

One World.  Made Better.™



**Coupa Supplier Portal  
– Supplier Manual**

2024



# 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

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Powered by



Hello GLASS- [REDACTED] 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](mailto: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

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.



## 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?](#)

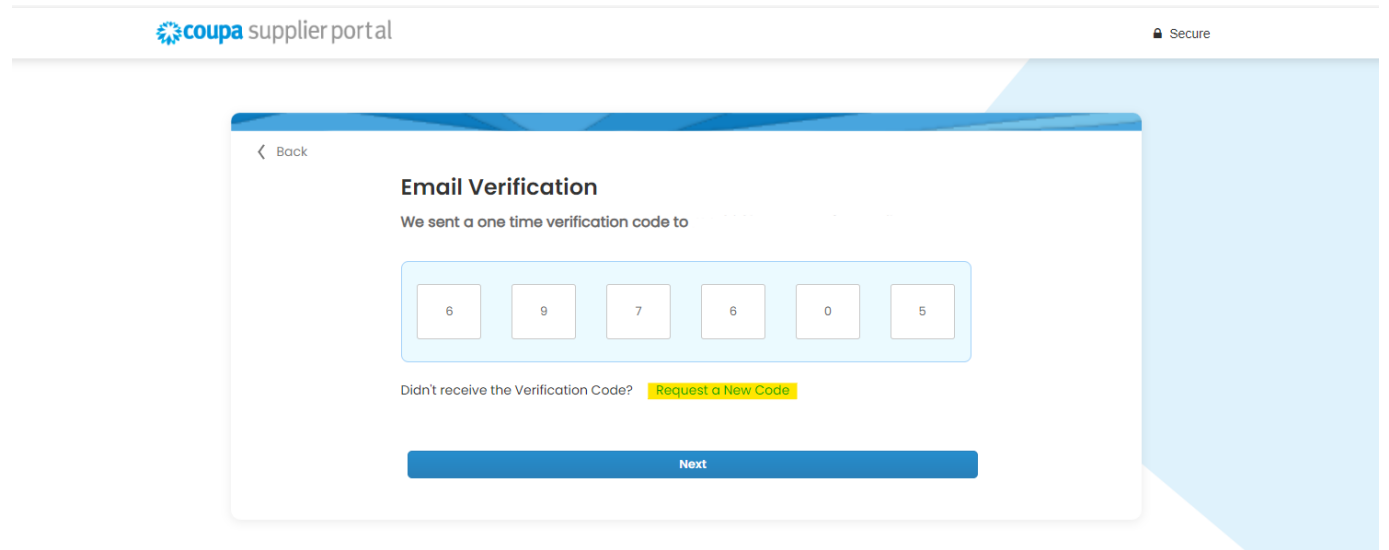
[Forward this to someone](#)

## 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 every time you login into your account, this is optional

The screenshot shows the 'coupa supplier portal' interface. At the top right, there is a user profile for 'KATIA' with a 'NOTIFICATIONS' bell icon. A dropdown menu is open, showing 'Account Settings', 'Notification Preferences', and 'Log Out'. The main navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', and 'Business Performance'. The page title is 'My Account Security & Two-Factor Authentication'. On the left, a sidebar menu lists 'Settings', 'Notification Preferences', and 'Security & Two-Factor Authentication' (which is highlighted). The main content area is titled 'Two-Factor Authentication' and contains the following options:

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

Below these are two sections:

- Via Authenticator App Enabled**: A box containing a checked 'Enabled' checkbox, the text 'Using an Authenticator App available from your mobile phone app store', and a 'Change Authentication App' link.
- Via SMS Disabled**: A box containing an unchecked 'Enable' checkbox, the text 'Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.', and two buttons: 'Show Recovery Codes' and 'Regenerate Recovery Codes'.

# 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.

The screenshot shows the 'coupa supplier portal' interface. At the top right, the user 'KATIA' is logged in, with a 'NOTIFICATIONS 6' badge. A dropdown menu is open, showing 'Account Settings', 'Notification Preferences', and 'Log Out'. The main navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', and 'Business Performance'. The page title is 'My Account Security & Two-Factor Authentication'. On the left, a sidebar menu has 'Settings', 'Notification Preferences', and 'Security & Two-Factor Authentication' (highlighted). The main content area is titled 'Two-Factor Authentication' and contains the following options:

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

Below these are two sections:

- Via Authenticator App Enabled**: A checkbox labeled 'Enabled' is checked. The text reads: 'Using an Authenticator App available from your mobile phone app store.' A link 'Change Authentication App' is present.
- Via SMS Disabled**: A checkbox labeled 'Enable' is unchecked. The text reads: 'Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.'

