SCM STAR

RESPOND TO RFX IN SCM STAR SUPPLIER USER GUIDE

SIEMENS

Contents

Respond to RFX

General Information

RFX is the common name for RFQs (Request for Quotation) and RFIs (Request for Information). This user-guides demonstrates the supplier response for RFQs, however all response rules also apply to RFIs.

Pre-requisites:

Prior to this exercise you will need to:

- Have access to the SCM STAR application

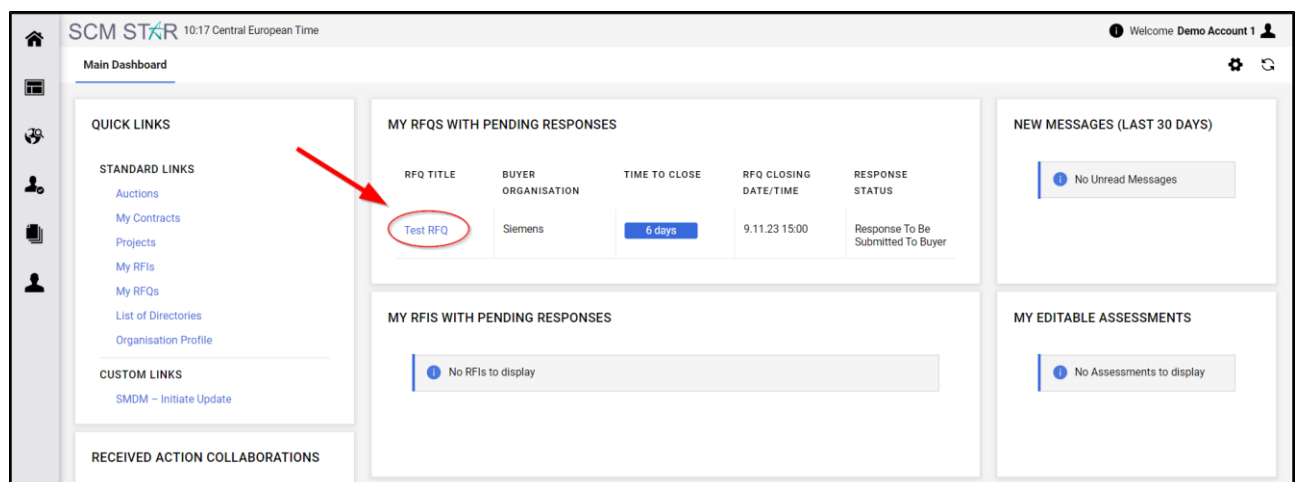- Have been invited to respond to an RFQ within the SCM STAR application

Objectives:

At the completion of this user guide, you should know the topics:

- Access to "My RFQ" section

- Create an RFQ Response

- Manage an RFQ Response

- Submit a Response to an RFQ
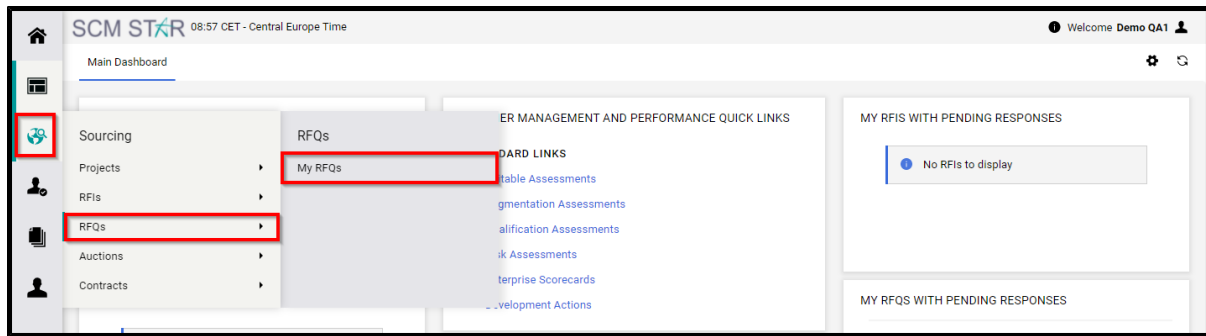
- Manage Messages within an RFQ

Access my RFQ

1. You can access the running event from the Widget in the Main Dashboard.

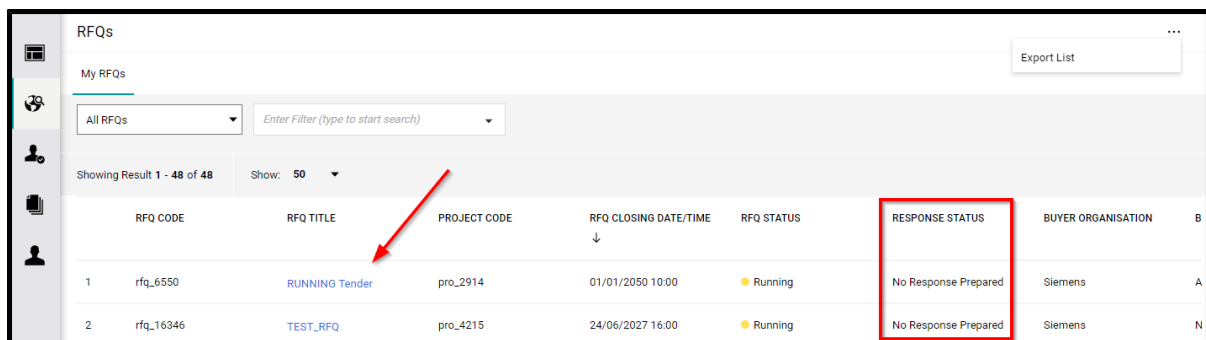*1 - Access event from Widget*

2. Alternatively, go to the Navigation menu and click on Sourcing, then click on RFQs or RFIs to access My RFQs or My RFIs

2 - Sourcing - RFQs - My RFQs

On the My RFQs/My RFIs page, you can view your response status for the RFx.

Click on the RFQ/RFI Title to start managing your response.

3 - Start Manage Your Response.

