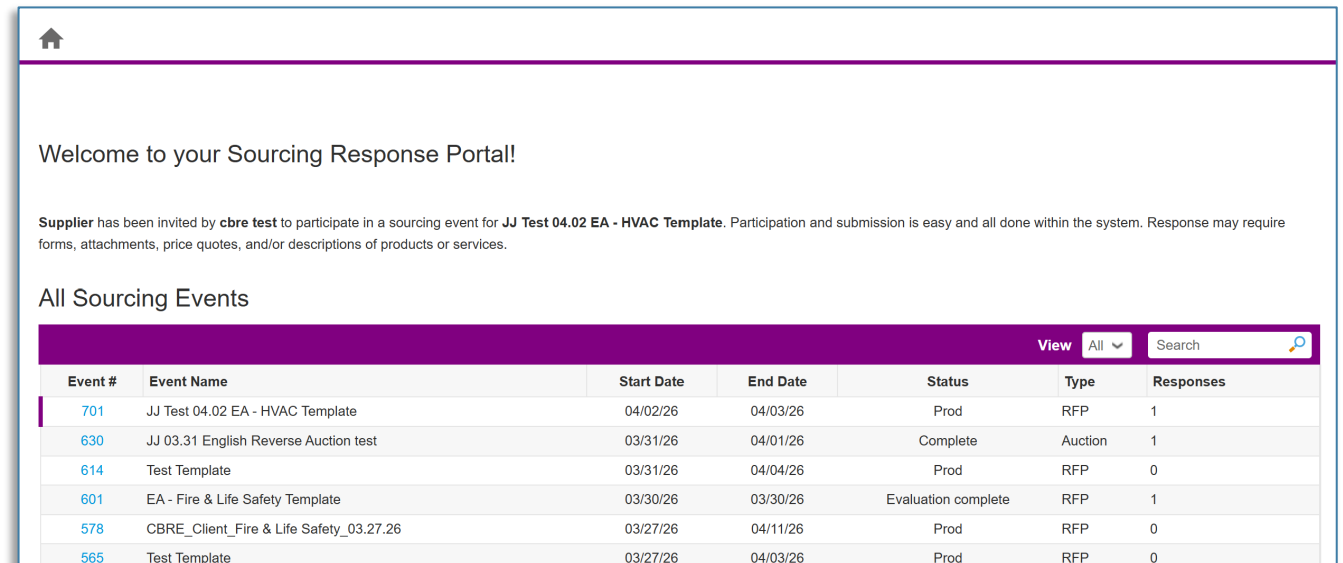
In an effort to strengthen CBRE's risk management program and ensure that we are in compliance with federally mandated laws and regulations, CBRE has partnered with a Supplier Screening and Certificate of Insurance tracking and management provider.

CBRE's Supplier Screening Program is checking for the following items:

Certificate(s) of Insurance  
Liens, Bankruptcies, Judgments  
Disadvantaged Business Certification Search

Instant Messages 0

Import from Excel Save Draft Submit Response



Welcome to your Sourcing Response Portal!

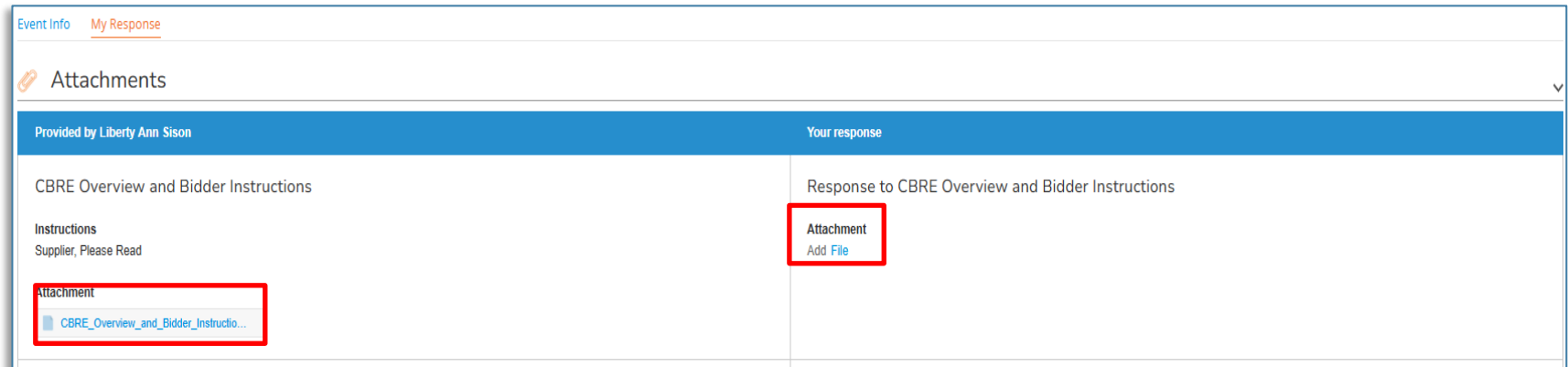
Supplier has been invited by **cbre test** to participate in a sourcing event for **JJ Test 04.02 EA - HVAC Template**. Participation and submission is easy and all done within the system. Response may require forms, attachments, price quotes, and/or descriptions of products or services.

