

One World.  Made Better.™



## Coupa SIM - Supplier Manual

Version 5  
September 2021

**GUARDIAN**   
INDUSTRIES

# Responsibilities

## Requester

- Manages Supplier relationship
- Collects the information and documents from the Supplier
- Submits the requests in Coupa SIM
- Supports the Supplier throughout the process
- Follows up on the Supplier request status

## Sourcing Specialist

- Provides payment terms and, eventually, the T&Cs document, negotiated with the supplier

## Supplier

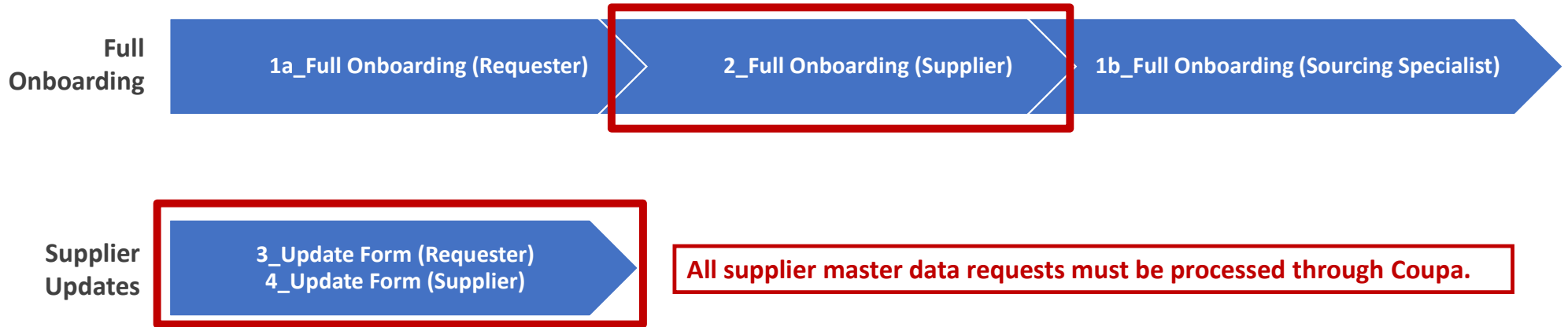
- Submits T&Cs, Certifications (ISO/Diversity), Insurances, Contacts, Compliance, Tax ID, Banking information
- Completes the questionnaire with additional necessary information

## SE Team

- Manages the whole on-boarding workflow in Coupa SIM
- Performs the document check, Tax ID validation, Restricted Party Screening and Bank Validation call
- Final supplier setup in CFC/CMS

# Coupa SIM Processes and Forms

Below is the high-level flow of the types of Supplier Onboarding and Update and their respective forms.



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**Full On-Boarding  
(Form 2 - Supplier)**

**GUARDIAN**   
INDUSTRIES

# Full Onboarding

Fwd: Guardian Profile Information Request - Action Required



Test Supplier2 <supplierr629@gmail.com>  
To Tendi, Massimo

Retention Policy Standard - Inbox Cleanup - 90 (90 days)

Expires 2/27/2021

If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Reply Reply All Forward ...

Sun 11/29/2020 8:04 AM



Guardian Profile Information Request - Action Required

Powered by

Hello Supplier,

Guardian needs you to provide information about your company electronically in order to prevent lost documents and make sure you are paid on time. They manage this information with Coupa, their chosen platform for Spend Management. Within the next 30 days, please respond below to provide this information. You can find the Coupa instruction manual as well the Guardian Terms and Conditions within our Supplier Portal: [https://www.guardian.com/en/supplier\\_portal\\_1](https://www.guardian.com/en/supplier_portal_1)

Note: Not providing this information in a timely manner may impact your ability to do business and get paid. Let us know if you are unable to do so for any reason.

Welcome!

Guardian

Join and Respond

The Supplier receives an email invitation to join Coupa. **It expires after 30 days from sending date.**

After clicking **Join and Respond**, the supplier is prompted to register

## Full Onboarding

First registration in Coupa is quite easy, only contact data, department, role in the company and a password are required.

After clicking **Submit**, the supplier is prompted to the public profile in Coupa Supplier Portal (CSP).

### Join the Coupa Supplier Portal

Complete the information below and create the password for your account. [Click here for help.](#)

\* First Name

\* Last Name

\* Company

\* Department

\* Role

\* 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](#).

**Submit**

---

### Forward Your Invitation

Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to a colleague's email below (must have the same email domain).

Forward Email

**Submit**

# Full Onboarding

By clicking **Information Requests** the supplier is prompted to the Guardian's questionnaire.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The 'Profile' menu is expanded, and the 'Information Requests' option is highlighted with a red box. A red arrow points from the text above to this link. The main content area displays a welcome message: 'Welcome! Do we have your details right?' followed by a paragraph explaining the profile's purpose and a note that information can be edited at any time. Below this, there are input fields for 'Website' (http://matthewjperry.com) and 'Tax ID' (319-48-4143). A sidebar on the left contains links for 'Your Profile', 'Overview', 'Profile Setup', 'Learning Center', 'Add more customers', 'Create a discoverable profile', 'Feedback', and 'Tell us what you think'.

# Full Onboarding

The Supplier Category field is prepopulated by default, the other fields must be filled in.

If Supplier Common name (Trade Name) and Legal name are the same, please repeat the same information.

Supplier Information Test Supplier4

---

### Supplier Categorization

\* Trade Name (DBA)

Supplier Common Name - Indicate if applicable

\* Country of Operation

\* Country of Origin

\* Supplier Region

\* Region Supplier will be conducting business

\* Supplier Category

\* Is Supplier Category any of the following: Production, Packaging, Tooling?