Create RFQ Response

There are 2 ways how to create an RFQ response in the application:

1. **Online Response:** the answers are provided directly online in the application

2. **Offline Response:** the answers are provided through a specific Excel template
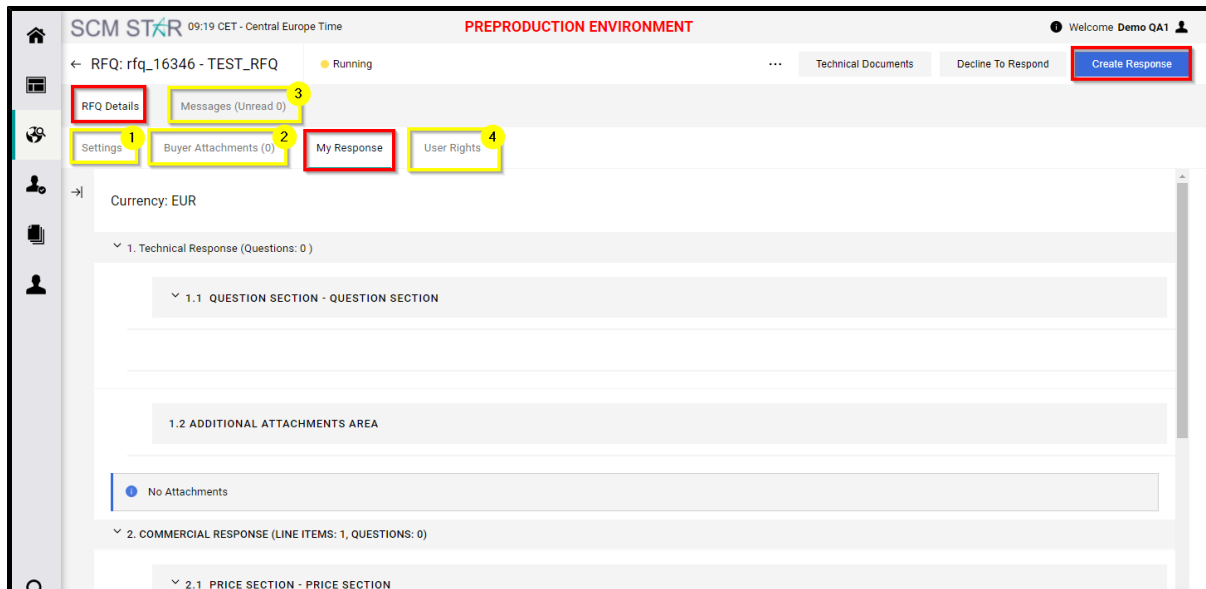
Online Response
Click on the RFQ/RFI title to access the RFQ. You will land in the **My Response** area.

You can then review the set-up of the RFQ.

1. **Settings:** In RFQ Settings Page you can see information such as deadline, responsible buyer name and if applicable also additional terms like payment terms, delivery date, etc.

2. **Buyer Attachments:** Buyers may upload general documents for you to read. You can download them in the Buyer Attachments area. See chapter attachment for more information.

3. **Messages:** Function to communicate with a buyer. See chapter "Messages" for more information.

4. **User Rights:** Here you can see a list of your colleagues who are also invited to this RFQ and therefore should have access to it.

*When ready, click **"Create Response"** to start the process.*

4 - Create Response

If you don't wish to participate in the RFQ you can click on the button **"Decline To Respond"**
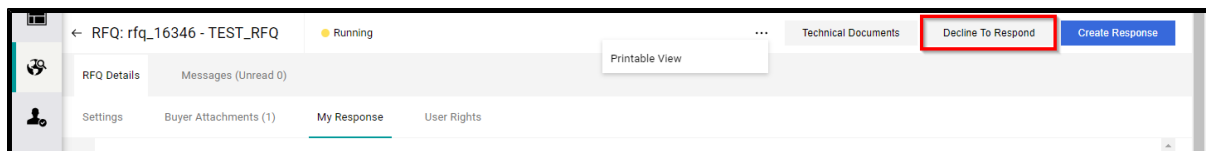
5 - Decline to Respond

Notice the **My Response Summary** section. It helps you keep track of your response progress based on the mandatory questions answered. Depending on the RFQ structure, you might see only one, two or all three sections of the Quality/Technical/Commercial Response Summary.

*To open the response for editing click on the **"Pencil"** icon. This must be done separately for each envelop.*

6 - Edit Function

1. Provide responses to all the mandatory questions (indicated by asterisk).

2. If you see the exclamation mark in triangle icon this means the buyer has attached an additional document that needs to be downloaded by clicking on the triangle icon. It is possible that the buyer requires from you to fill out the attached document and uploaded back to the system.

3. Depending on the question type you are required to answer by Text / Numeric / Attachment / Date / Option List / Multi Choice Option List / Yes or No Value

4. Optional: To ensure all mandatory questions are answered and the responses provided are in compliance with the format required, click **Validate Response**. The system will check the responses and show you the results.

7 - Create Technical Response

1. In the Commercial envelope the mandatory items are also marked with an asterisk. Depending on the structure you will need to provide the quotes for Price items, Price by Quantity, Cost-Breakdown or Price Discount.

2. It is also possible that the buyer created items that are optional to quote. In case that you wish to quote such items, make sure to select the respective checkboxes.

Please remember to save your responses. Click on **'Save and Continue'** to save. If you want to access the other sections of the RFx, click on **'Save and Return'** to return to the **My Response** page. From there, you can open and respond to questions in the other sections.

If your response is ready click on **Submit Response** (See below chapter **Submit Response**).

8 - Create Commercial Response

Offline Response

If you wish to respond to the RFQ offline, you can download the questionnaire in Excel format, complete it offline, then import the file to populate the online RFQ with your answers.

1. After clicking **Create Response**, you will see the **Export/Import Response** option on the upper right corner of the page.

2. Click **Export/Import Response**.

9 - Export/Import Response Button

3. Click **"Download"** to download the questionnaire in Excel format.

If you have any questions regarding the types of questions and how to work with the excel questionnaire, you can click on "Help To Create & Import Your Response" to get detailed instructions.

10 - Download and Import

4. In the downloaded excel document follow the instructions and complete all the mandatory questions (colour coded yellow).

5. When done, save the file and browse back to the **Export/Import Response** page.

6. Click '**Import Excel**' to upload the completed Excel questionnaire. The system will run a compliance check to see if there are missing rows, incompliant responses (e.g., texts entered in a numeric field) or missing mandatory responses. If all checks pass, you can proceed to save your responses. If not, please correct the errors indicated in the system message and re-import the questionnaire.

7. As always, remember to click '**Save Changes**' when you are finished.

11 - Save Changes

Submit Response

Once the RFQ questionnaire is completed, you are ready to publish your responses to SIEMENS.

