One World. Made Better.™

Coupa Supplier Portal – Supplier Manual

March 3, 2022

GUARDIAN® INDUSTRIES

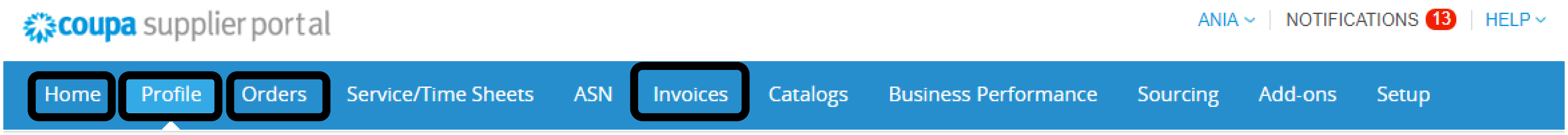
Introduction to Coupa Supplier Portal (CSP)

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

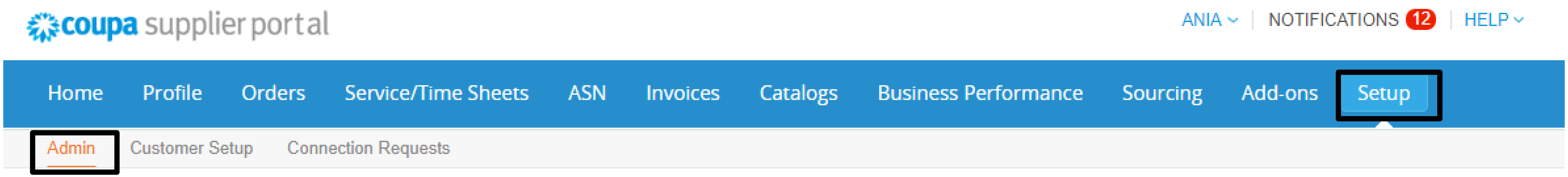
INVOICES -in the **Invoices** section you can view all created invoices and verify their current status



Introduction to Coupa Supplier Portal (CSP)

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

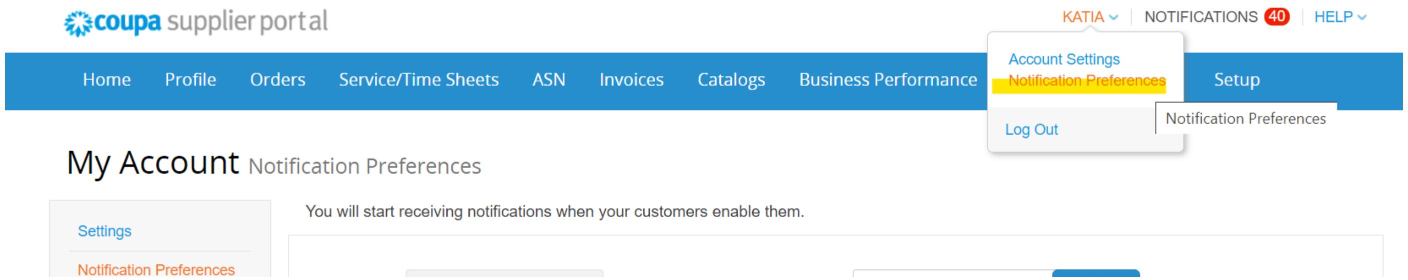
- User management – managing users' permissions and accesses;
- Legal entity setup;
- Payment preferences setup



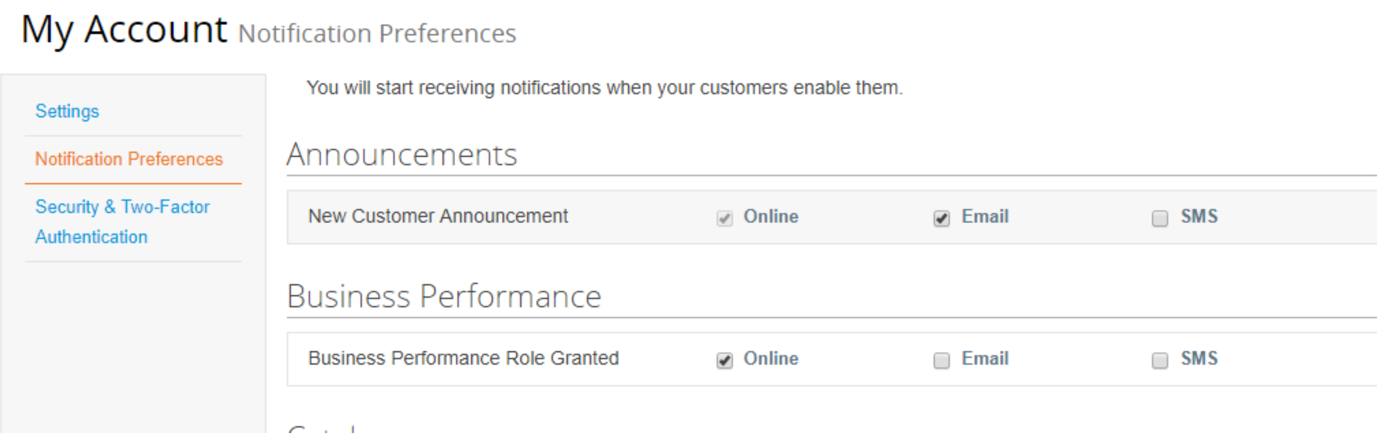
You can change the language at the bottom of each page:

Notifications

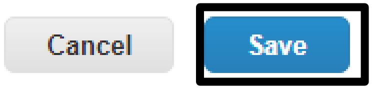
NOTIFICATIONS – You can set your notifications preferences in the top right corner by clicking in your username, then notification preferences. window:



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**



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Registering to Coupa Supplier Portal

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

Guardian Industries Registration Instructions - Action Required

Powered by

lello GLASS-[redacted] 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

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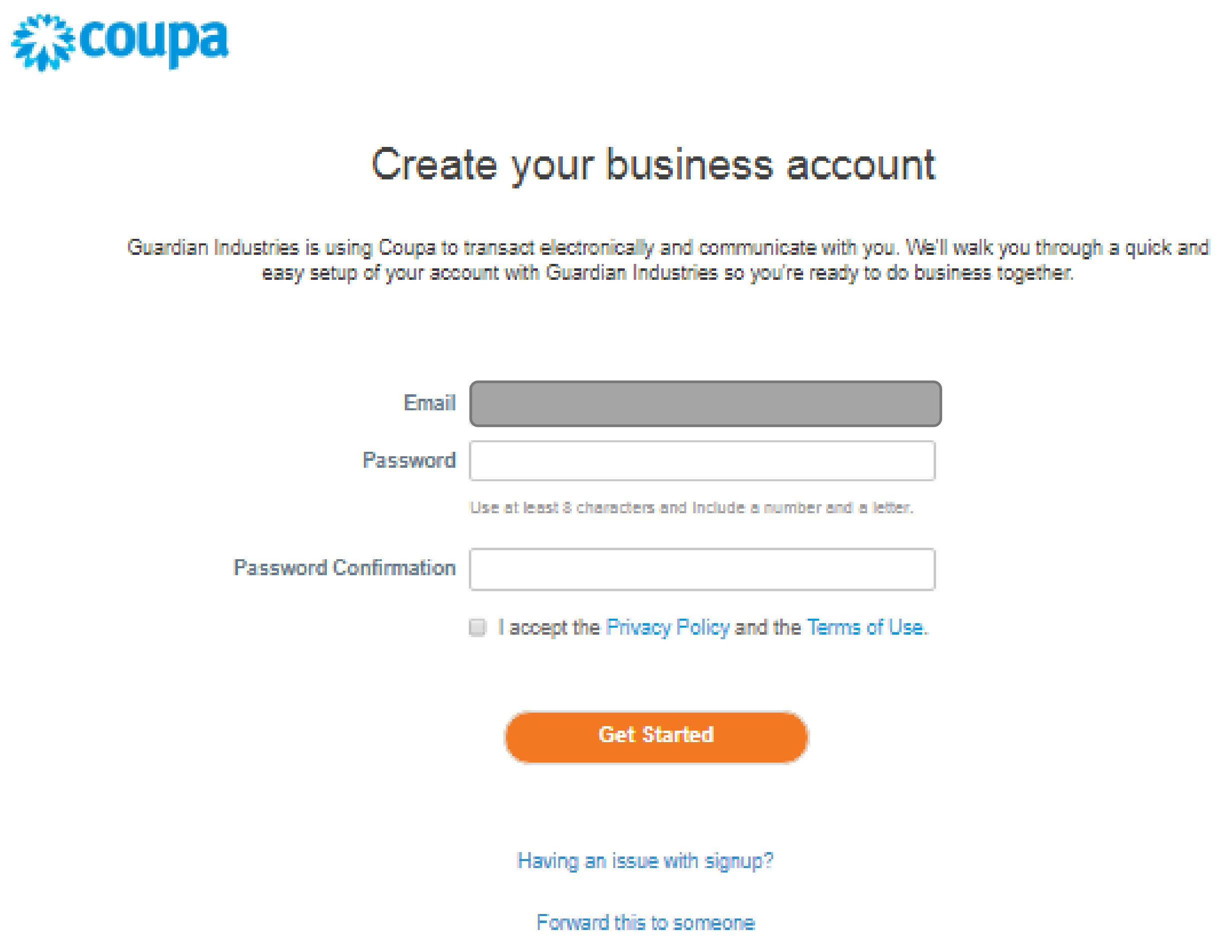
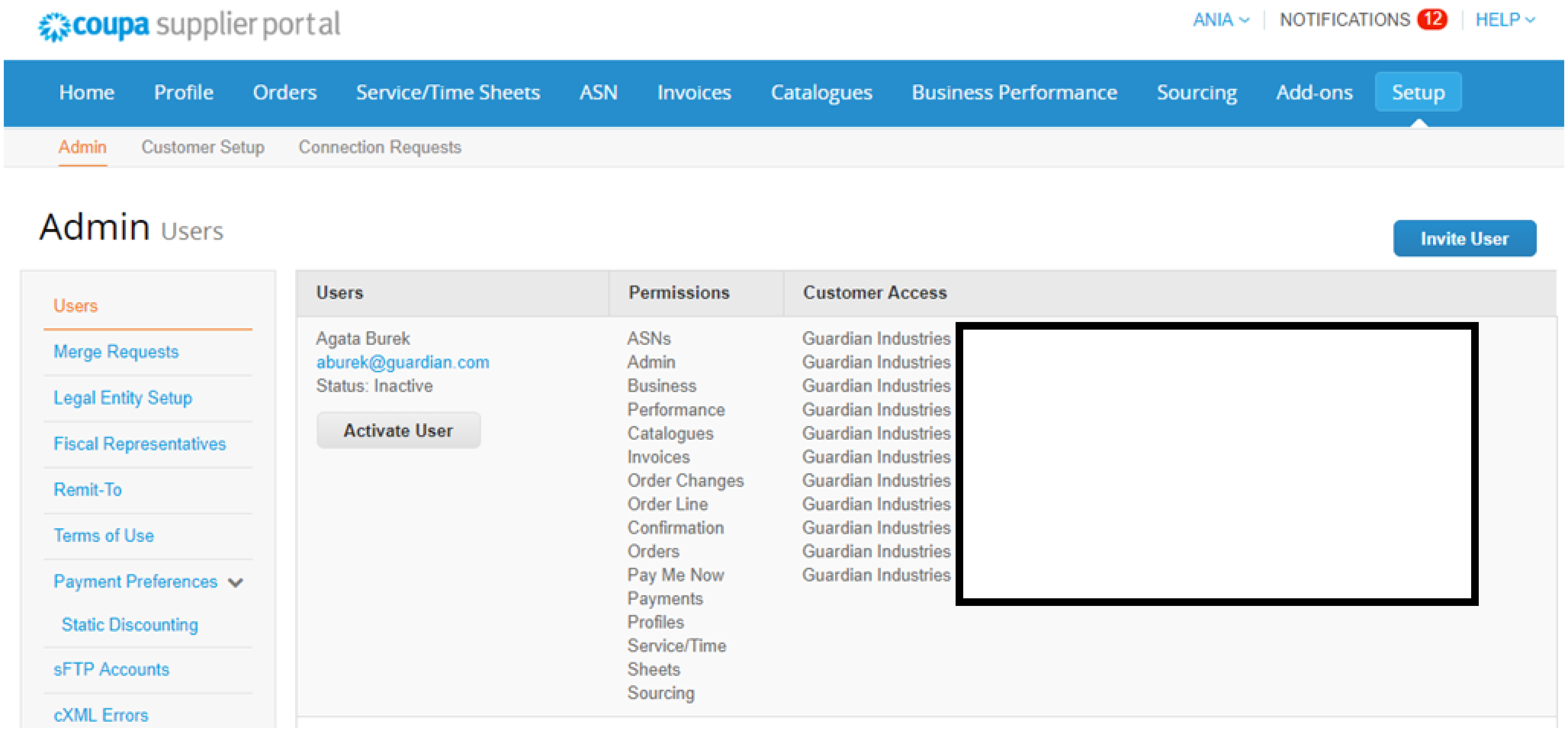
After clicking the button, you will see the registration form. Please, fill in your name, surname, create a password, accept the Privacy Policy and Terms of Use. Your company name and email will already be populated. Then click the **Get Started** button.



