



# Coupa CLM - Supplier guide



**Supplier CLM guide**

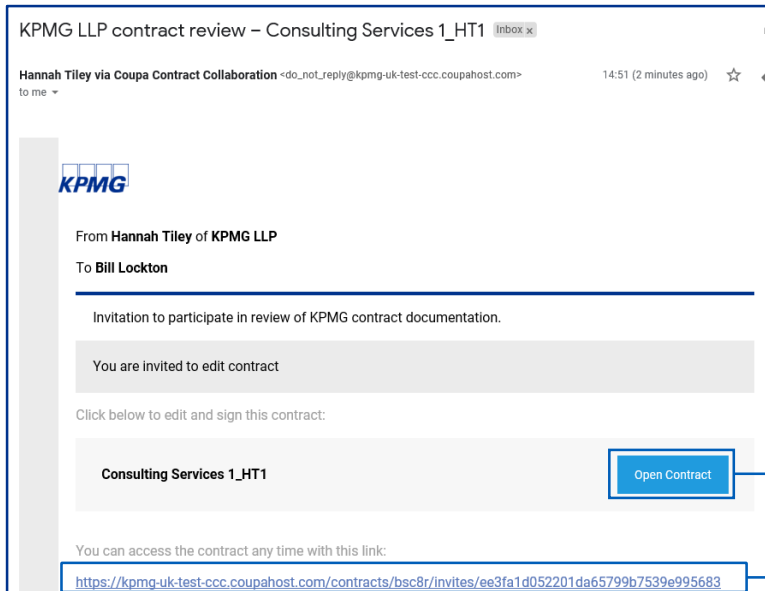
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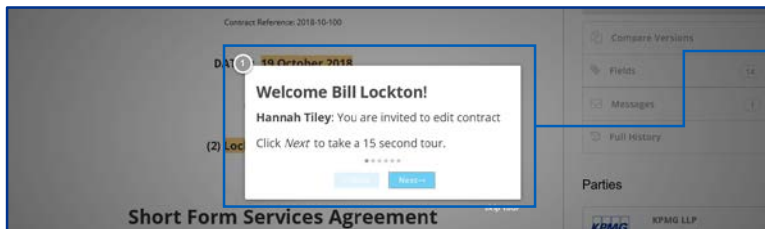
# Authoring and reviewing a contract document

## Contracts | Supplier review the contract document



- The supplier will receive a email invitation similar to the internal invitation which is sent to colleagues
- **Note:** The supplier **MUST** retain this email for future use (future amendments and signing of the contract)

- The supplier can click on **Open Contract** or the URL to access the contract document.

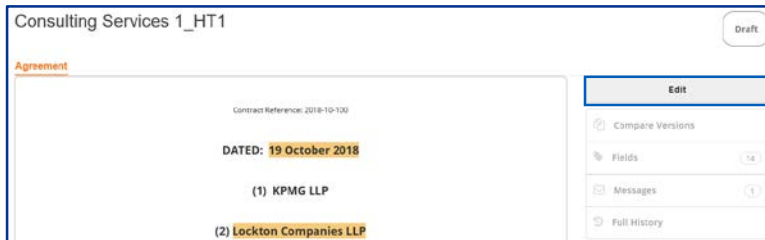


- The supplier will be invited to take a tour when they first join

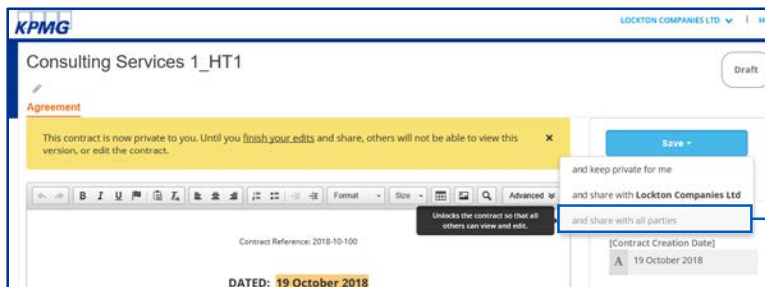
- They are then given similar access to view and edit the contract document, including inviting colleagues and other external parties