1. In My Response area, click on the **'Submit Response'** button.

*12 - **Submit Response***

2. Once you clicked on the "Submit Response" Button, confirm the action

13 - Confirm the Action

A blue banner appears on top of the page when the response was submitted to the buyer.
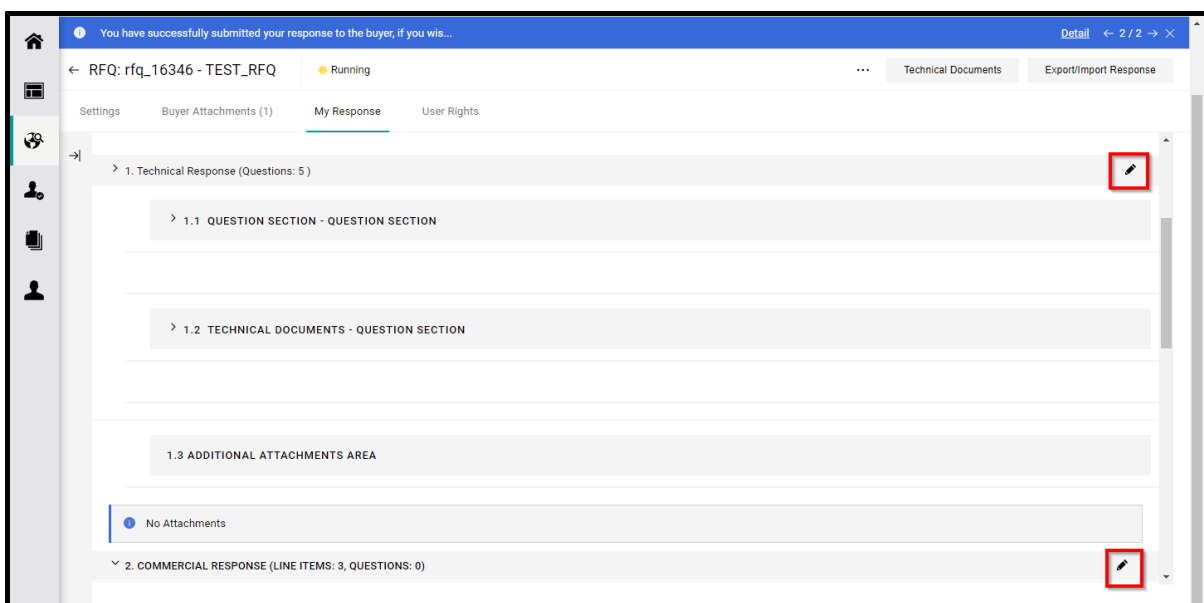
14 - Response was Successfully Sent

Modify your Response

You may edit and re-submit a submitted response, up to the Closing date & Time.
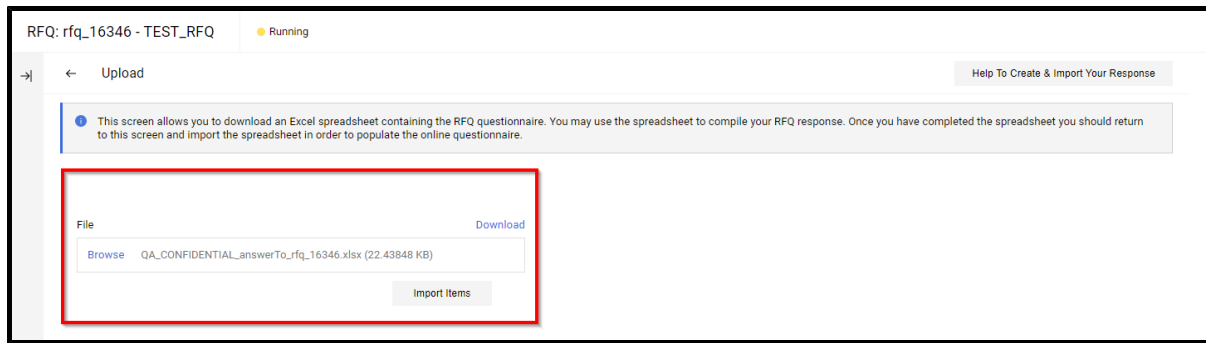
1. To modify responses online, you can edit your responses by turning the questionnaire into edit mode and updating your responses accordingly.

15 - Edit Function

To modify responses offline, you need to download the excel questionnaire, update your response, and then import the questionnaire into the system.

Remember to Save your responses as you go.
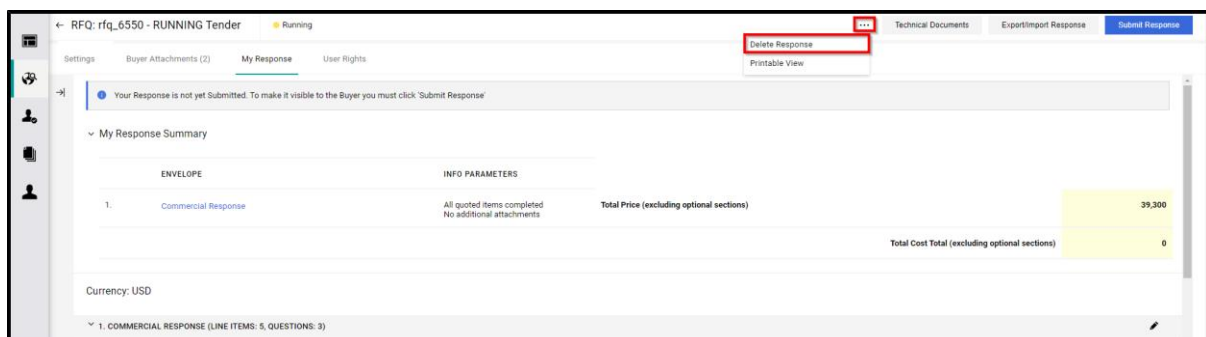
16 - Download and Import Item

Delete your Response

If you have already submitted your response, it is not possible to delete anymore.
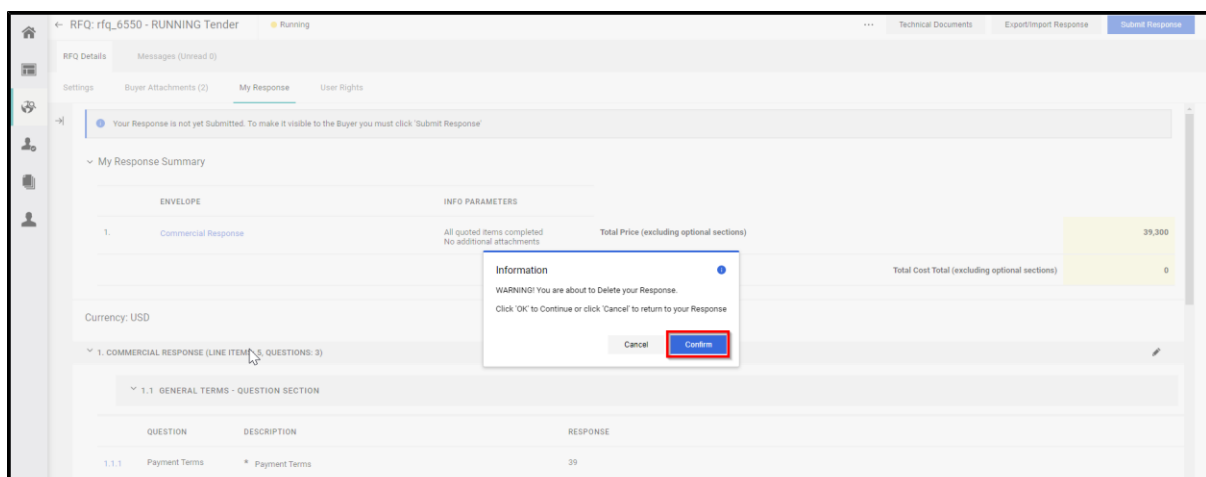
In case you have already submitted your response and you need it to delete it please contact responsible buyer via messages function within the RFQ and tell them to exclude you from the RFQ.

