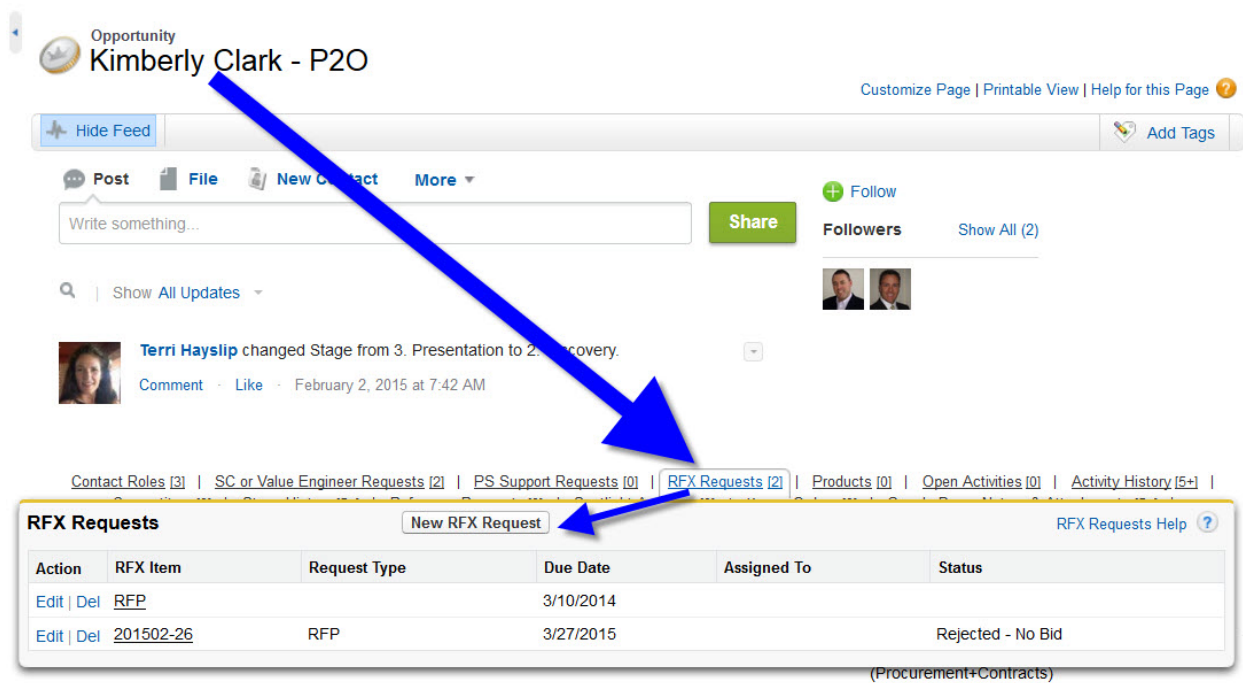


Requesting Support for RFXs and Security Surveys

1. Sales Rep Individually Reviews RFP.
2. Sales Rep Completes a “RFX Request” form in SFDC. The form is listed under the account opportunity in Salesforce and requires information including:
 - Basic Opportunity Information (e.g. Due Date, Deal Size, Seats)
 - Opportunity/RFP Qualification Criteria – Can Coupa win?



Opportunity
Kimberly Clark - P20

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Terri Hayslip changed Stage from 3. Presentation to 2. Discovery.
February 2, 2015 at 7:42 AM

Contact Roles [3] | SC or Value Engineer Requests [2] | PS Support Requests [0] | **RFX Requests [2]** | Products [0] | Open Activities [0] | Activity History [5+]

RFX Requests New RFX Request RFX Requests Help

Action	RFX Item	Request Type	Due Date	Assigned To	Status
Edit Del	RFP		3/10/2014		
Edit Del	201502-26	RFP	3/27/2015		Rejected - No Bid

(Procurement+Contracts)

3. After the request is submitted by the account rep, SFDC will automatically send the account SC a notification to review the RFP and enter a fit-gap analysis in the “RFX Request” form.
4. After the fit gap has been entered in the form, SFDC will automatically notify the RFP Team of the new request for RFP support.
5. The RFP Team will review the RFP. If it is approved, it will enter the RFP queue, and a Proposal Manager will contact Sales Rep RE. RFP response plan.