One World. Made Better.™

Coupa Supplier Portal – Supplier Manual

GUARDIAN® INDUSTRIES

One World. Made Better.™

Check for latest browser release:

May 2022 Release (R33) supports the latest versions of these web browsers:

- Google Chrome 99.0
- Mozilla Firefox 98.0
- Microsoft Edge 99.0

GUARDIAN®
INDUSTRIES

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

lello GLASS- CO-C1311589,

'ou 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 020. 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.

' 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.

Jeksandra 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]

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

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".
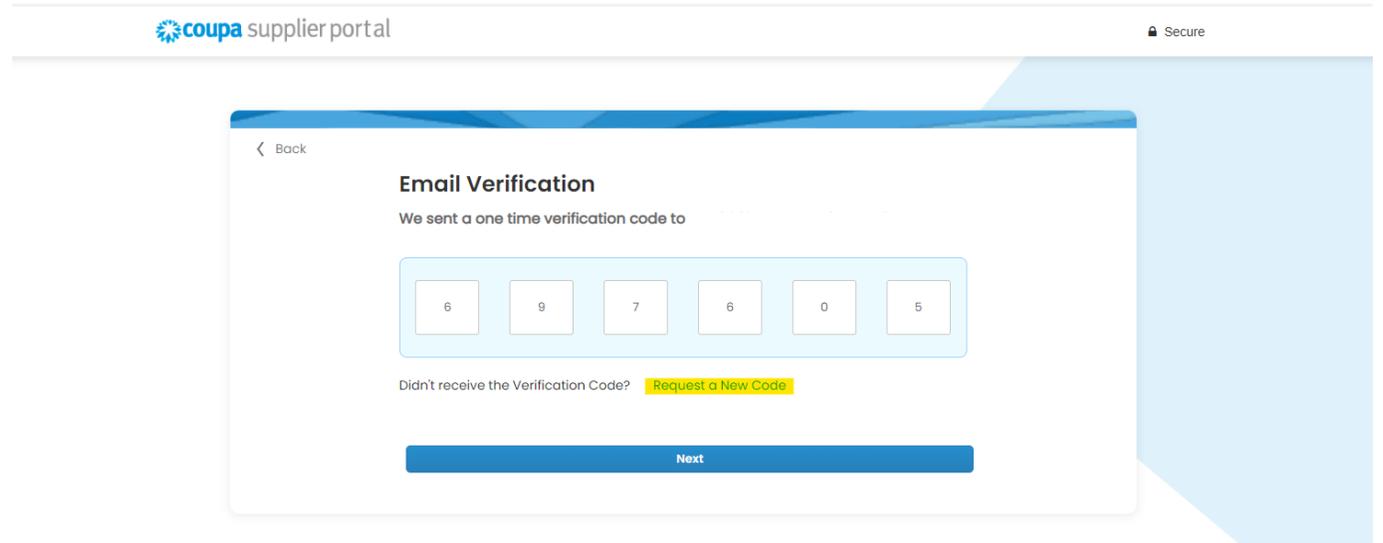
Two-Factor Authentication

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 login into your account, this is optional

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.

coupa supplier portal

KATIA ˅ | NOTIFICATIONS 6

Account Settings
Notification Preferences
Account Settings
Log Out

Home   Profile   Orders   Service/Time Sheets   ASN   Invoices   Catalogs   Business Performance   Setup

My Account Security & Two-Factor Authentication

Settings

Notification Preferences

Security & Two-Factor Authentication

Two-Factor Authentication

◉ Enable only for Payment Changes (Required for changing Legal Entity or Remit-To)
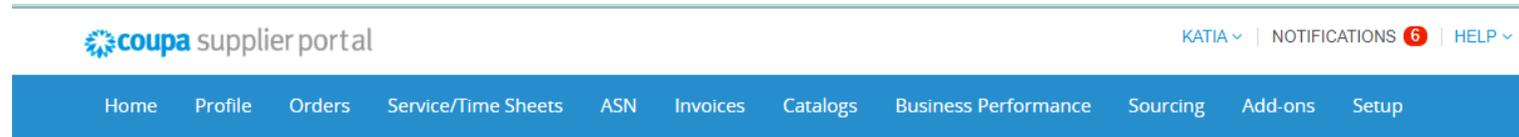◯ Enable for Both Account Access (Login) and Payment Changes

Via Authenticator App Enabled

☑ Enabled   Using an Authenticator App available from your mobile phone app store

Change Authentication App

Via SMS Disabled

☐ Enable   Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.

