

One World.  Made Better.™



## Coupa Supplier Portal – Supplier Manual

March 3, 2022



# Registering to Coupa Supplier Portal

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



Guardian Industries Registration Instructions - Action Required



Powered by

hello GLASS- [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 [accounts payable@guardian.com](mailto:accounts payable@guardian.com) and put 'COUPA' in the subject line.

Jeksandra Pozniak  
Guardian Industries



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.



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](#).

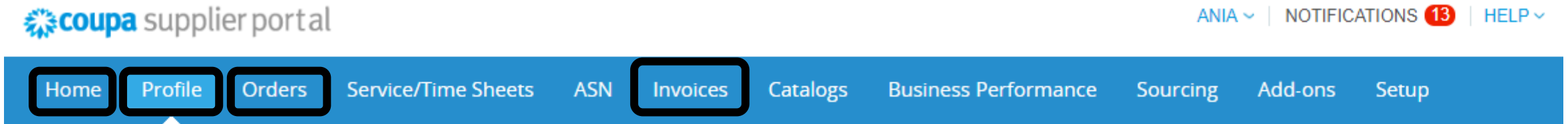
Get Started

[Having an issue with signup?](#)

[Forward this to someone](#)

# Introduction to Coupa Supplier Portal (CSP)

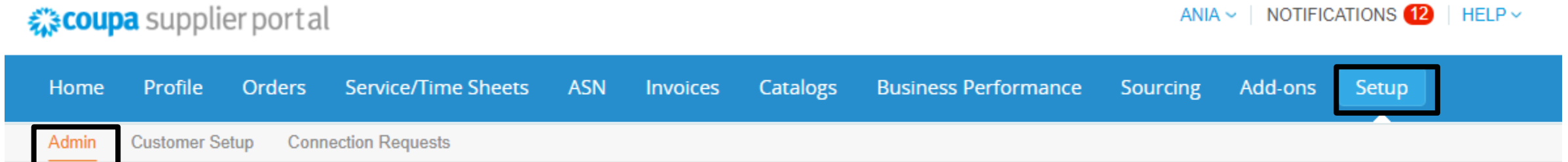
- HOME** - on the **Home** page you can see the information about your company
- PROFILE** - in the **Profile** section you can configure your profile. Your profile can be set up as public or customized for each Customer separately
- ORDERS** - in the **Orders** section you can find the Orders you receive, 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:

The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo and 'supplier portal'. On the right, there's a user profile for 'KATIA' with a dropdown menu open showing 'Account Settings', 'Notification Preferences' (highlighted), and 'Log Out'. A notification badge shows '40'. Below the header is a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Setup. The main content area is titled 'My Account Notification Preferences'. On the left is a sidebar with 'Settings' and 'Notification Preferences' (selected). The main area contains a message: 'You will start receiving notifications when your customers enable them.' Below this are two sections: 'Announcements' and 'Business Performance'. Each section has a table of notification preferences.

Category	Online	Email	SMS
New Customer Announcement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Performance Role Granted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>




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**

Two buttons are shown: a grey 'Cancel' button and a blue 'Save' button with a black border.

# 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.

 ANIA  | NOTIFICATIONS **12** | HELP 

HomeProfileOrdersService/Time SheetsASNInvoicesCataloguesBusiness PerformanceSourcingAdd-onsSetup