In case that you didn't submit your response, yet it is possible to delete it. In this case follow the steps below.

1. Click on the **"..."** and click on **"Delete Response"** button

2. And confirm it once more on the next open window.

*17 - Delete Response Button*

18 - Confirm Button

If you also want to withdraw participation on the RFQ please look at the next chapter "Withdraw Response".

Withdraw Response

in case you already submitted your response it is not possible to withdraw it anymore. In that case, please contact the responsible buyer and tell them to exclude you from the RFQ.

If you would like to withdraw from the RFQ, you must delete all of the responses entered previously (see chapter "**Delete your Response"**), then proceed with the following steps below.
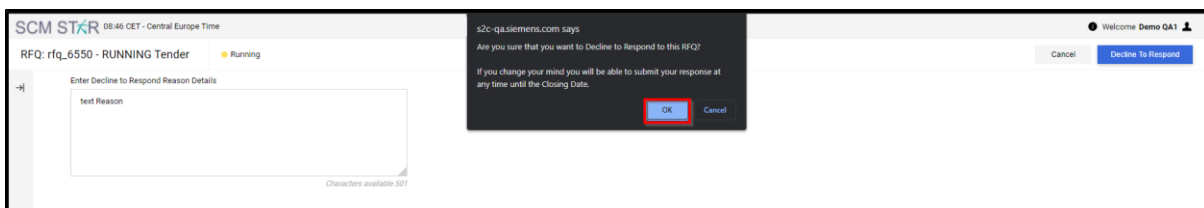
1. Find and click on 'Decline To Respond' in My Response page.

2. Optional: Enter a reason and confirm the action. The system will notify the Buyer Organization of the withdraw.
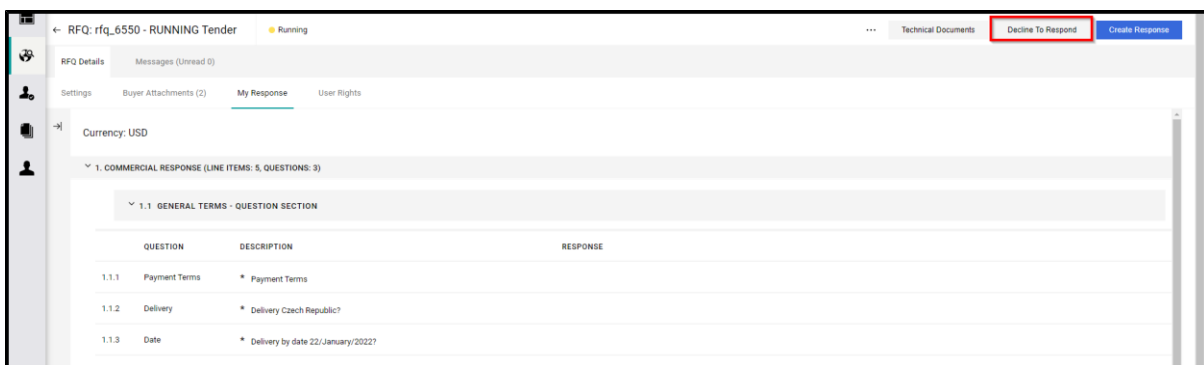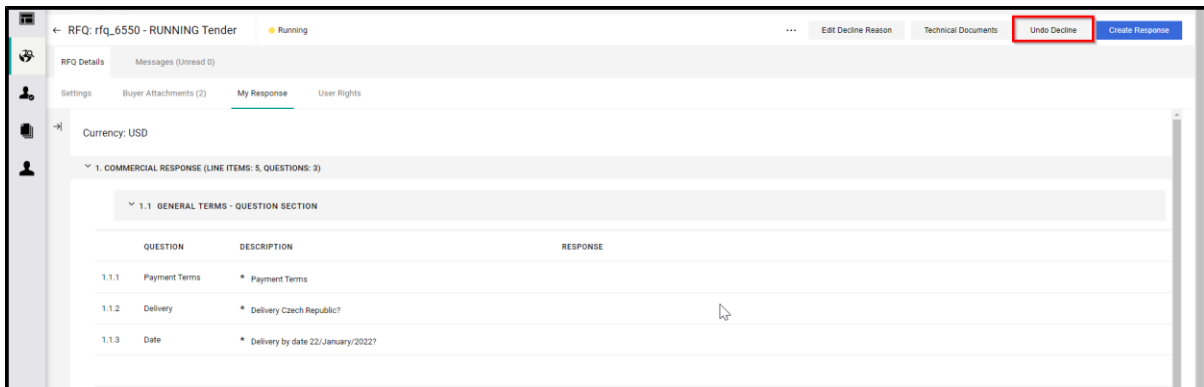

