

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 and put 'COUPA' in the subject line.

Aleksandra 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.

! **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.

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](#).

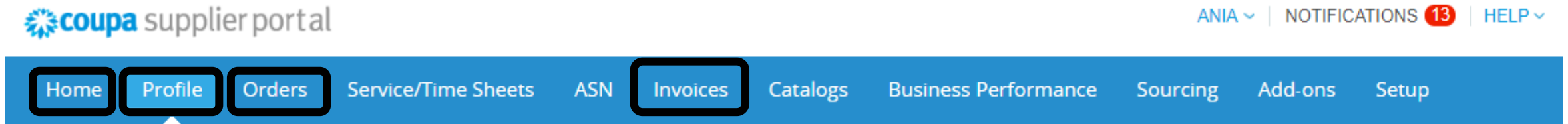
Get Started

[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



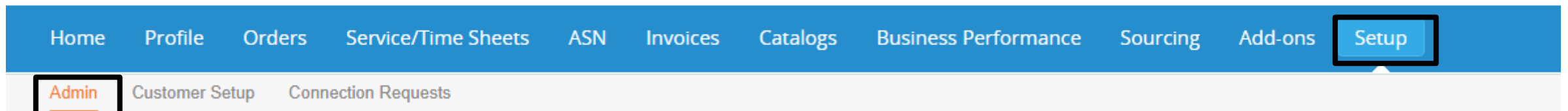
Introduction to Coupa Supplier Portal (CSP)

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

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

 coupa supplier portal

ANIA ▾ | NOTIFICATIONS **12** | HELP ▾



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.**

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right, the user's name 'KATIA' is displayed with a dropdown arrow, next to a 'NOTIFICATIONS 40' badge and a 'HELP' link. Below this is a blue navigation menu with items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Setup. A dropdown menu is open under the user's name, showing 'Account Settings', 'Notification Preferences' (highlighted in yellow), and 'Log Out'. The main content area is titled 'My Account Notification Preferences'. It includes a sidebar with 'Settings' and 'Notification Preferences' (selected). The main content area contains a heading 'You will start receiving notifications when your customers enable them.' followed by a progress bar. Below this, there are two sections: 'Announcements' and 'Business Performance'. Each section has a table of notification types with checkboxes for 'Online', 'Email', and 'SMS'. In the 'Announcements' section, 'New Customer Announcement' has 'Online' and 'Email' checked. In the 'Business Performance' section, 'Business Performance Role Granted' has 'Online' checked.

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.

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](#)

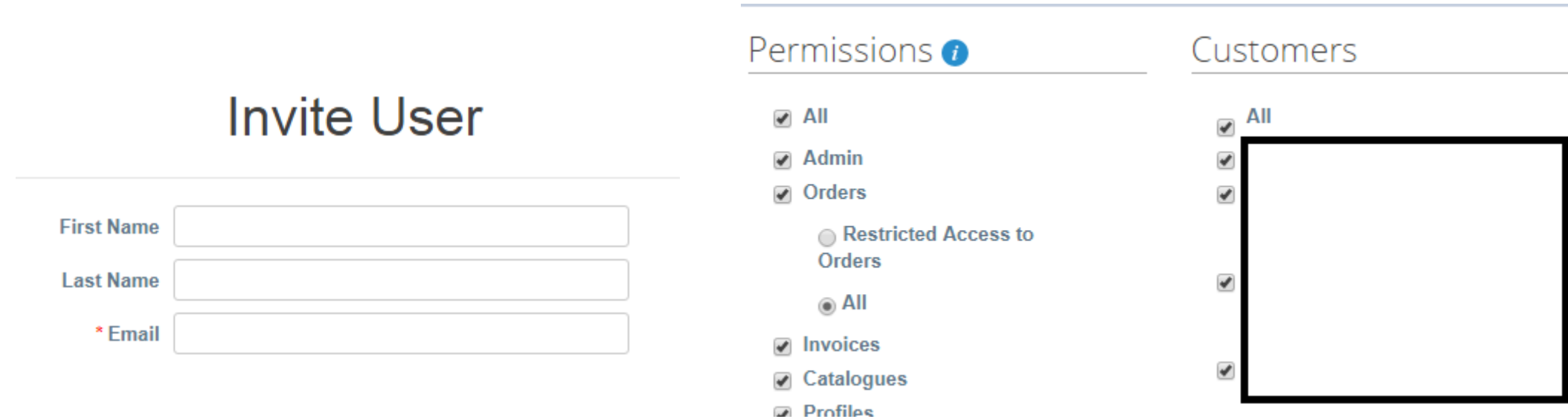
Users	Permissions	Customer Access
Agata Burek aburek@guardian.com Status: Inactive Activate User	ASNs Admin Business Performance Catalogues Invoices Order Changes Order Line Confirmation Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	Guardian Industries Guardian Industries Guardian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



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

A screenshot of a web form titled "Invite User". On the left, there are three input fields: "First Name", "Last Name", and "* Email". On the right, there are two sections: "Permissions" and "Customers". The "Permissions" section has a list of checkboxes: "All" (checked), "Admin" (checked), "Orders" (checked), "Restricted Access to Orders" (unchecked), and "All" (selected). Below these are "Invoices" (checked), "Catalogues" (checked), and "Profiles" (checked). The "Customers" section has a list of checkboxes: "All" (checked), followed by a large empty box with a black border, and then two more checked checkboxes.

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:



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

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							
Line	Type	Item	Qty	Unit	Price	Total	Invoiced
11		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	None	
Tax Reference					Item Description		
					None		

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

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

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