AdminCustomer SetupConnection Requests

Admin Users

Invite User

Users


Merge Requests

Legal Entity Setup

Fiscal Representatives

Remit-To

Terms of Use

Payment Preferences 

Static Discounting

sFTP Accounts

cXML Errors

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

# 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

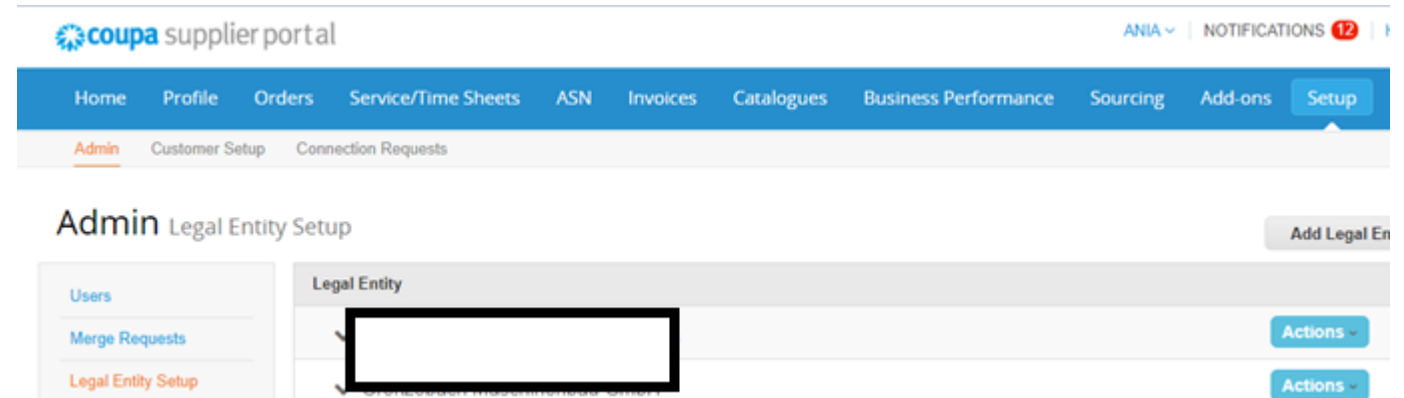


Send Invitation

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

# 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.



The screenshot shows the 'coupa supplier portal' header with a user menu (ANIA) and a notification badge (12). The navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. Below this, a sub-navigation bar has Admin (highlighted), Customer Setup, and Connection Requests. The main content area is titled 'Admin Legal Entity Setup' and features a sidebar with 'Users', 'Merge Requests', and 'Legal Entity Setup' (highlighted). The main panel shows a table with one row for a legal entity, with a red asterisk next to the 'Legal Entity Name' field. An 'Add Legal Entity' button is in the top right, and 'Actions' buttons are in the right margin of the table.

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

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.

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? i

Country/RegionUnited States

Tax ID

☐ I don't have Tax ID Number

Add additional Tax ID

Miscellaneous

Invoice-From Code

Preferred LanguageEnglish (US)

Cancel

Save & Continue

Setup complete

1234

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. i

- 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

coupa supplier portal

ANIA ▾ | NOTIFICATIONS 12 | HELP ▾

HomeProfileOrdersService/Time SheetsASNInvoicesCataloguesBusiness PerformanceSourcingAdd-onsSetup

OrdersOrder linesReturnsOrder ChangesOrder Line ChangesDeliveries

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

Export to ▾

View All ▾

Search 

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

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.

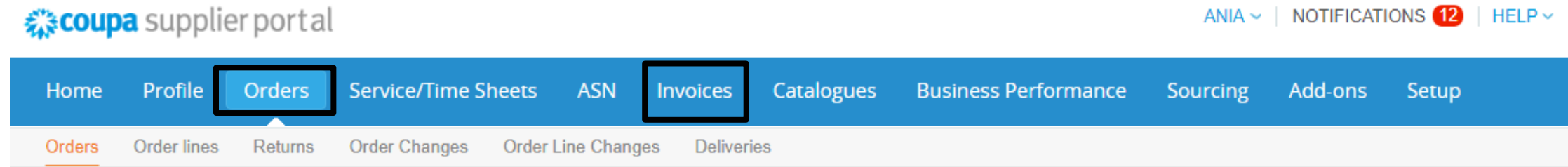
## Lines

Advanced							
Search				Sort by		Line Number: 0 → 9	
11	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		

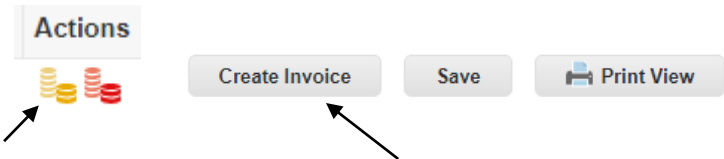
If an order has been closed or cancelled, it is not possible to create an invoice for it.

