One World. Made Better.™

Coupa Supplier Portal – Supplier Manual

January 2024

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Registering to Coupa Supplier Portal

To register to Coupa Supplier Portal, click the **Join Coupa** button which you will find in the email sent to you from the Portal:

Guardian Industries Registration Instructions - Action Required

Powered by

Hello GLASS-[____] CO-C1311589,

You have been identified as a supplier who would benefit from our Coupa Supplier Portal. This provides the ability for us to share electronic documents with regard to PO delivery and invoice submission. Guardian has launched this process in January 2020. Within the next 48 hours, please click the button below to register your account with us. If you are not the right person to receive this communication, please send this request to the appropriate person by using the forward link.

If you are unable to register for any reason or have questions regarding CSP (Coupa Supplier Portal) or Coupa in general please reach out to our Supplier Enablement Team at accountspayable@guardian.com and put 'COUPA' in the subject line.

Aleksandra Pozniak
Guardian Industries

| Join Coupa | Forward this invitation |

You can forward the invitation to another person who will be responsible for registering your company to CSP; just click the **Forward this invitation** button and provide that person's details.

| Join Coupa | Forward this invitation |

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After clicking the button, you will see the registration form. Please, fill in your name, surname, create a password, accept the Privacy Policy and Terms of Use. Your company name and email will already be populated. Then click the **Get Started** button.

coupa

Create your business account

Guardian Industries is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Guardian Industries so you're ready to do business together.

Email

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation

☐ I accept the Privacy Policy and the Terms of Use.

Get Started

Having an issue with signup?

Forward this to someone

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Verify your email

After completing your business information, you will be prompted into a new page to verify your e-mail address.

Coupa will send you an e-mail that contains a six-digit code to verify you are the owner of the email address.

Check your e-mail address to see if you receive the six-digit code if you didn't you can click on "Request a new code".
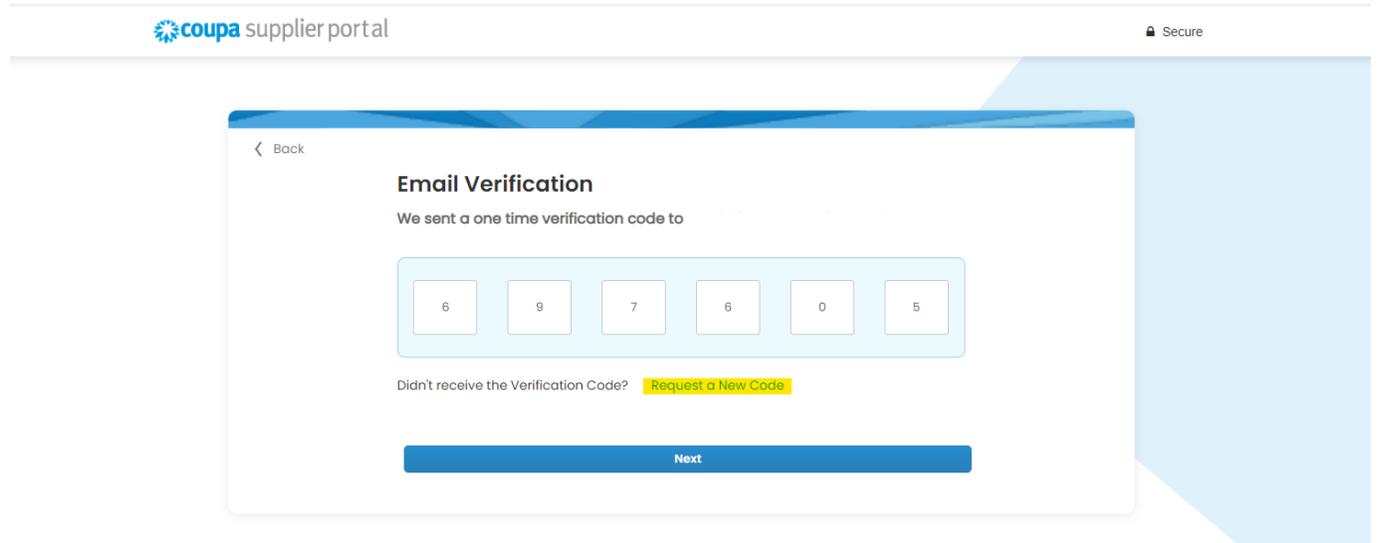
Verify your email

