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# Coupa SIM - Supplier Manual

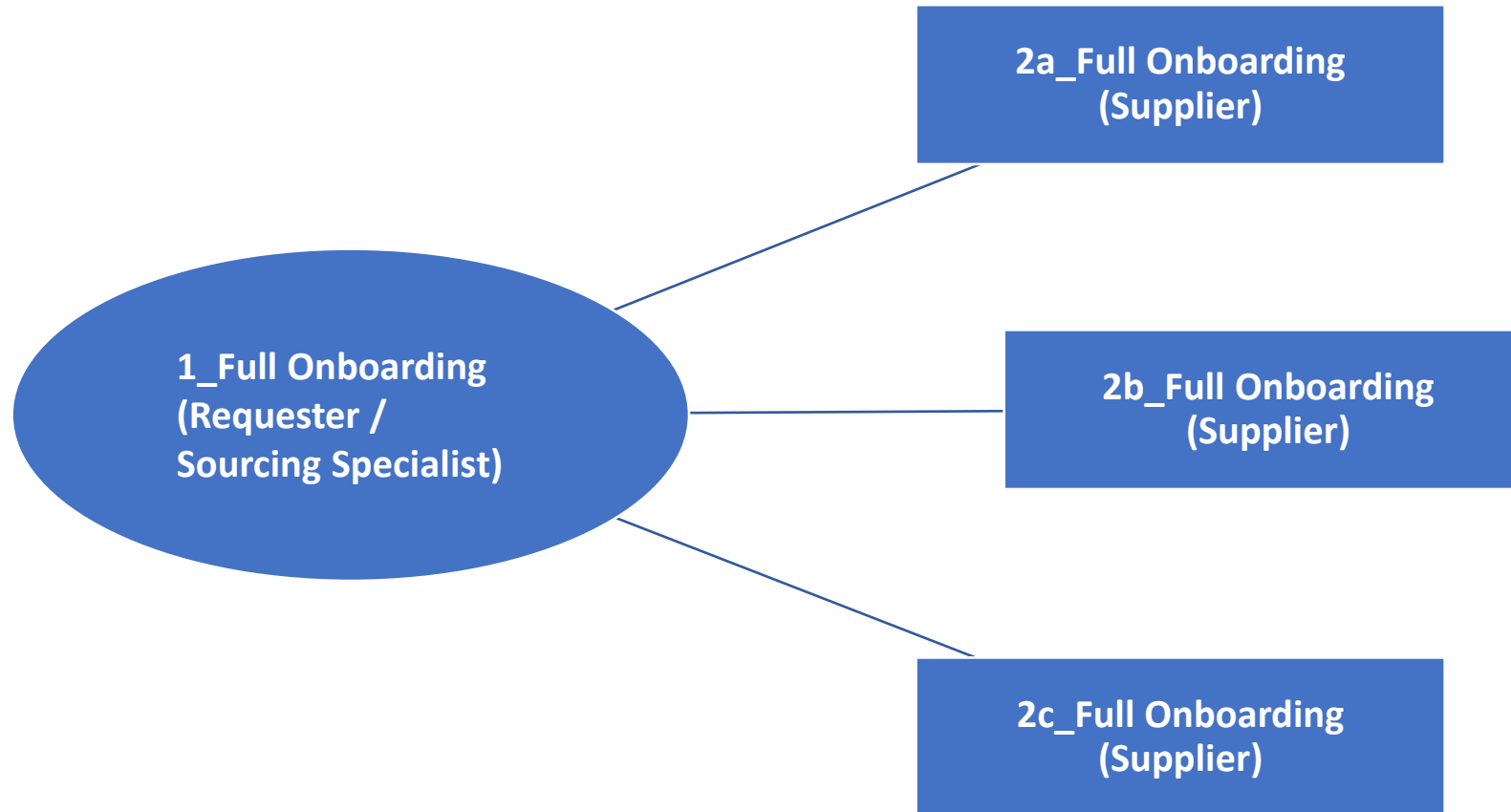
Version 9  
October 2023



# Coupa SIM Processes and Forms (1)

Below is the high-level flow of the types of Supplier Onboarding and Update and their respective forms.

## Full Onboarding



# Coupa SIM Processes and Forms (2)

Below is the high-level flow of the types of Supplier Onboarding and Update and their respective forms.

Urgent &  
Exception  
Suppliers  
(Requester)

5\_Urgent & Exception Onboarding  
(Requester)

Supplier  
Updates

3\_Update Form (Requester)  
4\_Update Form (Supplier)

All supplier master data requests must be processed through Coupa

11/7/2023

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**Form 2a, 2b, 2c**  
**Supplier / Sourcing Specialist**

**GUARDIAN**   
INDUSTRIES


# Full Onboarding

Fwd: Guardian Profile Information Request - Action Required

 Test Supplier2 <supplierr629@gmail.com>  
To  Tendi, Massimo

Retention Policy Standard - Inbox Cleanup - 90 (90 days)

Expires 2/27/2021

 If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



Guardian Profile Information Request - Action Required

Powered by



Hello Supplier,

Guardian needs you to provide information about your company electronically in order to prevent lost documents and make sure you are paid on time. They manage this information with Coupa, their chosen platform for Spend Management. Within the next 30 days, please respond below to provide this information. You can find the Coupa instruction manual as well the Guardian Terms and Conditions within our Supplier Portal: [https://www.guardian.com/en/supplier\\_portal\\_1](https://www.guardian.com/en/supplier_portal_1)

Note: Not providing this information in a timely manner may impact your ability to do business and get paid. Let us know if you are unable to do so for any reason.

Welcome!

Guardian

[Join and Respond](#)

The Supplier receives an email invitation to join Coupa. **It expires after 30 days from sending date.**

After clicking **Join and Respond**, the supplier is prompted to register

# Full Onboarding

First registration in Coupa is quite easy, only contact data, department, role in the company and a password are required.

After clicking **Submit**, the supplier is prompted to the public profile in Coupa Supplier Portal (CSP).

### Join the Coupa Supplier Portal

Complete the information below and create the password for your account. Click here for [help](#).

\* First Name

\* Last Name

\* Company

\* Department

\* Role

\* 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](#).

**Submit**

### Forward Your Invitation

Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to a colleague's email below (must have the same email domain).

Forward Email

**Submit**

# Full Onboarding

**Form 2a** → for direct material suppliers, so it contains questions referring to production item supply and undergoes the quality team review. It's filled by the supplier (external form).

**Form 2b** → for indirect material suppliers and misses the production-related questions and doesn't need any quality team approval. It's filled by the supplier (external form).

**Form 2c** → for low critical suppliers, regardless of the provided product/service. It's filled by the supplier (external form).

---

The following slides detail the 2a form process, since it's the largest and most complete supplier form.

# Full Onboarding

By clicking **Information Requests** the supplier is prompted to the Guardian's questionnaire.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The 'Profile' menu is expanded, and 'Information Requests' is highlighted with a red box. A red arrow points from the text above to this link. The main content area displays a welcome message: 'Welcome! Do we have your details right?' followed by a paragraph explaining the profile's purpose and a link to 'Add more customers'. Below this, there are input fields for 'Website' (http://matthewjperry.com) and 'Tax ID' (319-48-4143).



# Full Onboarding

## Terms and Conditions (T&C's):

US suppliers only must acknowledge (by a Y/N question) the T&C's, no signed and attached document is needed.