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.



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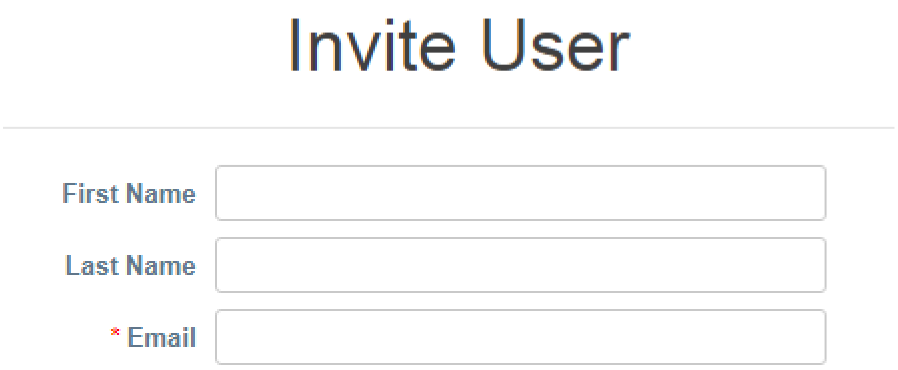
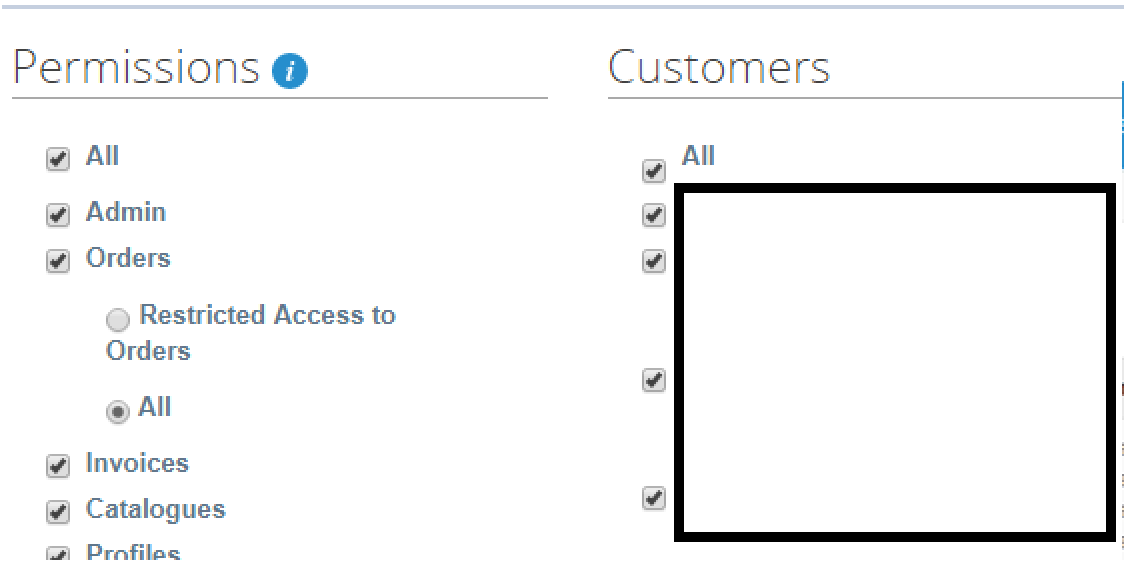
Inviting new users

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

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





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

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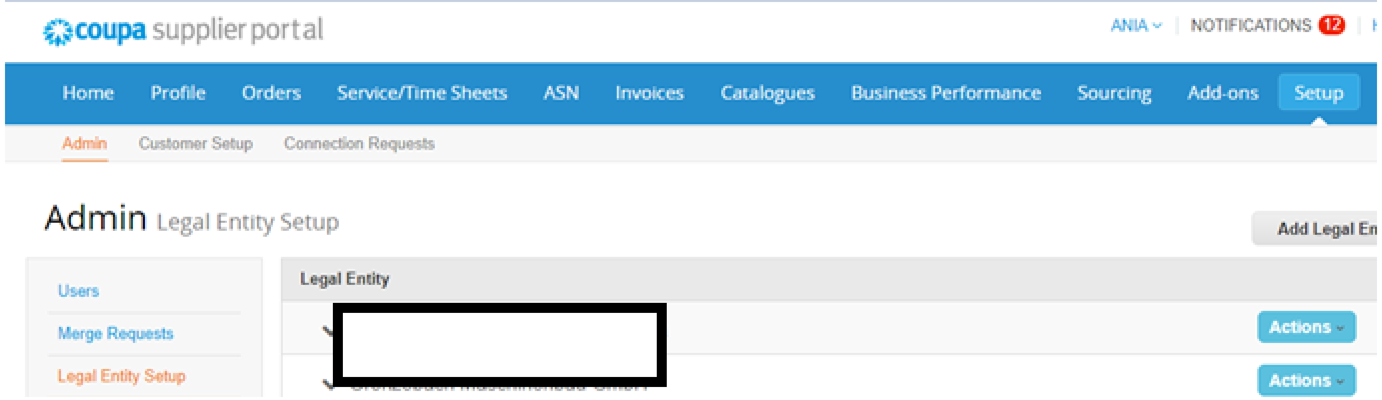
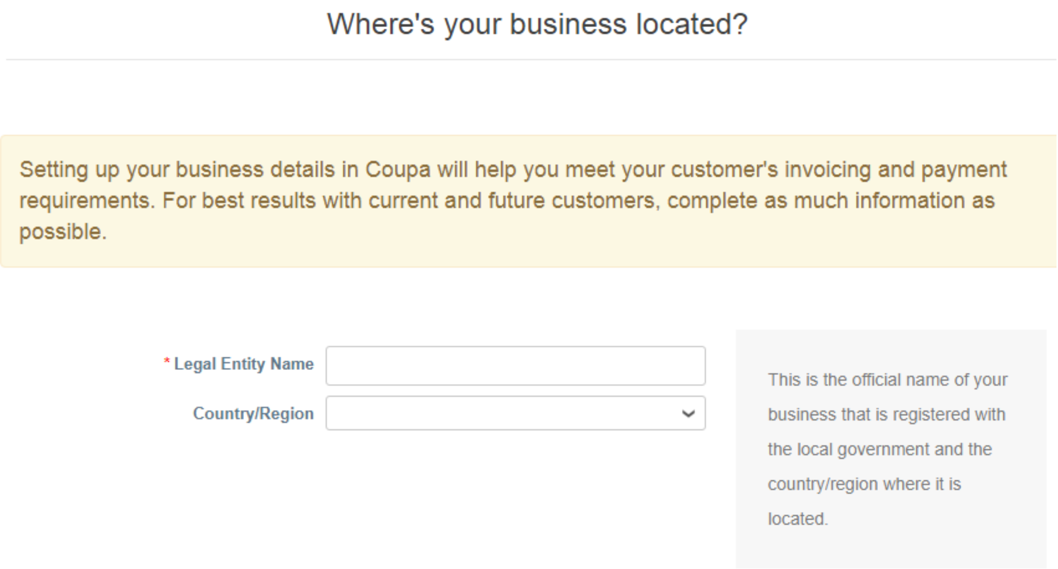
Legal Entity Setup

To setup a legal entity, go to the **Legal Entity Setup** option. Then click **Add Legal Entity** and fill in all the fields marked with a red asterisk.