19 - Decline to Response

20 - Respond Reason

21 - Confirm Button

But you can still submit responses at any time until the RFQ Closing date. To do so, use the Undo Decline feature on My Response page.
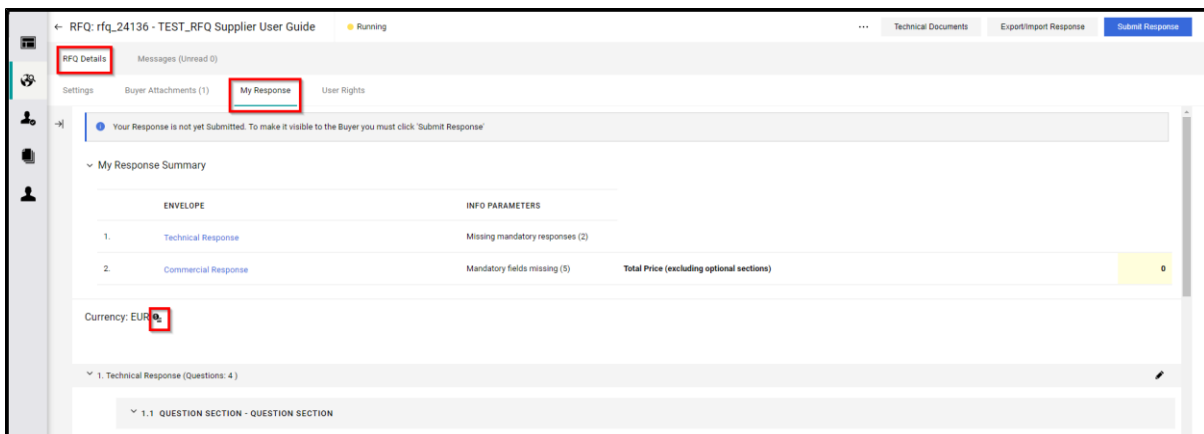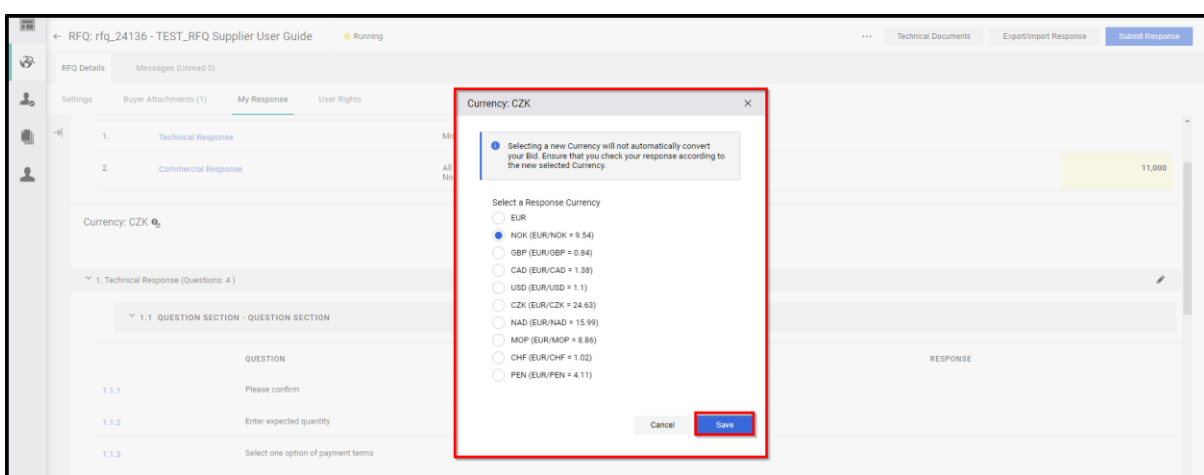
22 - Undo Decline

Multi-Currency

It is possible that the buyer created an RFQ where you can select a currency in which you want to bid.

In that case you can select the currency on the tab "My Response" next to the main currency of the RFQ.

23 - Multi Currency Icon

24 - Select your Bidding Currency

*It is recommended to select your bidding currency before you start to create your response.*

Attachments

In the RFQ there are several places where the Buyer can upload attachment for you.

1. In the Buyer Attachments tab.

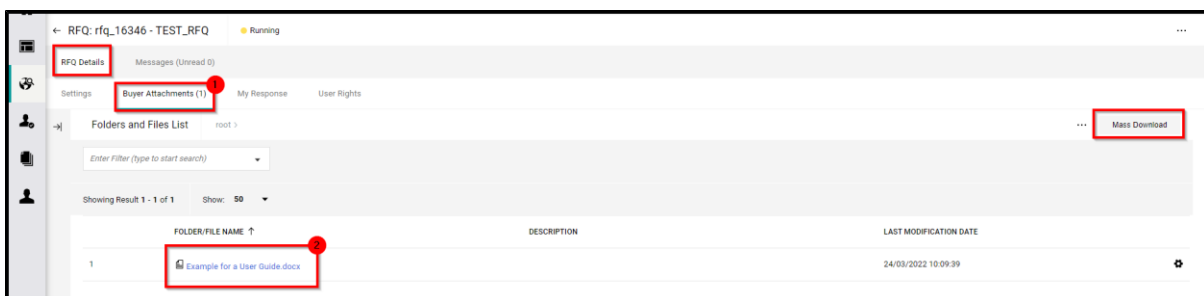2. In the Envelop sections within the questions

Buyer Attachments

When you first access the RFQ with the buyer attachments, you will see a banner that notifies you that you have not seen the Buyer Attachments yet
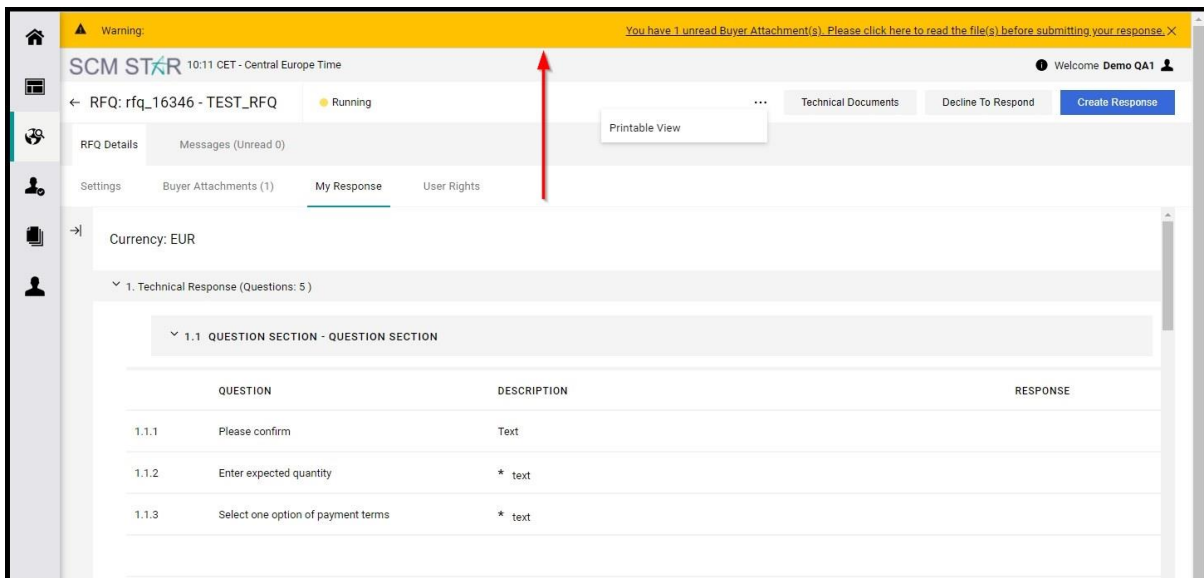
25 - Information Banner

1. Click on the Buyer Attachments tab

2. Click on the attachment name to downloaded

You can use the "Mass Download" function to download all the attachment at the same time.

26 - Buyer Attachments Download

Attachments in the Envelop Sections

If you see the exclamation mark in triangle icon this means the buyer has attached an additional document to the question that needs to be downloaded by clicking on the triangle icon. It is possible that the buyer requires from you to fill out the attached document and uploaded back to the system.

27 - Attachment within a Question

Upload Attachment

If the buyer requires from you to upload a document to the RFQ you need to upload it the designated place within the question. Please note you can only upload one document. If you need to upload more documents, please use zip folder.

28 - Attach Document

If have already upload an attachment delete it or replace it, you can click on the "**Bin**" icon or the "**Replace**" icon and upload a new document.