At the bottom of the settings area are two buttons: 'Show Recovery Codes' and '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

The screenshot shows the Coupa supplier portal interface. At the top, the logo and 'supplier portal' text are on the left, and user information 'KATIA' with a notification badge and a 'HELP' link are on the right. A blue navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below this, the 'My Account' section is active, with 'Notification Preferences' selected in the left sidebar. The main content area shows a message: 'You will start receiving notifications when your customers enable them.' Below this, there are input fields for 'Email' (katia.madrid@kochgs.com) and 'Mobile(SMS)' (+1 201-555-5555), with a 'Verify' button. A warning icon and text below the mobile field state: 'Verify number to receive SMS'. Underneath is an 'Announcements' section. A pop-up window is overlaid on top, titled 'Enter the code that you received by SMS'. It features a green success message: 'Your verification code has been sent to: +1 201-555-5555'. Below the message is a text input field labeled '\* Code'. At the bottom of the pop-up are three buttons: 'Cancel', 'Resend Code', and 'OK'.

## Two-Factor Authentication via Authenticator App

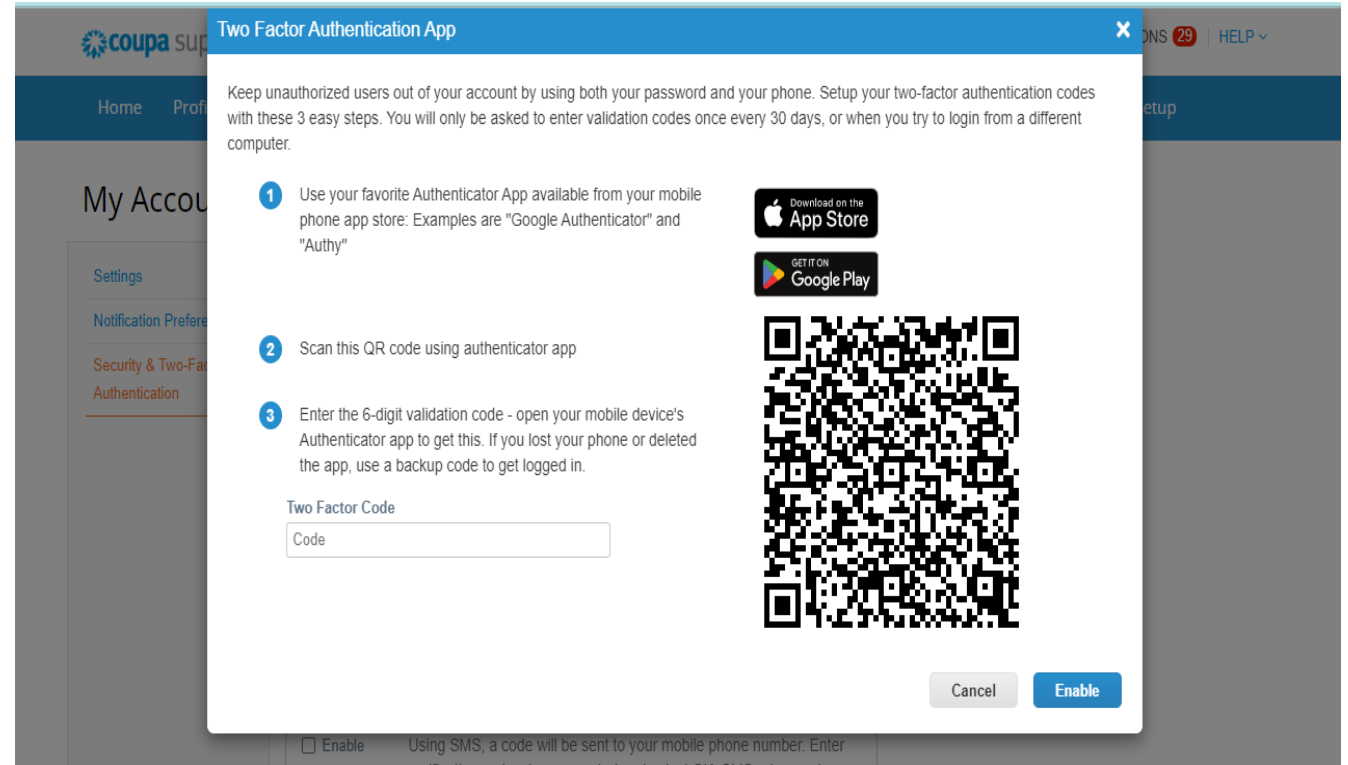
For the authentication via app, you will need to download an additional app on your phone, through your app store or google play store,

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.