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



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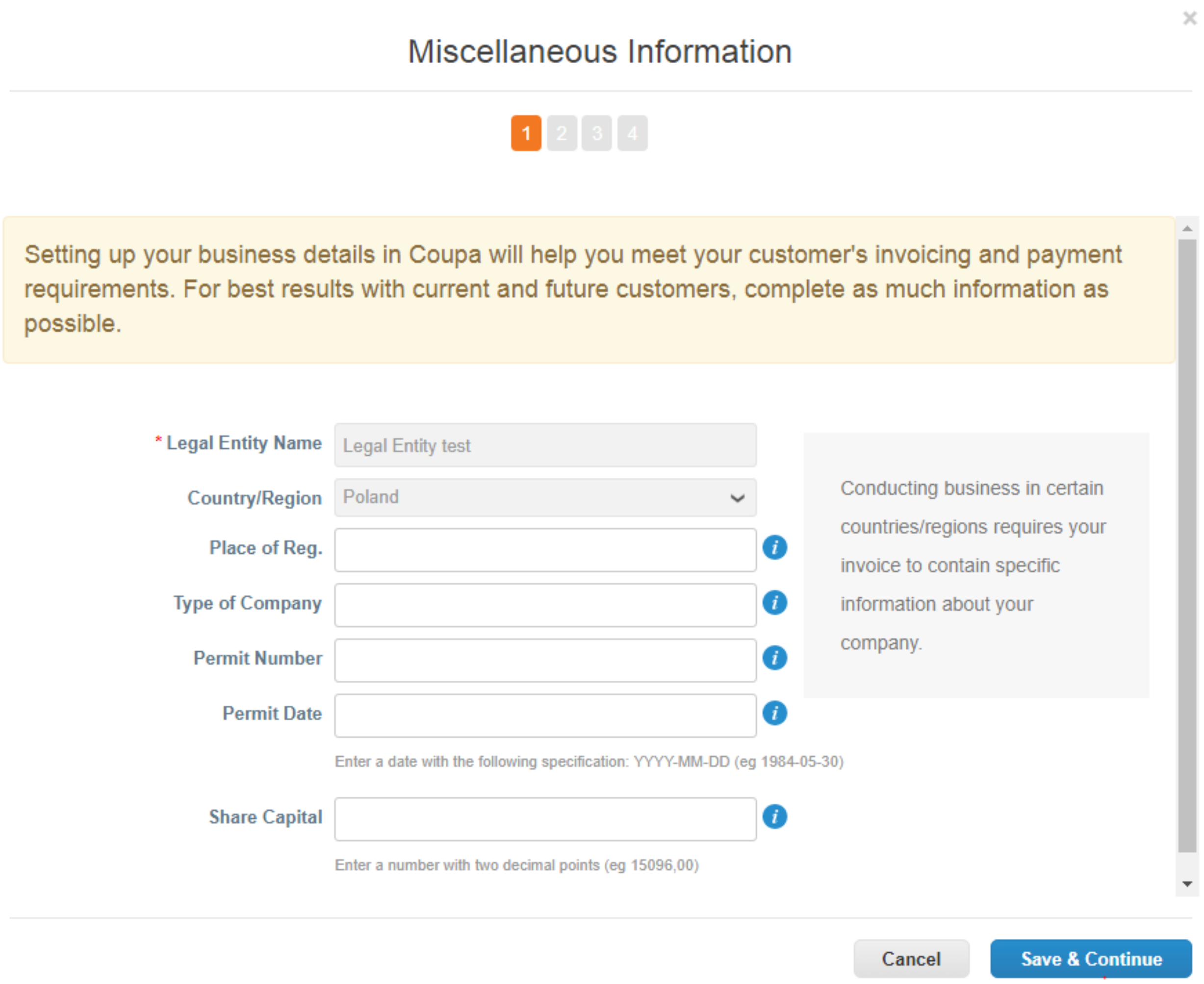
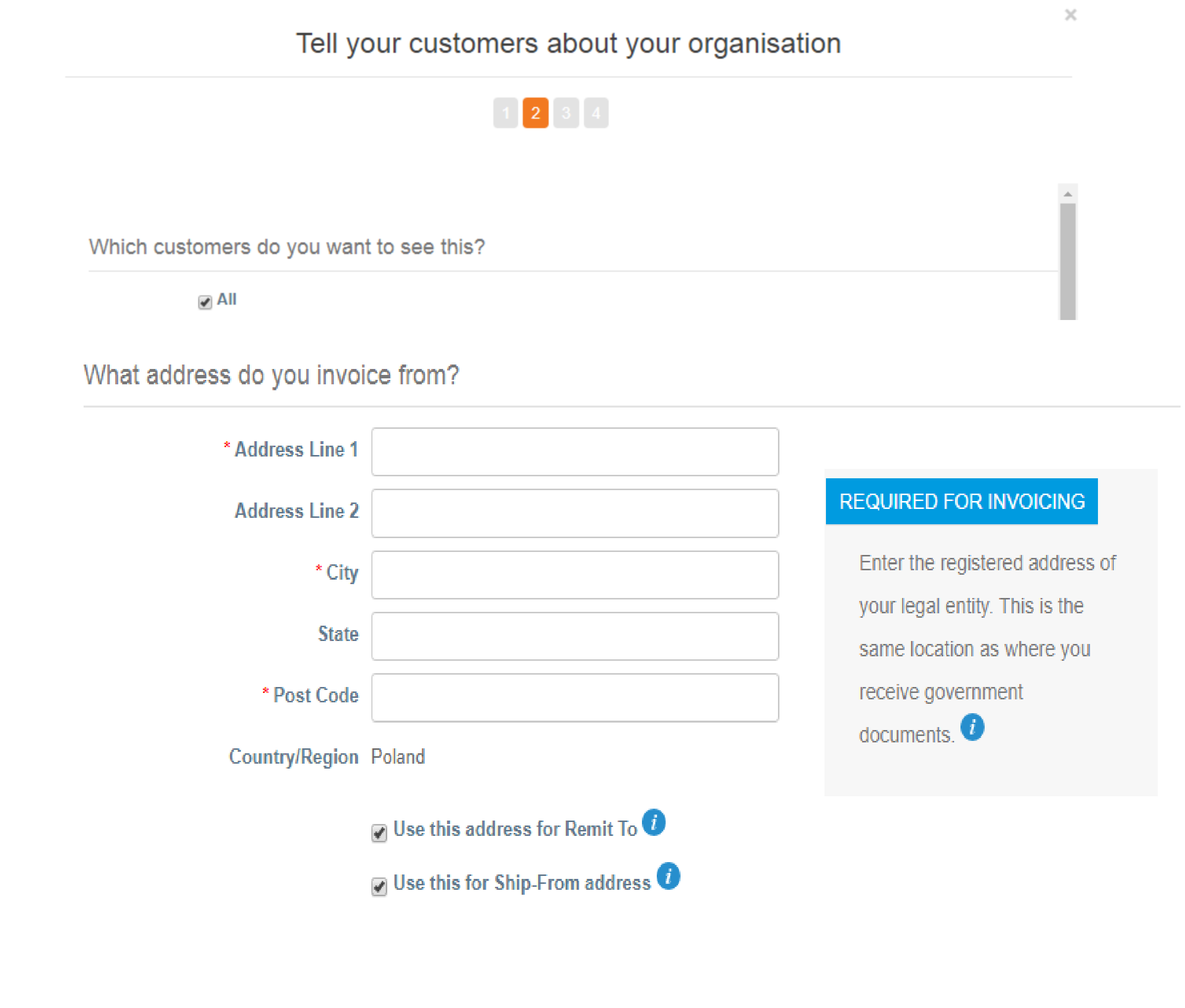
In the next window, you need to fill in the address from which the invoices will be issued, as well as indicate whether the address provided is used for remittances or as a sender address. Unchecking these options allows you to add other addresses.





