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Coupa SIM (On-Boarding) Playbook

Version 15
January 2024

GUARDIAN 
INDUSTRIES

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Coupa SIM (Supplier Information Management)



Responsibilities

Requester

- Manages Supplier relationship throughout the process
- Support low critical suppliers throughout the form 2c answering process. This doesn't include the bank details provision
- Submits form requests: form 1 (first part), form 3, form 5, form 6a, form 7
- Follows up on the Supplier request status

Sourcing Specialist (Strategic Sourcing & Procurement - SS&P)

- Provide supplier information within form 1 (second part - including the definition of supplier criticality and payment terms)
- Support high critical suppliers throughout the forms 2a/2b answering process. This doesn't include the bank details provision

Supplier

- Answers form's questions, provides the required information (including bank details) and documents
- Acknowledges and sign T&C's document (in the US: acknowledgement only)

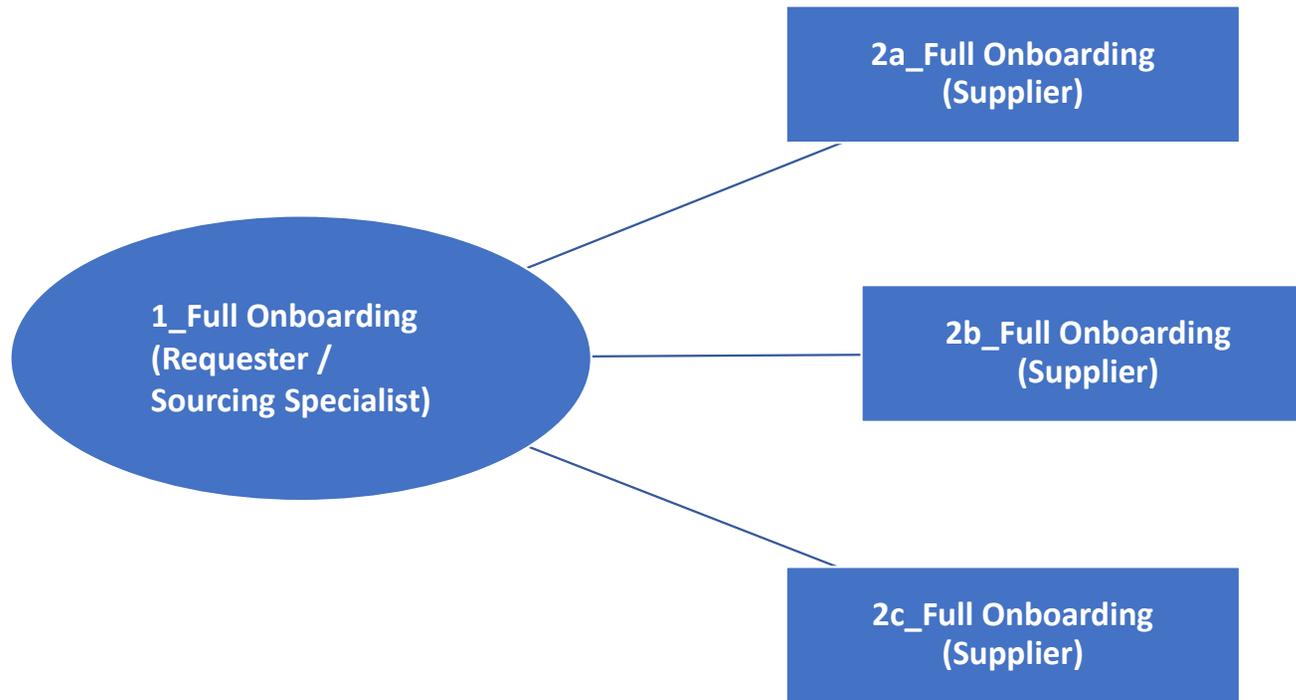
SE (Supplier Enablement) Team

- Manages the whole on-boarding workflow in Coupa SIM
- Provides suppliers with technical support (e.g., missed notifications, etc.)
- Performs the document check, Tax ID validation, Restricted Party Screening and Bank Validation call
- Final supplier setup in Tibco/WGS/CMS

Coupa SIM Processes and Forms (1)

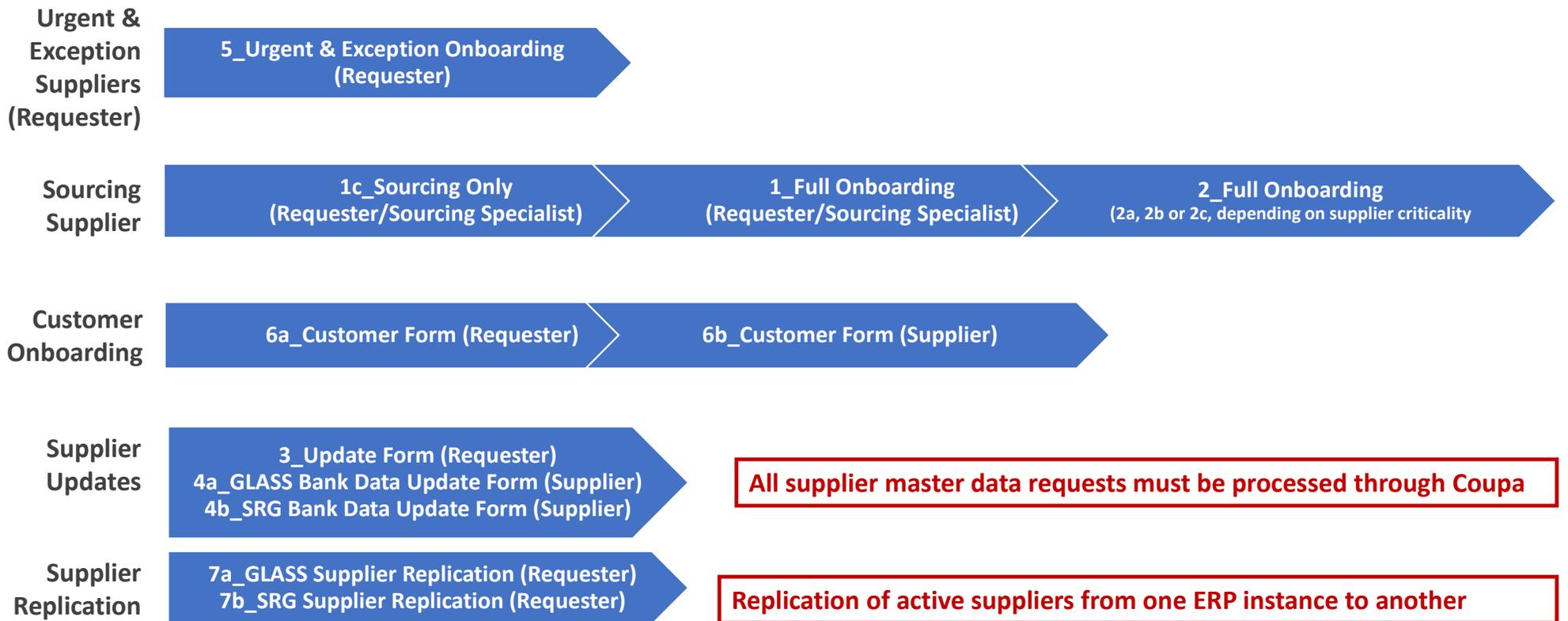
Below is the high-level flow of the types of Supplier Onboarding and Update and their respective forms.

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.



Supplier Criticality

With the aim to ensure an appropriate and time-adjusted onboarding process, we adopted the concept of “criticality” of a supplier.