The screenshot shows a web interface for setting up Two Factor Authentication. The main heading is "Two Factor Authentication App". Below the heading, there is a paragraph explaining the purpose: "Keep unauthorized users out of your account by using both your password and your phone. Setup your two-factor authentication codes with these 3 easy steps. You will only be asked to enter validation codes once every 30 days, or when you try to login from a different computer." The steps are listed as follows:

- 1 Use your favorite Authenticator App available from your mobile phone app store: Examples are "Google Authenticator" and "Authy"
- 2 Scan this QR code using authenticator app
- 3 Enter the 6-digit validation code - open your mobile device's Authenticator app to get this. If you lost your phone or deleted the app, use a backup code to get logged in.

Below the steps, there are two buttons for downloading the app: "Download on the App Store" and "GET IT ON Google Play". A large QR code is displayed to the right of the steps. Below the QR code, there is a text input field labeled "Two Factor Code" with a placeholder "Code". At the bottom right, there are two buttons: "Cancel" and "Enable".



## Two-Factor Authentication via Authenticator App

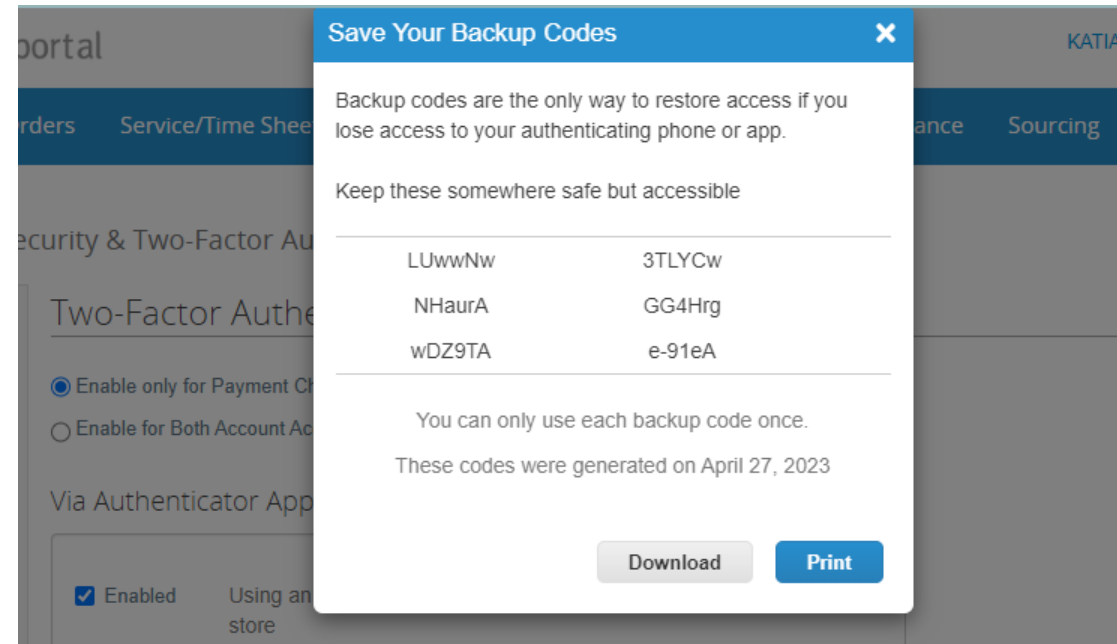
The portal will give you back up codes in case you lost, delete the app, or changed your phone,