The US supplier might want to negotiate specific items of the Terms and Conditions with Guardian. In this case, the negotiated T&C's document shall be provided at a later stage, anyway before the onboarding process finalization.

Guardian Industries requires that all suppliers review and acknowledge our Terms and Conditions. Please read our T&C's on our website and agree to continue: <https://www.guardian.com/en/supplier-portal> >

\* I have read and acknowledged the T&C's  >

# Full Onboarding

## Commercial Contract Clauses

Within this Questionnaire, the term Guardian is used and this refers to Guardian Industries and all of its subsidiaries. Any reference to Guardian is to be understood to mean Guardian Industries and all subsidiaries within.

### Contract Clauses:

**Clause #2** is intended to bind the supplier to performance even when an electronic signature is provided.

**Clause #3** allows the SE team to use external tools for a quicker supplier banking validation (not available worldwide yet).

Supplier agrees to conduct transactions with Guardian by electronic means, as that phrase is used and understood within the context of the Uniform Electronic Transactions Act, the Electronic Signatures in Global and National Commerce Act, and other applicable law. Each entry, submission, acknowledgement, and other action by Supplier through this system will be deemed electronically signed by Supplier and the electronic sound, symbol, or process (automated or otherwise) by which Supplier conducts such activity on or through this system will be deemed and treated as being Supplier's electronic signature. Under both state and federal law, an electronic signature is just as binding as a manual signature in ink on paper.

The individual or individuals initially setting up Supplier's account and/or participation on this system represents and warrants that he or she has all authority necessary to bind Supplier to the terms and conditions of this system and to any transactions entered into or administered by or through this system. Supplier will be bound by any and all acts or omissions undertaken through a Supplier user account on this system and waives any claim or defense that the individual using this system through a supplier account is, or was, not authorized to undertake the act or omission on behalf of Supplier. Guardian may rely upon any act or omission through a Supplier account on this system as the authorized act of Supplier.

3.- Supplier grants Guardian the permission to validate the accuracy of the information provided herein, which may include requesting validation from third parties, such as consumer reporting agencies via a consumer report. Supplier affirms (i) the information provided herein is complete and accurate, (ii) Supplier understands any information provided herein or Supplier otherwise discloses to Guardian may be disclosed to such third parties to validate such information.

# Full Onboarding

Types of information the supplier shall provide when filling in the Form:



Minority/Diversity Certifications (if available - US only)



ISO Certifications (if available)



Insurance details



Compliance information



Production related questions (form 2a only)



Contact details (sales, accounting, banking validation, safety, sourcing, etc.)



Remit-To address - Banking information



Tax ID information

# Full Onboarding

A production-related supplier will get the below section displayed:

Acknowledgements to Guardian Standards

---

Guardian Industries requires that all the Production suppliers review and acknowledge our Supplier Quality Manual. Please see our SQM on our website and agree to continue: [https://www.guardian.com/en/supplier\\_portal\\_1](https://www.guardian.com/en/supplier_portal_1)

\* I have read and acknowledged the SQM

---

\* Please specify tooling supplier type

Guardian requires that all the Packaging suppliers review and acknowledge our Packaging Standards. Please contact the buyer to obtain copy.

\* I have read and acknowledged the Packaging Standards.

The supplier shall acknowledge the Guardian Quality Manual and, eventually, the packaging and tooling standards, if applicable.



# Full Onboarding

The supplier indicates the currency, the preferred payment method and the effective date.

The selected banking region defines the type of bank statement or document that shall be attached for bank validation purposes.

## Banking Information

---

\* What currency you would like to be paid in?

USD ▼

\* Banking Region

US



\* Payment Method

EFT - Bank Transfer



Default payment method (EFT/bank transfer) will be updated to contract terms once contract update payment method accordingly.

\* Payment Effective Date

08/14/20



Bank Validation Documents to attach:

---

# Full Onboarding

The supplier shall create a Remit-To Address for payment. The company Remit-To Address can match with the physical address. Click the **Add Remit-To** button.

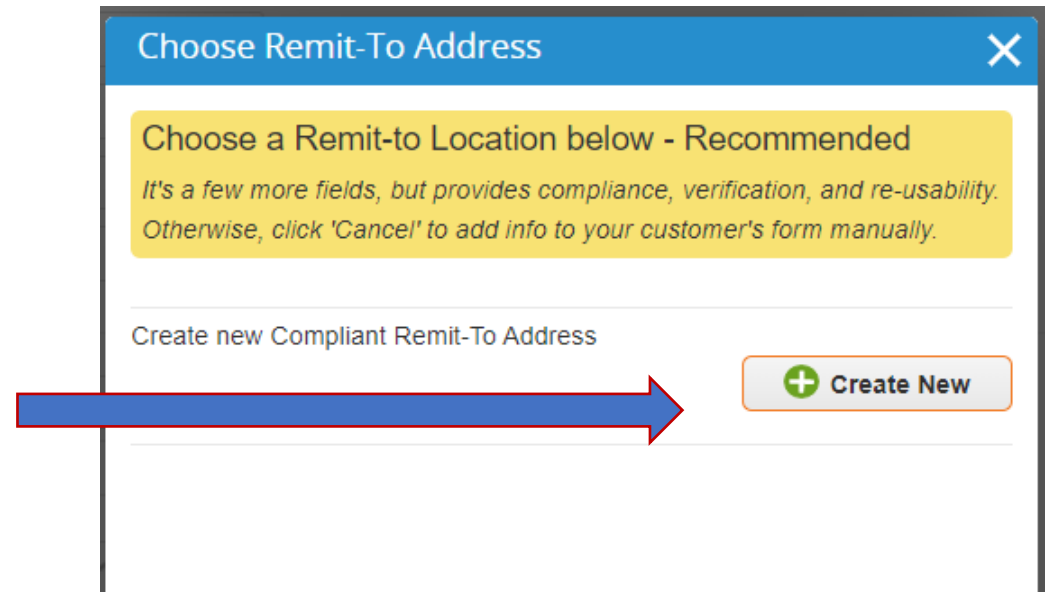
## \*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

**Add Remit-To**

A pop-up window is going to request to create a new address or to use an available one.

In case of creating a new address, click **Create New**



# Full Onboarding

A series of pop-up windows request the supplier to provide the Remit-To address details. **The accuracy of these details will ensure the payment of the supplier invoices to the correct bank account.**

Where's your business located? ✕

---

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

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

# Full Onboarding

Tell your customers about your organization

Which customers do you want to see this?

All  
 Guardian

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country United States

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 where you receive government documents. *i*

By selecting “All” or “Guardian” to the first question, you are providing the ability to let these data be available to all customers or to Guardian only.

The mandatory fields are the address, the city, the state or province and postal code.

European Tax IDs usually begin by the country identifier (i.e. FR, GB, DE).

For those suppliers that may have a domestic identifier only (Hungary, Poland, Spain, without the country identifier), the supplier shall tick the box “I don’t have Tax ID number”.

What is your Tax ID? *i*

Country United States

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code  *i*

Preferred Language English (US)



# Full Onboarding

Just to confirm that the previous address will be used as the “Remit-To” (the address to where the supplier will receive the payment)

Where do you want to receive payment?

1 2 3 4

\* Payment Type Address

What is your Remit-To Address?