The category "tooling" is intended for automotive mould's production



# Full Onboarding

Guardian Industries requires that all suppliers review and acknowledge our Terms and Conditions. Please read our T&C's on our website and agree to continue: <https://www.guardian.com/en/supplier-portal> >

\* I have read and acknowledged the T&C's >


## Terms and Conditions (T&C's):


The T&C's document can be found at the indicated URL or can be provided by the Guardian requester.

The supplier shall attach the signed and scanned T&C's document to the field on the right:

The supplier might want to negotiate specific items of the Terms and Conditions with Guardian. In this case, the negotiated T&C's document shall be provided at a later stage (attached to Form 1b) and anyway before the onboarding process finalization.

\* Please attach signed T&C's

Effective Date  

Expiration Date  

Attachments

Description

Please, indicate any far future date as expiration date

Effective date can be the date of form filling.

Expiration date to indicate is any far future date, since the document has not an established expiration date.

# Full Onboarding

## Terms and Conditions (T&C's):

The T&C's document can be found at the indicated URL or can be provided by the Guardian requester.

The supplier shall attach the signed and scanned T&C's document to the field on the right:

The Category Manager may authorize the supplier to skip the T&C's acknowledgement: if the **view-only** answer is set to "Yes", then **the supplier confirms it's** authorized to skip T&C's

The supplier might want to negotiate specific items of the T&C's with Guardian. In this case, the negotiated T&C's document shall be provided at a later stage (attached to Form 1b) and anyway before the onboarding process finalization.

\* Please attach signed T&C's

|                 |   |  |
|-----------------|---|--|
| Effective Date  | mm/dd/yy  |  |
| Expiration Date | mm/dd/yy  |  |
| Attachments     |   |  |
| Description     | <div style="border: 1px solid #ccc; height: 40px;"></div> |  |

Please, indicate any far future date as expiration date

Effective date is the date of form filling.

Expiration date to indicate is any far future date, since the document has not an established expiration date.

Guardian Terms and Conditions

Guardian Industries requires that all suppliers review and acknowledge our Terms and Conditions. Please read our T&C's on our website and agree to continue: <https://www.guardian.com/en/supplier-portal>

Is the Supplier authorized to skip T&C acknowledgement and sign? Yes

\* I have read and acknowledged the T&C's

Select

Yes

No, I would like to negotiate T&C's

No, authorized to skip T&C acknowledgement

# Full Onboarding

**Commercial Contract Clauses:**  
It is intended to bind the supplier to performance even when an electronic signature is provided.

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## Commercial Contract Clauses

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Within this Questionnaire, the term Guardian is used and this refers to Guardian Industries and all of its subsidiaries. Any reference to Guardian is to be understood to mean Guardian Industries and all subsidiaries within.

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Supplier agrees to conduct transactions with Guardian by electronic means, as that phrase is used and understood within the context of the Uniform Electronic Transactions Act, the Electronic Signatures in Global and National Commerce Act, and other applicable law. Each entry, submission, acknowledgement, and other action by Supplier through this system will be deemed electronically signed by Supplier and the electronic sound, symbol, or process (automated or otherwise) by which Supplier conducts such activity on or through this system will be deemed and treated as being Supplier's electronic signature. Under both state and federal law, an electronic signature is just as binding as a manual signature in ink on paper.

The individual or individuals initially setting up Supplier's account and/or participation on this system represents and warrants that he or she has all authority necessary to bind Supplier to the terms and conditions of this system and to any transactions entered into or administered by or through this system. Supplier will be bound by any and all acts or omissions undertaken through a Supplier user account on this system and waives any claim or defense that the individual using this system through a supplier account is, or was, not authorized to undertake the act or omission on behalf of Supplier. Guardian may rely upon any act or omission through a Supplier account on this system as the authorized act of Supplier.

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I have read and  
acknowledged the  
above clauses

# Full Onboarding

Types of information the supplier shall provide when filling in the Form:



Minority/Diversity Certifications (if available - US only)



ISO Certifications (if available)



Insurance details



Compliance information



Production related questions (if production supplier)



Contact details (sales, accounting, banking validation, safety)



Remit-To address - Banking information



Tax ID information

# Full Onboarding

A production-related supplier will get the below section displayed:

## Acknowledgements to Guardian Standards

Guardian Industries requires that all the Production suppliers review and acknowledge our Supplier Quality Manual. Please see our SQM on our website and agree to continue: [https://www.guardian.com/en/supplier\\_portal\\_1](https://www.guardian.com/en/supplier_portal_1)

\* I have read and acknowledged the SQM

\* Please specify tooling supplier type

N/A

Guardian requires that all the Packaging suppliers review and acknowledge our Packaging Standards. Please contact the buyer to obtain copy.

\* I have read and acknowledged the Packaging Standards.

N/A

## Production Supplier Questionnaire

Download the attachment and answer the Supplier Profile questions.

[Production\\_Supplier\\_Questionnaire.xlsm](#)

The delivery of a partially or fully unanswered questionnaire means the full rejection of this Form.

\* Attach the response here.

[Production\\_Supplier\\_Questionnaire\\_1.xlsm](#)

Please download the attachment and answer the questions.

The supplier shall acknowledge the Guardian Quality Manual and, eventually, the packaging and tooling standards, if they apply.

An additional production questionnaire is also provided: it's an Excel document that the supplier shall download, answer and upload again.