**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 POSs, 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)

# Introduction to Coupa Supplier Portal (CSP)

## HOME

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

## PROFILE

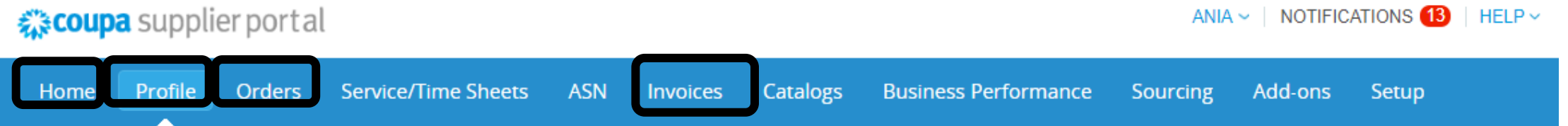
- in the **Profile** section you can configure your profile. Your profile can be set up as public or customized for each Customer separately

## ORDERS

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

## INVOICES

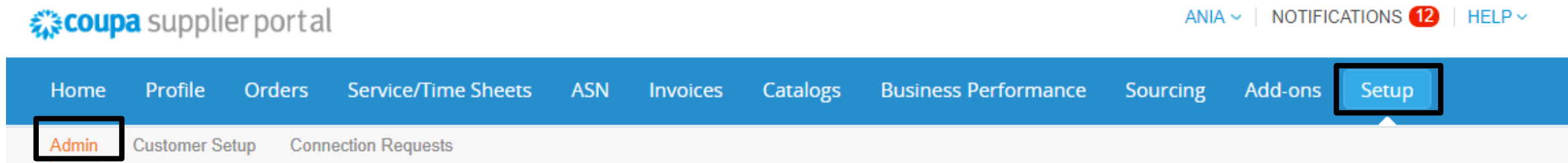
-in the **Invoices** section you can view all created invoices and verify their current status



# 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



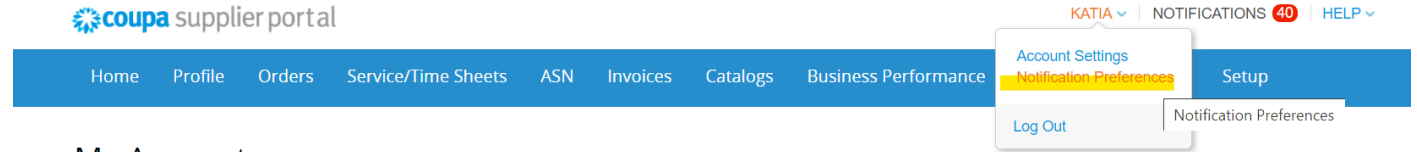
You can change the language at the bottom of each page:



# 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.**



## My Account Notification Preferences

Settings

Notification Preferences

You will start receiving notifications when your customers enable them.

## My Account Notification Preferences

Settings

Notification Preferences

Security & Two-Factor Authentication

You will start receiving notifications when your customers enable them.

### Announcements

|                           |  |   |                              |
|---------------------------|--|---|------------------------------|
| New Customer Announcement | <input checked="" type="checkbox"/> Online | <input checked="" type="checkbox"/> Email | <input type="checkbox"/> SMS |
|---------------------------|--|---|------------------------------|

### Business Performance

|                                   |  |                                |                              |
|-----------------------------------|--|--------------------------------|------------------------------|
| Business Performance Role Granted | <input checked="" type="checkbox"/> Online | <input type="checkbox"/> Email | <input type="checkbox"/> SMS |
|-----------------------------------|--|--------------------------------|------------------------------|

To save your settings, click **Save**

Cancel **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.

**coupa** supplier portal

ANIA | NOTIFICATIONS 12 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons **Setup**

**Admin** Customer Setup Connection Requests

## Admin Users

[Invite User](#)

| Users  | Permissions   | Customer Access  |
|--|---|--|
| <p>Agata Burek<br/>aburek@guardian.com<br/>Status: Inactive</p> <p><a href="#">Activate User</a></p> | <p>ASNs<br/>Admin<br/>Business<br/>Performance<br/>Catalogues<br/>Invoices<br/>Order Changes<br/>Order Line<br/>Confirmation<br/>Orders<br/>Pay Me Now<br/>Payments<br/>Profiles<br/>Service/Time<br/>Sheets<br/>Sourcing</p> | <p>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries<br/>Guardian Industries</p> |

## 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 i

- All
- Admin
- Orders
  - Restricted Access to Orders
  - All
- Invoices
- Catalogues
- Profiles