29 - Delete Attachment

In the case that the buyer allowed the general attachment you will also have the possibility to upload a general attachment at the of the envelop.


30 - General Attachment

Manage Messages

If you ever have questions about the RFx in which you are participating, you can contact the buyer through the Messages area within the RFx.

Note: If applicable Please pay attention to the date and time indicated in the End Date for Buyer Replies to Messages field on the RFx settings page. The Buyer has no obligation to respond to your message after the date and time noted.
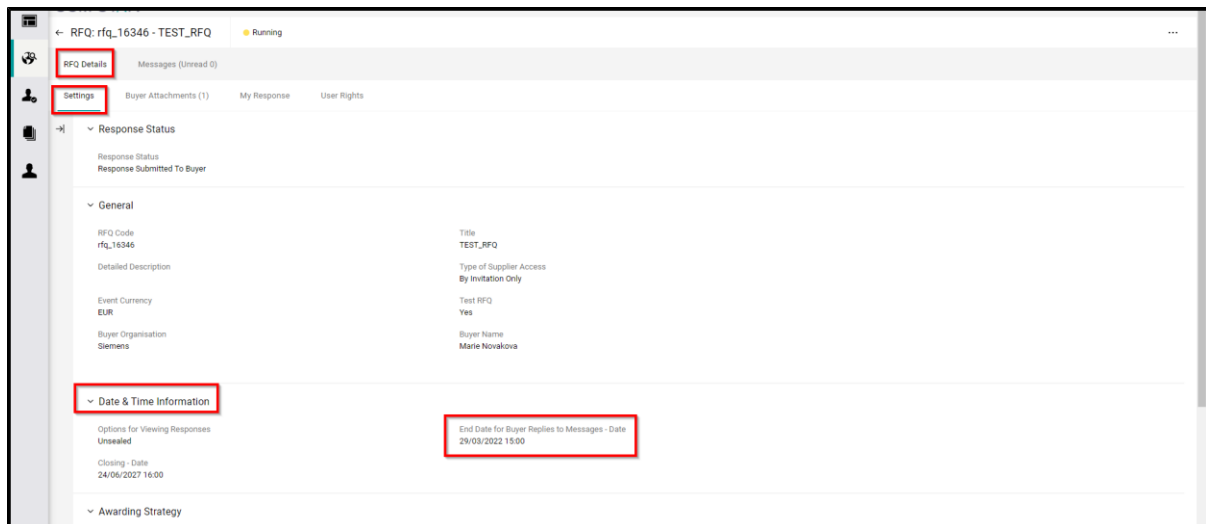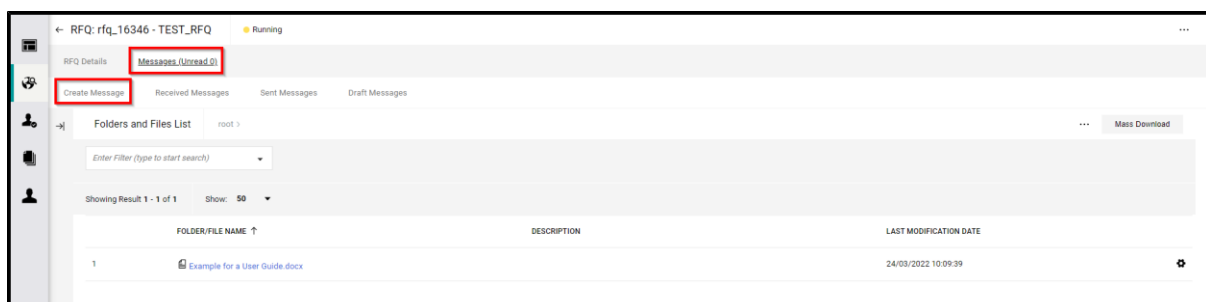

31 - End Date for Buyer Replies to Messages - Date
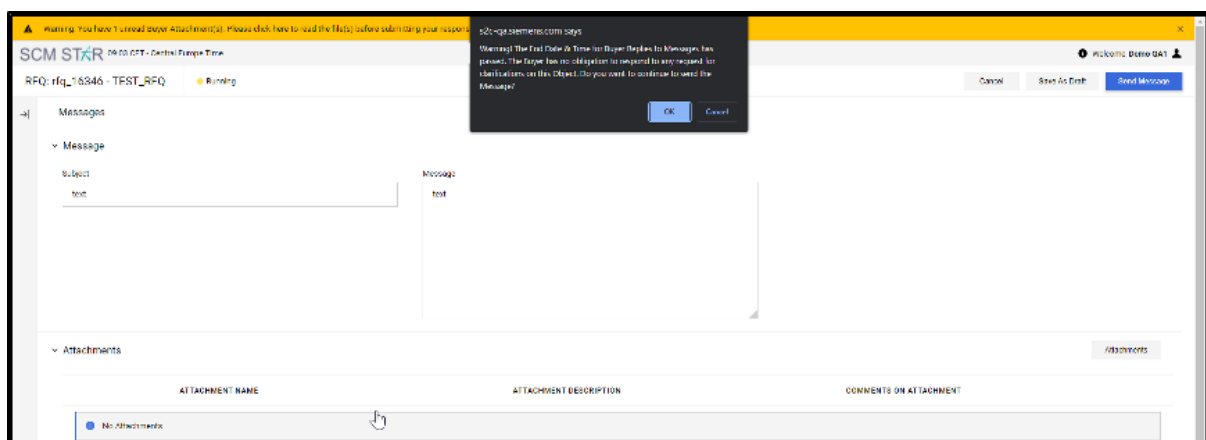
32 - Warning Notification

To create and send a Message to Buyer, please follow the following steps:

1. In the RFx you're working on, select the **'Messages'** tab.

2. Then click **'Create Message'.**

33 - Create Message

On the new page, you can

        a. Classify the message if the Buyer organization has the categories configured, e.g., Clarification.

        b. Compose a message

        c. Upload optional attachment to support your message.

When the message is created, click '**Send Message**'. If you're not ready to send it, click '**Save as Draft**'. Then you can retrieve the message later in the **Draft Messages** area.