**The delivery of a partially or a fully unanswered questionnaire means the rejection of the Form by the SE Team, form here the importance of a responsible answering of this form.**



## Full Onboarding

The supplier shall indicate the currency, the preferred payment method and the effective date.

The selected banking region defines the type of bank statement or document that shall be attached for bank validation purposes.

Banking Information

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\* What currency you would like to be paid in?

\* Banking Region

\* Payment Method

Default payment method (EFT/bank transfer) will be updated to contract terms once contract update payment method accordingly.

\* Payment Effective Date

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Bank Validation Documents to attach:

# Full Onboarding

The supplier shall create a Remit-To Address for payment. The company Remit-To Address can match with the physical address. Click the **Add Remit-To** button.

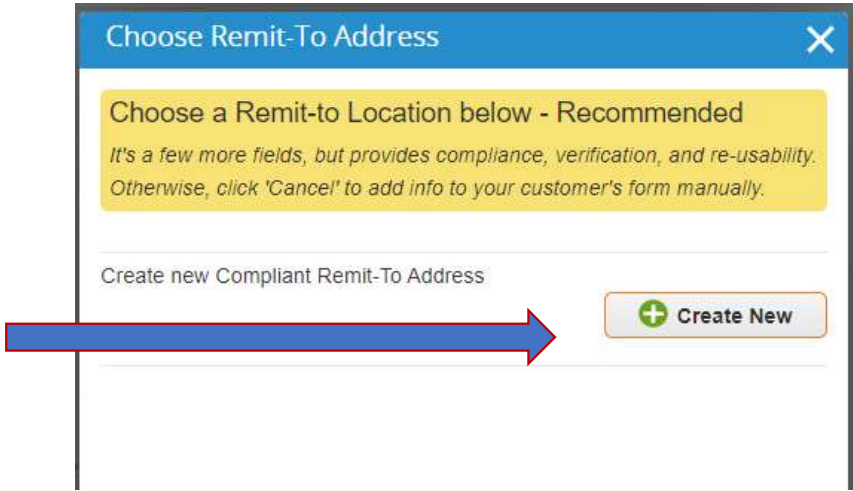
## \*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

**Add Remit-To**

A pop-up window is going to request to create a new address or to use an available one.

In case of creating a new address, click **Create New**



## Full Onboarding

A series of pop-up windows request the supplier to provide the Remit-To address details.

**The accuracy of these details will ensure the payment of the supplier invoices to the correct bank account.**

Where's your business located? ×

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the country where it is located.



# Full Onboarding

Tell your customers about your organization

Which customers do you want to see this?

All  
 Guardian

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country United States

Use this address for Remit-To ⓘ  
 Use this for Ship From address ⓘ

**REQUIRED FOR INVOICING**  
Enter the registered address of your legal entity. This is the same location where you receive government documents. ⓘ

By selecting “All” or “Guardian” to the first question, you are providing the ability to let these data be available to all customers or to Guardian only.

The mandatory fields are the address, the city, the state or province and postal code.

European Tax IDs usually begin by the country identifier (i.e. FR, GB, DE).

For those suppliers that may have a domestic identifier only (Hungary, Poland, Spain, without the country identifier), the supplier shall tick the box “I don’t have Tax ID number”.

What is your Tax ID? ⓘ

Country United States ×

Tax ID 11111111

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code  ⓘ

Preferred Language English (US) ▾

Cancel Save & Continue

# Full Onboarding

Just to confirm that the previous address will be used as the “Remit-To” (the address to where the supplier will receive the payment)

Where do you want to receive payment?

1 2 3 4

\* Payment Type Address

What is your Remit-To Address?

Address Line 1 test  
Address Line 2 test  
City test  
State  
Postal Code 1111111  
Country United States

Cancel Save & Continue

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

| Remit-To Account | Remit-To Address                                 | Status |        |
|------------------|--|--------|--------|
| Address          | test<br>test<br>test<br>1111111<br>United States | Active | Manage |

Deactivate Legal Entity Cancel Next

# Full Onboarding

Where do you ship goods from? ×

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered. Add Ship From

| Title  | Status |                     |
|--|--------|---------------------|
| test<br>test<br>test<br>1111111<br>United States | Active | <span>Manage</span> |

Deactivate Legal Entity Done

Just to confirm that the previous address will be also used as the “Ship From” (the address from where the supplier will ship the goods from)

By clicking **Add Now** the supplier adds the Remit-To address to its profile.

Setup Complete ×

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

## Full Onboarding

The following group of fields requests to provide the bank account details to which the supplier will receive the invoice payments.

The fields cover different country or regional requirements. Bank Name, Bank Address, Name on Bank Account, Bank Account Number, Swift Code, IBAN are always mandatory. Others (ABA, CLABE, SORT etc.), depend on country specific requirements and can be left blank.