All Sourcing Events

Event #	Event Name	Start Date	End Date	Status	Type	Responses
701	JJ Test 04.02 EA - HVAC Template	04/02/26	04/03/26	Prod	RFP	1
630	JJ 03.31 English Reverse Auction test	03/31/26	04/01/26	Complete	Auction	1
614	Test Template	03/31/26	04/04/26	Prod	RFP	0
601	EA - Fire & Life Safety Template	03/30/26	03/30/26	Evaluation complete	RFP	1
578	CBRE_Client_Fire & Life Safety_03.27.26	03/27/26	04/11/26	Prod	RFP	0
565	Test Template	03/27/26	04/03/26	Prod	RFP	0

# Review Attachments

Review Reference Documents: Before completing the questionnaire, navigate to the event's Attachment section. This section contains documents that may be required to review in order to provide accurate and timely responses. Some attachments may also need to be completed and/or uploaded as part of your response.



**Note::** Fields marked with a red asterisk (\*) are mandatory and must be completed to submit your bid.

# Review, Respond, & Save

Review each question in detail and respond using the appropriate dropdown, radio button/multi choice or text fields.

Be sure to select **Save** after completing each section to ensure your responses are recorded within the **Form**.

Forms

### 1. Pest Control - CONTRACT AND INSURANCE 1

Please answer the questions below.

#### INSURANCE

A sample Acoord insurance document can be found within Buyer's Attachments in this RFP. However, the specific required coverage and coverage limits are referenced within the Tier III requirements in the document "[Insert CBRE Insurance Tier Document Name]" located in the Buyer's Attachments in this RFP.

In an effort to strengthen CBRE's risk management program and ensure that we are in compliance with federally mandated laws and regulations, CBRE has partnered with a Supplier Screening and Certificate of Insurance tracking and management provider.

CBRE's Supplier Screening Program is checking for the following items:

- Certificate(s) of Insurance
- Liens, Bankruptcies, Judgments
- Disadvantaged Business Certification Search
- Business Security Search including OFAC
- W-9 Tax Form Collection
- Remittance Address Collection
- Health, Safety, and Environmental Questionnaire
- Business Continuity Questionnaire
- Information Security Management

A document has been included in this RFP regarding the GRMS Screening process. Please contact the GRMS Support Center with any questions regarding the screening and insurance requirements at <http://support.globalrms.com> or 877-616-2739.

Finally, note that specific insurance requirements may vary by account.

\* Insurance Tier # III requirement

Does your company meet the Insurance Tier # III requirements in the document "[Insert CBRE Insurance Tier Document Name]" located in the Buyer's Attachments in this RFP?

\* Comprehensive General Liability Insurance claim

Has your company been subject to any Comprehensive General Liability Insurance claims over the last (3) three years?

\* PURCHASING/SERVICES AGREEMENT

Does your company agree to all of the terms and conditions contained within the CBRE Master Services/Services Agreement located in the Buyer's Attachments of this RFP?

For those suppliers that have a current MSA with CBRE, a Statement of Work leveraged against your MSA would be used in lieu of the CBRE boilerplate MSA - so if you have a current CBRE MSA on file, answer "Yes" to this question.

Save

# Completing Pricing Questions

Use this section to define and price your offers.

Click an item to open it. The requested input will vary depending on what is being sourced.

There may also be additional item-specific questions from CBRE, these will be noted in a Form on the item or service line.