#### Customers

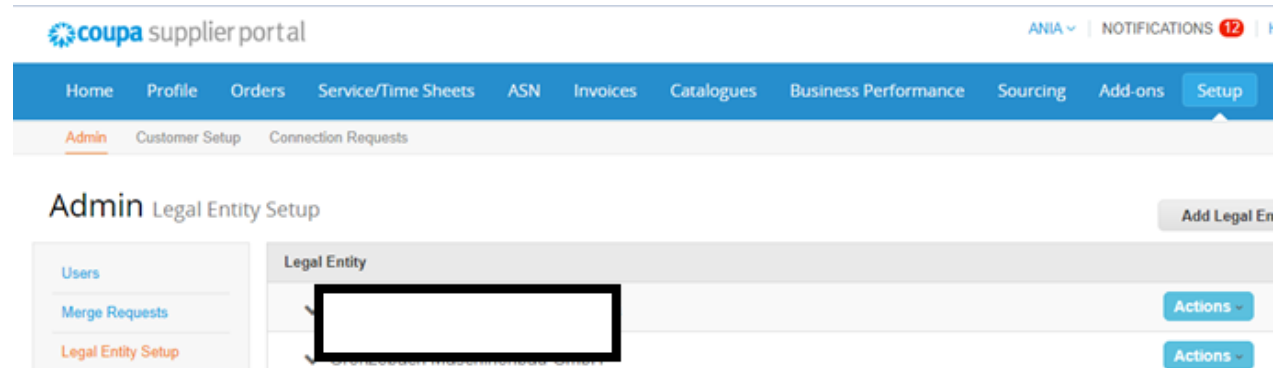
- All
- 
- 
- 
- 
-

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.



Where's your business located?

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

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/Region

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



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

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 as where you receive government documents. i

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*

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  ×

Tax ID

I don't have Tax ID Number


[Add additional Tax ID](#)

Miscellaneous

Invoice-From Code  [?](#)

Preferred Language

Setup complete



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 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.

# Orders

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

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Orders Order lines Returns Order Changes Order Line Changes Deliveries

Select Customer


Guardian Industries - 

Configure PO Delivery

## Purchase Orders

### Instructions From Customer

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

Click the  Action to Invoice from a Purchase Order

| PO Number | Order Date | Status | Acknowledged At | Items | Unanswered Comments | Total | Assigned To | Actions |
|-----------|------------|--------|-----------------|-------|---------------------|-------|-------------|---------|
|-----------|------------|--------|-----------------|-------|---------------------|-------|-------------|---------|

# 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


### Shipping

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

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

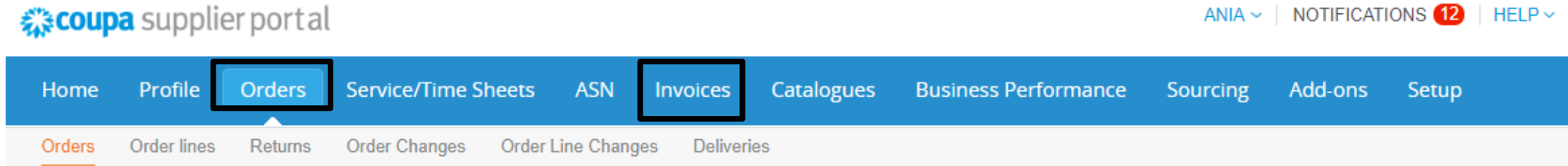
In the **Lines** section you can see the list of Coupe goods/services included in the order. Please make sure that the unit prices and totals are correct.

☰ Lines

| Advanced Search <input type="text"/> Sort by Line Number: 0 → 9            |   |                          |                                 |                         |                 |        |          |
|--|---|--------------------------|---------------------------------|-------------------------|-----------------|--------|----------|
| 11   | Type  | Item                     | Qty                             | Unit                    | Price           | Total  | Invoiced |
|  |  | COMPUTER SOFTWARE        | 6                               | PC - Piece              | 100.00          | 600.00 | 0.00     |
| <hr/>  |   |                          |                                 |                         |                 |        |          |
| <b>Need By</b>   | <b>Part Number</b>  | <b>Manufacturer Name</b> | <b>Manufacturer Part Number</b> | <b>Incoterms</b>        | <b>Location</b> |        |          |
| 07/10/2019   | None  | None                     | None                            | None                    | None            |        |          |
| <hr/>  |   |                          |                                 |                         |                 |        |          |
| <b>Tax Reference</b>   |   |                          |                                 | <b>Item Description</b> |                 |        |          |
| Rec Tax Amount=0;NonRec Tax Amount=.00;TaxGroupCode=VES;GoodsTaxRateCode=1 |   |                          |                                 | None                    |                 |        |          |