Address Line 1 test  
Address Line 2 test  
City test  
State  
Postal Code 1111111  
Country United States

Cancel Save & Continue

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status
Address	test test test 1111111 United States	Active

Manage

Deactivate Legal Entity Cancel Next

# Full Onboarding

Where do you ship goods from? ×

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered. Add Ship From

Title	Status	
test	Active	<span>Manage</span>
test		
test		
1111111		
United States		

Deactivate Legal Entity Done

Just to confirm that the previous address will be also used as the “Ship From” (the address from where the supplier will ship the goods from)

By clicking **Add Now** the supplier adds the Remit-To address to its profile.

Setup Complete ×

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

# Full Onboarding

The following group of fields requests to provide the bank account details to which the supplier will receive the invoice payments.

The fields cover different country or regional requirements. Bank Name, Bank Address, Name on Bank Account, Bank Account Number, Swift Code, IBAN are always mandatory. Others (ABA, CLABE, SORT etc.), depend on country specific requirements and can be left blank.

**Supplier collaboration is necessary to provide Guardian with a complete, coherent and accurate bank details, in order to avoid the SE Team form rejection due to missing data and the subsequent onboarding process delay.**

\* GI - Remit To New

Active	Active	▼
Bank Name	<input type="text"/>	
Bank Branch	<input type="text"/>	
Bank Address	<input type="text"/>	
Name on Bank Account	<input type="text"/>	
Bank Routing Number (ABA)	<input type="text"/>	<i>i</i>
SWIFT Code (BIC)	<input type="text"/>	<i>i</i>
Swift Address	<input type="text"/>	
Bank Account Number	<input type="text"/>	<i>i</i>
Correspondent Account	<input type="text"/>	
Clearing Code	<input type="text"/>	
	<small>(branch/transit number for banks located in Canada)</small>	
IBAN Number	<input type="text"/>	<i>i</i>
CLABE Number	<input type="text"/>	

# Full Onboarding

Below, you have an example of how Bank Code can be left blank (open the dropdown):

What are your Bank Account Details? ⓘ

Bank Account Country/Region:	Poland	ⓘ
Bank Account Currency:	PLN	ⓘ
Beneficiary Name:	Test&Test	
Bank Name:	Bank1	
Account Number:	0987654321	ⓘ
Confirm Account Number:	0987654321	
IBAN:	xxxPL00xxx	ⓘ
Confirm IBAN:	xxxPL00xxx	
Routing (Bank Code) Number:	Bank Code	ⓘ
SWIFT/BIC Code:	xxxPL00xxx	ⓘ
Bank Account Type:	Business	ⓘ

Routing (Bank Code) Number:	Bank Code	ⓘ
SWIFT/BIC Code:		ⓘ
Bank Account Type:		ⓘ

at is your Bank's Branch Address?

What are your Bank Account Details? ⓘ

Bank Account Country/Region:	Poland	ⓘ
Bank Account Currency:	PLN	ⓘ
Beneficiary Name:	Test&Test	
Bank Name:	Bank1	
Account Number:	0987654321	ⓘ
Confirm Account Number:	0987654321	
IBAN:	xxxPL00xxx	ⓘ
Confirm IBAN:	xxxPL00xxx	
Routing (Bank Code) Number:		ⓘ
SWIFT/BIC Code:	xxxPL00xxx	ⓘ
Bank Account Type:	Business	ⓘ

# Full Onboarding

For suppliers which have additional tax IDs, besides to the main one and according to the country legislation, additional fields are displayed in the form to make the supplier provide this information.

## Tax ID Detail Information

---

**\* Tax ID Type1** TaxID  
Main Tax ID Type

Please, select "TaxID (Tax58)" as CNPJ

**\* Tax ID1**   
Main Tax ID Number

**Tax ID Type2** Brazil - State Tax ID  
Please, select "TaxID1 (Tax 120)" as your State Tax ID

**Tax ID2**   
State Tax ID Number

**Tax ID Type3** Brazil - Municipal Tax ID  
Please, select "TaxID2 (Tax 121)" as your Municipal Tax ID

**Tax ID3**   
Municipal Tax ID Number

**Tax ID Type4**   
Please, specify the Tax Type

**Tax ID4**   
Please, specify the Tax Number

**Tax ID Type5**   
Please, specify the Tax Type

**Tax ID5**   
Please, specify the Tax Number

# Full Onboarding



After clicking the **Submit for approval** button, the provided information is saved in Coupa, and the form is sent to the SE Team for the data validation and approval.

Guardian

Profile Guardian

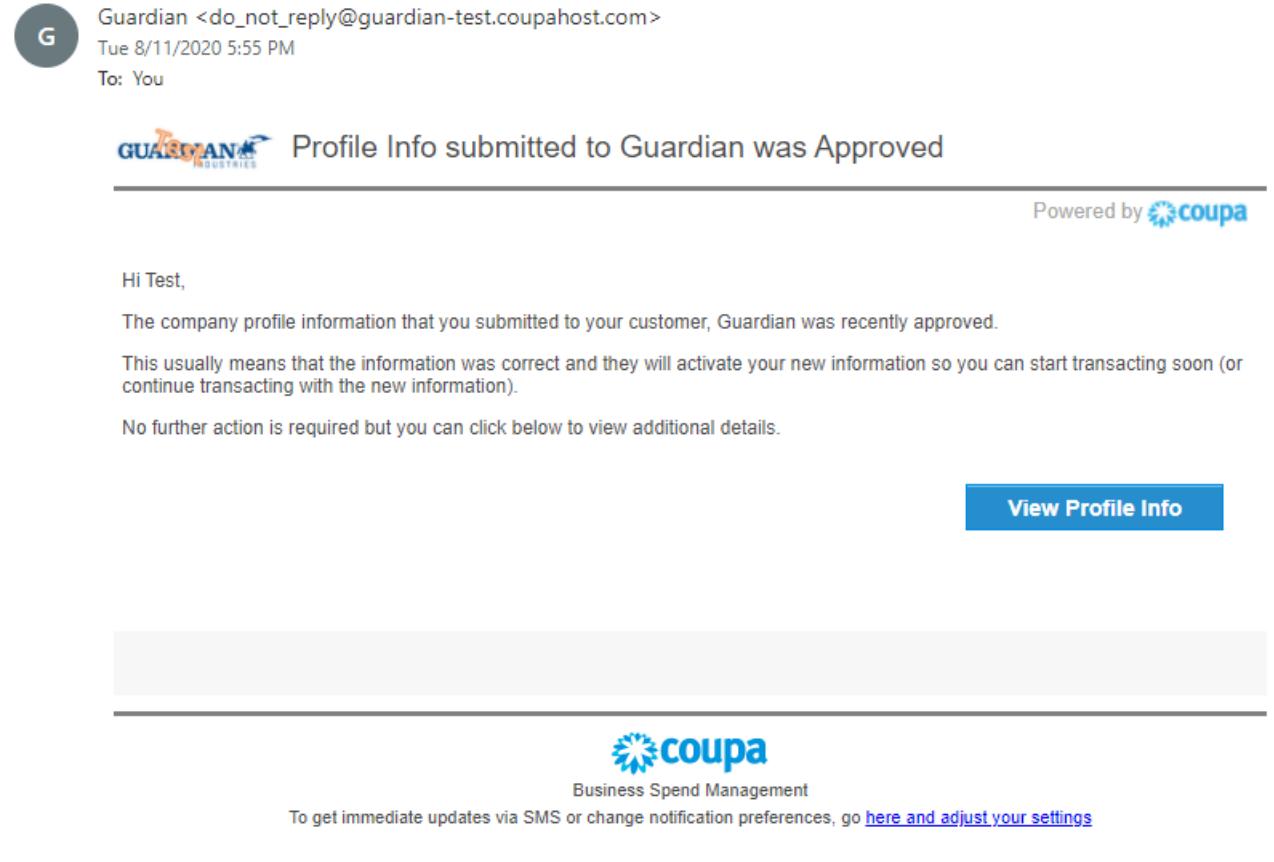
Your information has been submitted

Pending Approval

**If supplier doesn't see the green-highlighted message as above, it means the form is not submitted, due to a mistake or lack of required information. It remains stored as draft, but it's not sent. In such cases, Coupa advises with a bold-red message at the top of the form.**

# Full Onboarding

The Supplier receives the Coupa Confirmation that its profile was approved.