The screenshot displays the 'Items and Services' section of a sourcing questionnaire. It features two main items, each with a red border highlighting its pricing fields:

- Annual Service:** This item is categorized under 'Items Not In Lots (2 items)'. It has a price per unit of 2,480 USD. The input fields for '\* Price per Unit' (2,480) and '\* Currency' (USD) are highlighted.
- Service Materials:** This item has an expected quantity of 12 Each and a capacity of 12. Its price per unit is 190 USD. The input fields for '\* Price per Unit' (190) and '\* Currency' (USD) are highlighted.

At the bottom right of the interface, a 'Total' value of 4,760.00 USD is displayed. A legend at the bottom left indicates that an asterisk (\*) denotes a required field.

## Successful bid confirmation

After completing the questionnaire and entering in all the pricing details, select **Submit Responses**.

If the CBRE buyer has made changes to the event, you will need to resubmit your initial responses. You must check the box next to the red asterisk **I have reviewed the changes to this event**. Once done, select Submit Responses.

A **Green Banner** saying "Response submitted successfully to Buyer" confirms the submission went through.

**Note:** A red notification banner will appear if any mandatory fields are left incomplete.



A screenshot of a form header bar with a blue border. It contains a checked checkbox with the text "\* I have reviewed the changes to this event" highlighted by a red box. To the right are three buttons: "Import from Excel", "Save Draft", and "Submit Response", with the "Submit Response" button also highlighted by a red box.

Response submitted successfully to Buyer.

Some of the required forms are empty, please fix the validation before proceeding





# Edit Response

This shows the Event Dashboard after a response has been submitted. It confirms that the supplier still has the option to make changes before the deadline.

Welcome to your Sourcing Response Portal!

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### All Sourcing Events

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<a href="#">630</a>	JJ 03.31 English Reverse Auction test	03/31/26	04/01/26	Complete	Auction	1
<a href="#">614</a>	Test Template	03/31/26	04/04/26	Prod	RFP	0
<a href="#">601</a>	EA - Fire & Life Safety Template	03/30/26	03/30/26	Evaluation complete	RFP	1
<a href="#">578</a>	CBRE_Client_Fire & Life Safety_03.27.26	03/27/26	04/11/26	Prod	RFP	0
<a href="#">565</a>	Test Template	03/27/26	04/03/26	Prod	RFP	0

Note: If you don't receive your invitation email, check your spam folder

# Edit Response

If you need to update your bid after submitting, follow these steps:

Go to “My Response” tab and Click "Edit Response": This button is available as long as the event timer has not reached zero.

Modify Details: You can change your pricing, update form answers, or swap out attachments.

Re-submit: Crucial Step! Once you finish editing, you must click the "Submit Response" button again. If you don't re-submit, the buyer will only see your original, unedited version.

Pest Control Service - Event #460 Active

Event Ends 01:22  
days hrs

Event Info **My Response**

Responded on 03/17/26

Attachments  
Liberty Ann Sison has not provided any Attachments for this event

Forms  
1. Pest Control - CONTRACT AND INSURANCE 1

**INSURANCE**

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Instant Messages 0 ^

Edit Response

# Instant Messages

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7

# Instant Messages

The Instant Messages feature within a Coupa Sourcing event is the primary tool for direct communication between CBRE and the supplier while an event is active. Key Uses of this Feature

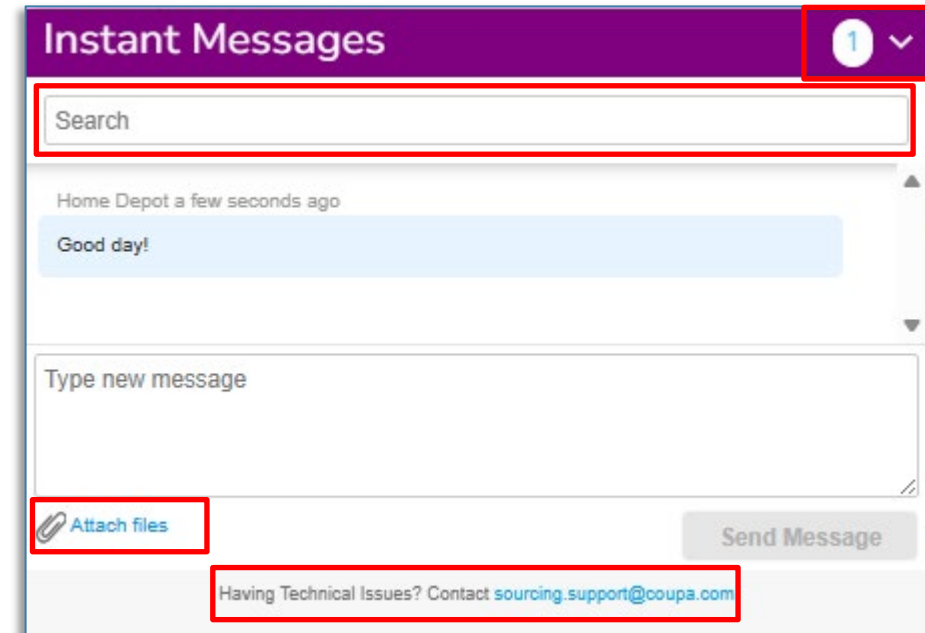
**Direct Inquiry:** Suppliers can ask for clarification on line items, technical specifications, or deadline extensions.