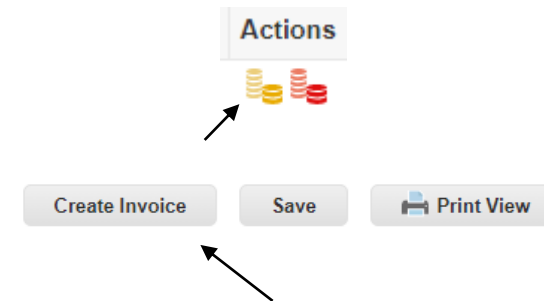
# Invoices

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.



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.

Choose Invoicing Details ✕

\* Legal Entity  ▼ + Add New


\* Remit-To  ▼

\* Ship-From Address  ▼


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

### General Info

\* Invoice #

\* Invoice Date  

Payment Term NET 60


\* Currency  

Delivery Number

Status Draft

\* Image Scan  No file chosen

Supplier Note

Attachments  [Add File](#) | [URL](#) | [Text](#)

### From

\* Supplier

Supplier Tax ID

\* Invoice-From Address

\* Remit-To Address

\* Ship-From Address

### To

Customer

\* Bill-To Address

Address Location Name

Buyer VAT IDVAT

Ship To Address

Address Location Name

Procurement Specialist

Purchase Order

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:

Image Scan  No file chosen

PO Line

S000225355-3  Clear



## 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 HEADER level, IN THE TOTALS section 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)

Lines  Line Level Taxation

| Type | Description | Qty      | UOM       | Price |   |
|------|-------------|----------|-----------|-------|---|
|      |             | 5.000000 | EA - Each | 59.31 | 296.55 <span style="color: red;">✖</span> |

|   |          |         |                       |
|---|----------|---------|-----------------------|
| <b>PO Line</b> <span style="float: right;">Clear</span> | Contract | Receipt | <b>Bill of Lading</b> |
|   |          | None    |                       |

|                      |                  |                       |                                 |
|----------------------|------------------|-----------------------|---------------------------------|
| Supplier Part Number | PO Tax Reference | Ancillary Part Number | Tax Legal Wording (Reqd for EU) |
|                      | None             |                       | Select                          |

Billing

|              |                                    |   |                                    |
|--------------|------------------------------------|---|------------------------------------|
| Tax          | <input type="text" value="0.000"/> | % | <input type="text" value="0.000"/> |
| Total Tax    |                                    |   | 0.00                               |
| Net Total    |                                    |   | 0.00                               |
| <b>Total</b> |                                    |   | <b>0.00</b>                        |

lete Cancel Save as Draft Calculate **Submit**

# How to Invoice an Open Purchase Order

If you received a purchase order that contains several lines that you will be supplying 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.**

Lines ☐ Line Level Taxation

| Type                  | Description        | Qty      | UOM                             | Price  |                      |  |
|-----------------------|--------------------|----------|---------------------------------|--------|----------------------|--|
|                       | January service    | 1.000000 | LB - Pound                      | 1.192  | 1.19                 |  |
| PO Line               | SRG NA-10000526-11 |          | Service/Time Sheet Line         | None   | Contract             | Receipt  |
|                       |                    |          |                                 |        |                      | None   |
| Bill of Lading        |                    |          | Credit Line                     | None   | Supplier Part Number | PO Tax Reference   |
|                       |                    |          |                                 |        | 01598700             | (Rec Tax Amount= .00;NonRec Tax Amount= .00;TaxGroupCode=EXE;GoodsTaxRateCode=1) |
| Ancillary Part Number |                    |          | Tax Legal Wording (Reqd for EU) | Select | Billing              |  |
|                       |                    |          |                                 |        | 6173100050000000     |  |

| Type           | Description      | Qty      | UOM                     | Price |                      |   |
|----------------|------------------|----------|-------------------------|-------|----------------------|---|
|                | February service | 0.000000 | LB - Pound              | 1.773 | 0.00                 |   |
| PO Line        | None             |          | Service/Time Sheet Line | None  | Contract             | Receipt   |
|                |                  |          |                         |       |                      | None  |
| Bill of Lading |                  |          | Credit Line             | None  | Supplier Part Number | PO Tax Reference  |
|                |                  |          |                         |       |                      | (Rec Tax Amount= .00;NonRec Tax Amount= .00;TaxGroupCode=EXE;Go |