A supplier is critical if at least two out of these three statements are true:

- 1. The provided products or services are essential for our operations**
- 2. Its sudden loss would cause significant disruption to the business**
- 3. Its (estimated) annual spending amount is considerable**

Based on this definition and the information collected in form 1, the Sourcing Specialist establishes the supplier criticality and, thus, which form follows:

- Direct Materials & High Critical Supplier → Form 2a (supplier form)**
- Indirect Materials & High Critical Supplier → Form 2b (supplier form)**
- Low Critical Supplier → Form 2c (supplier form)**



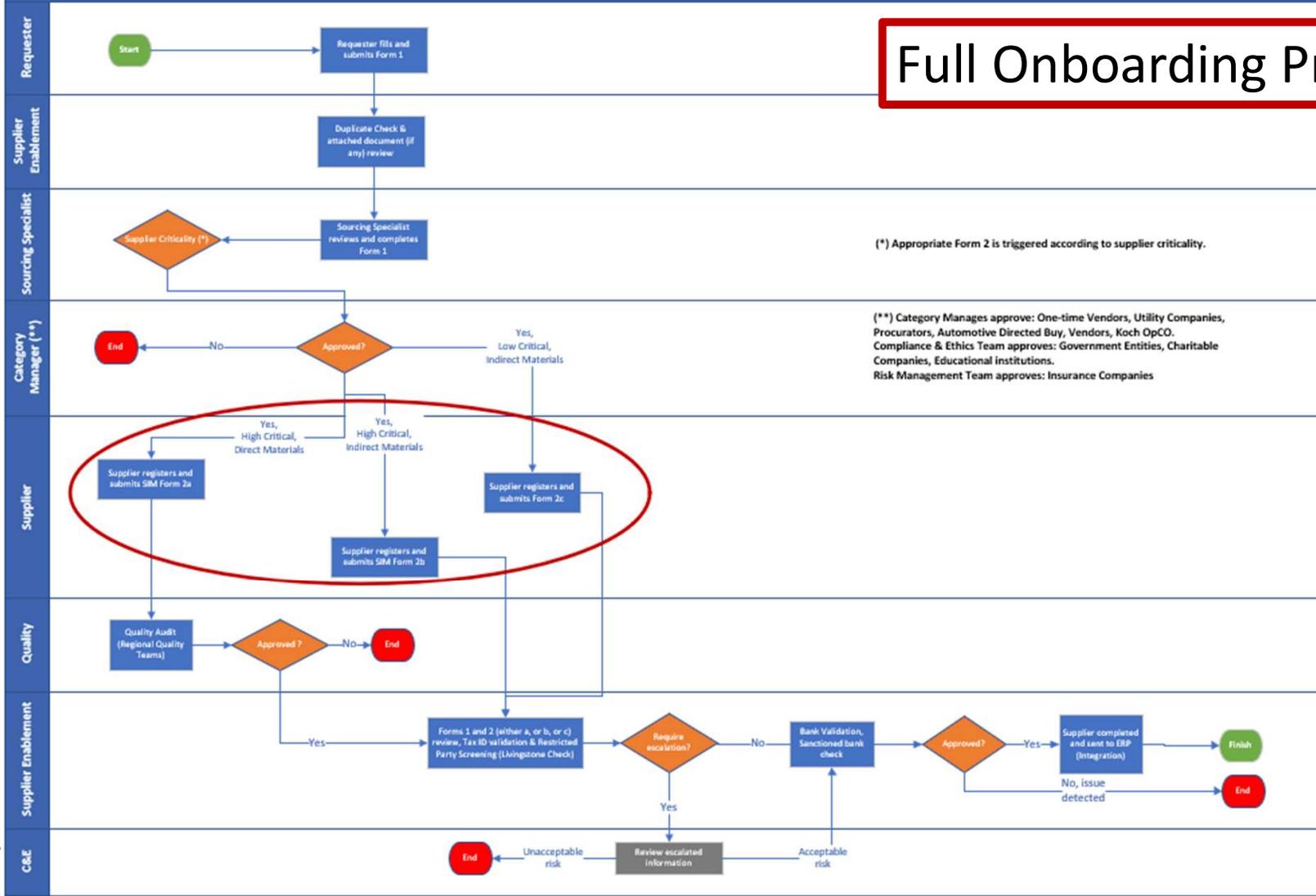
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Form 1
Requester / Sourcing Specialist

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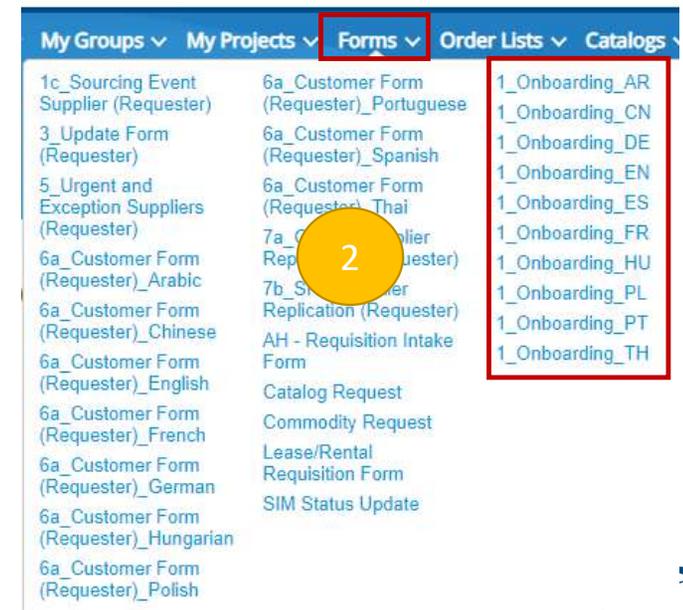
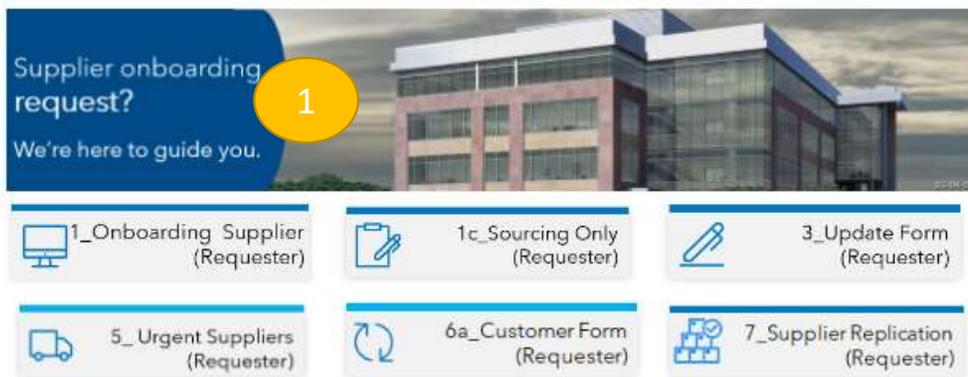
Full Onboarding Process



Full Onboarding

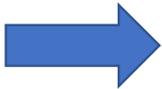
After logging in Coupa, the requester can:

1. Click the **Forms** dropdown and select the onboarding process depending on the supplier's language, or
2. **Select** the 1_Onboarding Supplier button



Full Onboarding

Legal Name

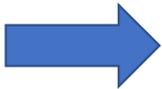


* Supplier Legal Name

Supplier Information:

The legal name is the formal, official name with its legal entity of the company and appears on government and legal forms.

Common Name



* Supplier Common Name

English characters only

The common name (or trade name) is the name the company is commonly known as when doing business. If not available or unknown, please put the same as legal name.



Please, use only CAPITAL LETTERS and write it only in ENGLISH ALPHABET.

Full Onboarding

Contact Purpose
must be left blank.



* Supplier Primary Contact (Please, do not fill the "Purpose" field)

Contact Purpose	<input type="text" value="Select Some Options"/>	
* First Name	<input type="text"/>	
* Last Name	<input type="text"/>	
* Email address	<input type="text"/>	
Business Phone	<input type="text" value="US/Canada"/> <input type="text" value="650-555-1212"/>	
Cell Phone	<input type="text" value="US/Canada"/> <input type="text" value="650-555-1212"/>	
Fax	<input type="text" value="US/Canada"/> <input type="text" value="650-555-1212"/>	

This is the **main supplier contact**, who will receive the invitation to join Coupa and fill the questionnaire (Form 2a or 2b or 2c).