After completing your business information, you will be prompted into a new page to verify your e-mail address.

Coupa will send you an e-mail that contains a six-digit code to verify you are the owner of the email address.

Check your e-mail address to see if you receive the six-digit code if you didn't you can click on "Request a new code".

Two-Factor Authentication

Beginning in May of 2023, you **must** enable two-factor authentication for additional security. The Coupa supplier portal will now require you to use two-factor authentication to access their data in the CSP, such as:

- Legal entity

- bank details

- Remit to addresses

- Manage accesses and assign permissions to new and existing users.

*you can enable it for every time you login into your account, this is optional

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Two-Factor Authentication

To enable two-factor authentication, click on account settings under your username, it will take you to **My Account page** then click on **Security & Two-Factor Authentication** link on the **My Account page.**

When you enable two-factor authentication, you can choose from the following options:

✓ For Payment Changes (Required for Changing Legal Entity or Remit-To)

✓ For both account access (login) and payment changes

Depending on how you want to receive the verification codes, you can select one of the following options, and set your preference as the default:

Via Authenticator App to use an authenticator app available from the app store on your mobile phone.

OR

Via Text Message to use a code sent via text message to your phone number.

Two-Factor Authentication via text message

if you want to receive text message (SMS) notifications or verification codes, you **must** enter and validate your phone number under My Account > Notification Preferences.

After you verify your phone number, enter the verification code in the pop-up window.

Once successful validation, you receive the verification codes in text messages

Two-Factor Authentication via Authenticator App

For the authentication via app, you will need to download an additional app on your phone, through your app store or google play store,

You can choose between available apps; we recommend you these two:

✓ "google authenticator" and "authy"

Once you have the app:

1. Open the app

2. Scan the QR code using the app

3. Enter the 6-digit validation code

4. Click enable.
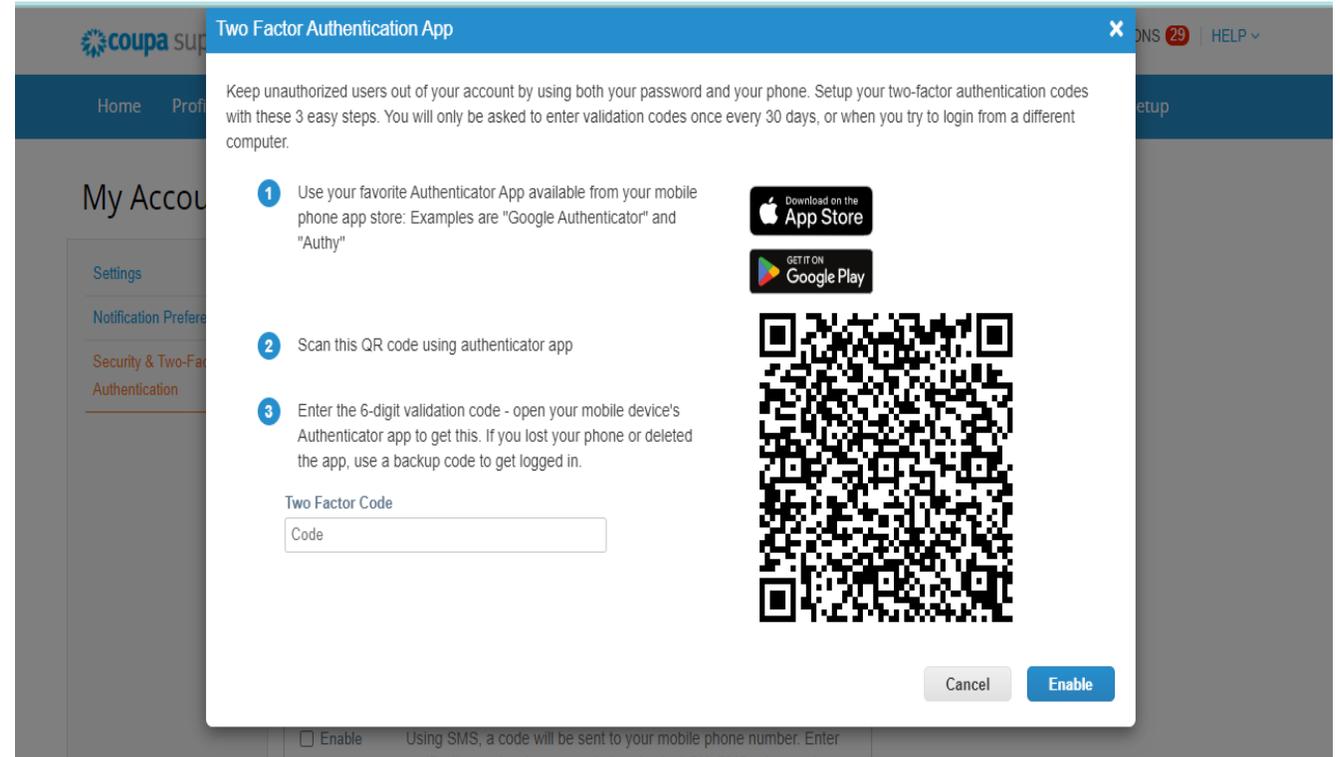
Two-Factor Authentication via Authenticator App

The portal will give you back up codes in case you lost, delete the app, or changed your phone,

Print this backup codes or email them to yourself before you click OK.

Note

You can only use a recovery code once, so refresh your list if you must use a recovery code. Go to Account Settings > Security & Two-Factor Authentication and

click **Regenerate Recovery Codes** to get a new list of codes.
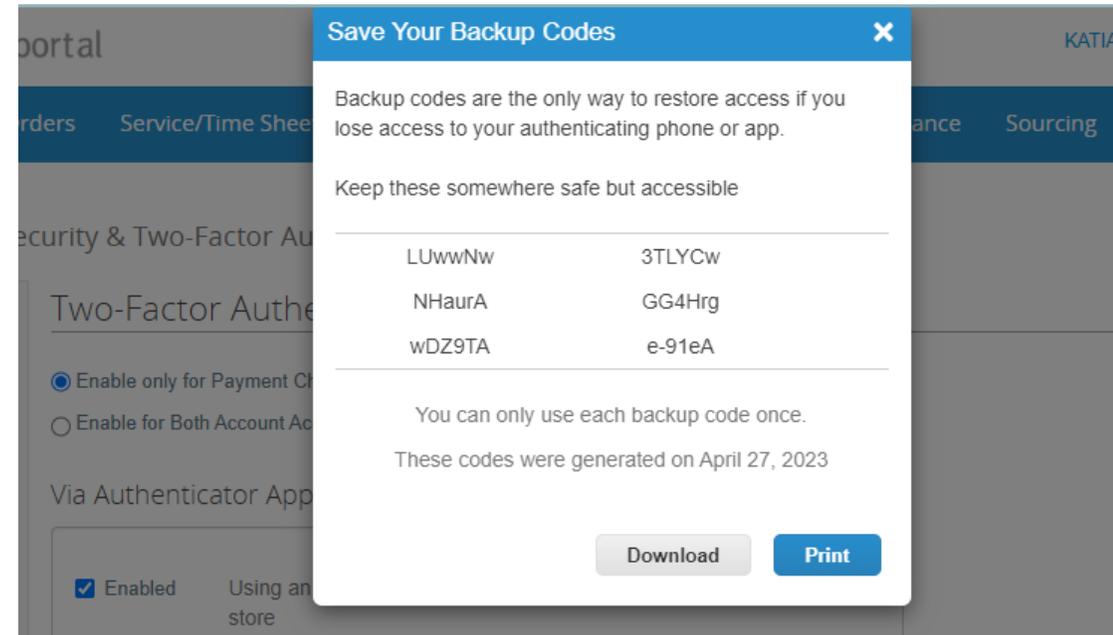
! **IMPORTANT:**