# Authoring and reviewing a contract document (cont.)

## Contracts | Supplier review the contract document



— Click on Edit to make changes



— Once all edits have been made, select Save and 'and share with all parties' to share with KPMG

# Signing the contract (native CLM e-signature)

## Contracts | Sign the contract

Consulting Services 1\_HT1

Summary Agreement Items

Contract Reference 2018-10-00

DATED: 19 October 2018

(1) KPMG LLP

(2) Lockton Companies LLP

Short Form Services Agreement

Approved

Sign

Compare Versions

Fields

Messages

— Click on **Sign** to sign the contract

SIGN IT SERVICES 2019-08-01

Full Name\*

Jo Freida

Full Legal Name of Organization\*

Jo IT Services

Sign

By typing  With mouse

Jo Freida

Clicking 'Sign' is the same as signing by hand.

Sign

— Confirm details and type **e signature**, then\_ and click on **Sign**

— The signature block is now stored on the contract agreement

# Authoring and reviewing a contract document

## Contracts | Supplier review in MS Word



Click on **Send to Supplier** when you have finished your edits and want the supplier to sign the contract

**Note:** All changes in the MS Word must be accepted by all parties (supplier or buyer)

# Authoring and reviewing a contract document - MS Word

## Contracts | Supplier Review in MS Word



Click on **Download** to start editing the contract in MS Word. When complete, click on **Upload**



Click on **Send to Other Party** to share the updated document with the contract owner

The contract is now ready to be submitted by the contract owner for approval

# Supplier FAQs

## Where do I go for more information?

For more information about Coupa's Contract Collaboration module, visit [https://success.coupa.com/Support/Docs/Power\\_Apps/Coupa\\_Contract\\_Collaboration](https://success.coupa.com/Support/Docs/Power_Apps/Coupa_Contract_Collaboration) and [https://success.coupa.com/Suppliers/For\\_Suppliers/Contract\\_Collaboration\\_for\\_Suppliers](https://success.coupa.com/Suppliers/For_Suppliers/Contract_Collaboration_for_Suppliers)

## Can I upload attachments in Contract Collaboration?

Yes, any party to the contract with Edit privileges for a contract can upload attachments up until the time the contract has been completed. The **Attach File** option can be found under **Contract Options** to the right of a contract. The Attached files are viewable and downloadable from the right hand toolbar.

## How do I edit a contract?

Editing a Contract document in Contract Collaboration is based on User Permissions or Permissions given to an supplier organisation. If you have permission to edit a contract the edit button will display above the contract.

## How do I sign a contract?

Signing a contract in the system is as easy as signing on paper. If you have permission, you can sign any open contract that you have access. Select **View the Contract**, Click the **Sign** button in the top right corner of the contract, Choose your signing option, either sign **By Typing** and type in your signature, or sign **With Mouse** and draw your signature. Confirm who you are signing on behalf of, type your name in full into the **Signature box** or draw your signature, and Click **Sign**. Detailed steps on the signing a contract is [here](#).



# Supplier FAQs (cont.)

## Does Contract Collaboration keep track of changes and versions as I edit and negotiate my contract?

Yes, Contract Lifecycle Management keeps a full history of all changes to a contract from the time it is created until it is marked as Complete. Above and to the right of the contract, you'll see the **Contract History** link.

Navigate to **Contract History > Compare Versions** to view the redlined difference between versions of the contract.

Navigate to the **Contract History > Full History** to view the events of the contract.

## Can I invite a colleague from my organisation to a contract?

Yes, there's no limitations on inviting a colleague from your organisation to collaborate on a contract. Detailed steps to invite a colleague are [here](#). When viewing the contract you want to invite the user to, click Invite Colleague, enter the name of the person you want to invite, the system will display a list of your colleagues who have a Coupa account and whose names match what you typed.

## Who can see my comments in Contract Collaboration?

As a supplier, you will be able to see all comments and replies to comments that have been added to contracts after you have been invited to the contract.

KPMG personnel has permission to view all comments and replies on a contract from when the contract was created.

## Can I download a contract into Microsoft Word during the Contract Collaboration process?

Yes, the system has functionality to enable users to download the contract into Microsoft Word, make edits and upload the contract to the system afterward.



Thank you



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