Full Onboarding

Requesting company: Glass or SRG

Request Plant

Region

Country

Location: US or Rest of World

Product/service the supplier delivers

Estimated annual spend

Tax details

Who will this supplier provide goods/services for? Guardian Glass

Guardian Plant (Request Plant) 023 - N. America

Supplier Region North America

Country United States of America,US

Supplier Location United States

Information for Category Manager Approval

Detailed Description of the products/services supplier will be providing

e.g. "electrical engine as a replacement in the hot end line".

Estimated annual spend with the supplier

Tax ID Detail Information

Tax ID Type Australia - Tax ID

Tax ID *****4123

Please, attach Tax ID / W9 / W8 document for validation

TEST_TAX_ID_DOCUMENT.docx

If the supplier is based in the European Union or the United Kingdom, the Tax ID number is enough. Elsewhere, tax ID document must be attached for validation purposes.

Full Onboarding

T&C's (Guardian's Terms and Conditions) agreement and sign are not mandatory for US-based companies. They shall only acknowledge our T&C's when filling form 2a or 2b or 2c (or declare their will to re-negotiate them).

Rest-of-world suppliers must acknowledge and sign the T&C's.

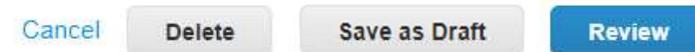
Guardian agreements with the OEM terms or contracts in place with the supplier are also valid.

The Requester delivers the T&C's document to the supplier. The updated T&C's are available at the Supplier Portal: www.guardian.com/us/en/supplier-portal

Full Onboarding

Requester's part of the form finishes here.

Now, Requester submits the form for **Review**, and then again for **approval**.



Supplier duplication check is advanced: as soon as the requester sends out the filled form 1, the **SE Team** reviews the eventual duplication of the requested supplier. If the supplier is already active in another WGS/CMS instance, it can be replicated by using a form 7 and full onboarding is not needed.

The same form is now sent the Sourcing Specialist (SS&P Team) to be completed.

~ SS&P Team Only ~

The mandatory questions below are answered by SS&P, not by the Requester

Full Onboarding

Sourcing Specialist receives a note in the To-Do section and an email to advise about next step to take:

To Do 3 more in your inbox

- New Supplier Request from ██████████ - 1_Full Onboarding (Requester)_Polish (#155234) Hide • Reject • Approve
- New Supplier Request from ██████████ - 1_Full Onboarding (Requester) (#153590) Hide • Reject • Approve
- New Supplier Request from ██████████ - 1_Full Onboarding (Requester) (#154697) Hide • Reject • Approve

Sourcing Specialist enters the request (**do not approve it yet!**), scrolls it down and click **Edit**.

Added by the approval chain 1_Full Onboarding (Requester)_SS_GLASS_E-EU

Add

01/05/23 Sourcing Specialist GLASS_East-EU Supplier Enablement Approval Complete

* Comment (required to reject)
Provide approval/rejection comment here

Edit Reject Approve

Full Onboarding

The mandatory questions below are answered by SS&P, not by the Requester

IMPORTANT

All SS&P questions are mandatory, even though they are not marked by asterisk. Forms with unanswered questions will be rejected.

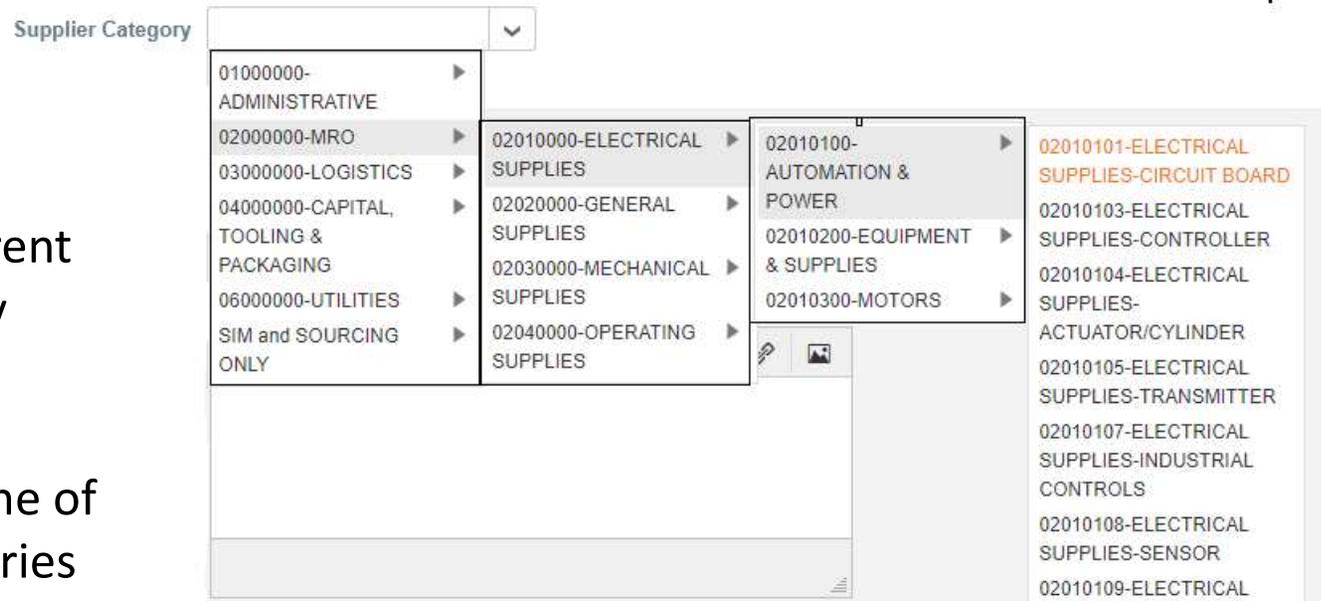
Missing answers neither trigger the right form, nor the Category Manager approval. From here, the importance of delivering a complete form.

Full Onboarding

Categorization

Coupa SIM utilizes the current categorization for Category Manager's approval.

The user needs to select one of the six listed level 1 categories and then one of the Level 2 sub-categories, down to reach the level 4.



Full Onboarding

Additional Questions

Indicate Supplier Tier Level

Will the supplier be providing goods/services to multiple plants?

Supplier Preferred Status None

Supplier Group

Supplier Classification None

Delivery Method

Delivery Terms

Place of Destination None
Destination town of the goods/services

Few additional information are requested



Full Onboarding

The below questions are asked for a matter of supplier classification

Additional Questions

* Supplier Preferred Status

Select

Non Addressable

Preferred

Non Preferred

Additional Questions

* Supplier Preferred Status

Select

Supplier Classification

Select

Government

Competitor

Critical

Intercompany

Customer Only

The Preferred Status means if the supplier should be considered as Preferred/Non-Preferred for the specific item it is going to provide us with, or rather, Guardian has no different choice to purchase that product (the so-called “Non-Addressable spend”: government authority, market monopolist, etc.).

This classification refers to the type of supplier:

- Government entity
- Competitor of another supplier we already work with
- Vendor disruption could halt our Production
- Intercompany supplier
- Supplier record created to process refunds to customers

Full Onboarding

Is the supplier under
cash accounting
scheme?

The Cash Accounting Scheme follows the principles of cash accounting, meaning that income is recorded when it is received, and expenses are recorded in the period they are paid.

The Cash Accounting VAT Scheme, therefore, differs from the Standard VAT Accounting Scheme, under which VAT is recorded on the date of issuing or receiving a VAT invoice, regardless of when (or if) the payment is made.