! THE USE OF THE CSP IS COMPLETELY **FREE**. YOU DON'T HAVE TO PAY ANYTHING TO REGISTER, HAVE ACCESS TO YOUR POs, INVOICES, etc. ,

! Right now, the portal is offering to get your profile verified with an additional cost. This is totally optional. We, Guardian/SRG don't require this verification.

! Starting May 2023, two-factor authentication will be **mandatory** for viewing or making changes to the legal entity, remit to address or bank account information on the CSP. Besides the mentioned accounts, the rest remains same as before. (for more information visit pages 3-7)

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Introduction to Coupa Supplier Portal (CSP)

HOME — on the **Home** page you can see the information about your company

PROFILE — in the **Profile** section you can configure your profile. Your profile can be set up as public or customized for each Customer separately

ORDERS — in the **Orders** section you can find the Orders you receive, organized by Customer

INVOICES — in the **Invoices** section you can view all created invoices and verify their current status

Introduction to Coupa Supplier Portal (CSP)

SETUP - the most frequently used options in this tab are:

- User management – managing users' permissions and accesses;

- Legal entity setup;

- Payment preferences setup
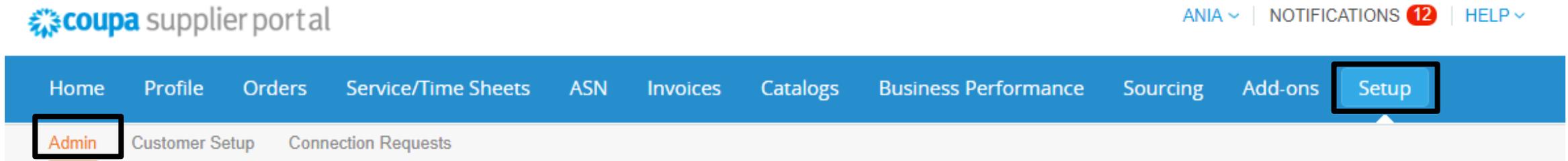
You can change the language at the bottom of each page:

Notifications

You can set your notifications preferences in the top right corner by clicking in your username, then notification preferences. window:

To receive notifications about a particular action, check the relevant box in the **Online** (to receive notifications in CSP) or **Email** column, or if you have a cellphone number added in the portal you can also receive notifications via SMS. **If no option is selected, then no notification will be sent**.

To save your settings, click **Save**

Users

The **Admin** section, which is located under the **Setup** tab, provides a list of users who have access to Coupa Supplier Portal. In this section you can deactivate users, invite new users and configure the accesses of current users.

Inviting new users

To invite a new user, use the **Invite User** button   **Invite User**

Then fill in the fields **First Name**, **Last Name** and **Email Address,** as well as select permissions and customers.