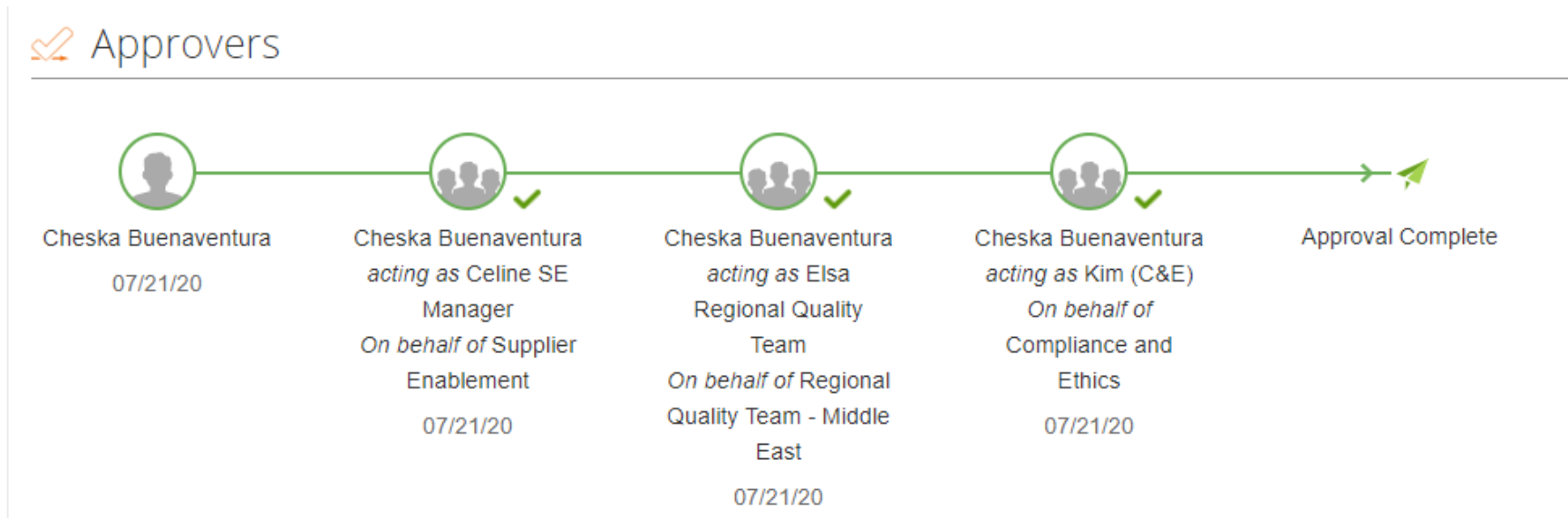
It's important to know that the profile approval doesn't mean that supplier is ready to go. Other internal steps are needed before the supplier can begin to transact with Guardian.

# Full Onboarding

If it is a Production supplier request (form 2a), then, the SE Team adds the Regional Quality Team approval to the chain.

The supplier may be red-flagged by the SE Team, due to compliance reasons. In that case, the form is escalated to the Compliance and Ethics (C&E) Team for further investigations

Should any of these two reject the form, the onboarding process ends.



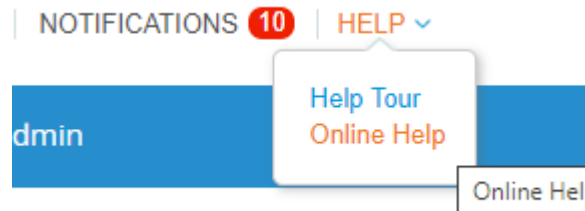
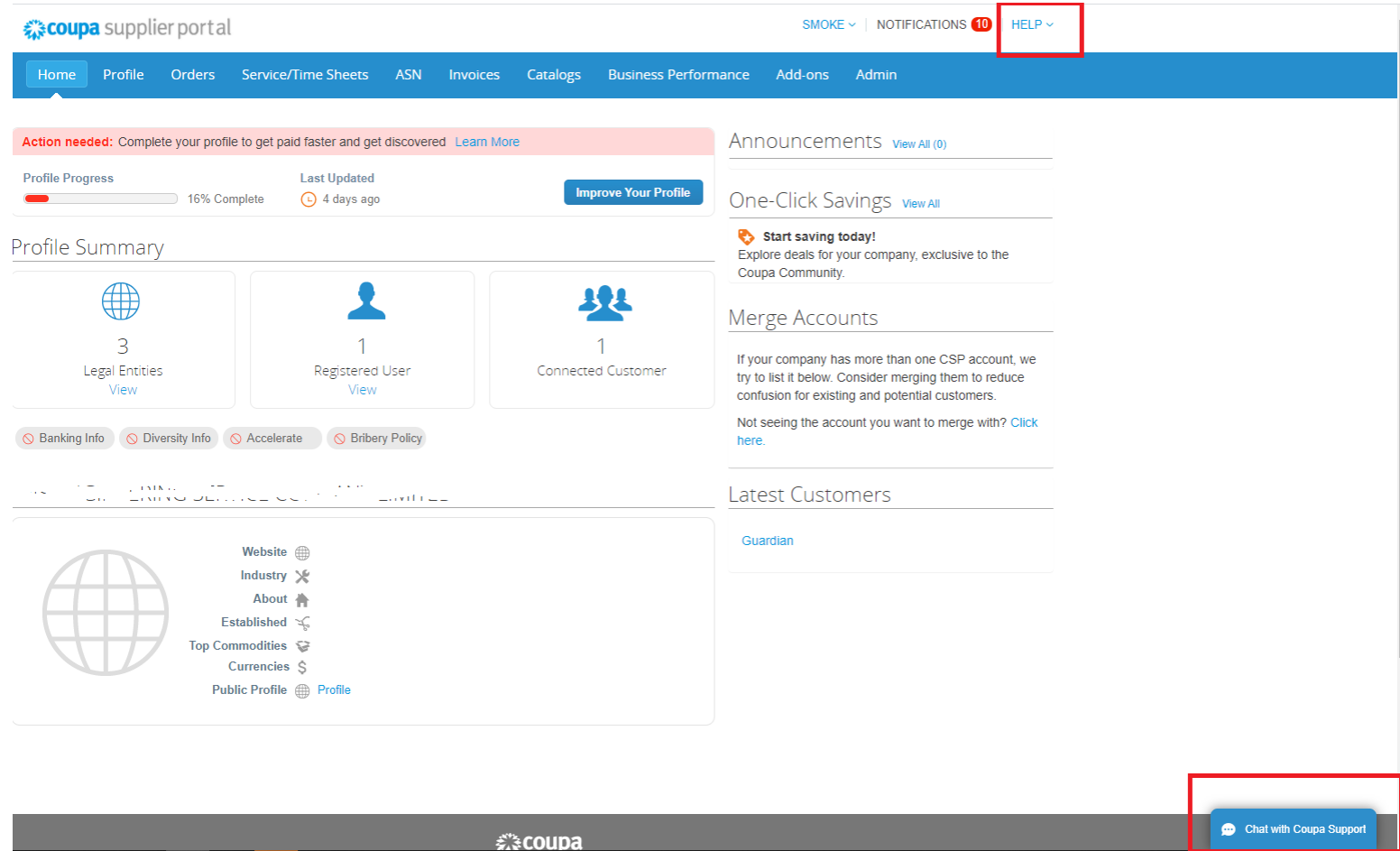