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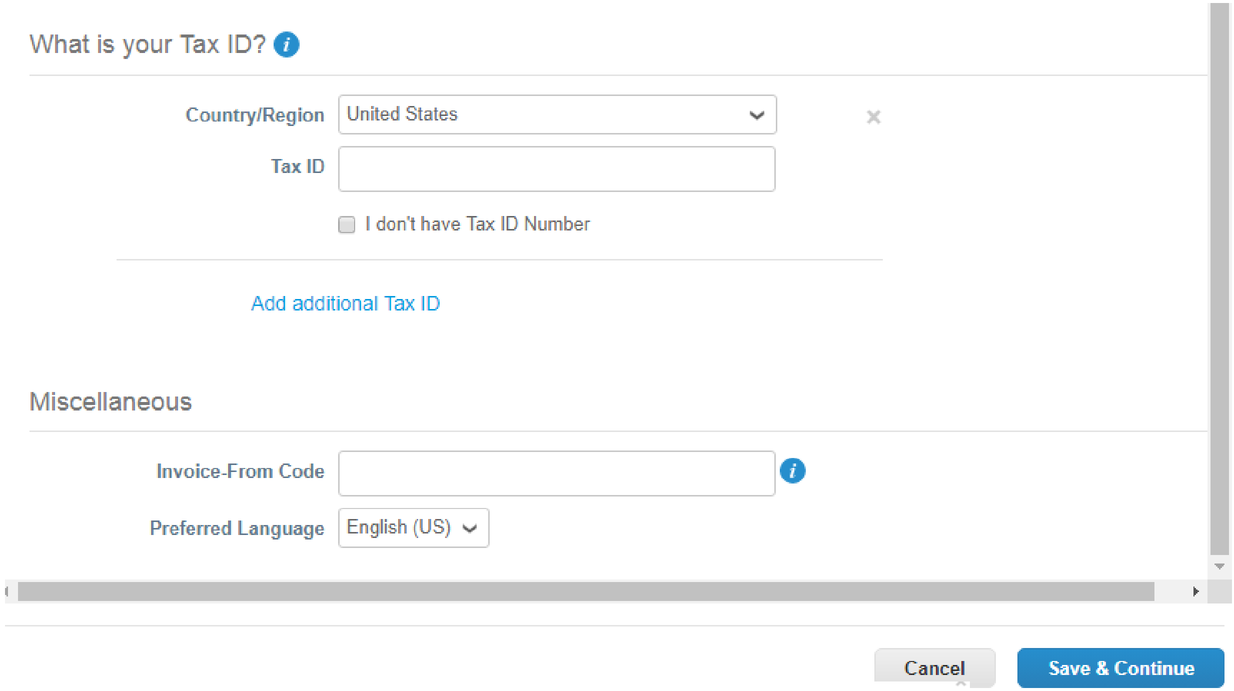
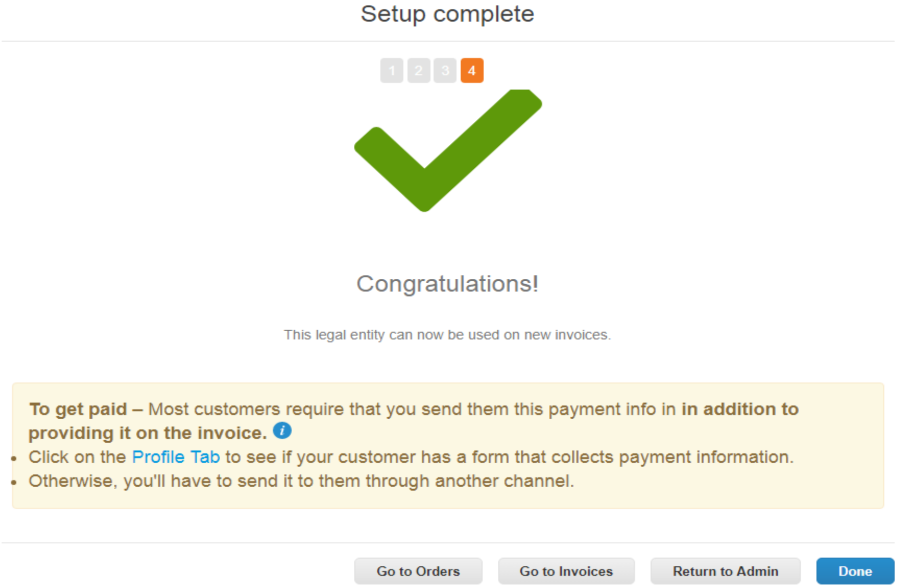
It is also mandatory to enter your Tax ID number and country of registration. In the **Miscellaneous** section you can select your preferred language.
After updating all the fields, save the data by clicking the **Save & Continue** button.



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.



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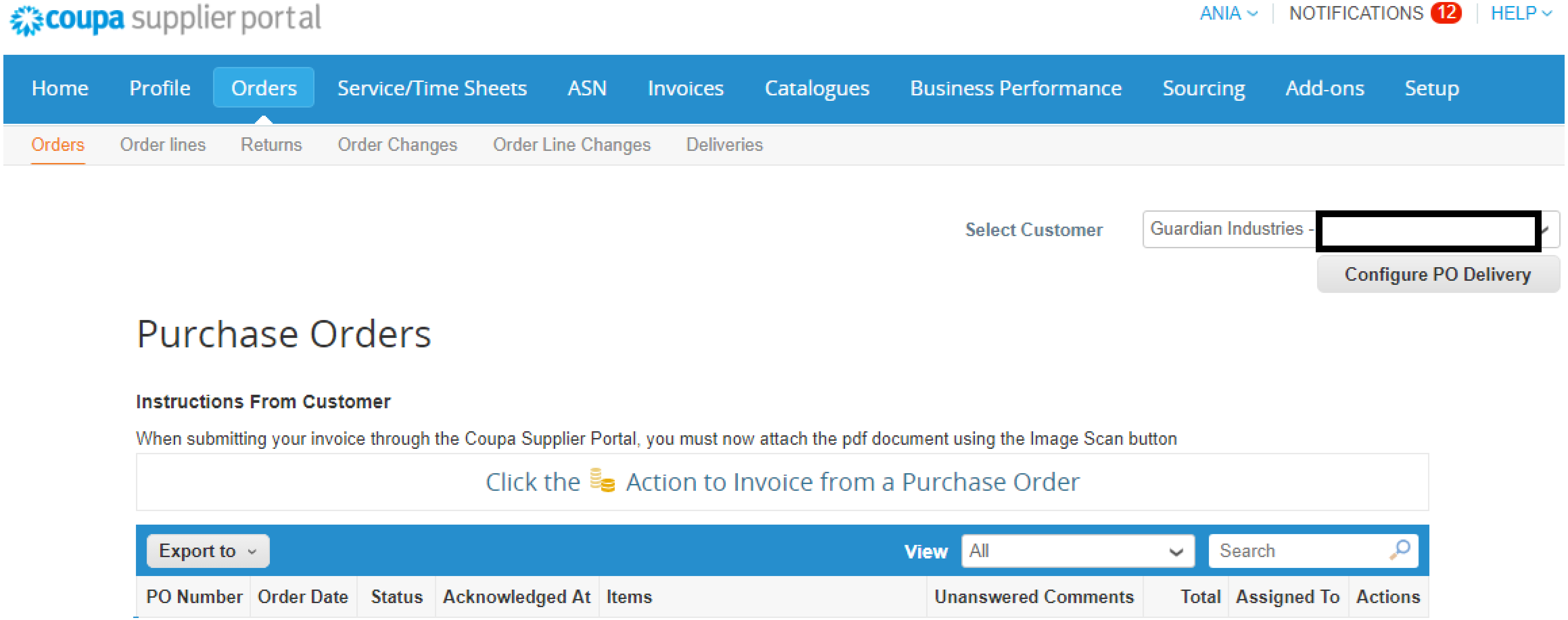
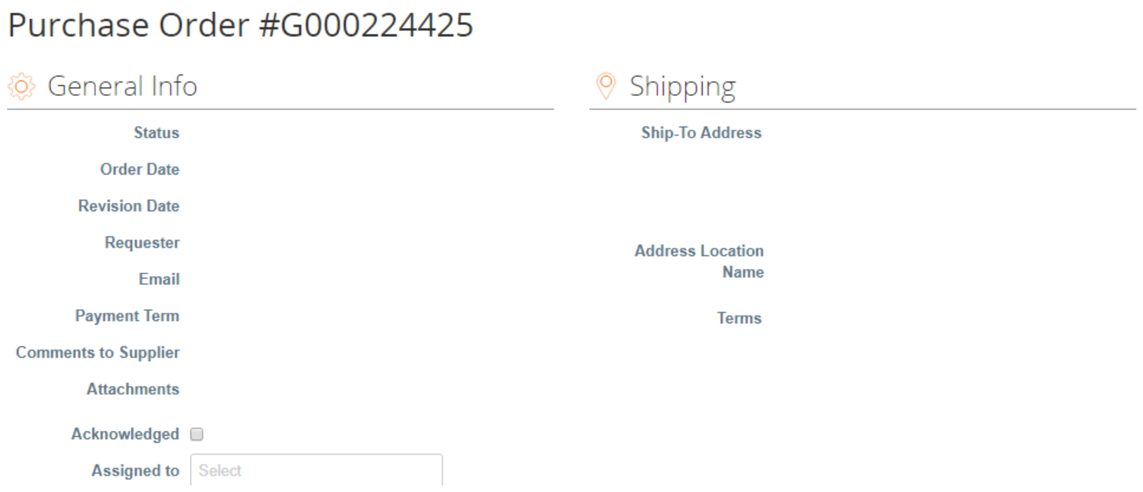
Orders