[Show Recovery Codes]   [Regenerate Recovery Codes]

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

2/20/2024

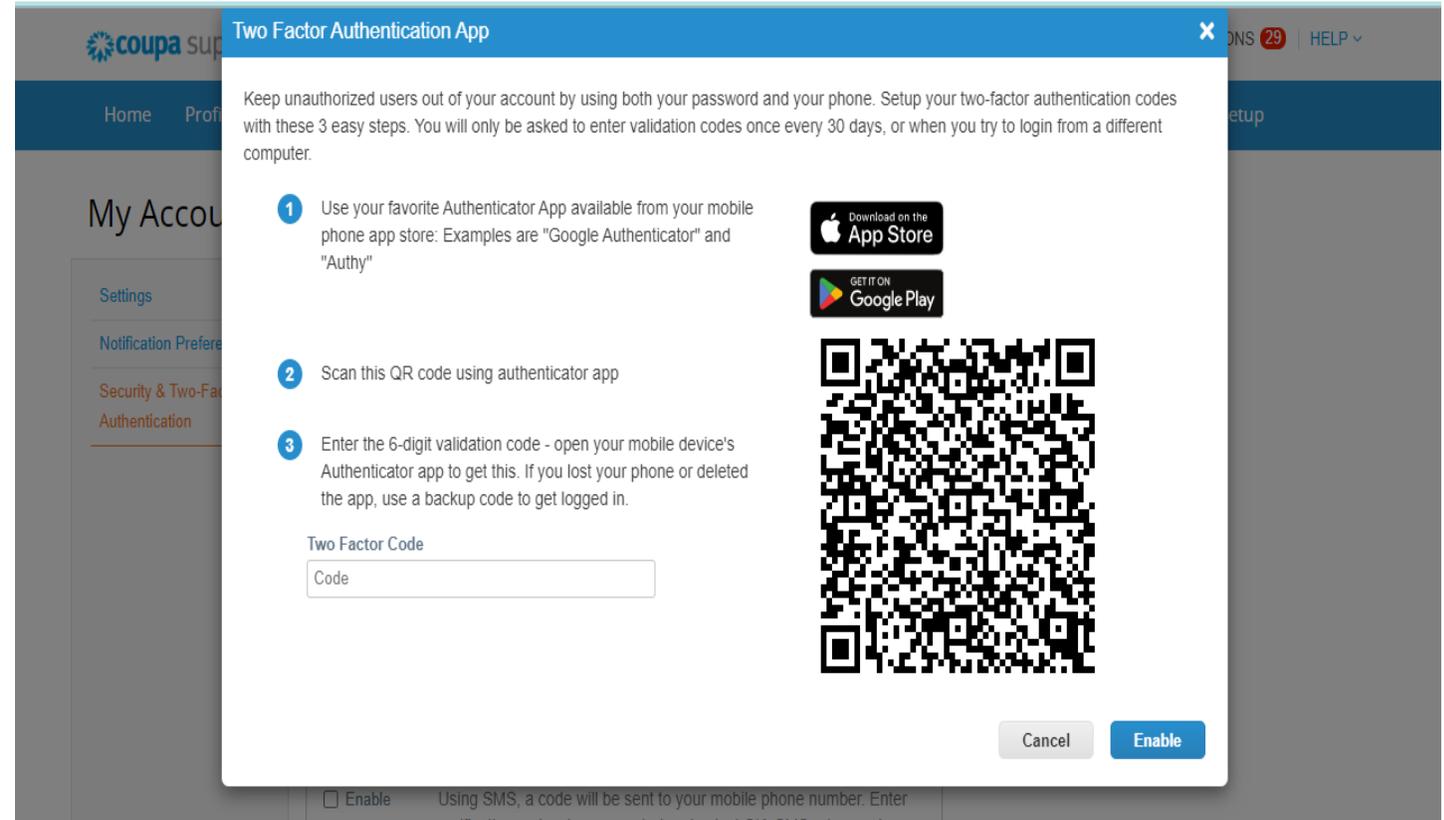# Two-Factor Authentication
via Authenticator App

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.