# Full Onboarding

The website which the supplier logs on is different from the one to which Guardian has access.

Due to this, **Guardian has no access to the pages which the supplier is working on.**

Coupa offers a Help Center, accessible at top-right of the screen (Online Help).



**An email address for non-urgent support is also available for suppliers:**  
[supplier@coupa.com](mailto:supplier@coupa.com)

# Full Onboarding

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Add-ons', and 'Admin'. A 'HELP' button is highlighted with a red box. Below the navigation bar, there is a 'Profile Progress' section showing 16% completion and a 'Last Updated' section showing '4 days ago'. The 'Profile Summary' section includes 'Legal Entities' (3), 'Registered User' (1), and 'Connected Customer' (1). There are also sections for 'Announcements', 'One-Click Savings', 'Merge Accounts', and 'Latest Customers'. At the bottom right, a 'Chat with Coupa Support' button is highlighted with a red box. A blue arrow points from this button towards the chat window on the right.

Moreover, an online chat with a Coupa expert is possible through the button the supplier can find at bottom-right of the screen (“Chat with Coupa Support”).



By clicking the “Chat” button a window pops up to request the supplier contact for a call.

The screenshot shows the 'Chat with Coupa Support' window. It has a blue header with the title 'Chat with Coupa Support' and a close button. The main content area contains the following text: 'This support service is for technical issues with the Coupa Supplier Portal only. For questions relating to transactions, please contact your customer directly.' and 'This chat session will be saved as part of the supplier support request ticket. Continuing with this session will constitute your consent for this action.' Below this is a form with the following fields: '\*First Name' (required), '\*Last Name' (required), '\*Email' (required), and 'Phone'. There is a blue 'Start Chat' button at the bottom.

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# Form 4 - Supplier Update Supplier



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**Form 2a, 2b, 2c**  
**Supplier / Sourcing Specialist**

**GUARDIAN**   
INDUSTRIES

# Full Onboarding

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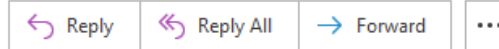


Test Supplier2 <suppliert629@gmail.com>

To • Tendi, Massimo

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Expires 2/27/2021



Sun 11/29/2020 8:04 AM

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Welcome!

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The Supplier receives an email invitation to join Coupa. **It expires after 30 days from sending date.**

After clicking **Join and Respond**, the supplier is prompted to register

# Full Onboarding

First registration in Coupa is quite easy, only contact data, department, role in the company and a password are required.

After clicking **Submit**, the supplier is prompted to the public profile in Coupa Supplier Portal (CSP).

## Join the Coupa Supplier Portal

Complete the information below and create the password for your account. Click here for [help](#).

\* First Name

\* Last Name

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\* Password

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**Form 2a** → for direct material suppliers, so it contains questions referring to production item supply and undergoes the quality team review. It's filled by the supplier (external form).

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**Form 2c** → for low critical suppliers, regardless of the provided product/service. It's filled by the supplier (external form).

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The following slides detail the 2a form process, since it's the largest and most complete supplier form.

# Full Onboarding

By clicking **Information Requests** the supplier is prompted to the Guardian's questionnaire.

The screenshot shows the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the right, there are links for "TEST", "NOTIFICATIONS 6", and "HELP". A blue navigation bar contains the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below this bar, a sub-menu is visible with "Your Profile" and "Information Requests" (the latter is highlighted with a red box). A red arrow points from the text above to the "Information Requests" link. The main content area displays a welcome message: "Welcome! Do we have your details right?" followed by a paragraph: "Your profile helps you get discovered by buyers spending billions of dollars every year. To save you time, we have pre-filled your profile with publicly available data on your company. You can always edit, add or remove your information in your profile at any time." Below this, there are two sections: "Website" with a text input field containing "http://matthewjperry.com" and "Tax ID" with a text input field containing "319-48-4143". On the left side of the main content area, there is a sidebar menu with the following items: Overview, Profile Setup, Learning Center (with sub-links "Add more customers" and "Create a discoverable profile"), and Feedback (with sub-link "Tell us what you think").



# Full Onboarding

## Terms and Conditions (T&C's):

US suppliers only must acknowledge (by a Y/N question) the T&C's, no signed and attached document is needed.

The US supplier might want to negotiate specific items of the Terms and Conditions with Guardian. In this case, the negotiated T&C's document shall be provided at a later stage, anyway before the onboarding process finalization.

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### Contract Clauses:

**Clause #2** is intended to bind the supplier to performance even when an electronic signature is provided.

**Clause #3** allows the SE team to use external tools for a quicker supplier banking validation (not available worldwide yet).

Supplier agrees to conduct transactions with Guardian by electronic means, as that phrase is used and understood within the context of the Uniform Electronic Transactions Act, the Electronic Signatures in Global and National Commerce Act, and other applicable law. Each entry, submission, acknowledgement, and other action by Supplier through this system will be deemed electronically signed by Supplier and the electronic sound, symbol, or process (automated or otherwise) by which Supplier conducts such activity on or through this system will be deemed and treated as being Supplier's electronic signature. Under both state and federal law, an electronic signature is just as binding as a manual signature in ink on paper.

The individual or individuals initially setting up Supplier's account and/or participation on this system represents and warrants that he or she has all authority necessary to bind Supplier to the terms and conditions of this system and to any transactions entered into or administered by or through this system. Supplier will be bound by any and all acts or omissions undertaken through a Supplier user account on this system and waives any claim or defense that the individual using this system through a supplier account is, or was, not authorized to undertake the act or omission on behalf of Supplier. Guardian may rely upon any act or omission through a Supplier account on this system as the authorized act of Supplier.

3.- Supplier grants Guardian the permission to validate the accuracy of the information provided herein, which may include requesting validation from third parties, such as consumer reporting agencies via a consumer report. Supplier affirms (i) the information provided herein is complete and accurate, (ii) Supplier understands any information provided herein or Supplier otherwise discloses to Guardian may be disclosed to such third parties to validate such information.