Invite User

First Name	
Last Name	
* Email	

Permissions ⓘ

- ☑ All
- ☑ Admin
- ☑ Orders
  - ◯ Restricted Access to Orders
  - ◉ All
- ☑ Invoices
- ☑ Catalogues
- ☑ Profiles

Customers

- ☑ All

To send the invitation, click the **Send Invitation** button: **Send Invitation**

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Legal Entity Setup

To setup a legal entity, go to the **Legal Entity Setup** option. Then click **Add Legal Entity** and fill in all the fields marked with a red asterisk.
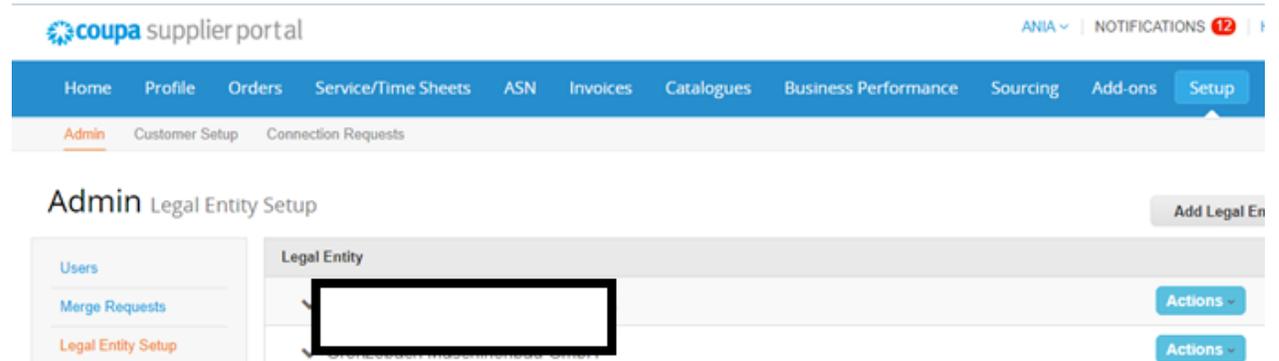
On the first page enter the Legal Entity Name and Country, and then click the **Continue** button.

In the next window, you need to fill in the address from which the invoices will be issued, as well as indicate whether the address provided is used for remittances or as a sender address. Unchecking these options allows you to add other addresses. Please make sure to allow Guardian to see these addresses.

Tell your customers about your organisation

1 2 3 4

Which customers do you want to see this?

☑ All

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Post Code

Country/Region Poland

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location as where you receive government documents.

☑ Use this address for Remit To

☑ Use this for Ship-From address

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It is also mandatory to enter your Tax ID number and country of registration. In the **Miscellaneous** section you can select your preferred language.
After updating all the fields, save the data by clicking the **Save & Continue** button.

Note: no need to fill out the *invoice-from code*

What is your Tax ID? ⓘ

Country/Region | United States | ✕
Tax ID |
☐ I don't have Tax ID Number

Add additional Tax ID

Miscellaneous

Invoice-From Code | | ⓘ
Preferred Language | English (US) ⌄

Cancel | Save & Continue

After approving the changes, a message will appear on the screen indicating that the created legal entity can be used in the invoice creation process.

Setup complete

1 2 3 **4**

✔

Congratulations!

This legal entity can now be used on new invoices.

To get paid – Most customers require that you send them this payment info in **in addition to providing it on the invoice.** ⓘ
• Click on the Profile Tab to see if your customer has a form that collects payment information.
• Otherwise, you'll have to send it to them through another channel.

Go to Orders | Go to Invoices | Return to Admin | Done

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Orders

In the **Orders** tab you can find the Orders you receive, organized by Customer

Orders

You can open an order by clicking on its number. Once you open an order, you can verify the details. Each order contains the following data: number, status, order date, payment terms, shipping address. If the order was not created correctly, please contact the person who created the order - their data can be found in the **Requester** and **Email** fields.

Purchase Order #G000224425

General Info

Status	Issued - Pending Manual
Order Date	04/10/2021
Revision Date	04/10/2021
Requester	Faustyna Mikolaszek
Email	fmikolaszek@guardian.com
Payment Term	NET 30
Comments to Supplier	None
Attachments	None
Acknowledged	☐
Assigned to	Select

Shipping

Ship-To Address	Guardian Llodio Uno S.L.U. C/ Jos Mat a 36 1400 Llodio VI Spain Attn: Faustyna Mikolaszek
Address Location Name	None
Terms	Services

! **If an order has been closed or cancelled, it is not possible to create an invoice for it.**

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In the **Lines** section you can see the list of Coupe goods/services included in the order. Please make sure that the unit prices and totals are correct.

