



Coupa SIM - Supplier Manual

Version 6 July 2022



Responsibilities

Requester

- Manages Supplier relationship
- Collects the information and documents from the Supplier
- Submits the requests in Coupa SIM
- Supports the Supplier throughout the process
- Follows up on the Supplier request status

Sourcing Specialist

• Provides payment terms and, eventually, the T&Cs document, negotiated with the supplier

Supplier

- Submits T&Cs, Certifications (ISO/Diversity), Insurances, Contacts, Compliance, Tax ID, Banking information
- Completes the questionnaire with additional necessary information

SE Team

- Manages the whole on-boarding workflow in Coupa SIM
- Performs the document check, Tax ID validation, Restricted Party Screening and Bank Validation call
- Final supplier setup in CFC/CMS



Coupa SIM Processes and Forms

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









Full On-Boarding (Form 2 - Supplier)



Fwd: Guardian Profile Information Request - Action Required					
Test Supplier2 <suppliert629@gmail.com></suppliert629@gmail.com>		S Reply	Reply All	→ Forward][
To Tendi, Massimo				Sun 11/29/2020	8:04 AM
Retention Policy Standard - Inbox Cleanup - 90 (90 days)	Expires 2/2//2021				
(i) 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 pictures.	wnload of some pictures in this message.				
×					
Guardian Profile Information Request - Action Required					
				Powered b	y ×
tello Supplier,					
Guardian needs you to provide information about your company electronically in order to prevent I for Spend Management. Within the next 30 days, please respond below to provide this information https://www.guardian.com/en/supplier_portal_1	lost documents and make sure you are paid on tin n.You can find the Coupa instruction manual as we	ne. They manage this inf ell the Guardian Terms a	formation with Cou and Conditions with	pa, their chosen p nin our Supplier Po	ilatform ortal:

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



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).

	r below and create the password for y	our account. Once here for help.
* First Name	Test	
* Last Name	Supplier4	
* Company	Test Supplier4	
* Department		~
* Role		~
* Email	test_supplier4@hotmail.com	
* Password		
	Use at least 8 characters and include a number	r and a letter.
Password Confirmation		
	I accept the Privacy Policy and the Te	erms of Use.
	Submit	
Forward Your I	nvitation	
Forward Your I	NVITATION	o join quickly? Send a copy of yo
FOrWard Your I Not the right person to re nvitation to a colleague'	NVITATION egister now? Want to ask a coworker to s email below (must have the same en	o join quickly? Send a copy of yo mail domain).
Forward Your I Not the right person to re invitation to a colleague'	nvitation egister now? Want to ask a coworker to s email below (must have the same en	to join quickly? Send a copy of yo mail domain).





The Supplier Category field is prepopulated by default, the other fields must be filled in.

If Supplier Common name (Trade Name) and Legal name are the same, please repeat the same information.

* Trade Name (DBA)	Test Supplier4	
	Supplier Common Name - Indicate if appli	cable
* Country of Operation	Select	~
* Country of Origin		~
* Supplier Region	Select	~
* Region Supplier will be conducting business	Select	~
* Supplier Category	ADMINISTRATIVE (ADMIN) > ADMIN_SERVICES - HR SERVICES (ADMIN_7)	ж ~
* Is Supplier Category	Select	~

The category "tooling" is intended for automotive mould's production at SRG



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		

Terms and Conditions (T&C's):

The T&C's document can be found at the indicated URL or can be provided by the Guardian requester.

The supplier shall attach the signed and scanned T&C's document to the field on the right:

The 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 (attached to Form 1b) and anyway before the onboarding process finalization.

Effective Date	mm/dd/yy	
Expiration Date	mm/dd/yy	
Attachments		
Description		

Please, indicate any far future date as expiration date

Effective date can be the date of form filling.

>

Expiration date to indicate is any far future date, since the document has not an established expiration date.



Terms and Conditions (T&C's):

The T&C's document can be found at the indicated URL or can be provided by the Guardian requester.

The supplier shall attach the signed and scanned T&C's document to the field on the right:

Effective Date	mm/dd/yy
Expiration Date	mm/dd/yy
Attachments	
Description	

Please, indicate any far future date as expiration date

Is the Supplier authorized to skip T&C acknowledgement and Effective date is the date of form filling.

Expiration date to indicate is any far future date, since the document has not an established expiration date.