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

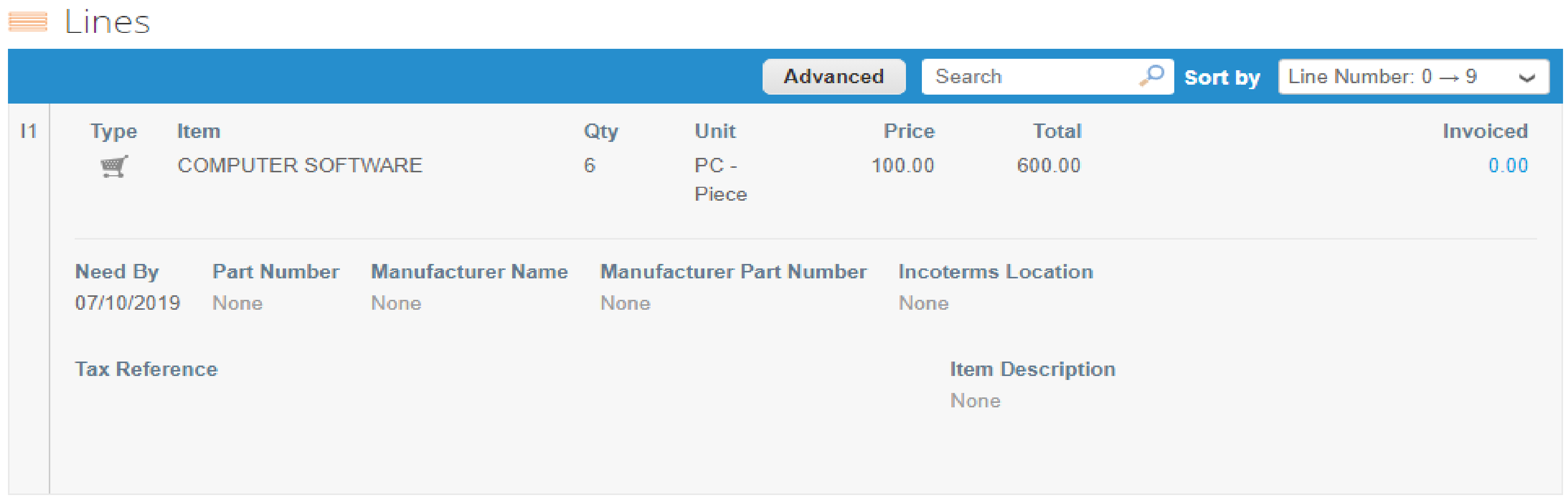


Orders

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



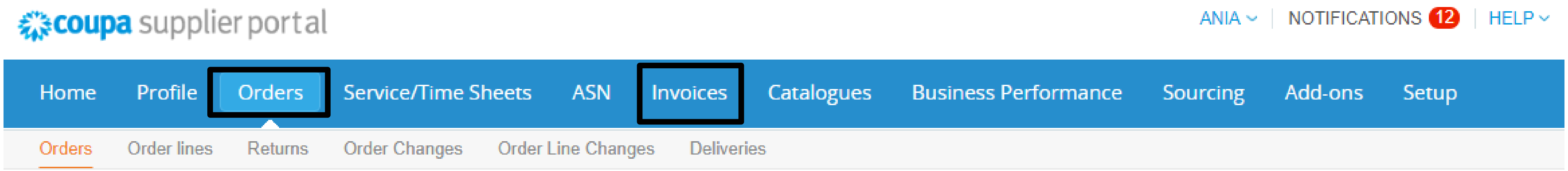
In the **Lines** section you can see the list of Coupe goods/services included in the order. Please make sure that the unit prices and totals are correct.



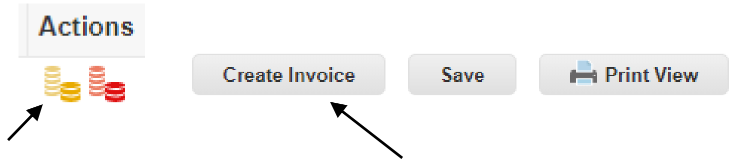
If an order has been closed or cancelled, it is not possible to create an invoice for it.

Invoices

To create an invoice, go either to the **Orders** or **Invoices** tab.

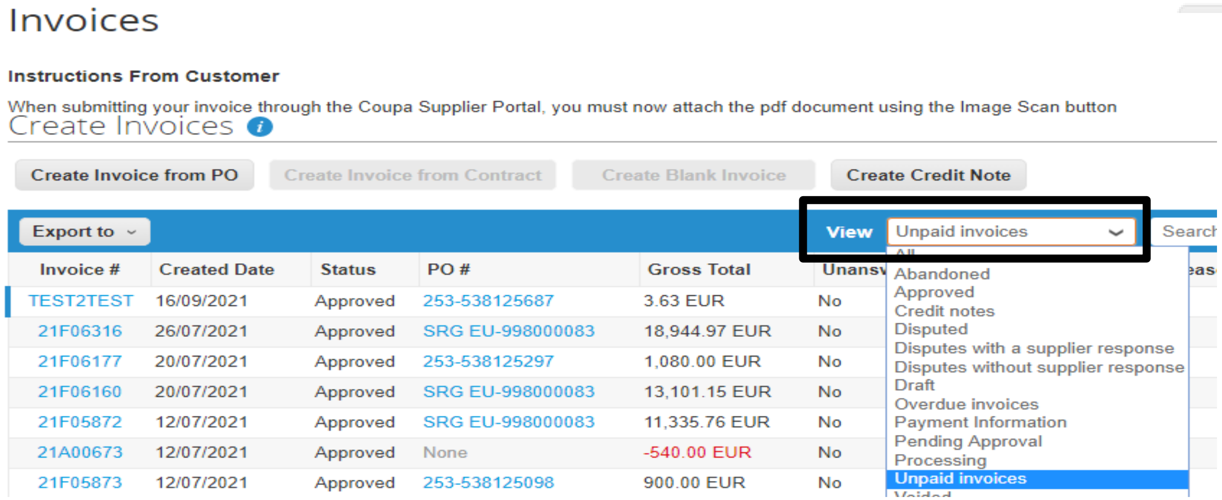


To create an invoice from the **Orders** tab, click the gold coins icon in the **Actions** column. You can also create an invoice after opening an order by clicking the **Create Invoice** button.

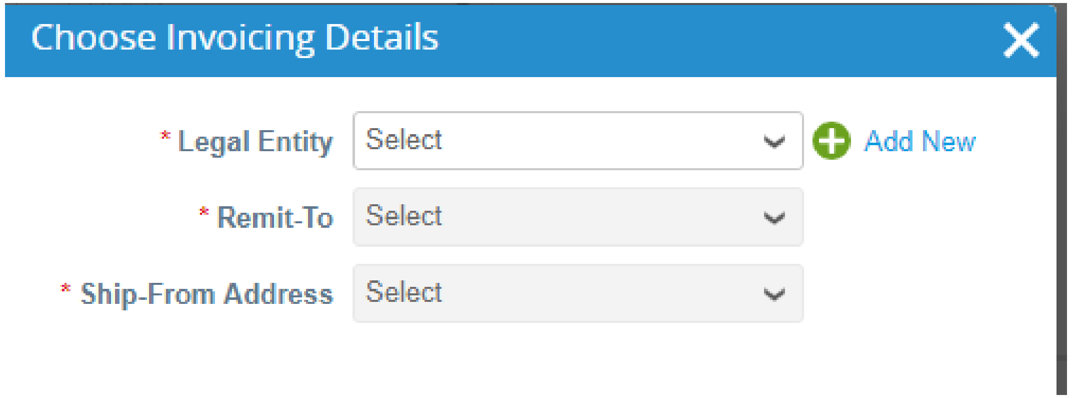


In the **Select Customer** drop-down list, you can select a Customer whose Orders you want to view.

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.



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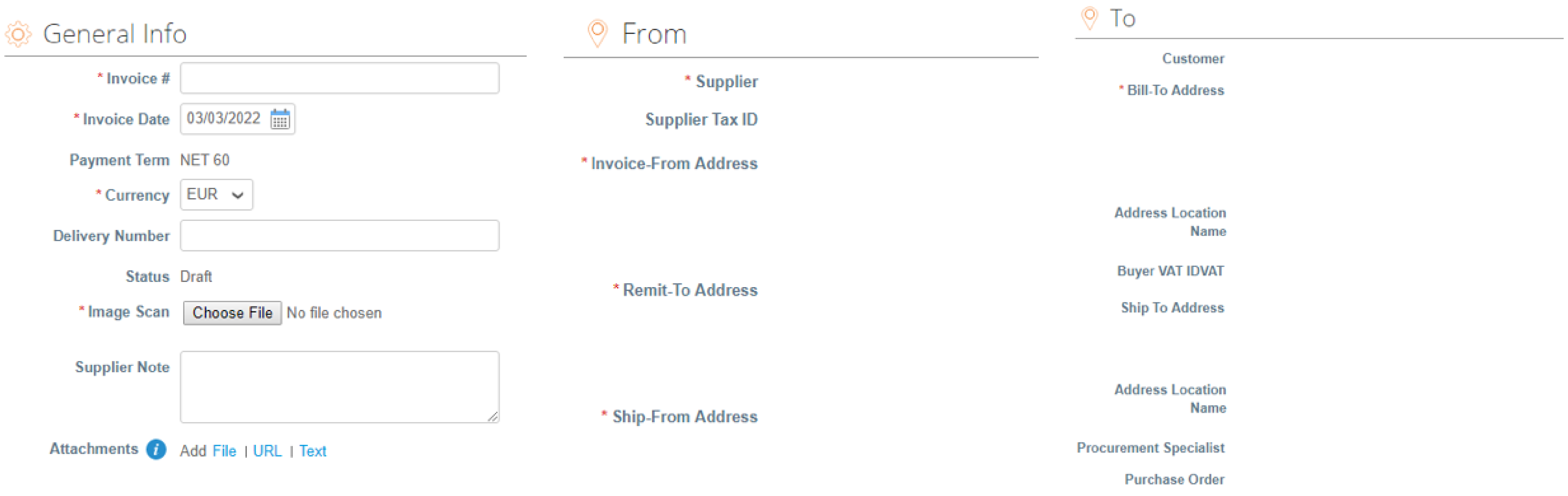
All fields marked with a red asterisk are mandatory. Verify whether the **General Information** and **From** and **To** sections are filled out correctly.