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

Select Customer

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 |                                    |
|-----------|--------------|----------|------------------|---------------|--------|------------------------------------|
| TEST2TEST | 16/09/2021   | Approved | 253-538125687    | 3.63 EUR      | No     | All                                |
| 21F06316  | 26/07/2021   | Approved | SRG EU-998000083 | 18,944.97 EUR | No     | Abandoned                          |
| 21F06177  | 20/07/2021   | Approved | 253-538125297    | 1,080.00 EUR  | No     | Approved                           |
| 21F06160  | 20/07/2021   | Approved | SRG EU-998000083 | 13,101.15 EUR | No     | Credit notes                       |
| 21F05872  | 12/07/2021   | Approved | SRG EU-998000083 | 11,335.76 EUR | No     | Disputed                           |
| 21A00673  | 12/07/2021   | Approved | None             | -540.00 EUR   | No     | Disputes with a supplier response  |
| 21F05873  | 12/07/2021   | Approved | 253-538125098    | 900.00 EUR    | No     | Disputes without supplier response |


Unpaid invoices

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 |
|-----------|------------|---------------------------------------|------------------|---------------------|--------|
| Paid      | PO #       | Invoice #                             | Status           | Invoice Date        | Pa     |
| 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     |

- 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

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                  |                |   |

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

### Comments

[Mute Comments](#) ▼

Enter Comment

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

Attachments [Add File](#) | [URL](#)

### History

## 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

To download a copy from the invoice 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 [i](#)

[Create Invoice from PO](#)
[Create Invoice from Contract](#)
[Create Blank Invoice](#)
[Create Credit Note](#)

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

## Invoice #1435872-0001-01 [Back](#)

### General Info

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

### Bill To & Ship To

Supplier

Invoice From

Remit To

Ship From

Supplier Tax ID

Customer

Bill To Address

VAT ID

Address Location Name

Ship To Address

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.

Invoice Date  
January 27, 2020

# Invoice

## 101654

|           |         |              |  |
|-----------|---------|--------------|--|
| <b>To</b> |         | <b>From</b>  |  |
| Bill To   | Ship To | Invoice From |  |

|                                    |                               |
|------------------------------------|-------------------------------|
| Buyer Tax ID<br>430616823          | Supplier Tax ID<br>26-3645246 |
| Attn/Ref<br>Guardian Ordering User |                               |

**Invoice Details**

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

Discount Amount  
0.0

Bill Of Lading  
None

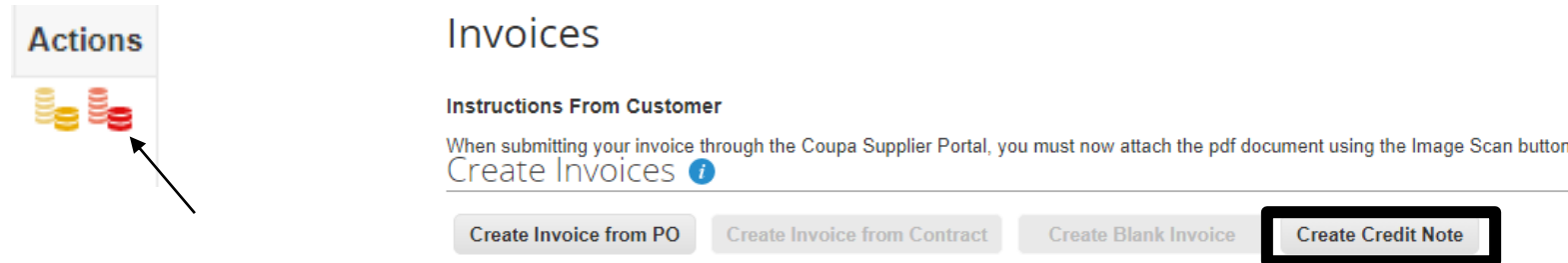
| Item | PO                    | Description       | Supplier Part Number | Qty | Units | Unit Price | Total      |
|------|-----------------------|-------------------|----------------------|-----|-------|------------|------------|
| 1    | 26-3645246-11         | Transit WIP Racks |                      | 15  | Piece | \$350.00   | \$5,250.00 |
|      | Auxiliary Part Number |                   |                      |     |       |            |            |
|      | None                  |                   |                      |     |       |            |            |