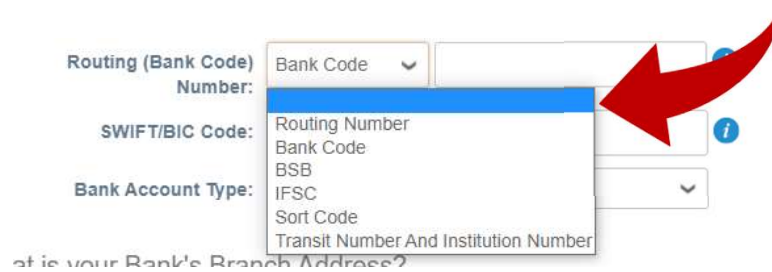
**Supplier responsibility is necessary to provide Guardian with a complete, coherent and accurate bank details, in order to avoid the SE Team form rejection due to missing data and the subsequent onboarding process delay.**

\* GI - Remit To New

|                           |  |                   |
|---------------------------|--|-------------------|
| Active                    | Active   | ▼                 |
| Bank Name                 | <input type="text"/>   |                   |
| Bank Branch               | <input type="text"/>   |                   |
| Bank Address              | <input type="text"/>   |                   |
| Name on Bank Account      | <input type="text"/>   |                   |
| Bank Routing Number (ABA) | <input type="text"/>   | <a href="#">i</a> |
| SWIFT Code (BIC)          | <input type="text"/>   | <a href="#">i</a> |
| Swift Address             | <input type="text"/>   |                   |
| Bank Account Number       | <input type="text"/>   | <a href="#">i</a> |
| Correspondent Account     | <input type="text"/>   |                   |
| Clearing Code             | <input type="text"/>   |                   |
|                           | <small>(branch/transit number for banks located in Canada)</small> |                   |
| IBAN Number               | <input type="text"/>   | <a href="#">i</a> |
| CLABE Number              | <input type="text"/>   |                   |

# Full Onboarding

Below, you have an example of how Bank Code can be left blank (open the dropdown):



What are your Bank Account Details? ⓘ

|                              |            |
|------------------------------|------------|
| Bank Account Country/Region: | Poland     |
| Bank Account Currency:       | PLN        |
| Beneficiary Name:            | Test&Test  |
| Bank Name:                   | Bank1      |
| Account Number:              | 0987654321 |
| Confirm Account Number:      | 0987654321 |
| IBAN:                        | xxxPL00xxx |
| Confirm IBAN:                | xxxPL00xxx |
| Routing (Bank Code) Number:  | Bank Code  |
| SWIFT/BIC Code:              | xxxPL00xxx |
| Bank Account Type:           | Business   |

What are your Bank Account Details? ⓘ

|                              |            |
|------------------------------|------------|
| Bank Account Country/Region: | Poland     |
| Bank Account Currency:       | PLN        |
| Beneficiary Name:            | Test&Test  |
| Bank Name:                   | Bank1      |
| Account Number:              | 0987654321 |
| Confirm Account Number:      | 0987654321 |
| IBAN:                        | xxxPL00xxx |
| Confirm IBAN:                | xxxPL00xxx |
| Routing (Bank Code) Number:  |            |
| SWIFT/BIC Code:              | xxxPL00xxx |
| Bank Account Type:           | Business   |



# Full Onboarding

For suppliers which have additional tax IDs, besides to the main one and according to the country legislation, new fields are displayed in the form to make the supplier provide this information.

## Tax ID Detail Information

\* **Tax ID Type1** TaxID  
Main Tax ID Type  
Please, select "TaxID (Tax58)" as CNPJ

\* **Tax ID1** \*\*\*\*\*1-43  
Main Tax ID Number

**Tax ID Type2** Brazil - State Tax ID  
Please, select "TaxID1 (Tax 120)" as your State Tax ID

**Tax ID2** 83.077.395  
State Tax ID Number

**Tax ID Type3** Brazil - Municipal Tax ID  
Please, select "TaxID2 (Tax 121)" as your Municipal Tax ID

**Tax ID3** 252223590  
Municipal Tax ID Number

**Tax ID Type4**   
Please, specify the Tax Type

**Tax ID4**   
Please, specify the Tax Number

**Tax ID Type5**   
Please, specify the Tax Type

**Tax ID5**   
Please, specify the Tax Number

## Full Onboarding



After clicking the **Submit for approval** button, the provided information is saved in Coupa and the form is sent to the SE Team for the data validation and approval.

Guardian

Profile Guardian



Pending Approval





**If supplier doesn't see the green-highlighted message as above, it means the form wasn't submitted, due to a mistake or lack of required information, and it remains stored as draft, but it's not sent.**

**In such cases, Coupa advises with a bold-red message at the top of the form.**


## Full Onboarding

The Supplier receives the Coupa Confirmation that its profile was approved.

 Guardian <do\_not\_reply@guardian-test.coupahost.com>  
Tue 8/11/2020 5:55 PM  
To: You

 Profile Info submitted to Guardian was Approved

---

Powered by 

Hi Test,


The company profile information that you submitted to your customer, Guardian was recently approved.

This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).

No further action is required but you can click below to view additional details.

[View Profile Info](#)

---

  
Business Spend Management

To get immediate updates via SMS or change notification preferences, go [here and adjust your settings](#)

It's important to know that the profile approval doesn't mean that supplier is ready to go. Other internal steps are needed before the supplier can begin to transact with Guardian.



## Full Onboarding

If it is a Production supplier request, then, the SE Team adds the Regional Quality Team approval to the chain.

Eventually, the supplier (Production or non-Production) may be red-flagged by the SE Team, due to compliance reasons. In that case, the form is escalated to the Compliance and Ethics (C&E) Team for a further review.

Should any of these two reject the form, the onboarding process ends.