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Types of information the supplier shall provide when filling in the Form:



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ISO Certifications (if available)



Insurance details



Compliance information



Production related questions (form 2a only)



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Remit-To address - Banking information



Tax ID information

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A production-related supplier will get the below section displayed:

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## Banking Information

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USD ▼

\* Banking Region

US



\* Payment Method

EFT - Bank Transfer



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Bank Validation Documents to attach:

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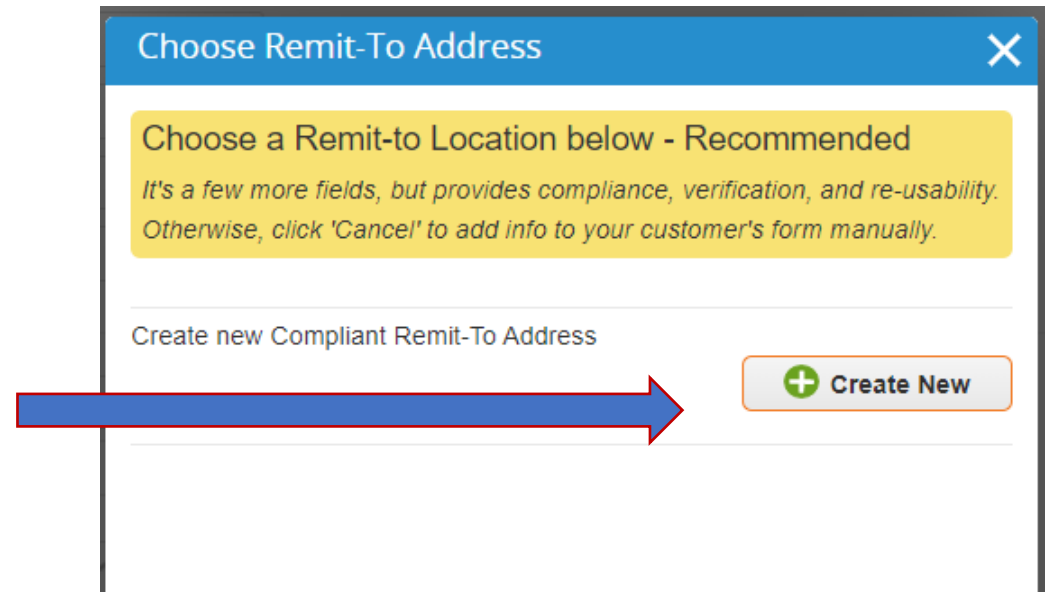
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A series of pop-up windows request the supplier to provide the Remit-To address details. **The accuracy of these details will ensure the payment of the supplier invoices to the correct bank account.**

Where's your business located? ✕

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

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

# Full Onboarding

Tell your customers about your organization

Which customers do you want to see this?

All  
 Guardian

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

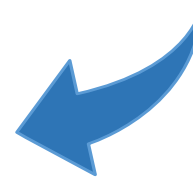
\* Postal Code

Country United States

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 where you receive government documents. *i*



By selecting “All” or “Guardian” to the first question, you are providing the ability to let these data be available to all customers or to Guardian only.

The mandatory fields are the address, the city, the state or province and postal code.

European Tax IDs usually begin by the country identifier (i.e. FR, GB, DE).

For those suppliers that may have a domestic identifier only (Hungary, Poland, Spain, without the country identifier), the supplier shall tick the box “I don’t have Tax ID number”.



What is your Tax ID? *i*

Country United States

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code  *i*

Preferred Language English (US)



# Full Onboarding

Just to confirm that the previous address will be used as the “Remit-To” (the address to where the supplier will receive the payment)

Where do you want to receive payment?

1 2 3 4

\* Payment Type Address

What is your Remit-To Address?

Address Line 1 test  
Address Line 2 test  
City test  
State  
Postal Code 1111111  
Country United States

Cancel Save & Continue

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status
Address	test test test 1111111 United States	Active

Manage

Deactivate Legal Entity Cancel Next

# Full Onboarding

Where do you ship goods from? ×

1 2 3 4

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered. Add Ship From

Title	Status	
test	Active	<span>Manage</span>
test		
test		
1111111		
United States		

Deactivate Legal Entity Done

Just to confirm that the previous address will be also used as the “Ship From” (the address from where the supplier will ship the goods from)

By clicking **Add Now** the supplier adds the Remit-To address to its profile.

Setup Complete ×

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

# Full Onboarding

The following group of fields requests to provide the bank account details to which the supplier will receive the invoice payments.

The fields cover different country or regional requirements. Bank Name, Bank Address, Name on Bank Account, Bank Account Number, Swift Code, IBAN are always mandatory. Others (ABA, CLABE, SORT etc.), depend on country specific requirements and can be left blank.

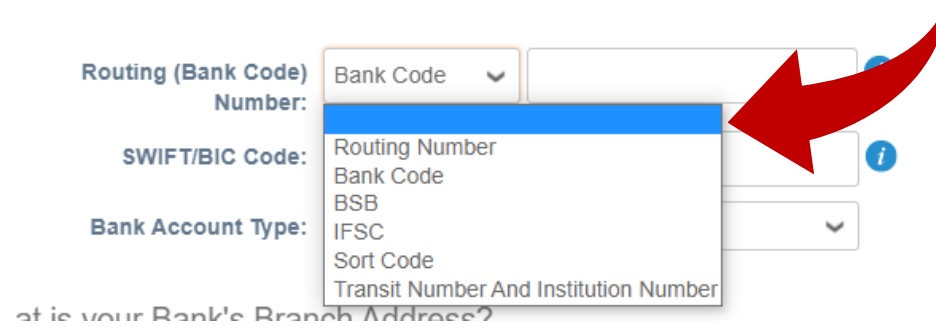
**Supplier collaboration is necessary to provide Guardian with a complete, coherent and accurate bank details, in order to avoid the SE Team form rejection due to missing data and the subsequent onboarding process delay.**

\* GI - Remit To New

Active	Active	▼
Bank Name	<input type="text"/>	
Bank Branch	<input type="text"/>	
Bank Address	<input type="text"/>	
Name on Bank Account	<input type="text"/>	
Bank Routing Number (ABA)	<input type="text"/>	<i>i</i>
SWIFT Code (BIC)	<input type="text"/>	<i>i</i>
Swift Address	<input type="text"/>	
Bank Account Number	<input type="text"/>	<i>i</i>
Correspondent Account	<input type="text"/>	
Clearing Code	<input type="text"/>	
	<small>(branch/transit number for banks located in Canada)</small>	
IBAN Number	<input type="text"/>	<i>i</i>
CLABE Number	<input type="text"/>	

# Full Onboarding

Below, you have an example of how Bank Code can be left blank (open the dropdown):



What are your Bank Account Details?

Bank Account Country/Region:	Poland	
Bank Account Currency:	PLN	
Beneficiary Name:	Test&Test	
Bank Name:	Bank1	
Account Number:	0987654321	
Confirm Account Number:	0987654321	
IBAN:	xxxPL00xxx	
Confirm IBAN:	xxxPL00xxx	
Routing (Bank Code) Number:	Bank Code	
SWIFT/BIC Code:	xxxPL00xxx	
Bank Account Type:	Business	

What are your Bank Account Details?