The Category Manager may authorize the supplier to skip the T&C's acknowledgement: if the view-only answer is set to "Yes", then the supplier confirms it's authorized to skip T&C's

The supplier might want to negotiate specific items of the T&C's with Guardian. In this case, the negotiated T&C's document shall be provided at a later stage (attached to Form 1b) and anyway before the onboarding process finalization. Guardian Terms and Conditions

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

sign?		
* I have read and acknowledged the T&C's	Select Yes No, I would like to negotiate T&C's No, authorized to skip T&C acknowledgement	~



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.



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





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

Acknowledgements	to Guard	ian Standard	İS
being and search and search the second search			

Guardian Industries requires that all the Production suppliers review and acknowledge our Supplier Quality Man	ual. Please see our SQM
on our website and agree to continue: https://www.guardian.com/en/supplier_portal_1	

* I have read and acknowledged the SQM	
* Please specify tooling supplier type	N/A × ~
	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.	N/A 🗶 🛩

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





The supplier shall indicate 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 Informa	ation		
* What currency you would like to be paid in?	USD 🗸			
* Banking Region	US	×	~)	
* Payment Method	EFT - Bank Transfer	×	-	
* Payment Effective Date	Default payment method (EFT/ba update payment method accordin 08/14/20	nk transfer) v ngly.	will be	updated to contract terms once cont



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





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 detai requirements. For best results possible.	ls in Coupa will help you meet your custor with current and future customers, compl	ner's invoicing and payment ete as much information as	
* Legal Entity Name Country	Test Supplier4 United States	This is the official name of your business that is registered with the local government and the country where it is located.	
		Cancel	e



Tel	l your customers about yo	ur organization
Vhich customers do you v Z All Z Guardian	vant to see this?	
Vhat address do you invo	ice from?	
* Address Line 1		
Address Line 2		REQUIRED FOR INVOICING
* City		Enter the registered address of
State		your legal entity. This is the
* Postal Code		receive government
Country	United States	documents. 🧭
	Use this address for Remit-To ()	
	Use this for Ship From address 🕖	

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". 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.

Tax ID 1111111 I don't have Tax ID Number Add additional Tax ID Miscellaneous Invoice From Code 7 Preferred Language English (US) V	Country	United States	~	×	
☐ I don't have Tax ID Number Add additional Tax ID Miscellaneous Invoice From Code Preferred Language English (US) ♥	Tax ID	1111111			
Add additional Tax ID Miscellaneous Invoice From Code Preferred Language English (US) V		I don't have Tax ID Number			
Invoice From Code Preferred Language English (US)	Add addi	tional Tax ID			
Preferred Language English (US) 🗸	Add addi Miscellaneous	tional Tax ID			
	Add addi Miscellaneous	tional Tax ID	0		



	1 2 3 4	
For many countries includi your legal entity is register	ing different shipping details on the invoice is required if they are different to where ed.	Add Ship From
Title	Status	
est est I111111 Jnited States	Active	Manage

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.



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

Activo	Active	
Active	Active	
Bank Name		
Bank Branch		
Bank Address		
Name on Bank Account		
Bank Routing Number (ABA)		0
SWIFT Code (BIC)		0
Swift Address		
Bank Account Number		0
Correspondent Account		
Clearing Code		
	(branch/transit number for ba	nks located in Canada)
IBAN Number		0
CLABE Number		

GUARI

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

Routing (Bank Code)	Bank Code 🖌	
Number:		
SWIET/BIC Code:	Routing Number	
ovin hbio oode.	Bank Code	
	BSB	
Bank Account Type:	IFSC	\sim
	Sort Code	
	Transit Number And Institution Number	

What are your Bank Account Details? 🕖



What are your Bank Account Details? 🕖



For suppliers which have additional tax IDs, besides to the main one and according to the country legislation, new 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	**************1-43	
	Main Tax ID Number	
Tax ID Type2	Brazil - State Tax ID	
	Please, select "TaxID1 (Tax 120)" as your State Tax ID	
Tax ID2	83.077.395	
	State Tax ID Number	
Tax ID Type3	Brazil - Municipal Tax ID	
	Please, select "TaxID2 (Tax 121)" as your Mudicipal Tax ID	
Tax ID3	252223590	
	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	



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.



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

Eventually, the supplier (Production or non-Production) 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 a further review.

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



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



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12/14/2022



Moreover, an online chat with a Coupa expert is possible through the button the supplier can find at bottomright of the screen ("Chat with Coupa Support").