Under the **Cash Accounting Scheme, the business pays the VAT on sales when customers pay their invoices but cannot reclaim VAT on purchases until suppliers are actually paid.**

Full Onboarding

Supplier Criticality

Supplier Criticality US, Indirect Materials, High Spend
Assessment

Depending on the supplier country (US or elsewhere), the category (direct or indirect materials) and the estimated annual spending amount, Coupa provides an assessment of the supplier criticality (example above).

Based on this assessment and on other details within the same form 1, the Sourcing Specialist establishes the criticality to apply:

- **Direct Materials, High Critical Supplier → Form 2a**
- **Indirect Spending, High Critical Supplier → Form 2b**
- **Low Critical Supplier → Form 2c**

Full Onboarding

Payment Terms



* Payment Terms

Default answer should be NET 60. Default payment terms will be updated to contract terms once contract is negotiated and signed. If contract has already been signed, please update terms accordingly.

Payment terms: the default payment term is **NET 60**. The Sourcing Specialist might negotiate different terms with the supplier and set them in the drop-down field.

Only the below standard ones (written exactly in this way) must be selected:

2.0% NET 10 / NET 30	2.0% NET 15 / NET 60	NET 30
1.0% NET 10 / NET 30	1.0% NET 15 / NET 60	NET 15
3.0% NET 14 / NET 30	NET 90	NET 120
1.0% NET 15 / NET 45	NET 75	PAY IMMEDIATELY
2.0% NET 14 / NET 30	NET 60	
2.0% NET 15 / NET 45	NET 45	

A selected payment different from the above listed ones means the system rejection of the supplier.

Full Onboarding

Additional mandatory documents shall be attached, according to specific requirements of some countries (examples):

Brazil

* Copy of Constituting Act of Statutes and their amendments

No file chosen

Please attach the following documents:

For Individual vendor: Identity card copy, Business certificate

For General domestic vendor: Company registration certificate, Tax and VAT Certificate

For Oversea vendor: Company registration certificate

* Thailand Attachment

No file chosen

Thailand

Full Onboarding

Submit the form for **Review**



Once all information is final, **submit the form for approval**. The approval chain is now visible:



Full Onboarding

If the request is for a Production supplier, **regardless of the high/low criticality**, then the SE Team, shall add the Regional Quality Team as a watcher.

The Quality Team is notified that a Production supplier started the onboarding process and will review/approve the supplier, whatever form 2 the Sourcing Specialist selected.

Approvers

Added by: Approval chain 1a_Full Onboarding (Requester)_SE

Name: Regional Quality Team - M

Approver Position: As Watcher

Buttons: Cancel, Add

Workflow Diagram:

- Massimo Tendi (08/18/20)
- Supplier Enablement
- Category Manager - MINERALS - NON-METALLIC
- Approval Complete

Full Onboarding

After form 1 is fully approved, the requester sees within the **Recent Activity** box the submitted form and the onboarding progress:

Recent Activity [View All](#)

Process Supplier Onboarding (#16)
TestBea • 28 Dec • **In Progress**

1_Full Onboarding (Requester)
Supplier TestBea • 28 Dec • Applied

If hovering over **In Progress**, the requester can see the form approval flow, with both the completed and the pending steps:

do you need

Onboarding Progress
In progress

Last update
🕒 12/28/22 05:05 PM

activity [View](#)

r Onboarding
In Progress

ing (Requester
• 28 Dec • App

ing (Sourcing
Consulting • 17

ing (Sourcing

Supplier Onboarded

Beatriz Sanchez
1_Full Onboarding (Requester)
12/28/22

Massimo Tendi
On behalf of Supplier Enablement
12/28/22

TestBea TestBea
2b_Full Onboarding (Supplier)

Approval Needed

Next steps pending form response

Full Onboarding

After the SE Team review, depending on the criticality level **Supplier** is invited to register in Coupa to answer Form 2a or 2b or 2c



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

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](#)



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

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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

Reply Reply All Forward ...

Sun 11/29/2020 8:04 AM

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

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. **The link 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.

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

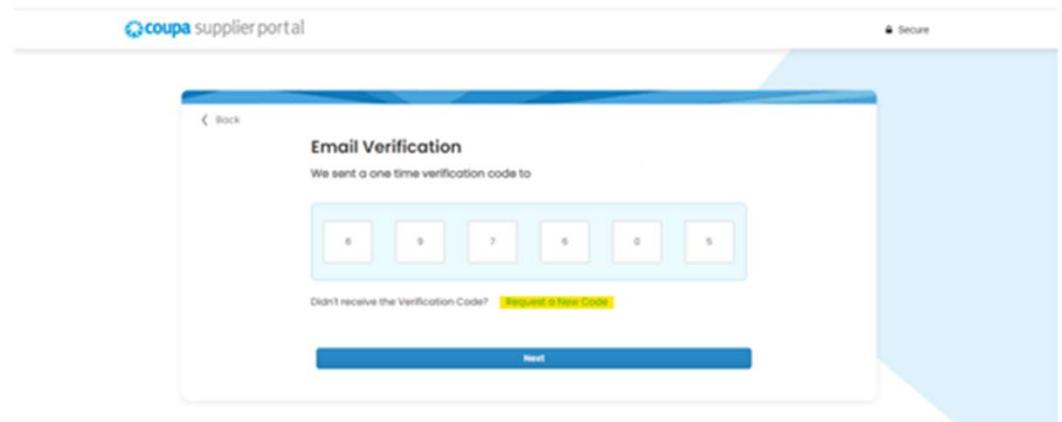
Submit



Full Onboarding

Supplier is then required to verify its email address. Coupa sends the provided email a six-digit code to be set in this page.

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



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. 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 under "Profile", with "Information Requests" highlighted by 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?". Below this, it states: "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." There are two input fields: "Website" with the value "http://matthewjperry.com" and "Tax ID" with the value "319-48-4143". On the left side, there is a sidebar menu with items: "Your Profile", "Overview", "Profile Setup", "Learning Center", "Add more customers", "Create a discoverable profile", "Feedback", and "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.

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	<input type="text"/> >

Full Onboarding

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).

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.

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

* 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 x ▼

* Payment Method

EFT - Bank Transfer x ▼

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.

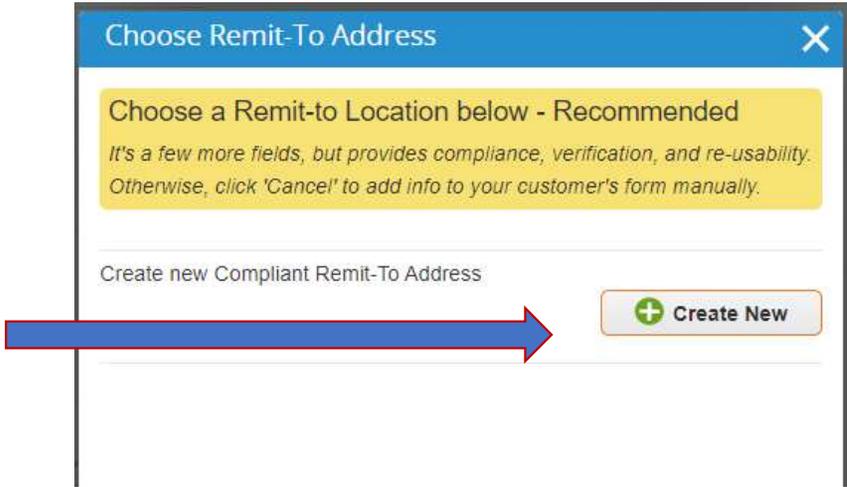
*Remit-To Addresses

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
 Use this for Ship From address

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents.

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?