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:

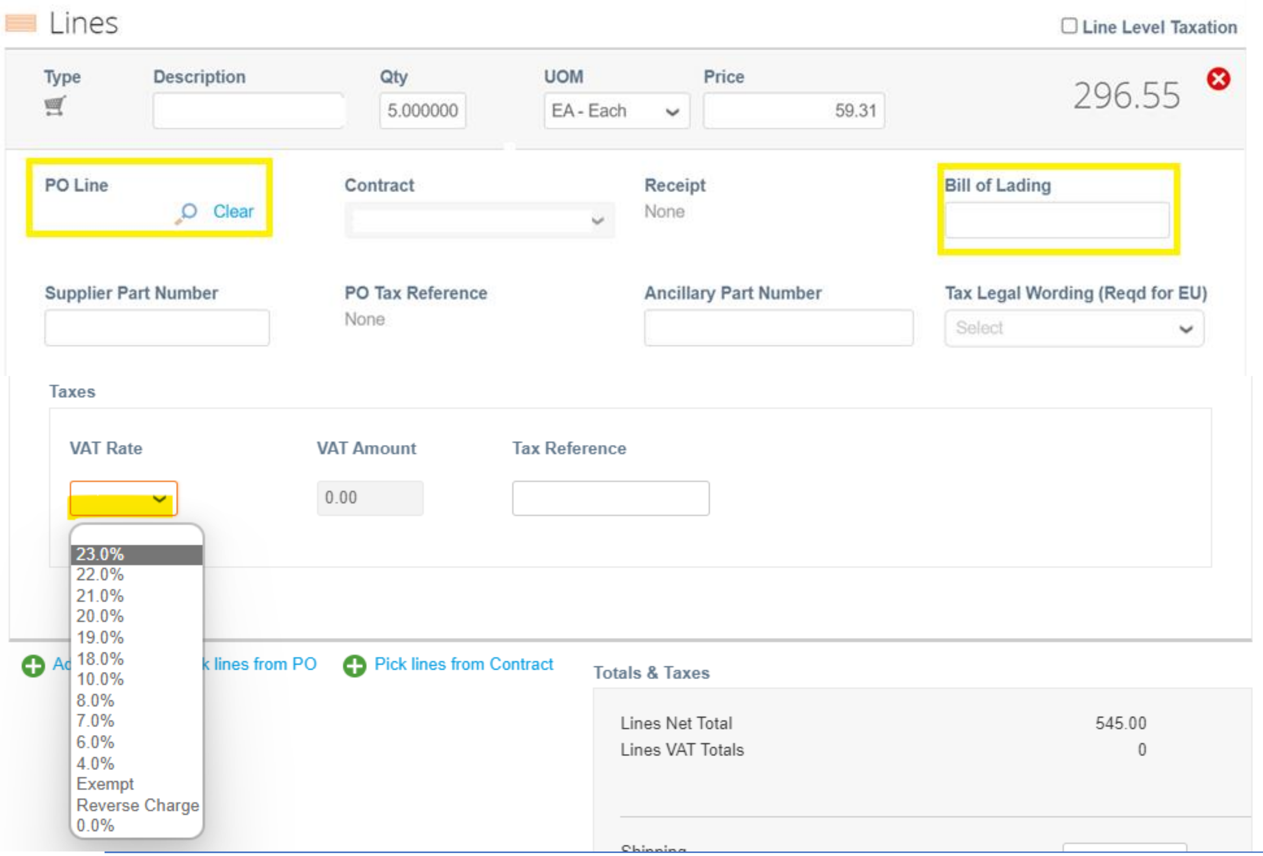
PO lines

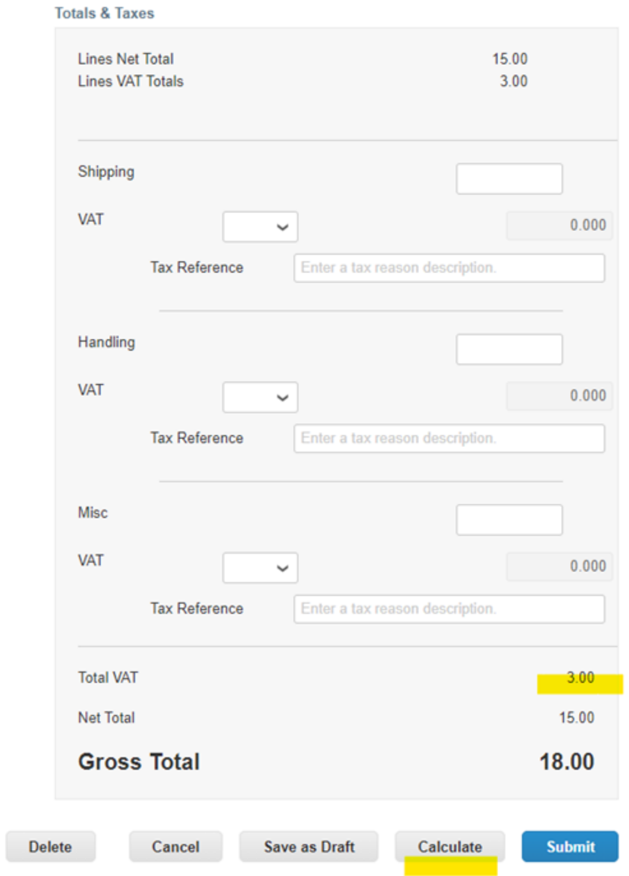
It's important to review that the correct purchase order lines are selected in each line. As well as filling the Bill of lading in each line with your internal folio and at the line level choose the appropriate tax rate from the "**VAT Description**" dropdown.

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

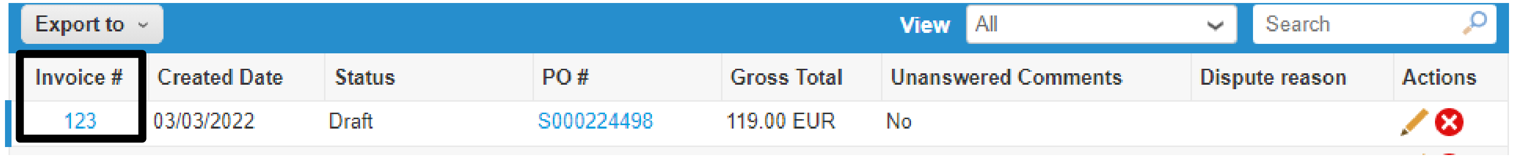
When complete, select "**Calculate**" to see the gross value of the invoice.

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

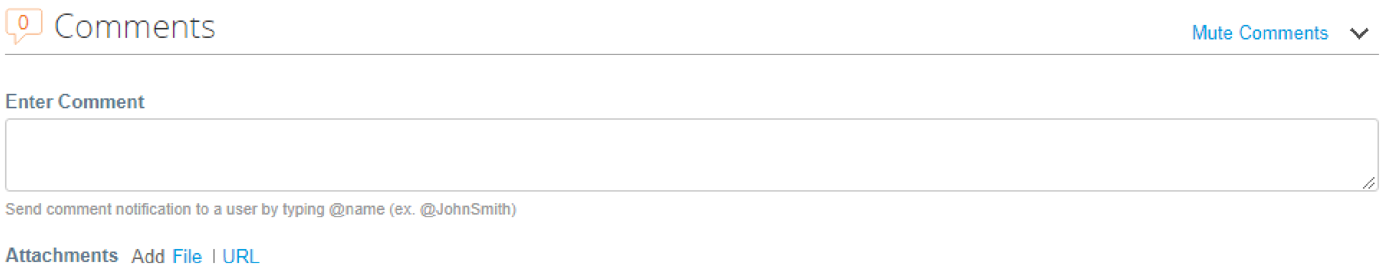




You can view the details of an invoice by clicking on its number:



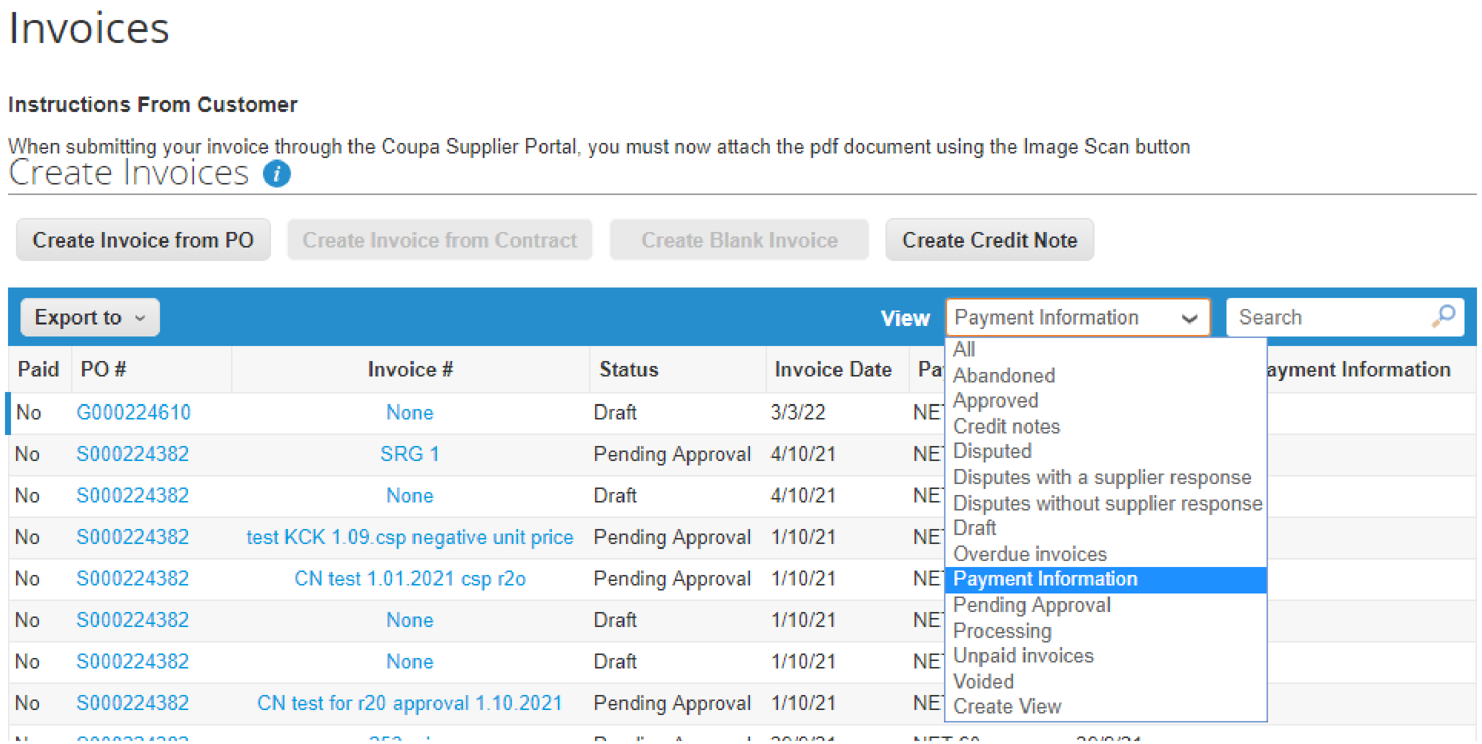
You can also see the comments and history of the selected invoice in the invoice details.