		/	
		/	
-	1		

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

ed as part of the supplier nuing with this session will is action. *Last Name This field is required.
*Last Name
This field is required.
This field is required.
t Chat





Supplier Update (Form 4 - Supplier)



Select ADDRESS CHANGE BANK ACCOUNT CHANGE CHANGE/ADD ORDER CONTACT CHANGE/ADD CONTACT FOR PAYMENT LEGAL NAME CHANGE PAYMENT METHOD CHANGE

Supplier can request to submit the Update Form for these reasons. The fields to be filled will be displayed according to the selected type.

Bank account change request mean the creation of a new Remit-To address and the need to provide the bank statement/letter, as already seen in Form 2.

As said, payment term changes can only be requested by Guardian.



Form 4 shall be sent to the supplier by the Guardian requester. First, the requester needs to search for the needed Supplier:

	A Requests	Orders	Invoices Community Inventory	Sourcing Suppli	ers Contracts	s Reports Setup			
	Suppliers Supplier In	ormation A	rtifacts Supplier Sites Catalogs Supplier	Portal Directory Insight	S				
	Suppliers								
	Create Load f	rom file	Export to 🗸 View All	~ (Advanced	Search P			
	Match Conditions M	atch all conditi	ions 🗸			Add group of conditions			
	ilter By Name		Filter Clause contains	Filter Text test supplie	er	0			
						Cancel Search	1		
	Opportunities	Supplier	Base			>			
Name Display Name	Status	On Hold	Pending Request Count Pending Requests	Supplier Portal Status	Supplier Contact	Address	Supplier Information Status	Request change orders	Actions
SRG_Test Supplier 0-C123123 SRG_Test Supplier	Active	No	0	Invited	Pat Kapp	Sample Address Auburn Hills, michigan 48321 United States	Draft	No	N 🛛 🗹 🖈 🏀 🕞 🖓
Sanjeev Test Supplier Sanjeev Test Supplier	Inactive	No	0	Linked	Sanjeev Rao	123 Main St Naperville, IL 60564 United States		No	∖⊗ 6 lõ
SRG_SAN Test Supplier-C199999 SAN Test Supplier	Active	No	0	Not Linked	Test FN Test LN			No	🔪 😢 💉 🌾 🏷 🔿
Test Supplier 123 Test Supplier 123	Active	No	0	Linked				No	🔪 😣 🚿 🏀 🔂 📀



After searching for the Supplier's name, there two ways of sending it:

- 1. By ticking the box next to the Supplier's Name and clicking the Request Info button.
- 2. By clicking the Send Request for Information icon (paper plane icon) under Actions.

				2	
	Suppliers				
	Create Load from file Export to V showing limited - search for GI supplier 14 x	fiew lois - C	Advanced GI supplier 14		
Name Display Name Country Star	Opportunities Supplier Base On Hold Pending Request Count Pending Requests	Supplier Portal Status Supplier Contact	Address Supplier Information Status	Request change orders	Actions
GI Supplier 14 GI Supplier 14 United States Onb	oarding No 0	Linked Catriona Gray	678 Pending mapping Texas, 5678 United States	No	🔪 <mark>8</mark> 🐔 🐻
Invite Réquest Info Request leg:	al signoff Add Tag Request Review Per page 15	45 90			

INDUSTRIES

- 3. The request email pops up.
- 4. In Select Supplier Information
 Form dropdown, Choose
 "4_Update Form (Supplier)".
- 5. Click Send Info Request button.



Supplier Information GI Supplier 14 **Supplier Update - Supplier** * Specify the reason for Select ~ changing this supplier * Delivered Guardian Plant * Tax ID Number GUARDIAN Update your profile for Guardian Industries Contact Information Powered by Coupa Contact Information Hello Supplier, Primary Contact Guardian Industries wants you to respond by updating your company profile on Coupa. This information is required so they can transact with you electronically. First Name Catriona Use the "Update Profile" button to respond or decline. Last Name Gray Lois Escapalao Email address demosupplierdemo2+SIM14(0 Guardian Industries Work Phone US/Canada ~ 650-555-1212 Update Profile Fax US/Canada 🗸 850,555,1212 6. Supplier will receive an email invitation to update its Comments information. 7. By clicking Update Profile button, it will be redirected to the Submit for Approve Decline Save Update Form. 8. After filling out the form and clicking Submit button, Form will be sent for approval to the SE team. By clicking Save, the form will be saved as a draft, whereas clicking Decline means to reject answering the form. **GUARD**

To request a bank account change, the supplier needs to follow this process (similar to what seen in Form 2).