**Audit Trail:** All messages sent here are logged within the event history, providing a transparent record for both parties.

## Important Notes for Users

**Notifications:** When a new message arrives, a notification bubble (the white "1" in the purple header) will appear to alert you.

**Search bar:** Search by keyword to display relevant chat history.**File Sharing:** The "Attach files" paperclip icon allows you to send documents (like updated quotes or certifications) directly through the chat.



Note: If the chat malfunctions, a direct link to [sourcing.support@coupa.com](mailto:sourcing.support@coupa.com) is provided at the bottom for troubleshooting.

Sourcing  
Response Portal  
Dashboard

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8

# Sourcing Response Portal

The Sourcing Response Portal is the central hub for suppliers to manage all sourcing events.

Only the specific person that was invited to the event will be able to see the events listed in this view

Use an existing invitation email and select, View Event to get back to the Portal and review any event you have been invited to

Welcome to your Sourcing Response Portal!

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565	Test Template	03/27/26	04/03/26	Prod	RFP	0

**Note:** CBRE has not enabled sourcing responses through the CSP, we are only allowing via email and this Coupa Sourcing Response Portal

# Table View

**Events Table:** The central part of the portal, which lists several sourcing opportunities with the following details:

**Event #:** A unique identification number for each request (e.g., 460, 459, 452).

**Event Name:** Titles of the Event Name

**Start & End Dates:** Timeframes for when the bids or responses are open.

**Search:** The search bar located at the top right of the event table allows you to narrow down the list of events in real-time as you type. You can search by unique ID (e.g. 431) or keywords in Title (Eg. “Pest ontrol”)

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All Sourcing Events

Event #	Event Name	Start Date	End Date	Status	Type	Responses
460	Pest Control Service	03/17/26	03/19/26	Prod	RFP	1
459	Pest Control Template	03/17/26	03/17/26	Complete	RFP	0
452	General Services Template	03/16/26	03/18/26	Pause	RFP	0
431	Pest Control Template	03/14/26	03/17/26	Prod	RFP	0
428	Custom Email Notification - Awarded Supplier	03/14/26	03/21/26	Prod	RFI	0
370	Pest Control Template	03/23/26	04/03/26	Prod	RFP	0

Per page 15 | 45 | 90

# Table View

**Status:** Shows the current stage of the event, such as Prod (active), Complete, or Pause.

**Type:** Categorizes the event as an RFP (Request for Proposal) or RFI (Request for Information).

**Responses:** Indicates how many responses have been submitted (example: Event #460 shows "1" response).


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All Sourcing Events

Event #	Event Name	Start Date	End Date	Status	Type	Responses
460	Pest Control Service	03/17/26	03/19/26	Prod	RFP	1
459	Pest Control Template	03/17/26	03/17/26	Complete	RFP	0
452	General Services Template	03/16/26	03/18/26	Pause	RFP	0
31	Pest Control Template	03/14/26	03/17/26	Prod	RFP	0
428	Custom Email Notification - Awarded Supplier	03/14/26	03/21/26	Prod	RFI	0
370	Pest Control Template	03/23/26	04/03/26	Prod	RFP	0

Per page 15 | 45 | 90

**Note:** The flag icon  signal that CBRE has made updates or changes to that specific section of the event since you last viewed it, and you need to review them.



# Thank you!