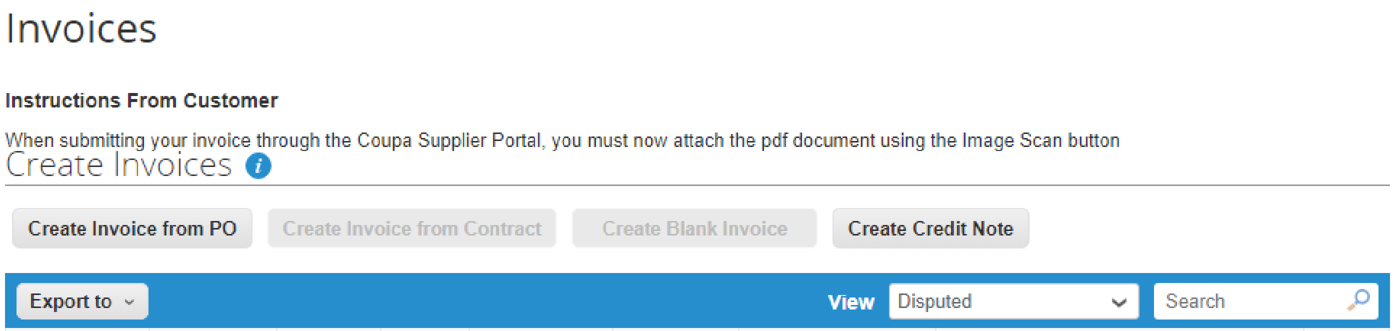


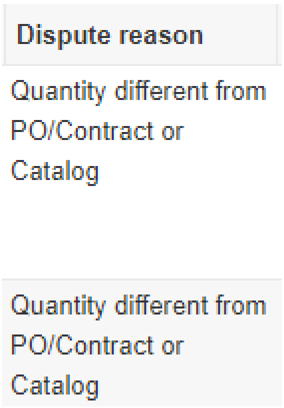
Invoice statuses:

- **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

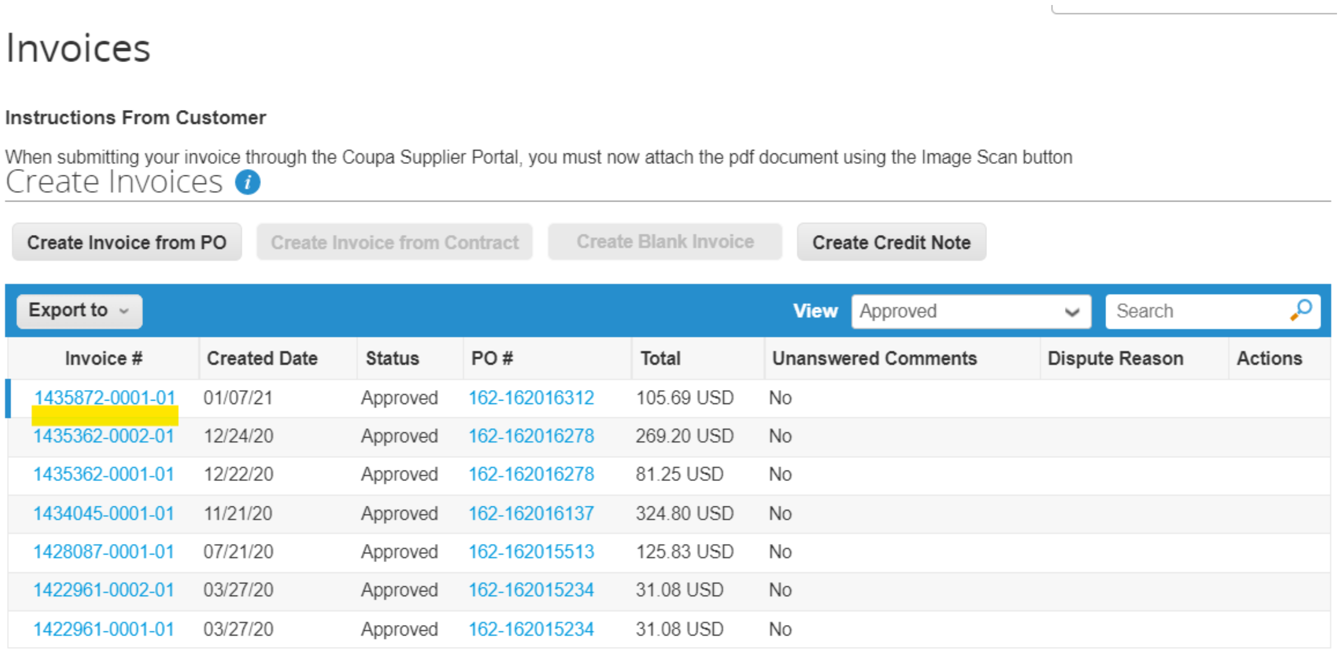
In the **Invoices** tab you can create and customize your own view. After modifying the view and applying the **Approved** filter, you can check the payment information. You can also check the **Dispute reason** for any Disputed invoices by using the **Disputed** filter.







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



Invoices

Instructions From Customer

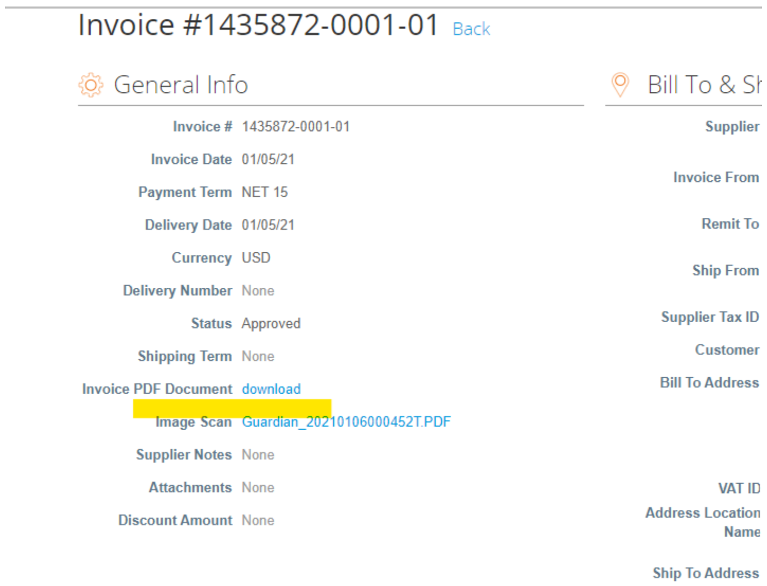
When submitting your invoice through the Coupa Supplier Portal, you must now attach the pdf document using the Image Scan button

Create Invoices

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

Export to | View: Approved | Search

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



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- After clicking on download a window will pop up with the copy of the invoice in this format, and you will be able to save it as PDF.
- You must know that this copy of the invoice is **not a tax invoice.**

Invoice Date
January 27, 2020

Invoice
101654

To		From
Bill To	Ship To	Invoice From
Buyer Tax ID 430616823		Supplier Tax ID 26-3645246
Attn/Ref Guardian Ordering User		

Invoice Details

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

Discount Amount
0.0

Bill Of Lading
None

Item	PO	Description	Supplier Part Number	Qty	Units	Unit Price	Total
1	[illegible] Ancillary Part Number None	Transit WIP Racks		15	Piece	$350.00	$5,250.00

Supplier Notes
- Already sent invoice to Ripleyaccountspayable

Taxes

Taxable Amount Charged Per Rate	Total Tax Per Rate
$5,250.00 at TAX (0.0%)	$0.00

Totals

Taxable Amount	$5,250.00
Amount Excluding Tax	$5,250.00
Total Tax	$0.00
Total Payable	$5,250.00

NOT A TAX INVOICE

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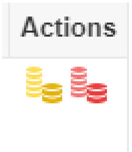
How to create invoice with multiple PO`s?

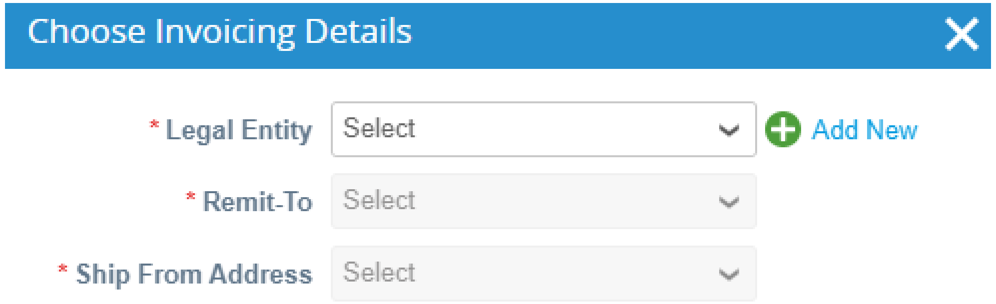
To create Invoice for multiple purchase orders, please go to section “Orders” or “Invoices”

Click on the button „Select Customer” to see Guardian / SRG Global orders.

To create invoice from the Orders tab, please click on the gold icon in section “Actions” or click the button “Create invoice” (available when you open order and PO details are visible for you).