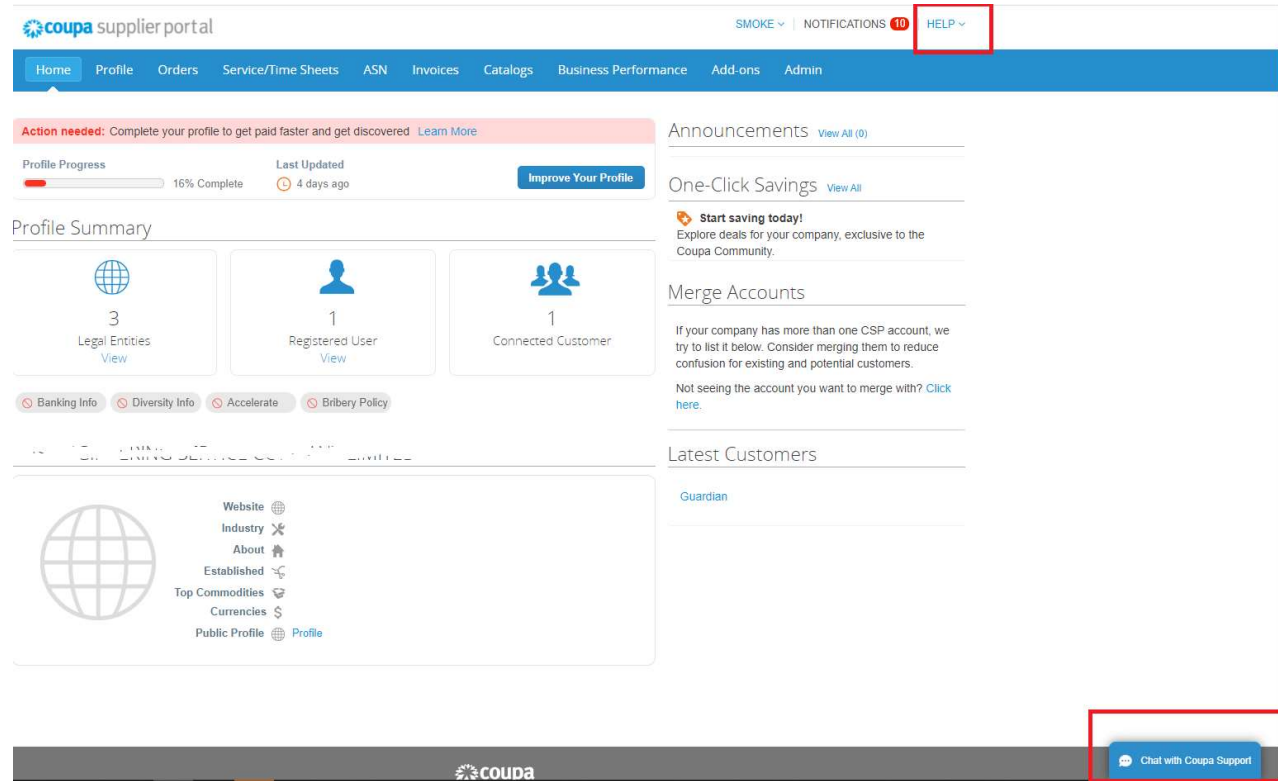


# Full Onboarding

The website which the supplier logs on is different from the one to which Guardian has access.

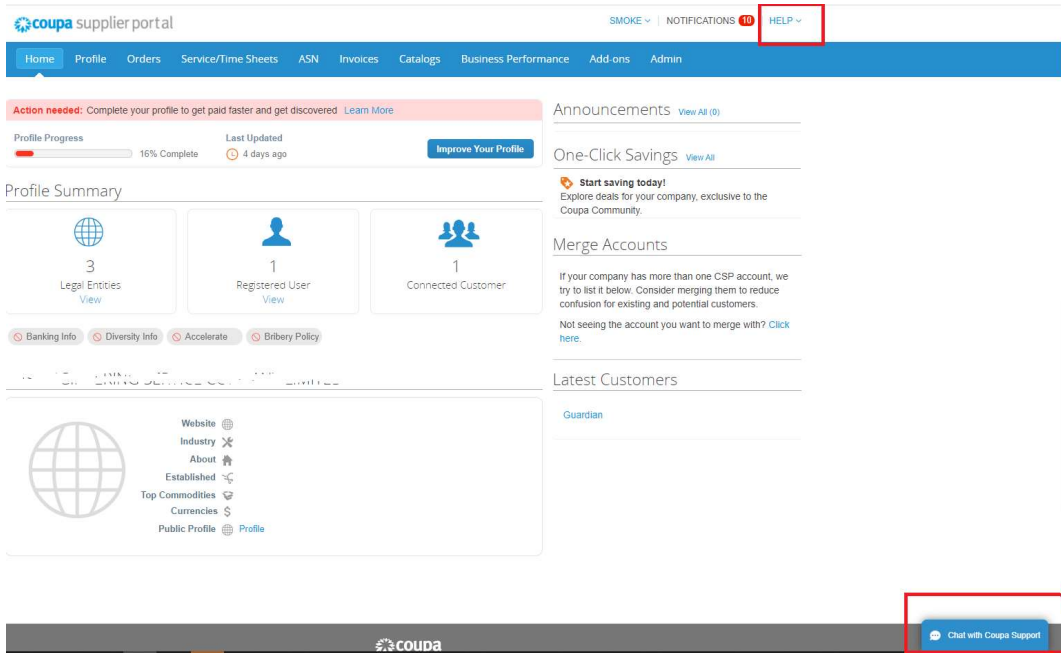
Due to this, **Guardian has no access to the pages which the supplier is working on.**

Coupa offers a Help Center, accessible at top-right of the screen (Online Help).



**An email address for non-urgent support is also available for suppliers:**  
[supplier@coupa.com](mailto:supplier@coupa.com)

# Full Onboarding



Moreover, an online chat with a Coupa expert is possible through the button the supplier can find at bottom-right of the screen (“Chat with Coupa Support”).



By clicking the “Chat” button a window pops up to request the supplier contact for a call.

### Chat with Coupa Support

This support service is for technical issues with the Coupa Supplier Portal only. For questions relating to transactions, please contact your customer directly.