Country United States

Tax ID 11111111

I don't have Tax ID Number

Add additional Tax ID

Miscellaneous

Invoice From Code

Preferred Language English (US)

Cancel Save & Continue

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 test test 1111111 United States	Active	Manage

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"/>	
SWIFT Code (BIC)	<input type="text"/>	
Swift Address	<input type="text"/>	
Bank Account Number	<input type="text"/>	
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"/>	
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: Routing Number ⓘ

Bank Account Type: Bank Code ⓘ

BSB ⓘ

IFSC ⓘ

Sort Code ⓘ

Transit Number And Institution Number ⓘ

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		▼

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** *****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 Municipal 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

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



Pending Approval

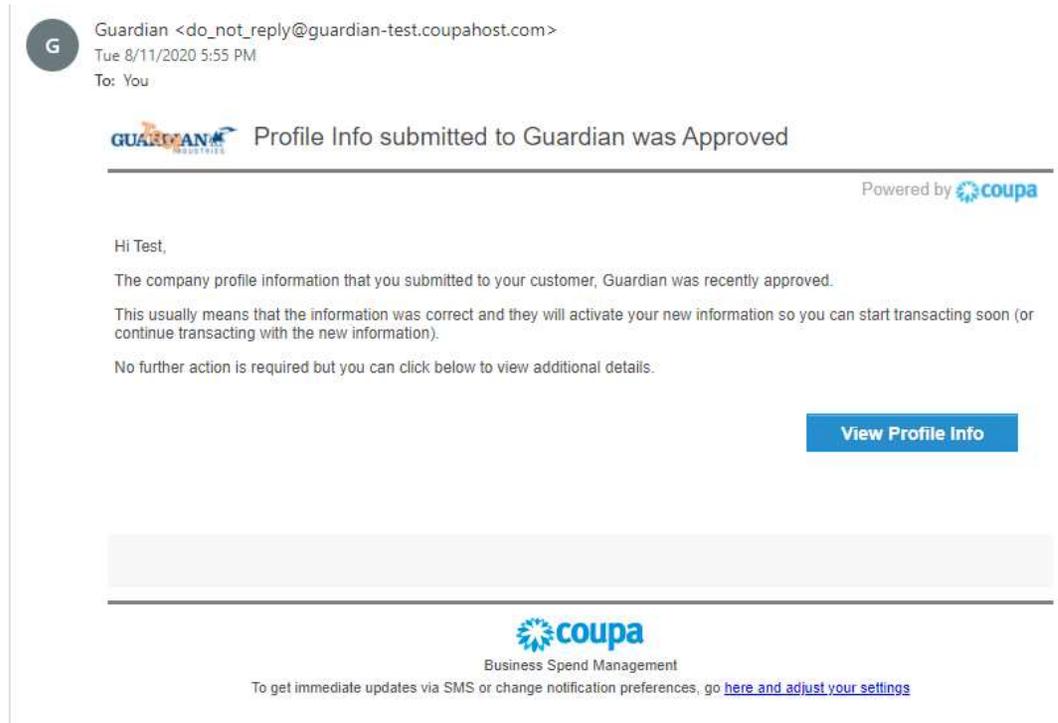


If supplier doesn't see the green-highlighted message as above, it means the form is not submitted, due to a mistake or lack of required information. It remains stored as draft, but it's not sent.

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.

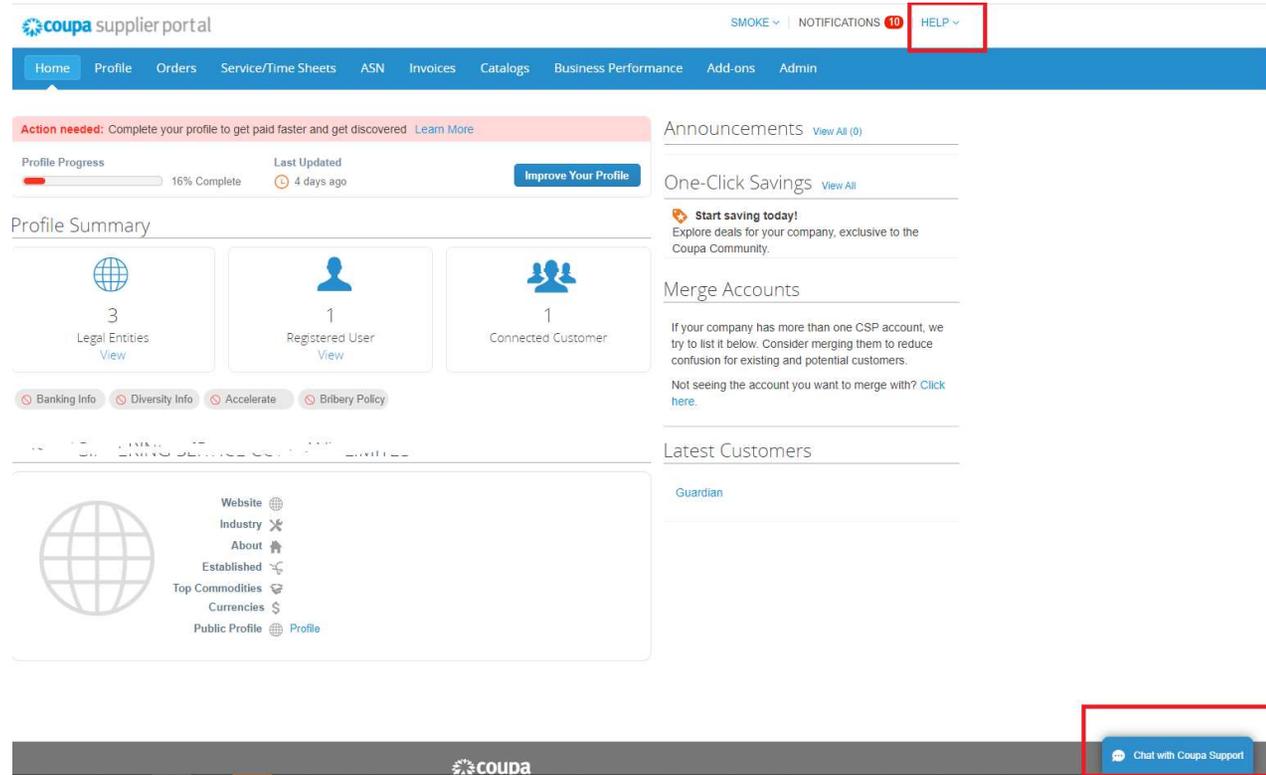


Full Onboarding

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

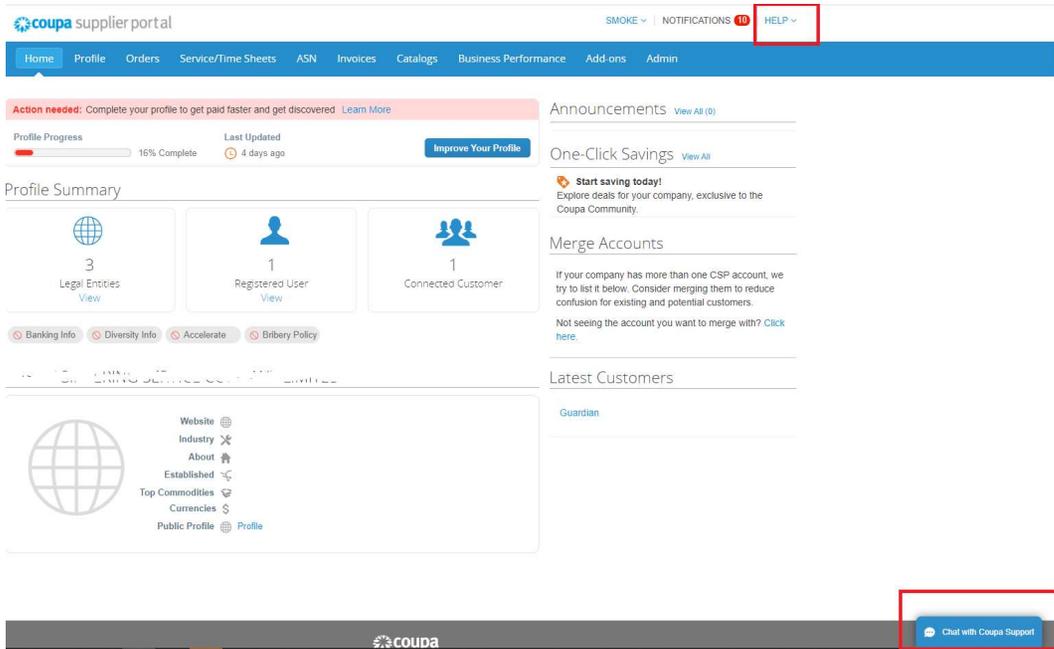
Due to this, **Guardian has no access to the pages which the supplier is working on.**

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

Full Onboarding



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.