Invoices

To create an invoice, go either to the **Orders** or **Invoices** tab.
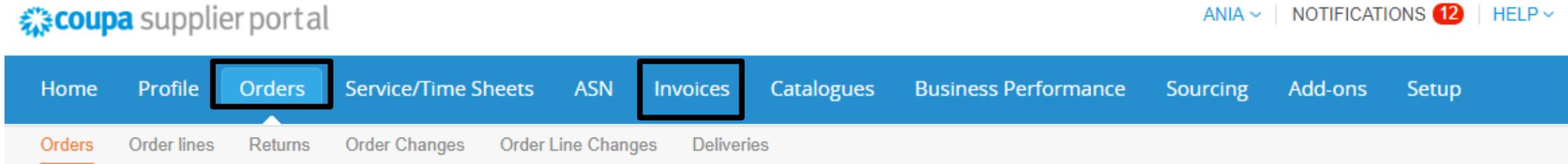
To create an invoice from the **Orders** tab, click the gold coins icon in the **Actions** column.

You can also create an invoice after opening an order by clicking the **Create Invoice** button.

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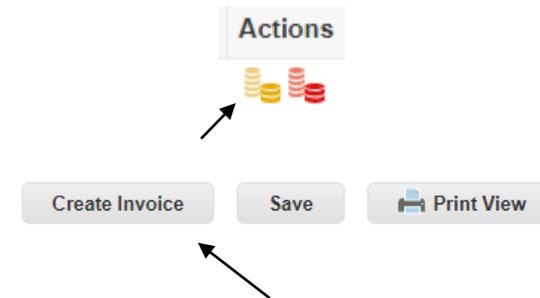
When you click on *Create invoice* the portal will ask you to select the **Legal Entity**. You can choose from existing addresses or add a new one using the **Add New** option.

All fields marked with a red asterisk are mandatory. Verify whether the **General Information** and **From** and **To** sections are filled out correctly.

You need to add the pdf invoice file in the "Image Scan" filed and check if the correct invoice line was selected. If not, please add it by clicking on magnifying glass icon:

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PO lines

It's important to review that the correct purchase order lines are selected in each line. As well as filling the Bill of lading in each line with your internal folio and at the line level choose the appropriate tax rate from the "**VAT Description**" dropdown.

(if you are tax exempt you can choose "exempt")

When complete, select "**Calculate**" to see the gross value of the invoice.

When are finished, select "**Submit**". (Remember that the total amount in orders doesn't include taxes. Those are calculated separately when creating the invoices)

How to Invoice an Open Purchase Order

If you received a purchase order that contains several lines that you will be suppling in different periods of time, you can partially create invoices utilizing that same purchase order by deleting the PO lines you did not supplied, that will allow you to use those lines for later.

For example, for an annual purchase order you may be submitting invoices partially according to the services provided in each month so you need to make sure **to only invoice the lines you effectively supplied that month** by deleting the rest of the lines, that way you will have available those lines to create invoices later.

To delete the lines you won't be invoicing, simply click on the **x** situated in the top right of the line.

You can also invoice the lines partially; you just need to adjust the quantity in the "*Qty*" field.

! Note: Leaving the line in 0.00 its not the right procedure and it will cause a rejection of the invoice.

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To view all the invoices submitted for Guardian and their status **Select *Guardian* from the Customer** drop-down list:

Select Customer   Guardian Industries - SRG EU[████████] ⌄

The Portal allows you to filter your created invoices with the **View** option.