This chat session will be saved as part of the supplier support request ticket. Continuing with this session will constitute your consent for this action.

\*First Name

\*Last Name

This field is required. This field is required.

\*Email

This field is required.

Phone

**Start Chat**

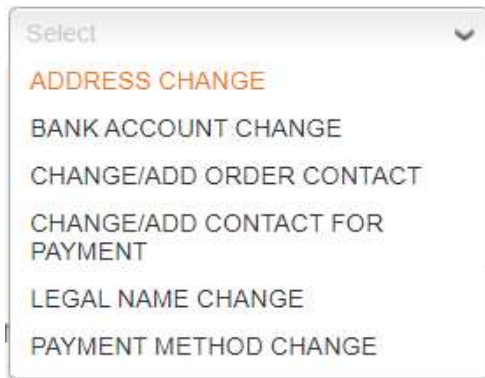
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## Supplier Update (Form 4 - Supplier)



## Supplier Update - Supplier



Select

- ADDRESS CHANGE
- BANK ACCOUNT CHANGE
- CHANGE/ADD ORDER CONTACT
- CHANGE/ADD CONTACT FOR PAYMENT
- LEGAL NAME CHANGE
- PAYMENT METHOD CHANGE

Supplier can request to submit the Update Form for these reasons. The fields to be filled will be displayed according to the selected type.

Bank account change request mean the creation of a new Remit-To address and the need to provide the bank statement/letter, as already seen in Form 2.

As said, payment term changes can only be requested by Guardian.

# Supplier Update - Supplier

Form 4 shall be sent to the supplier by the Guardian requester.  
First, the requester needs to search for the needed Supplier:

The screenshot shows the 'Suppliers' search interface. The 'Suppliers' menu item is highlighted in red. The search filter section is also highlighted in red, showing 'Filter By Name', 'Filter Clause contains', and 'Filter Text test supplier'. The 'Advanced' search mode is selected, and the 'Search' button is highlighted in red.

| Name  | Display Name          | Status   | On Hold | Pending Request Count | Pending Requests | Supplier Portal Status | Supplier Contact | Address   | Supplier Information Status | Request change orders | Actions |
|---|-----------------------|----------|---------|-----------------------|------------------|------------------------|------------------|---|-----------------------------|-----------------------|---------|
| <input checked="" type="checkbox"/> SRG_Test Supplier 0-C123123 | SRG_Test Supplier     | Active   | No      | 0                     |                  | Invited                | Pat Kapp         | Sample Address<br>Auburn Hills, michigan 48321<br>United States | Draft                       | No                    |         |
| <input type="checkbox"/> Sanjeev Test Supplier                  | Sanjeev Test Supplier | Inactive | No      | 0                     |                  | Linked                 | Sanjeev Rao      | 123 Main St<br>Naperville, IL 60564<br>United States            |                             | No                    |         |
| <input type="checkbox"/> SRG_SAN Test Supplier-C199999          | SAN Test Supplier     | Active   | No      | 0                     |                  | Not Linked             | Test FN Test LN  |   |                             | No                    |         |
| <input type="checkbox"/> Test Supplier 123                      | Test Supplier 123     | Active   | No      | 0                     |                  | Linked                 |                  |   |                             | No                    |         |

# Supplier Update - Supplier

After searching for the Supplier's name, there two ways of sending it:

1. By ticking the box next to the Supplier's Name and clicking the **Request Info** button.
2. By clicking the **Send Request for Information** icon (paper plane icon) under Actions.

The screenshot displays the 'Suppliers' management interface. At the top, there are buttons for 'Create', 'Load from file', and 'Export to'. A search bar contains 'lois' and a search button. Below the search bar, there are tabs for 'Opportunities' and 'Supplier Base'. The main table lists suppliers with columns: Name, Display Name, Country, Status, On Hold, Pending Request Count, Pending Requests, Supplier Portal Status, Supplier Contact, Address, Supplier Information Status, Request change orders, and Actions. The first row is for 'GI Supplier 14'. A red circle with the number '1' and a hand cursor points to the 'Request Info' button in the bottom toolbar. Another red circle with the number '2' and a red arrow points to the paper plane icon in the 'Actions' column of the first row.

| <input checked="" type="checkbox"/> | Name           | Display Name   | Country       | Status     | On Hold | Pending Request Count | Pending Requests | Supplier Portal Status | Supplier Contact | Address                       | Supplier Information Status | Request change orders | Actions |
|-------------------------------------|----------------|----------------|---------------|------------|---------|-----------------------|------------------|------------------------|------------------|-------------------------------|-----------------------------|-----------------------|---------|
| <input checked="" type="checkbox"/> | GI Supplier 14 | GI Supplier 14 | United States | Onboarding | No      | 0                     |                  | Linked                 | Catriona Gray    | 678 Texas, 5678 United States | Pending mapping             | No                    |         |

Invite **Request Info** Request legal signoff Add Tag Request Review Per page 15 | 45 | 90

## Supplier Update - Supplier

3. The request email pops up.
4. In **Select Supplier Information Form** dropdown, Choose "4\_Update Form (Supplier)".
5. Click **Send Info Request** button.

Request Updated Information from Supplier(s)

Verdana 11pt B I U A A

3

Hello Supplier,

Guardian Industries wants you to respond by updating your company profile on Coupa. This information is required so they can transact with you electronically.

Use the "Update Profile" button to respond or decline.