A screenshot of the 'Chat with Coupa Support' window. The window title is 'Chat with Coupa Support' with a close button. The text inside reads: 'This support service is for technical issues with the Coupa Supplier Portal only. For questions relating to transactions, please contact your customer directly. 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.' The form includes fields for '*First Name', '*Last Name', and '*Email', each with a red border and the text 'This field is required.' below it. There is also a 'Phone' field. A blue 'Start Chat' button is at the bottom.

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Form 1c - Sourcing Only
Supplier / Sourcing Specialist

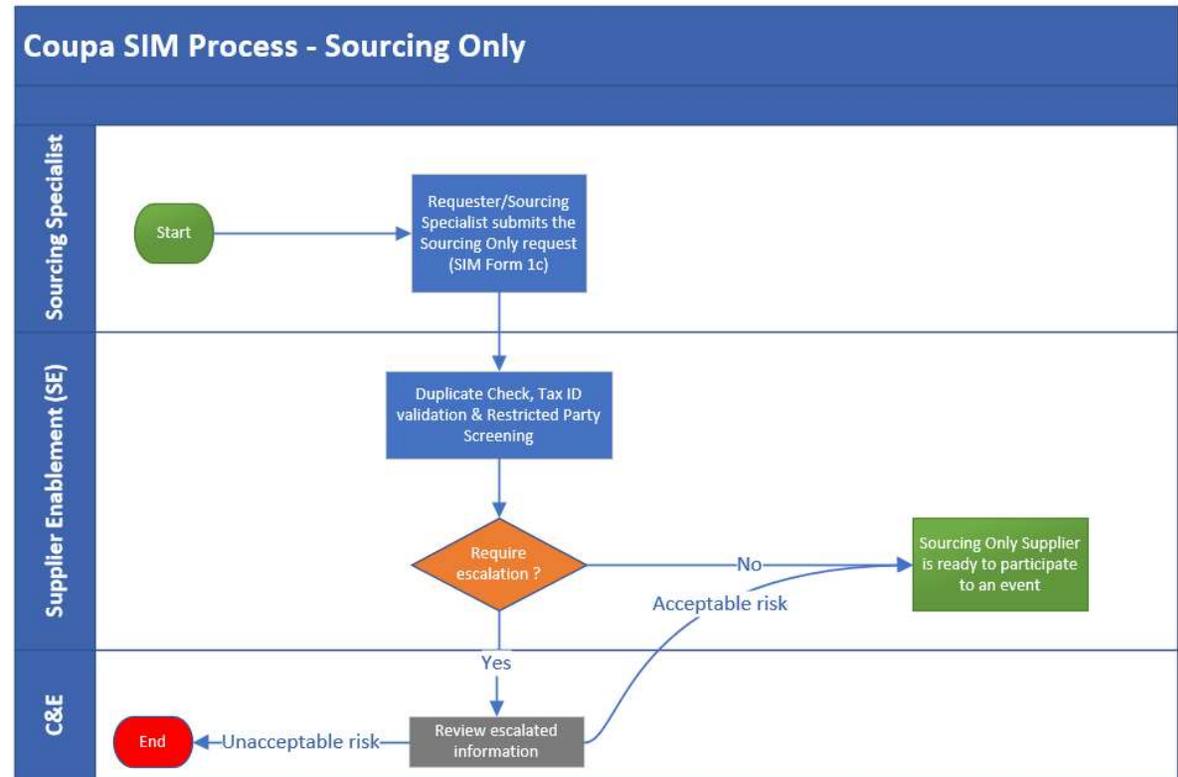
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Sourcing Only

The Sourcing Only process (**form 1c**) is for those suppliers which don't exist yet in our ERP, but they are requested to join a sourcing event.

The process is intended to validate the supplier tax ID and run the restricted party screening (compliance check) to allow the supplier to participate in the event.

In case the supplier is finally awarded, then the full onboarding process is needed.



1c_Sourcing Only (Requester) - Response #1526

Sourcing Only

Basic supplier information is needed

Supplier Information:

* Organization Name
Supplier Legal Name

* Who will this supplier provide goods/services for? x v

* Guardian Plant (Request Plant) 605 - Portageville

* Supplier Category CAPITAL_FAB BUILDINGS

* Contact Information

* First Name

* Last Name

* Email address 

Work Phone
650-555-1212

Fax
650-555-1212

Supplier contact person information



Sourcing Only

Compliance Internal Questions:

Is the proposed vendor's legal address, its HQ office and/or its financial institution (bank) located in any of these countries: Afghanistan, the Bahamas, Belarus, Botswana, British Virgin Islands, Congo Republic, Democratic Republic of the Congo, Ethiopia, Ghana, Iraq, Libya, Nigeria, Lebanon, Moldova, Pakistan, Panama, Puerto Rico, Kingdom of Saudi Arabia, Sri Lanka, Russia, Sudan, Timor-Leste, Trinidad and Tobago, Tunisia, UAE, US Virgin Islands, Ukraine, Yemen?

* Compliance Question on Location (Country)

Required documents for supplier creation:

* Please attach Tax ID / W9 / W8 validation document [Guardian_Test_Supplier_response.xlsx](#)



A tax ID document must be attached for its validation

Sourcing Only

Submit the form for your **Review**



Required document for supplier creation:

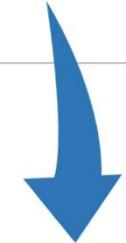
* Please attach Tax ID / W9 / W8 validation document

Guardian_Terms...ition - 2.docx

To be filled up by Supplier Enablement Team (please do not populate):

Compliance Approval

Once all information is final, click **submit for approval** to send the form to the SE Team.



Approvers



Krezell Mayo



Supplier Enablement



Compliance and Ethics



Approval Complete



Sourcing Only

If the Supplier is not awarded after the Sourcing event, then the onboarding process ends.

If the supplier is awarded, the Requester/Sourcing Specialist shall begin the onboarding process from scratch: form 1 → form 2 (2a, 2b, 2c).

In fact, the supplier has provided neither the T&C's (if required), nor the payment terms (contained in form 1), nor the compliance answers, banking, tax details (form 2). For this reason, the full onboarding process is needed for awarded suppliers.



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Form 3 - Supplier Update Requester

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Supplier Update - Requester

ADD/INACTIVE PLANT TO P2/CMS
ADDRESS CHANGE
ADD/REPLACE SIGNED T&C's
BANK ACCOUNT CHANGE
CHANGE/ADD MAIN CONTACTS
CHANGE/ADD ORDER CONTACT
CHANGE/ADD CONTACT FOR PAYMENT
CHANGE/ADD OTHER CONTACTS
CHANGE/ADD PRIMARY CONTACT
CHANGE TAX REGIME - ONLY BRAZIL
CLOSE/SUSPEND A SUPPLIER
LEGAL NAME CHANGE
PAYMENT TERMS CHANGE
PAYMENT METHOD CHANGE
PREFERRED STATUS CHANGE
VENDOR PART UPDATES IN CMS

Supplier changes can be requested for these reasons. The fields to be filled will be displayed according to the selected type.