2/20/2024

# 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.
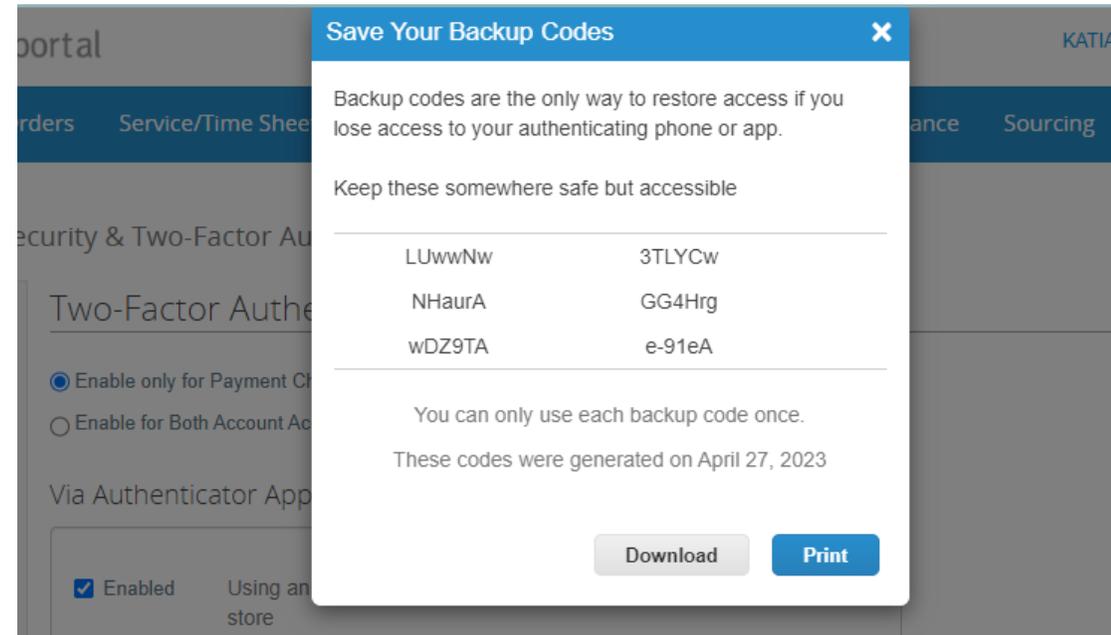
! **IMPORTANT:**

! 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. This two-factor authentication is completely FREE (for more information visit pages 4-8)

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
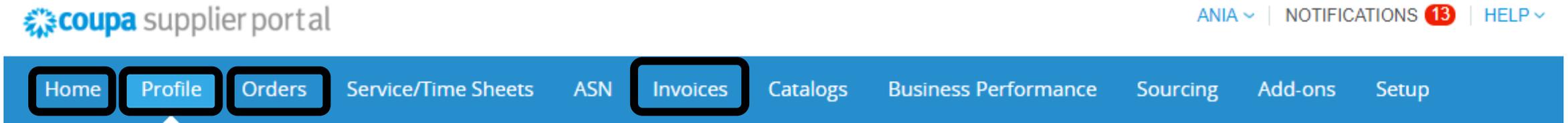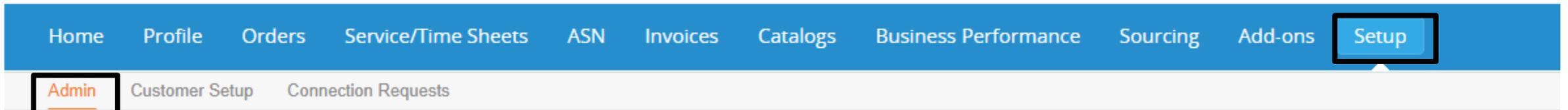
Introduction to Coupa Supplier Portal (CSP)

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

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

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.
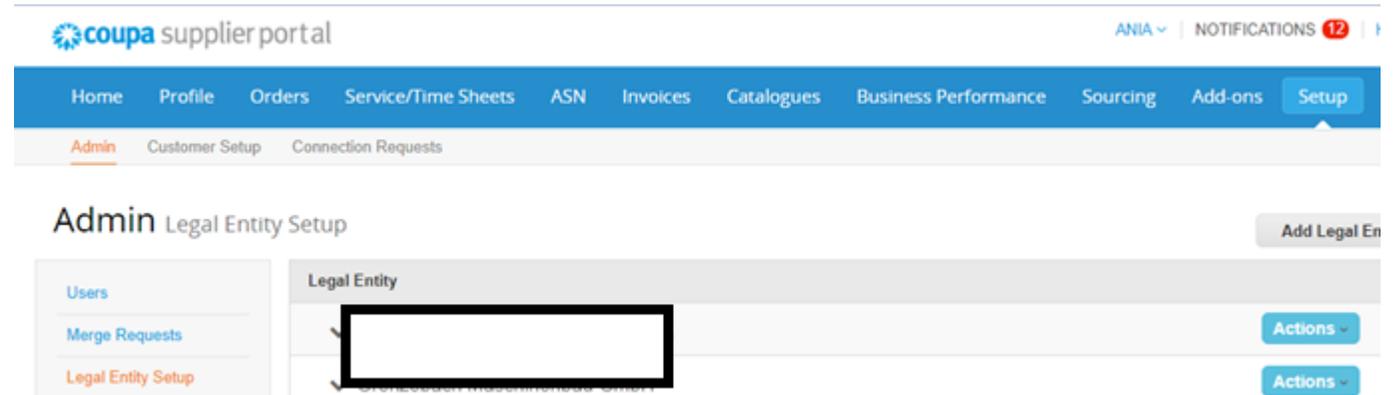
On the first page enter the Legal Entity Name and Country, and then click the **Continue** button.