Lois Escapalao  
Guardian Industries

4

Powered by TinyMCE

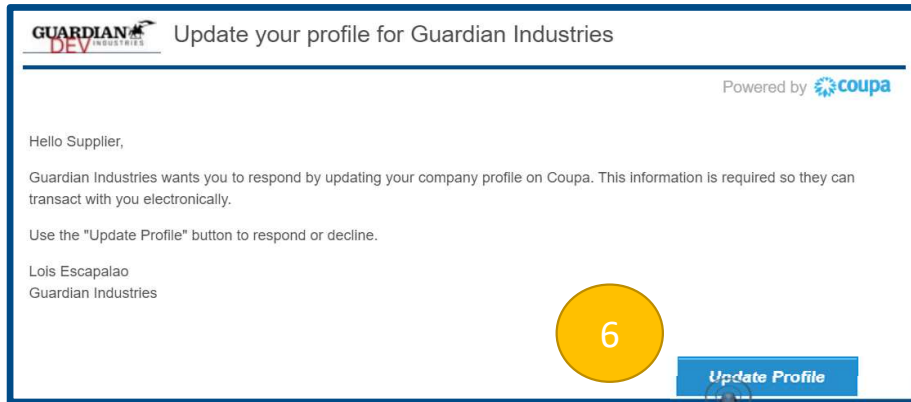
Select Supplier Information Form: 4\_Update Form (Supplier)

5


Cancel Send Info Request (1 Suppliers)



# Supplier Update - Supplier



Update your profile for Guardian Industries

Powered by 

Hello Supplier,

Guardian Industries wants you to respond by updating your company profile on Coupa. This information is required so they can transact with you electronically.

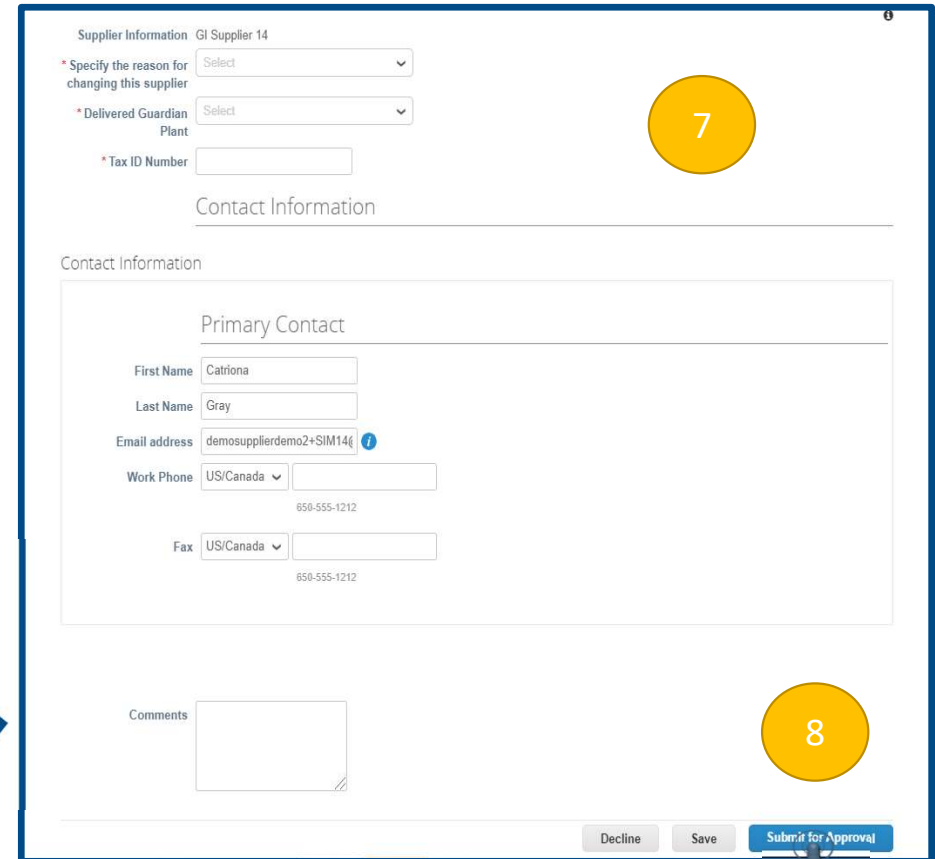
Use the "Update Profile" button to respond or decline.

Lois Escapalao  
Guardian Industries

**6**

[Update Profile](#)

- Supplier will receive an email invitation to update its information.
- By clicking **Update Profile** button, it will be redirected to the Update Form.
- After filling out the form and clicking **Submit** button, Form will be sent for approval to the SE team. By clicking **Save**, the form will be saved as a draft, whereas clicking **Decline** means to reject answering the form.



Supplier Information GI Supplier 14

\* Specify the reason for changing this supplier

\* Delivered Guardian Plant

\* Tax ID Number

Contact Information

Contact Information

Primary Contact

First Name

Last Name

Email address

Work Phone

Fax

Comments

[Decline](#) [Save](#) [Submit for Approval](#)

**7**

**8**

# Supplier Update - Supplier

Guardian

To request a bank account change, the supplier needs to follow this process (similar to what seen in Form 2).

After receiving the notification and joining Coupa Portal, the supplier tick the “Send to ERP” box and select “Bank Account Change”.

Supplier name, tax ID# and contact information are populated by the system and don't be modified.

✓ We have auto-filled some information from your Public Profile.

Supplier Information Test Supplier7BIS

\* Send to ERP?

This should be checked for supplier update to be interfaced to client ERP. Please check.