Bank Account Country/Region:	Poland	
Bank Account Currency:	PLN	
Beneficiary Name:	Test&Test	
Bank Name:	Bank1	
Account Number:	0987654321	
Confirm Account Number:	0987654321	
IBAN:	xxxPL00xxx	
Confirm IBAN:	xxxPL00xxx	
Routing (Bank Code) Number:		
SWIFT/BIC Code:	xxxPL00xxx	
Bank Account Type:	Business	

# Full Onboarding

For suppliers which have additional tax IDs, besides to the main one and according to the country legislation, additional fields are displayed in the form to make the supplier provide this information.

## Tax ID Detail Information

**\* Tax ID Type1** TaxID  
Main Tax ID Type

Please, select "TaxID (Tax58)" as CNPJ

**\* Tax ID1**   
Main Tax ID Number

**Tax ID Type2** Brazil - State Tax ID  
Please, select "TaxID1 (Tax 120)" as your State Tax ID

**Tax ID2**   
State Tax ID Number

**Tax ID Type3** Brazil - Municipal Tax ID  
Please, select "TaxID2 (Tax 121)" as your Municipal Tax ID

**Tax ID3**   
Municipal Tax ID Number

**Tax ID Type4**   
Please, specify the Tax Type

**Tax ID4**   
Please, specify the Tax Number

**Tax ID Type5**   
Please, specify the Tax Type

**Tax ID5**   
Please, specify the Tax Number



# Full Onboarding



After clicking the **Submit for approval** button, the provided information is saved in Coupa, and the form is sent to the SE Team for the data validation and approval.

Guardian

Profile Guardian

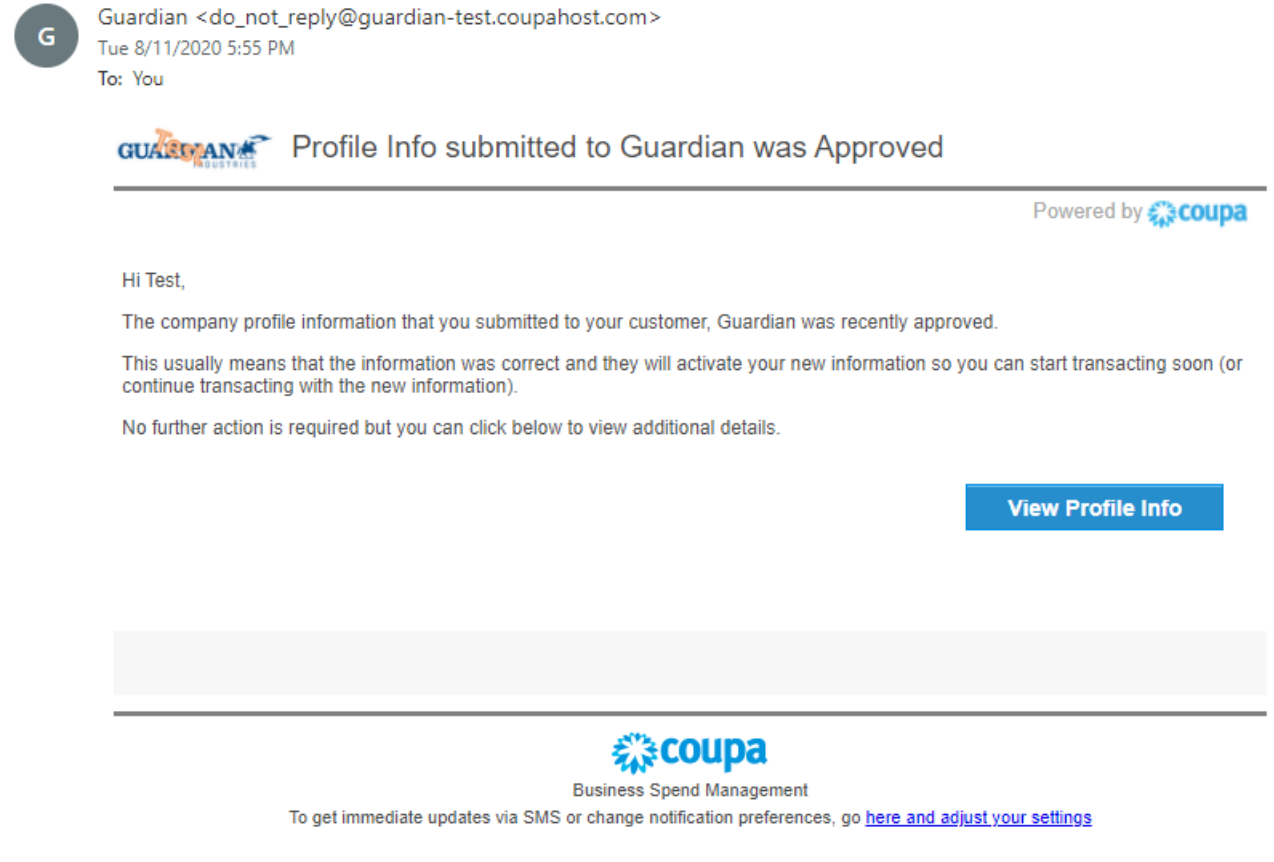
Your information has been submitted

Pending Approval


**If supplier doesn't see the green-highlighted message as above, it means the form is not submitted, due to a mistake or lack of required information. It remains stored as draft, but it's not sent. In such cases, Coupa advises with a bold-red message at the top of the form.**

# Full Onboarding


The Supplier receives the Coupa Confirmation that its profile was approved.



**G** Guardian <do\_not\_reply@guardian-test.coupahost.com>  
Tue 8/11/2020 5:55 PM  
To: You

 Profile Info submitted to Guardian was Approved

---

Powered by 

Hi Test,


The company profile information that you submitted to your customer, Guardian was recently approved.

This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).

No further action is required but you can click below to view additional details.

[View Profile Info](#)

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 **coupa**  
Business Spend Management

To get immediate updates via SMS or change notification preferences, go [here and adjust your settings](#)

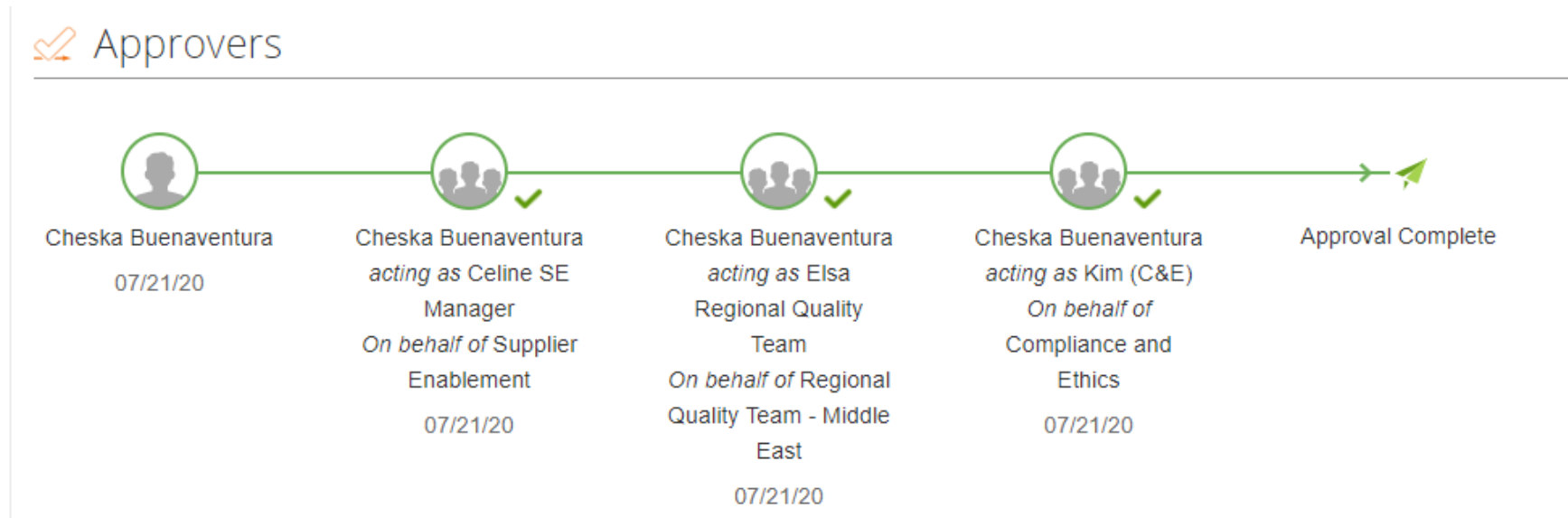
It's important to know that the profile approval doesn't mean that supplier is ready to go. Other internal steps are needed before the supplier can begin to transact with Guardian.