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.

Miscellaneous Information

1 2 3 4

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	Legal Entity test
Country/Region	Poland
Place of Reg.	ⓘ
Type of Company	ⓘ
Permit Number	ⓘ
Permit Date	ⓘ

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

Enter a date with the following specification: YYYY-MM-DD (eg 1984-05-30)

Share Capital	ⓘ

Enter a number with two decimal points (eg 15096,00)

Cancel   **Save & Continue**

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 ⓘ

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.

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.

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

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

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	
Order Date	
Revision Date	
Requester	
Email	
Payment Term	
Comments to Supplier	
Attachments	
Acknowledged	☐
Assigned to	Select

📍 Shipping

Ship-To Address	
Address Location Name	
Terms	

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.

≡ Lines

	Advanced	Search	🔍	Sort by	Line Number: 0 → 9 ⌄

I1	Type	Item	Qty	Unit	Price	Total	Invoiced
	🛒	COMPUTER SOFTWARE	6	PC - Piece	100.00	600.00	0.00

Need By	Part Number	Manufacturer Name	Manufacturer Part Number	Incoterms Location
07/10/2019	None	None	None	None

Tax Reference

Item Description
None

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

Invoices

To create an invoice, go either to the **Orders** or **Invoices** tab.
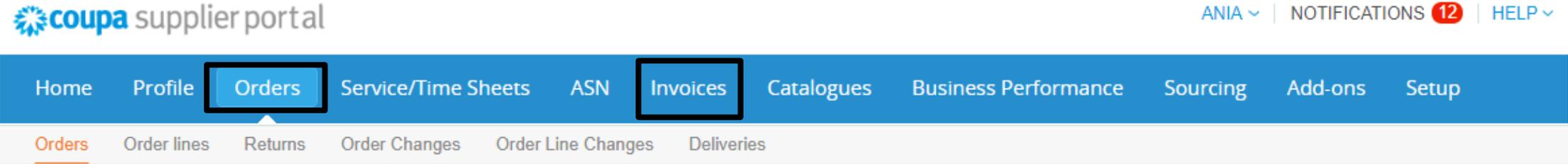
To create an invoice from the **Orders** tab, click the gold coins icon in the **Actions** column. You can also create an invoice after opening an order by clicking the **Create Invoice** button.

In the **Select Customer** drop-down list, you can select a Customer whose Orders you want to view.

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

The invoice creation form will appear on the screen. Select the **Legal Entity**. You can choose from existing addresses or add a new one using the **Add New** option.

Choose Invoicing Details ✕

* Legal Entity [Select ⌄] ➕ Add New

* Remit-To [Select ⌄]

* Ship-From Address [Select ⌄]

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:

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.

2/20/2024

You can 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.

🕒 History

💬 0 Comments   Mute Comments ⌄

Enter Comment

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

Attachments Add File | URL

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

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.

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 **Payment Information** ⌄   Search 🔍

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
Create View

Paid	PO #	Invoice #	Status	Invoice Date	Pa...	...ayment Information
No	G000224610	None	Draft	3/3/22	NE...	
No	S000224382	SRG 1	Pending Approval	4/10/21	NE...	
No	S000224382	None	Draft	4/10/21	NE...	
No	S000224382	test KCK 1.09.csp negative unit price	Pending Approval	1/10/21	NE...	
No	S000224382	CN test 1.01.2021 csp r2o	Pending Approval	1/10/21	NE...	
No	S000224382	None	Draft	1/10/21	NE...	
No	S000224382	None	Draft	1/10/21	NE...	
No	S000224382	CN test for r20 approval 1.10.2021	Pending Approval	1/10/21	NE...	

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 **Disputed** ⌄   Search 🔍

Dispute reason
Quantity different from PO/Contract or Catalog
Quantity different from PO/Contract or Catalog

Disputed Invoices

When an invoice has been disputed, the supplier has to take action to correct it. You can find additional information in the comment section. If a credit note is issued in regards to 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.

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