\* Specify the reason for changing this supplier

BANK ACCOUNT CHANGE x v

\* Tax ID Number 7777777777

Contact Information

Contact Information

First Name Test

Last Name Supplier7

Email address Supplier7.UAT@gmail.com i

Work Phone US/Canada v 650-555-1212

Fax US/Canada v 650-555-1212



# Supplier Update - Supplier

A contact person at supplier's is needed for banking validation purposes.

Currency type must be selected.

If the currency type is going to change vs. the existing one (e.g. old account is in PLN and new account is in EUR), then the supplier should specify it.

Supplier's Banking  
Validation Contact -  
Name

Provide contact for someone other than person filling out this form.

Supplier's Banking  
Validation Contact -  
Email

Provide contact for someone other than person filling out this form.

Supplier's Banking  
Validation Contact -  
Phone

Provide contact for someone other than person filling out this form.

\* What currency you  
would like to be paid  
in?

Has the currency of  
your new bank account  
changed?



## Supplier Update - Supplier

The selected banking region defines the type of bank statement or document that shall be attached for bank validation purposes.

Banking Information (Only)

\* Banking Region

\* For Bank account change, attach bank documents here:  No file chosen

The supplier shall create a Remit-To Address for payment. The company Remit-To Address can match with the physical address. Click the **Add Remit-To** button.

### \* Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

# Supplier Update - Supplier

A pop-up window is going to request to create a new address. Click **Create New**.

A series of pop-up windows request the supplier to provide the new Remit-To address details.

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the country where it is located.

Choose Remit-To Address

Choose a Remit-to Location below - Recommended  
*It's a few more fields, but provides compliance, verification, and re-usability. Otherwise, click 'Cancel' to add info to your customer's form manually.*

Create new Compliant Remit-To Address

X

X

X, 11111

Thailand

Thailand

# Supplier Update - Supplier

Tell your customers about your organization

Which customers do you want to see this?

All  
 Guardian

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country United States

Use this address for Remit-To *i*  
 Use this for Ship From address *i*

**REQUIRED FOR INVOICING**  
Enter the registered address of your legal entity. This is the same location where you receive government documents. *i*

By selecting “All” or “Guardian” to the first question, the supplier provides the ability to let these data be available to all customers or to Guardian only.

The mandatory fields are the address, the city, the state or province and postal code.

European Tax IDs usually begin by the country identifier (i.e. FR, GB, DE).

For those suppliers that may have a domestic identifier only (Hungary, Poland, Spain, without the country identifier), the supplier shall tick the box “I don’t have Tax ID number”.

What is your Tax ID? *i*

Country United States

Tax ID 11111111

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code  *i*

Preferred Language English (US)

Cancel Save & Continue

# Supplier Update - Supplier

These are to confirm that the previous address will be used as the “Remit-To” (the address to where the supplier will receive the payment)

Where do you want to receive payment?

1 2 3 4

\* Payment Type Address

What is your Remit-To Address?

Address Line 1 test  
Address Line 2 test  
City test  
State  
Postal Code 111111  
Country United States

Cancel Save & Continue

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

| Remit-To Account | Remit-To Address                                | Status |        |
|------------------|---|--------|--------|
| Address          | test<br>test<br>test<br>111111<br>United States | Active | Manage |

Deactivate Legal Entity Cancel Next

And these ones are to confirm that the previous address will be also used as the “Ship From” (the address from where the supplier will ship the goods from)

Where do you ship goods from?

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

| Title   | Status |        |
|---|--------|--------|
| test<br>test<br>test<br>111111<br>United States | Active | Manage |

Deactivate Legal Entity Done

Setup Complete

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

Click Add Now



## Supplier Update - Supplier

The following group of fields (**GI - Remit To New**) requests to provide the bank account details to which the supplier will receive the invoice payments.

Bank Name, Bank Address, Name on Bank Account, Bank Account Number, Swift Code, IBAN are always mandatory. Others (ABA, CLABE, SORT, etc.), depend on country specific requirements.

This group of fields must be placed in **Active** status.

Below this fields, the supplier finds its current bank account details, under the title **GI - Remit To Update**. The old account needs to be switched to **Inactive** status.

Active **Inactive** ▼

Bank Name X

### \* GI - Remit To New

Active Active ▼

Bank Name

Bank Branch

Bank Address

Name on Bank Account

Bank Routing Number (ABA) ⓘ

SWIFT Code (BIC) ⓘ

Swift Address

Bank Account Number ⓘ

Correspondent Account

Clearing Code  
(branch/transit number for banks located in Canada)

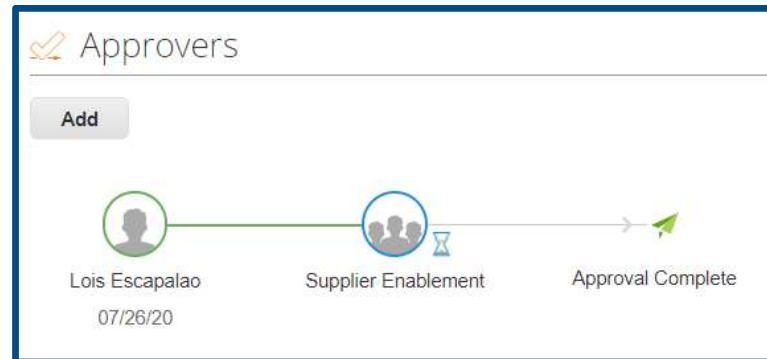
IBAN Number ⓘ

CLABE Number



## Supplier Update - Supplier

Once form is fully approved, the information will be sent to CFC/CMS for supplier update.



## Coupa SIM - Useful Links