Invoices

Instructions From Customer

When submitting your invoice through the Coupa Supplier Portal, you must now attach the pdf document using the Image Scan button

Create Invoices ⓘ

Create Invoice from PO	Create Invoice from Contract	Create Blank Invoice	Create Credit Note

Export to ⌄					View	Unpaid invoices ⌄	Search

Invoice #	Created Date	Status	PO #	Gross Total	Unansv		eas
TEST2TEST	16/09/2021	Approved	253-538125687	3.63 EUR	No		
21F06316	26/07/2021	Approved	SRG EU-998000083	18,944.97 EUR	No		
21F06177	20/07/2021	Approved	253-538125297	1,080.00 EUR	No		
21F06160	20/07/2021	Approved	SRG EU-998000083	13,101.15 EUR	No		
21F05872	12/07/2021	Approved	SRG EU-998000083	11,335.76 EUR	No		
21A00673	12/07/2021	Approved	None	-540.00 EUR	No		
21F05873	12/07/2021	Approved	253-538125098	900.00 EUR	No		

Dropdown options:
- All
- Abandoned
- Approved
- Credit notes
- Disputed
- Disputes with a supplier response
- Disputes without supplier response
- Draft
- Overdue invoices
- Payment Information
- Pending Approval
- Processing
- **Unpaid invoices**
- Voided

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In the **Invoices** tab you can create and customize your own view. After modifying the view and applying the **Approved** filter, you can check the payment information. You can also check the **Dispute reason** for any Disputed invoices by using the **Disputed** filter.

You can also view the details of an invoice by clicking on its number:

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
123	03/03/2022	Draft	S000224498	119.00 EUR	No		✏️ ❌

Export to ⌄   View All   Search 🔍

You can also see the comments and history of the selected invoice in the invoice details.

💬 0 Comments   Mute Comments ⌄

Enter Comment

Send comment notification to a user by typing @name (ex. @JohnSmith)

Attachments Add File | URL

🕐 History

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Invoice statuses

- **Draft** – the invoice has not yet been sent to the customer

- **Pending Approval** – the invoice has not yet been fully approved by the customer

- **Disputed** – the invoice has been disputed by the Accounts Payable team

- **Voided** – the invoice was cancelled after it was fully approved

- **Approved** – the invoice has been approved and will be paid in accordance with the payment terms

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To download the legal invoce that you created, you will need to enter the Invoice details by clicking on the Invoice# and in the General Info section you will see the field **Invoice PDF document** and the option for download a copy.

Invoices

Instructions From Customer

When submitting your invoice through the Coupa Supplier Portal, you must now attach the pdf document using the Image Scan button

Create Invoices ⓘ

| Create Invoice from PO | Create Invoice from Contract | Create Blank Invoice | Create Credit Note |

Export to ⌄ | View | Approved ⌄ | Search 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
1435872-0001-01	01/07/21	Approved	162-162016312	105.69 USD	No		
1435362-0002-01	12/24/20	Approved	162-162016278	269.20 USD	No		
1435362-0001-01	12/22/20	Approved	162-162016278	81.25 USD	No		
1434045-0001-01	11/21/20	Approved	162-162016137	324.80 USD	No		
1428087-0001-01	07/21/20	Approved	162-162015513	125.83 USD	No		
1422961-0002-01	03/27/20	Approved	162-162015234	31.08 USD	No		
1422961-0001-01	03/27/20	Approved	162-162015234	31.08 USD	No		

Invoice #1435872-0001-01 Back

⚙ General Info   📍 Bill To & Sh

Invoice #	1435872-0001-01
Invoice Date	01/05/21
Payment Term	NET 15
Delivery Date	01/05/21
Currency	USD
Delivery Number	None
Status	Approved
Shipping Term	None
Invoice PDF Document	download
Image Scan	Guardian_20210106000452T.PDF
Supplier Notes	None
Attachments	None
Discount Amount	None

Supplier

Invoice From

Remit To

Ship From

Supplier Tax ID

Customer

Bill To Address

VAT ID

Address Location Name

Ship To Address

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- After clicking on download a window will pop up with the copy of the invoice in this format, and you will be able to save it as PDF.