34 - Send Message

Back on the **Messages** tab, a **Sent Messages** area will be displayed. You can keep track of messages sent, see if they were read by the Buyer and see the message replies. To view Buyer replies, please access the **Received Messages** area.
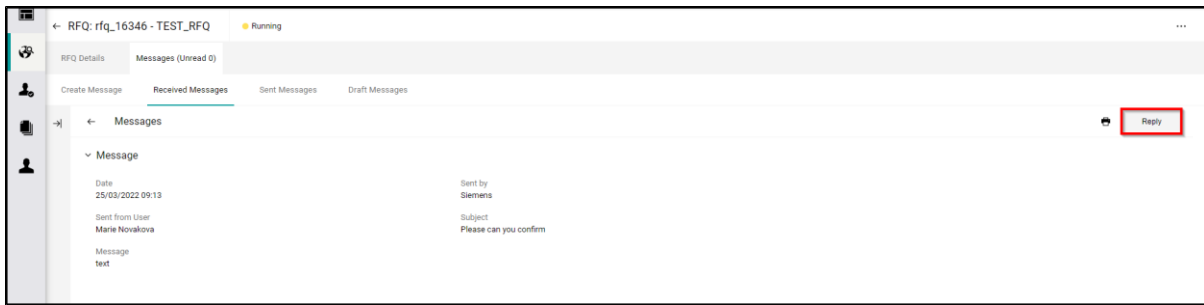

35 - Sent Message

Reply to Buyer Message

    1. In the **Received Messages** area, click on **Reply** to compose your message to the Buyer.

   2. When done, click **Send Message** to send your reply.

36 - Received Messages

17

37 - Reply

Create Response for Multi-Lot RFQ

1. To start creating a response click on the button **"Create Response"**

2. You will be redirected to the new page where you will see a list of all available lots of this RFQ. Here you have to select the lots where you want to participate. You can also read the description for each lot and download the buyer attachments.
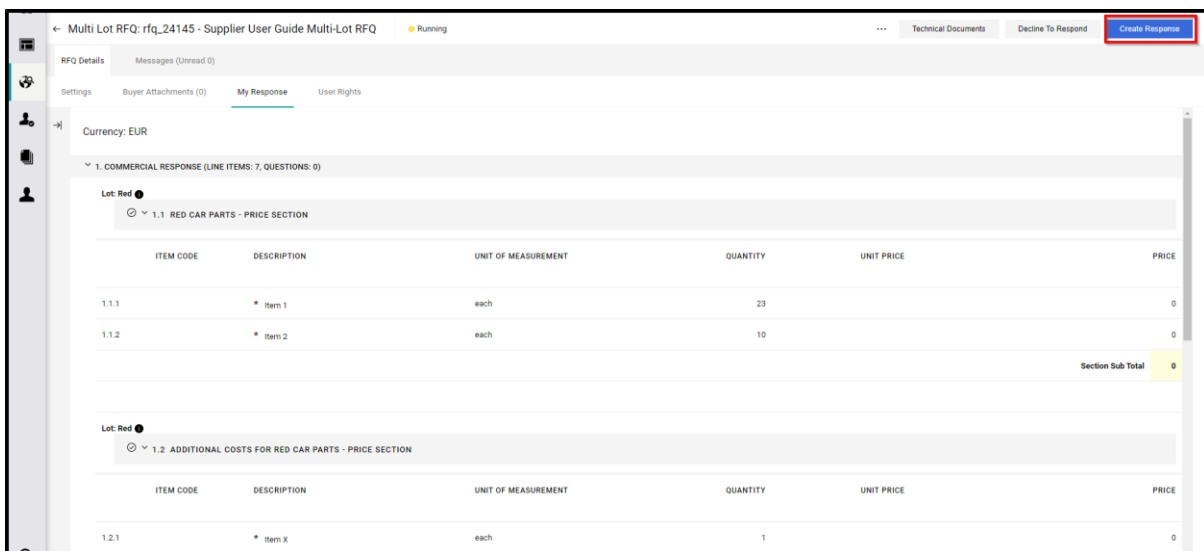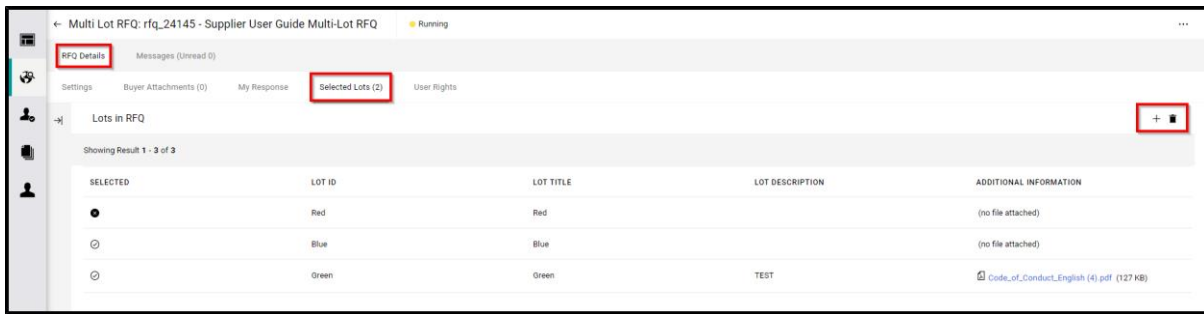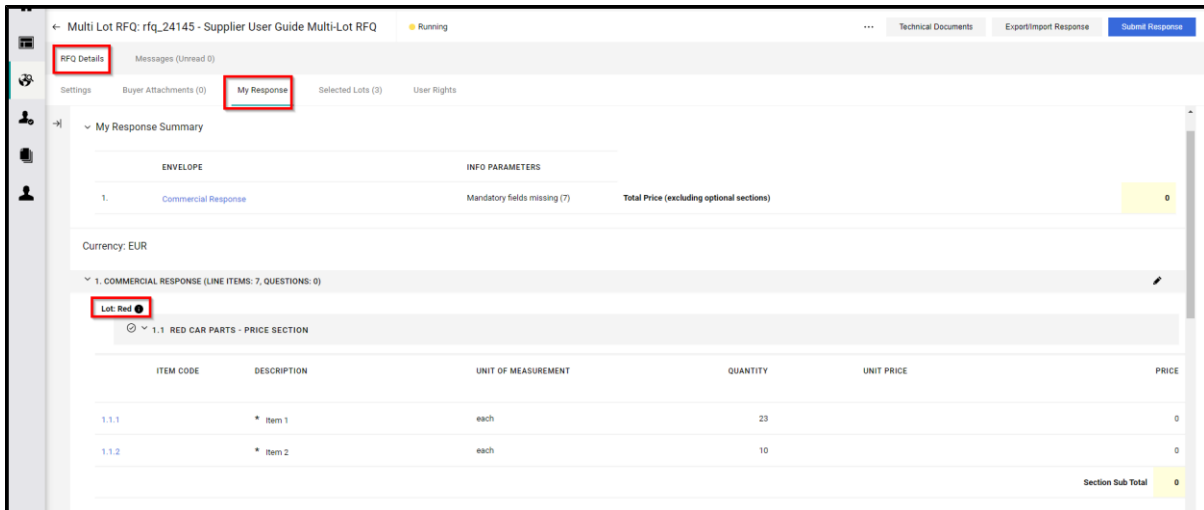