After receiving the notification and joining Coupa Portal, the supplier tick the "Send to ERP" box and select "Bank Account Change".

Supplier name, tax ID# and contact information are populated by the system and don't be modified.

Guardian

Ve have auto-filled some information from your Public Profile.

Supplier Information Test Supplier7BIS * Send to ERP? 1 This should be checked for supplier update to be interfaced to client ERP. Please check BANK ACCOUNT CHANGE × × * Specify the reason for changing this supplier * Tax ID Number 7777777777 Contact Information Contact Information First Name Test Last Name Supplier7 Email address Supplier7.UAT@gmail.com Work Phone US/Canada 🗸 650-555-1212 Fax US/Canada ~ 650-555-1212 INDUSTRIE

Supplier Opuate - Supplier	Supplier's Banking Validation Contact - Name	Provide contact for s	omeone other than person filling out t	his form.
A contact person at supplier's is needed for banking validation purposes.	Supplier's Banking Validation Contact - Email	Provide contact for s	omeone other than person filling out t	his form.
Currency type must be selected.	Supplier's Banking Validation Contact - Phone	Provide contact for s	omeone other than person filling out t	his form.
If the currency type is going to change vs. the existing one (e.g. old account is in PLN and new account is in EUR), then the supplier should specify it.	* What currency y would like to be p i	you EUR ❤ aid in?	Has the currency of your new bank account changed?	v
			GUAF	

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

* Banking Region	Select	~
* For Bank account change, attach bank documents here:	Choose File No file chosen	

Ranking Information (Only

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. Click Create New.

A series of pop-up windows request the supplier to provide the new Remit-To address details.

Setting up your business details in C requirements. For best results with o possible.	Coupa will help you meet your current and future customers, o	ustomer omplete	's invoicing and payment as much information as
* Legal Entity Name Test S	3upplier4		This is the official name of your
Country United	d States	~	business that is registered with the local government and the country where it is located.





ich customers do you want to see this? ☑ All ☑ Guardian Nat address do you invoice from?	
All Guardian	
♥ Guardian	
nat address do you invoice from?	
* Address Line 1	
Address Line 2 REQUIRED FOR IN	OICING
* City Enter the registered	d address of
your legal entity. T	his is the
* Postal Code receive governmen	nt you
Country United States	

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". By selecting "All" or "Guardian" to the first question, the supplier provides 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.

Country	United States	~	×	
Tax ID	1111111			
	I don't have Tax ID Number			
Miscellaneous				
		0		
Invoice From Code				

These are 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?			
		3 4	
* Payment Type Address	v		
What is your Remit-To Add	Iress?		
Address Line 1	test		
Address Line 2	test		
City	test		
State			
Postal Code	1111111		
Country	United States		
W	here do you want	canc to receive payment?	el Save & Continue
		a (a)	
Remit-To locations let your customer add more locations, otherwise click N	s know where to send paymer Next.	nt for their invoices. Click Add Remit-To t	O Add Remit-To
Remit-To Account	Remit-To Address	Status	
ddress	test test 1111111 United States	Active	Manage

And these ones are 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)

Title	Status		
test test 1111111 United States	Acuve		Manage
	Deactivate	Legal Entity	Done
	Setup Complete		×
	1234		
	Do you want to Add Remit-To Address to the customer profile now?		
r	A	dd Later	Add Now

The following group of fields (GI - Remit To New) requests to provide the bank account details to which the supplier will receive the invoice payments.

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.

This group of fields must be placed in Active status.

Below this fields, the supplier finds its current bank account details, under the title GI - Remit To Update. The old account needs to be switched to Inactive status.

Active	Inactive 🗸
Bank Name	х
1 12 1	

*GI - Remit To New

		Active 🖌	Active
		e	Bank Name
		h	Bank Branch
		s	Bank Address
		nt	me on Bank Accoun
		er (ank Routing Numbe (ABA
		>)	SWIFT Code (BIC
]		s	Swift Address
	0	er	ank Account Numbe
		nt	Corresponden Accoun
		le	Clearing Code
	or banks located in Canada)	(branch/transit n	
	0	er	IBAN Numbe
		er	CLABE Numbe

GUAR

Once form is fully approved, the information will be sent to CFC/CMS for supplier update.





Coupa SIM - Useful Links