# Full Onboarding

If it is a Production supplier request (form 2a), then, the SE Team adds the Regional Quality Team approval to the chain.

The supplier may be red-flagged by the SE Team, due to compliance reasons. In that case, the form is escalated to the Compliance and Ethics (C&E) Team for further investigations

Should any of these two reject the form, the onboarding process ends.



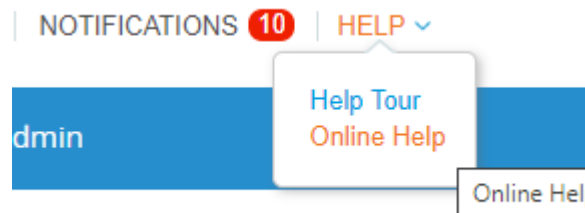
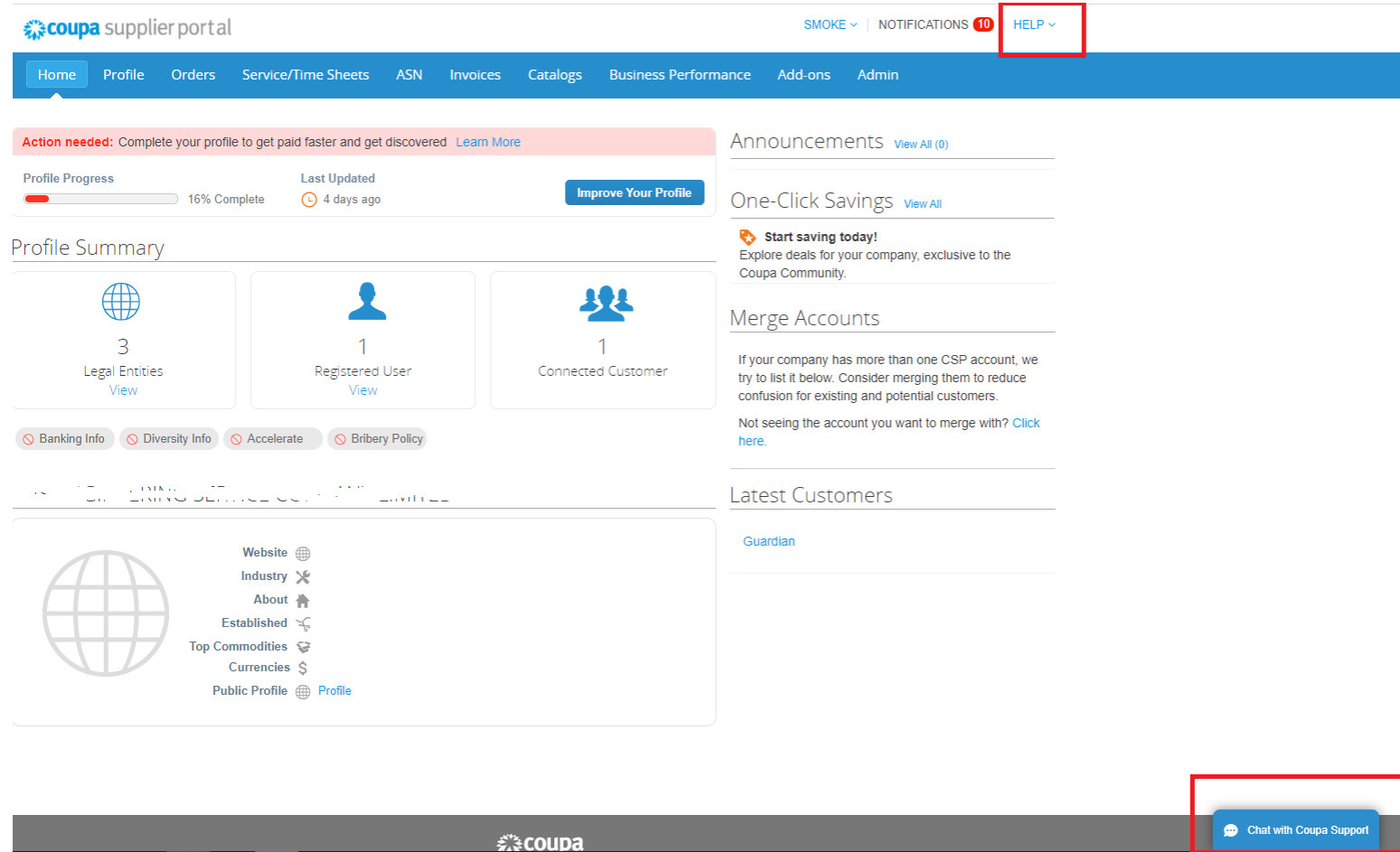


# Full Onboarding

The website which the supplier logs on is different from the one to which Guardian has access.

Due to this, **Guardian has no access to the pages which the supplier is working on.**

Coupa offers a Help Center, accessible at top-right of the screen (Online Help).



**An email address for non-urgent support is also available for suppliers:**  
[supplier@coupa.com](mailto:supplier@coupa.com)

# Full Onboarding

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Add-ons', and 'Admin'. A 'HELP' button is highlighted with a red box. Below the navigation bar, there is a 'Profile Progress' section showing '16% Complete' and a 'Last Updated' section showing '4 days ago'. The 'Profile Summary' section includes '3 Legal Entities', '1 Registered User', and '1 Connected Customer'. A 'Chat with Coupa Support' button is highlighted with a red box at the bottom right of the main content area.

Moreover, an online chat with a Coupa expert is possible through the button the supplier can find at bottom-right of the screen (“Chat with Coupa Support”).



By clicking the “Chat” button a window pops up to request the supplier contact for a call.

The 'Chat with Coupa Support' window contains the following text and form elements:

- Header: Chat with Coupa Support
- Text: This support service is for technical issues with the Coupa Supplier Portal only. For questions relating to transactions, please contact your customer directly.
- Text: This chat session will be saved as part of the supplier support request ticket. Continuing with this session will constitute your consent for this action.
- Form fields:
  - \*First Name (required)
  - \*Last Name (required)
  - \*Email (required)
  - Phone
- Button: Start Chat

# Coupa SIM - Useful Links