38 - Create Response

39 - Select Lots

When you click on confirm a new tab **"Selected Lots"** will appear. In this tab you can always change your initial lot selection by using the add or remove function.
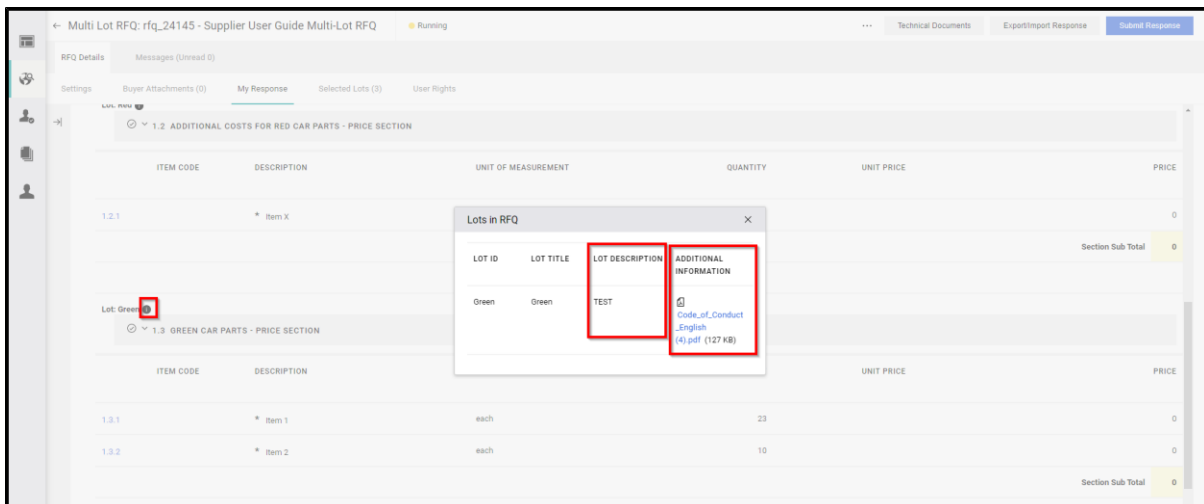
40 - Selected Lots

In the "My "Response" tab you will see the lots and the associated sections.

41 - Lot Sections

Next to each lot name you will find an information symbol. When you click on it a pop-up window appears where you can see buyer description and download buyer attachments if applicable.


42 - Information Symbol

All other functions such as RFQ editing, creating, submitting, etc. the response works the same as in the single lot RFQs, please see the appropriate chapters.
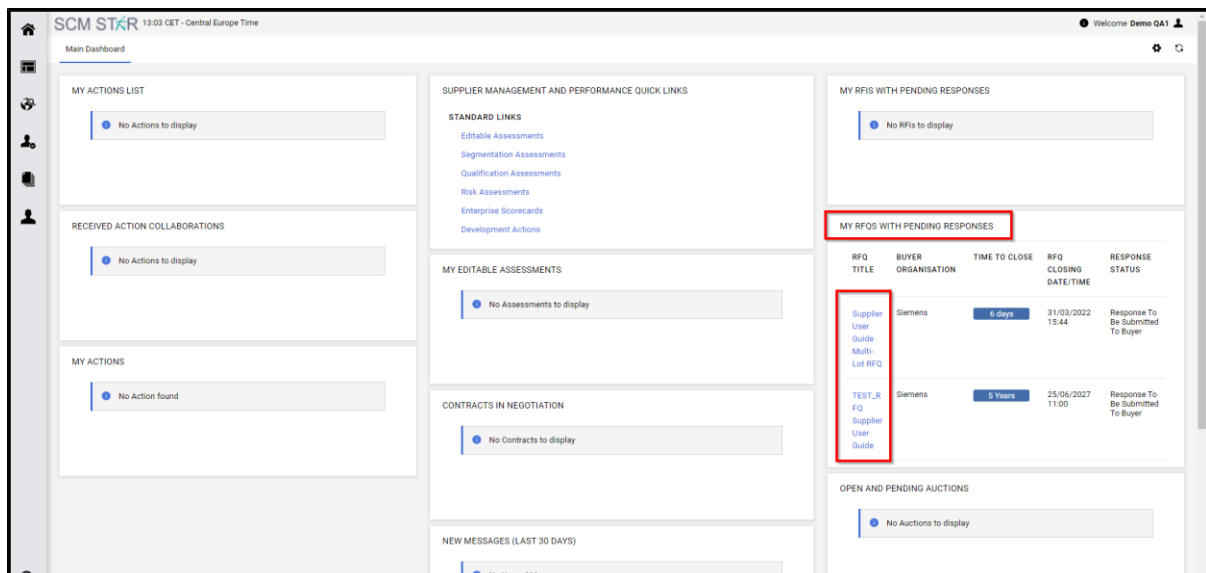
Tips for Suppliers

When you are invited to an RFQ, you will receive an email notification. The email contains a deep link that allows you to access the event directly.

The email contains additional useful information such as the name of the buyer and the response deadline.
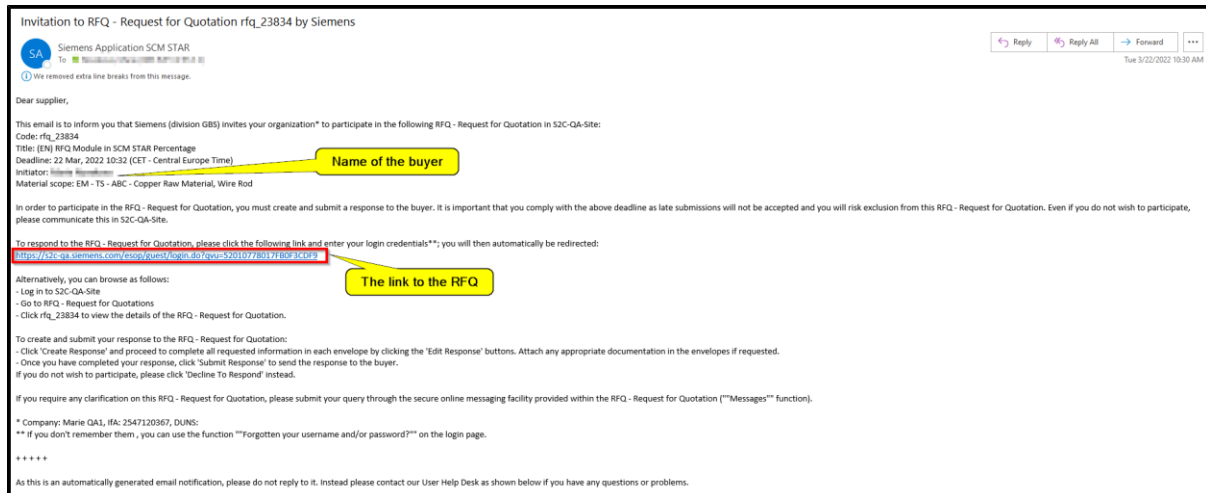
All new events to which you have not submitted a response will appear in Widgets on the Main Dashboard.

The Widgets contain links via which you can access the events.

43 - Main Dashboard