|  |                                 |                    |
|--|---------------------------------|--------------------|
| Supplier Notes<br>- Already sent invoice to Ripleyaccounts payable | Taxes                           |                    |
|  | Taxable Amount Charged Per Rate | Total Tax Per Rate |
|  | \$5,250.00 at TAX (0.0%)        | \$0.00             |
|  | <b>Totals</b>                   |                    |
|  | Taxable Amount                  | \$5,250.00         |
|  | Amount Excluding Tax            | \$5,250.00         |
|  | Total Tax                       | \$0.00             |
|  | Total Payable                   | \$5,250.00         |



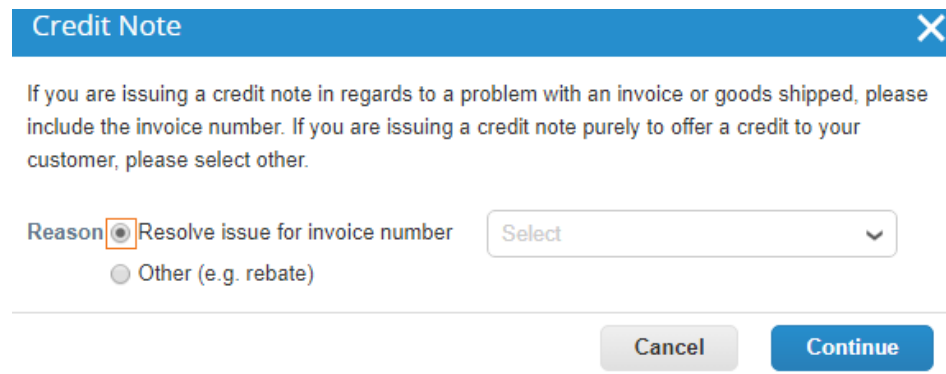
## Credit Notes

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 screenshot shows the 'Invoices' section of a software interface. On the left, there is an 'Actions' menu with a red coins icon highlighted by an arrow. The main area is titled 'Invoices' and contains instructions from a customer: 'When submitting your invoice through the Coupa Supplier Portal, you must now attach the pdf document using the Image Scan button'. Below this is a 'Create Invoices' link with an information icon. At the bottom, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note', which is highlighted with a black border.

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**



The 'Credit Note' dialog box has a blue header with a close button. The main text reads: 'If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer, please select other.' Below this, there are two radio button options: 'Reason' with 'Resolve issue for invoice number' (selected) and 'Other (e.g. rebate)'. A dropdown menu is next to the selected option, showing 'Select'. At the bottom, there are 'Cancel' and 'Continue' buttons.

## 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.

### Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer, please select other.

Reason  Resolve issue for invoice number

Other (e.g. rebate)

# cXML Errors

If you have enabled a cXML connection with Guardian for orders and/or invoices and you have received a notification that an 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.

[Admin](#) [Customer Setup](#)

## Admin

- Users
- Merge Requests
- Merge Suggestions
- Requests to Join
- Legal Entity Setup
- Coupa Verified
- Fiscal Representatives
- Remit-To
- Additional CaaS Information
- sFTP Accounts
- cXML Errors**

### cXML purchase order

[Purchase Order](#) [Invoice](#)

View All  Search

| Document ID | PO Number  | Created Date      | Category                           | Request error  | Response error |
|-------------|------------|-------------------|------------------------------------|--|----------------|
| 562518      | G000562518 | 15/12/23 12:43 pm | No status returned when sending PO | <?xml version="1.0" encoding="UTF-8"?> <!DOCTYPE cXML SYSTEM > <cXML xml:lang="en-US" payload' 12-12T13:24:35Z"> <Header> <From> ... |                |
| 562518      | G000562518 | 15/12/23 12:43 pm | Connection to supplier failed      | No status element in setup response: This URL has no default content configured. Webhook.site</a>                                    |                |

Per page 15 | 45 | 90

If you have any additional questions or comments, please let us know, we would like to hear from you. Please send us an email to [globalSE@guardian.com](mailto:globalSE@guardian.com)