- You must know that this copy of the invoice is **your tax invoice.**

Invoice Date
January 27, 2020

Invoice
101654

To		From
Bill To	Ship To	Invoice From

Buyer Tax ID	Supplier Tax ID
430616823	26-3645246

Attn/Ref
Guardian Ordering User

Invoice Details

Invoice Number	Invoice Date	Payment Term	Payment Due Date
101654	January 27, 2020	NET 60	
Currency	Contract Number	Date of Supply	Delivery Number
USD		January 27, 2020	4280 & 4281

Discount Amount
0.0

Bill Of Lading
None

Item	PO	Description	Supplier Part Number	Qty	Units	Unit Price	Total
1	604-604006255-H	Transit WIP Racks		15	Piece	$350.00	$5,250.00
	Ancilary Part Number None						

Supplier Notes	Taxes	
- Already sent invoice to Ripleyaccountspayable	Taxable Amount Charged Per Rate	Total Tax Per Rate
	$5,250.00 at TAX (0.0%)	$0.00
	Totals	
	Taxable Amount	$5,250.00
	Amount Excluding Tax	$5,250.00
	Total Tax	$0.00
	Total Payable	$5,250.00

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Credit Notes

To create a credit note, click on the red coins icon in the **Actions** column in the **Orders Tab or click on Create Credit Note from the invoices tab**. **amount**.
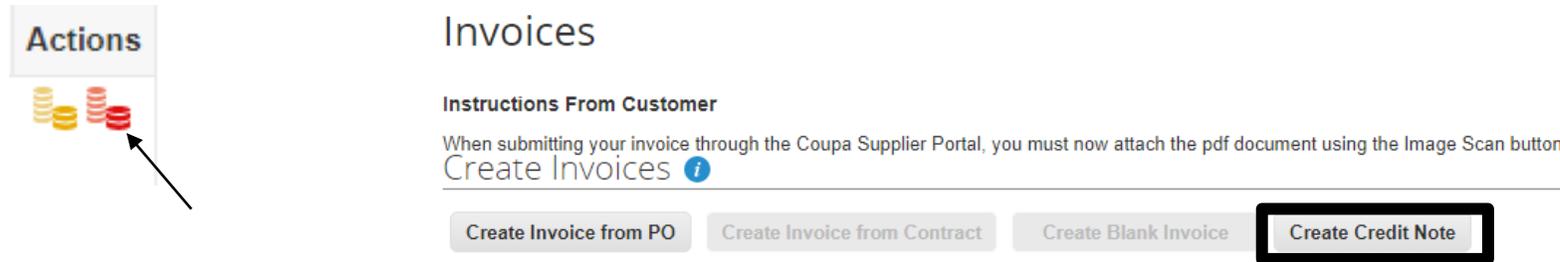
The **Create Credit Note** window will then appear and the system will ask you to provide the reason for creating a credit note. Then select the address and complete the fields marked with a red asterisk. **Credit notes must be created in the negative**

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Disputed Invoices

When an invoice has been disputed, the supplier must take action to correct it. You can find additional information in the comment section. If a credit note is issued regarding a problem with an invoice or goods shipped, choose the relevant invoice by using the **Resolve issue for invoice number** option from the drop-down list.

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cXML Errors

If you have enabled a cXML connection with Guardian for orders and/or invoices and you have received a notification that and error has occurred, please check the section of **cXML errors** in the setup>admin tab of your Coupa Supplier portal Account for more details and contact us if needed. Alternatively, you may also refer this Coupa Documentation for more details.

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If you have any addiotional questions or comments, please let us know, we would like to hear from you. Please send us an email to globalSE@guardian.com