# 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.



## 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	Abandoned		Approved		Credit notes	
TEST2TEST	16/09/2021	Approved	253-538125687	3.63 EUR	No	Disputed		Disputes with a supplier response		Disputes without supplier response	
21F06316	26/07/2021	Approved	SRG EU-998000083	18,944.97 EUR	No	Draft		Overdue invoices		Payment Information	
21F06177	20/07/2021	Approved	253-538125297	1,080.00 EUR	No	Pending Approval		Processing		Unpaid Invoices	
21F06160	20/07/2021	Approved	SRG EU-998000083	13,101.15 EUR	No	Voided					
21F05872	12/07/2021	Approved	SRG EU-998000083	11,335.76 EUR	No						
21A00673	12/07/2021	Approved	None	-540.00 EUR	No						
21F05873	12/07/2021	Approved	253-538125098	900.00 EUR	No						

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.

 General Info

\* Invoice #

\* Invoice Date

03/03/2022

Payment Term

NET 60

\* Currency

EUR

Delivery Number

Status

Draft


\* Image Scan

Choose File


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

Choose File

No file chosen

PO Line

S000225355-3

Clear

16

2/23/2023

GUARDIAN

INDUSTRIES

# 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

PO Line

Clear

Contract

Receipt

None

Bill of Lading

Supplier Part Number

PO Tax Reference

None

Ancillary Part Number

Tax Legal Wording (Reqd for EU)

Select

Billing

Totals & Taxes

Lines Net Total0.00

Shipping

Tax

Tax Reference

Enter a tax reason description.

Handling

Tax

Tax Reference

Enter a tax reason description.

Misc

Tax

Tax Reference

Enter a tax reason description.

Tax

0.000%

0.000



Total Tax0.00

Net Total0.00


Total0.00


leteCancelSave as DraftCalculateSubmit

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

Export to ▾		View All ▾		Search 🔍			
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.

 History

 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 

Paid	PO #	Invoice #	Status	Invoice Date	Pa	Payment 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	
No	S000224382	SRG 1	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




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 

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

Export to 		View <div>Approved</div>		Search 				
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		 Bill To & Ship To	
Invoice # 1435872-0001-01		Supplier	
Invoice Date 01/05/21		Invoice From	
Payment Term NET 15		Remit To	
Delivery Date 01/05/21		Ship From	
Currency USD		Supplier Tax ID	
Delivery Number None		Customer	
Status Approved		Bill To Address	
Shipping Term None			
Invoice PDF Document <a href="#">download</a>			
 Image Scan <a href="#">Guardian_20210106000452T.PDF</a>			
Supplier Notes None		VAT ID	
Attachments None		Address Location Name	
Discount Amount None		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.
- You must know that this copy of the invoice is **not a tax invoice**.

Invoice Date  
January 27, 2020

## Invoice

### 101654

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

Buyer Tax ID 430616823 Attn/Ref Guardian Ordering User	Supplier Tax ID 26-3645246
---	-------------------------------

#### Invoice Details

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

Discount Amount  
0.0

Bill Of Lading  
None

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

<b>Supplier Notes</b> - Already sent invoice to Ripleyaccountspayable	<b>Taxes</b> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Taxable Amount Charged Per Rate \$5,250.00 at TAX (0.0%)</td> <td style="width: 30%; text-align: right;">Total Tax Per Rate \$0.00</td> </tr> </table> <b>Totals</b> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Taxable Amount</td> <td style="width: 30%; text-align: right;">\$5,250.00</td> </tr> <tr> <td>Amount Excluding Tax</td> <td style="text-align: right;">\$5,250.00</td> </tr> <tr> <td>Total Tax</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Total Payable</td> <td style="text-align: right;">\$5,250.00</td> </tr> </table>	Taxable Amount Charged Per Rate \$5,250.00 at TAX (0.0%)	Total Tax Per Rate \$0.00	Taxable Amount	\$5,250.00	Amount Excluding Tax	\$5,250.00	Total Tax	\$0.00	Total Payable	\$5,250.00
Taxable Amount Charged Per Rate \$5,250.00 at TAX (0.0%)	Total Tax Per Rate \$0.00										
Taxable Amount	\$5,250.00										
Amount Excluding Tax	\$5,250.00										
Total Tax	\$0.00										
Total Payable	\$5,250.00										

NOT A TAX INVOICE

# 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.



## 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

### 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)

Select



Cancel

Continue

## 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)

Cancel

Continue

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)