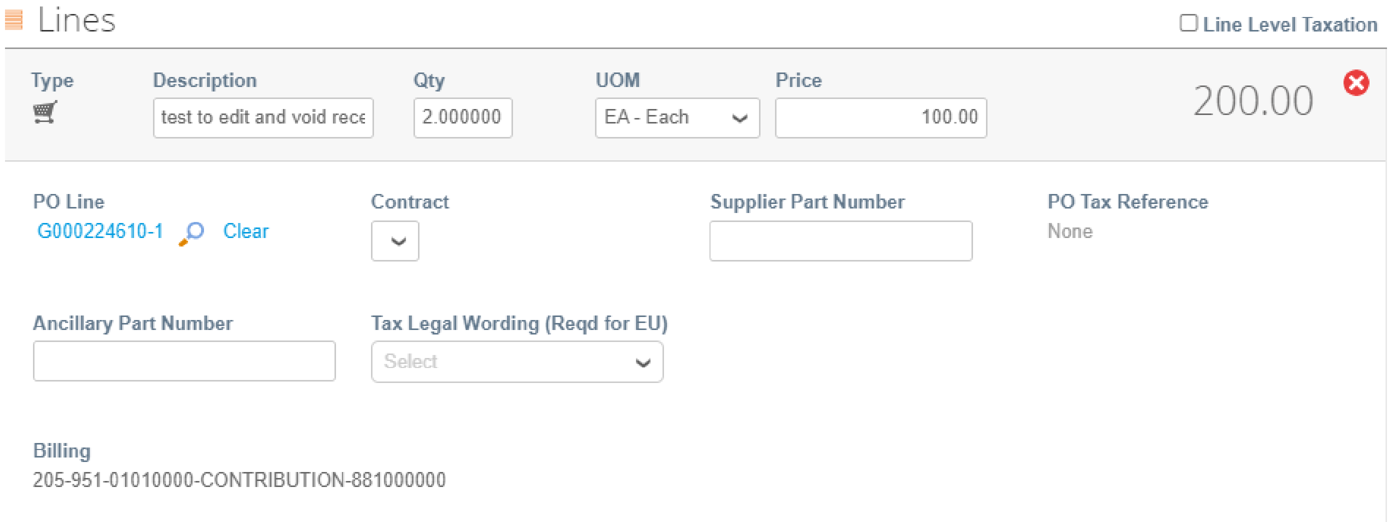


The pop-up windows appear to select the Legal Entity, Remit-to and Ship from Addresses. You can select from existing ones or add new (“Add New” button).

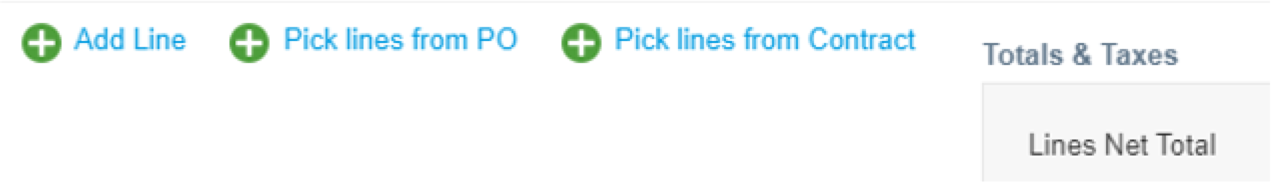


All required fields are marked with asterisk, some of them are filled out automatically based on the information from PO. Please double check information in “General Info”, „From” and „To” sections.

Check the PO line which is selected

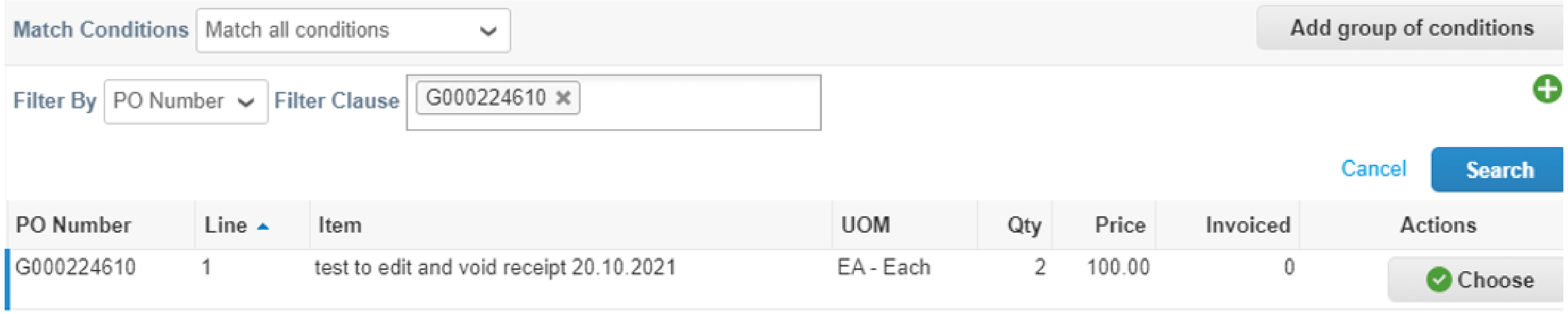


If everything is correct, you can add second PO using button “Add line”

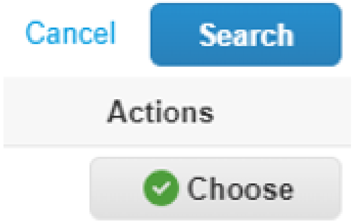


Use magnifying glass icon to select the new PO number

To find available order, please use the “x” button to delete the PO which is currently selected from the field “Filter Clause” and select the new one

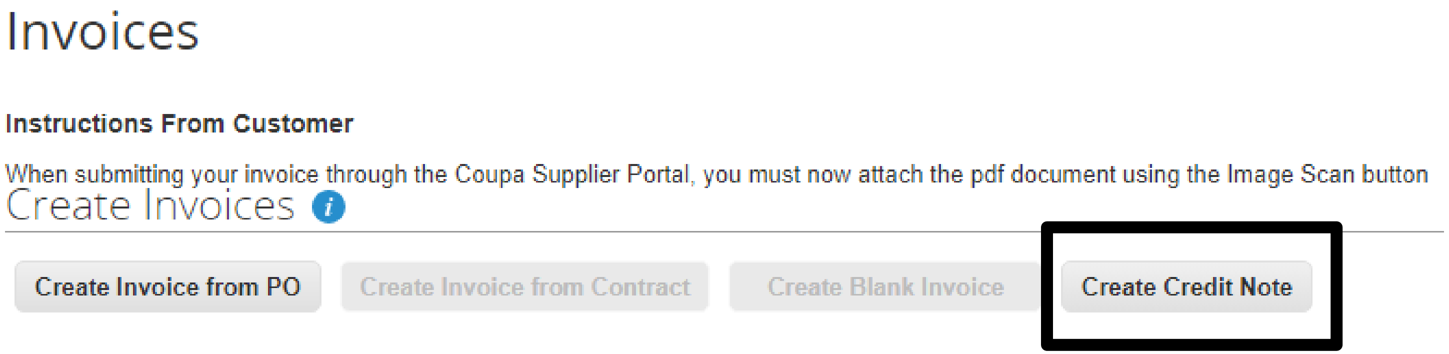


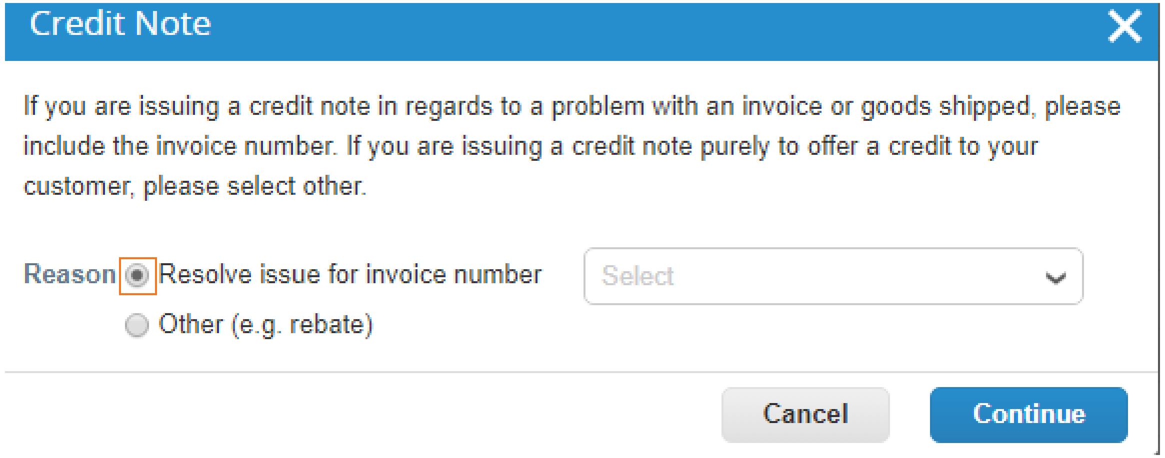
Once done click „Search” and „Choose”



Credit Notes

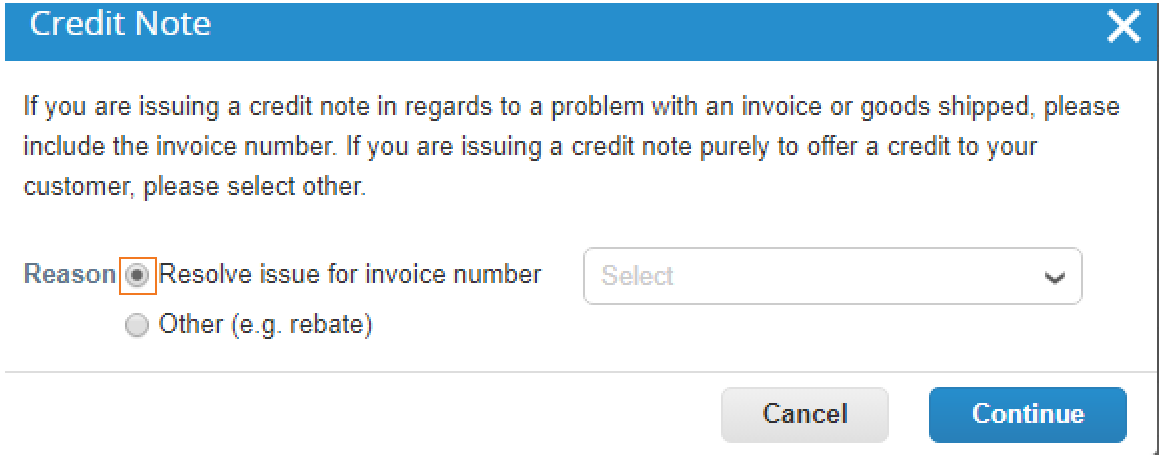
To create a credit note, click on the red coins icon in the **Actions** column. The **Create Credit Note** window will then appear and the system will ask you to provide the reason for creating a credit note. Then select the address and complete the fields marked with an asterisk. Credit notes must be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





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