Tax ID changes or Legal Entity changes always mean a new company, therefore, a new full onboarding process is needed.

Payment term changes can only be requested by Guardian.

The approval flow for supplier changes includes only the SE Team, except if it is a **Payment term change**, for which the Category Manager approval is also needed.

Supplier Update - Requester

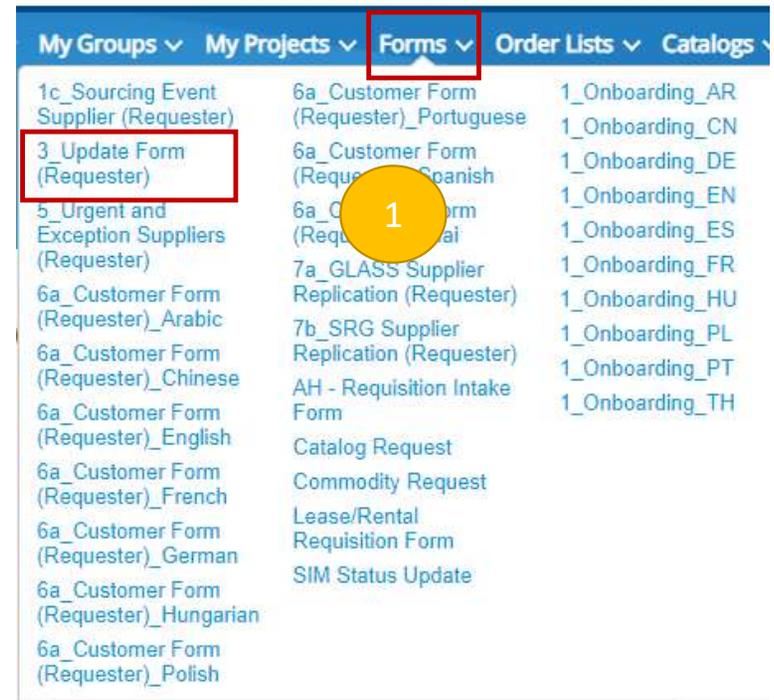
1. Click the Forms dropdown and select the name of the form.

2. Or Click the 3_Update Form button



Supplier onboarding request?
We're here to guide you.

1_Onboarding Supplier (Requester)	1c_Sourcing Only (Requester)	3_Update Form (Requester)
5_Urgent Suppliers (Requester)	6a_Customer Form (Requester)	7_Supplier Replication (Requester)

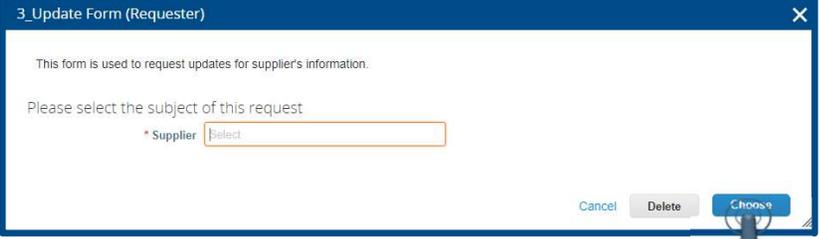


My Groups ▾	My Projects ▾	Forms ▾	Order Lists ▾	Catalogs ▾
1c_Sourcing Event Supplier (Requester)	6a_Customer Form (Requester)_Portuguese	1_Onboarding_AR		
3_Update Form (Requester)	6a_Customer Form (Requester)_Spanish	1_Onboarding_CN		
5_Urgent and Exception Suppliers (Requester)	6a_Customer Form (Requester)_Thai	1_Onboarding_DE		
6a_Customer Form (Requester)_Arabic	7a_GLASS Supplier Replication (Requester)	1_Onboarding_EN		
6a_Customer Form (Requester)_Chinese	7b_SRG Supplier Replication (Requester)	1_Onboarding_ES		
6a_Customer Form (Requester)_English	AH - Requisition Intake Form	1_Onboarding_FR		
6a_Customer Form (Requester)_French	Catalog Request	1_Onboarding_HU		
6a_Customer Form (Requester)_German	Commodity Request	1_Onboarding_PL		
6a_Customer Form (Requester)_Hungarian	Lease/Rental Requisition Form	1_Onboarding_PT		
6a_Customer Form (Requester)_Polish	SIM Status Update	1_Onboarding_TH		

Supplier Update - Requester

Upon clicking the **Request** button, a pop-up window will be displayed.
Enter the Supplier Name and click **Choose**.
Update form will now be displayed.

According to the selected change purpose, the appropriate questions are displayed accordingly.



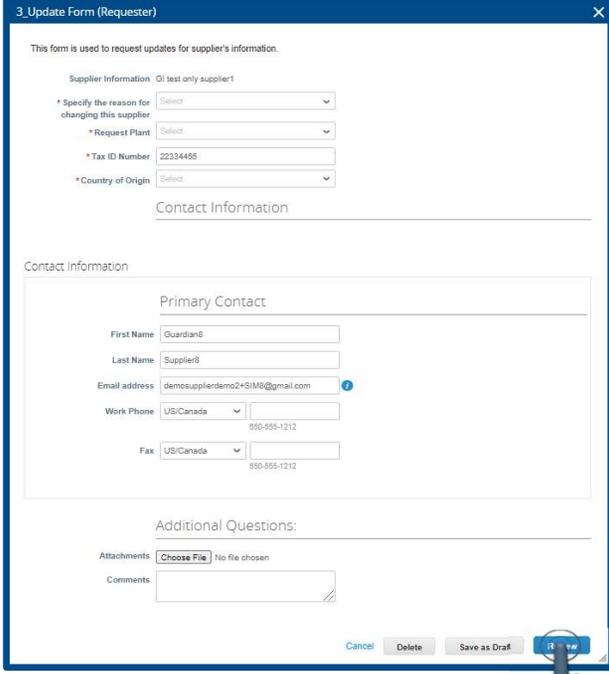
3_Update Form (Requester)

This form is used to request updates for supplier's information.

Please select the subject of this request

* Supplier

Cancel Delete Choose



3_Update Form (Requester)

This form is used to request updates for supplier's information.

Supplier Information Q1 test only supplier:1

* Specify the reason for changing this supplier

* Request Plant

* Tax ID Number

* Country of Origin

Contact Information

Contact Information

Primary Contact

First Name

Last Name

Email address

Work Phone

Fax

Additional Questions:

Attachments No file chosen

Comments

Cancel Delete Save as Draft Review

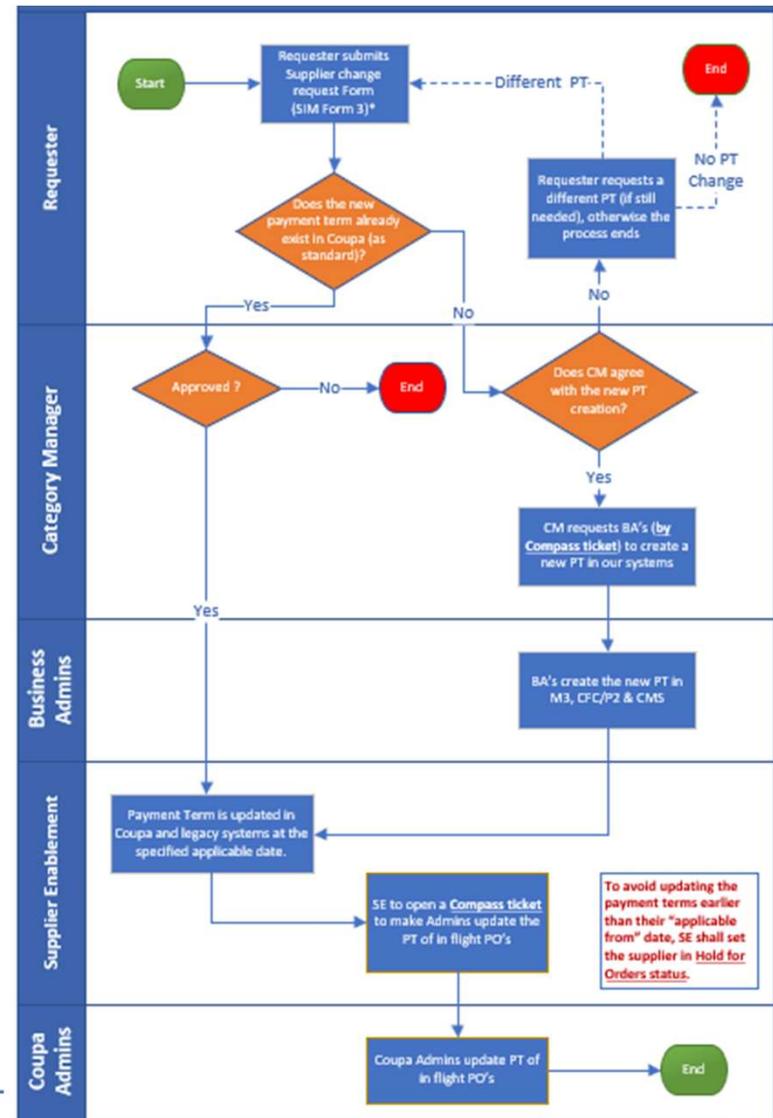
Supplier Update - Requester

Payment term requests

Requester must specify **when** the new payment term is applicable from (immediately? Next month? Beginning of next contract?) and **what** to do with in-flight PO's.

The indicated date separates the old term application from the new. PO's until that date are paid under the old term, PO's after that date are paid under the new one.

SE shall apply the payment term by the date indicated in form 3 and request the Coupa Admins to update the in-flight PO's.



Supplier Update - Requester

Payment term change requests

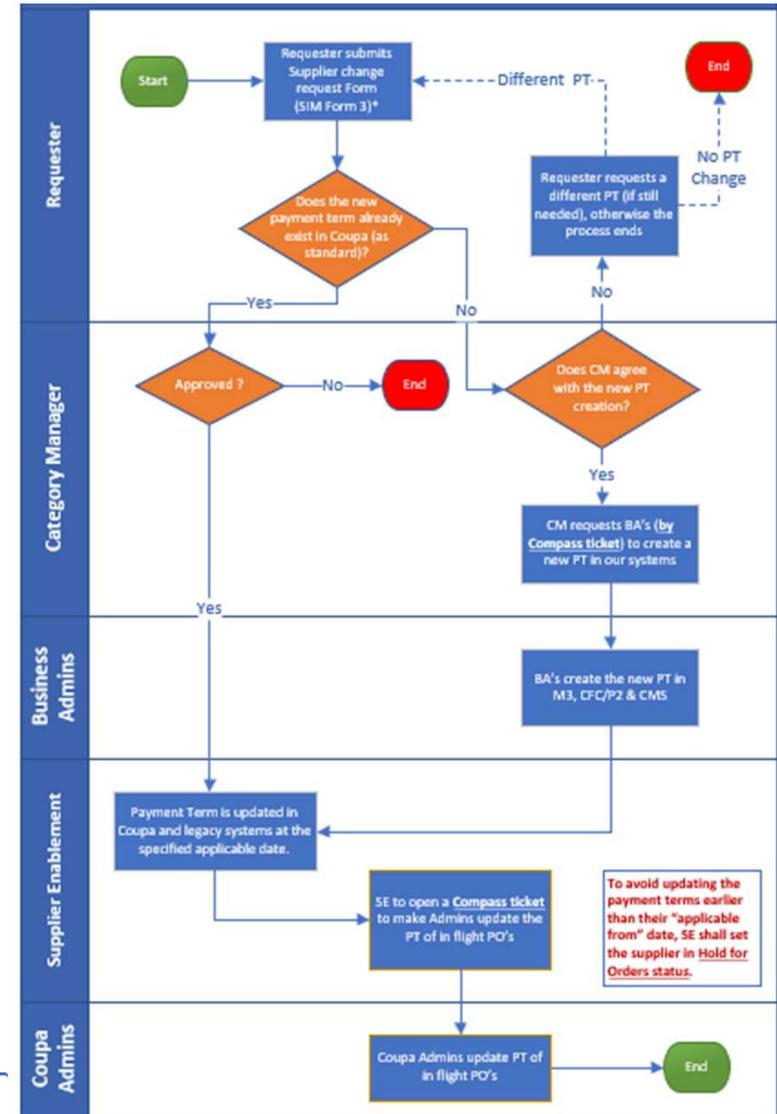
If payment term is a new standard one, then it must be approved first by the Category Manager. If approved, the same Category Manager shall request (through Compass ticket) our BA's its creation in all our system where it is applicable (Coupa, M3, Tibco/WGS/P2, CMS)



Requester must specify when the new payment term is applicable from (immediately? Next month?) and what to do with the in flights PO's.

This date separates the application of the new term from the old one.

Approved invoices always keep the old term and are paid under that.



Supplier Update - Requester

For active suppliers in our ERPs, T&C's can be added to the supplier profile at later stage.

The T&C document attached here is then sent, after the form approval, to the SIM Supplier Record, so that it will be visible and downloadable by the Sourcing/Processing teams.

* Please attach signed T&C's

Effective Date

Expiration Date

Attachments

Description

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.

Please, indicate any far future date as expiration date

SUPPLIER FOR TEST

Supplier Record details

Supplier Information

Name: SUPPLIER FOR TEST

Status: Approved

Supplier Classification: Competitor

Supplier Preferred Status: Non Addressable

PO Transmission

PO Method: Prompt

PO Change Method: Prompt

Hold POs For Buyer Review: None

PO Email: None

CXML URL: None

CXML Domain: None

CXML Identity: None

CXML Supplier Domain: None

CXML Supplier Identity: None

CXML Secret: None

CXML Protocol: None

CXML SSL Version: None

Disable Cert Verify: None

Supplier Classification

Tax Region: None

Tax Classification: None

Tax-Exempt Other Explanation: None

Federal Reportable: None

International Tax Classification: None

International Other Explanation: None

Government Agency Interaction Indicator: None

Government Agency Interaction: None

Minority Indicator: None

Minority Type: None

Organization Type: None

Inco Terms: None

Certificates

Custom Certificate 1

Effective Date: 04/25/21

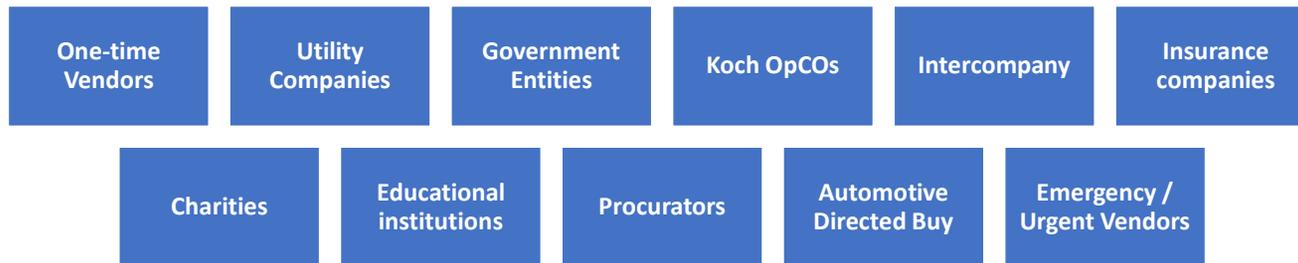
Expiration Date: 04/25/30

Attachments:

Description: None

Supplier Update - Requester

Bank account changes initiated through form 3 are allowed only for supplier types listed below:

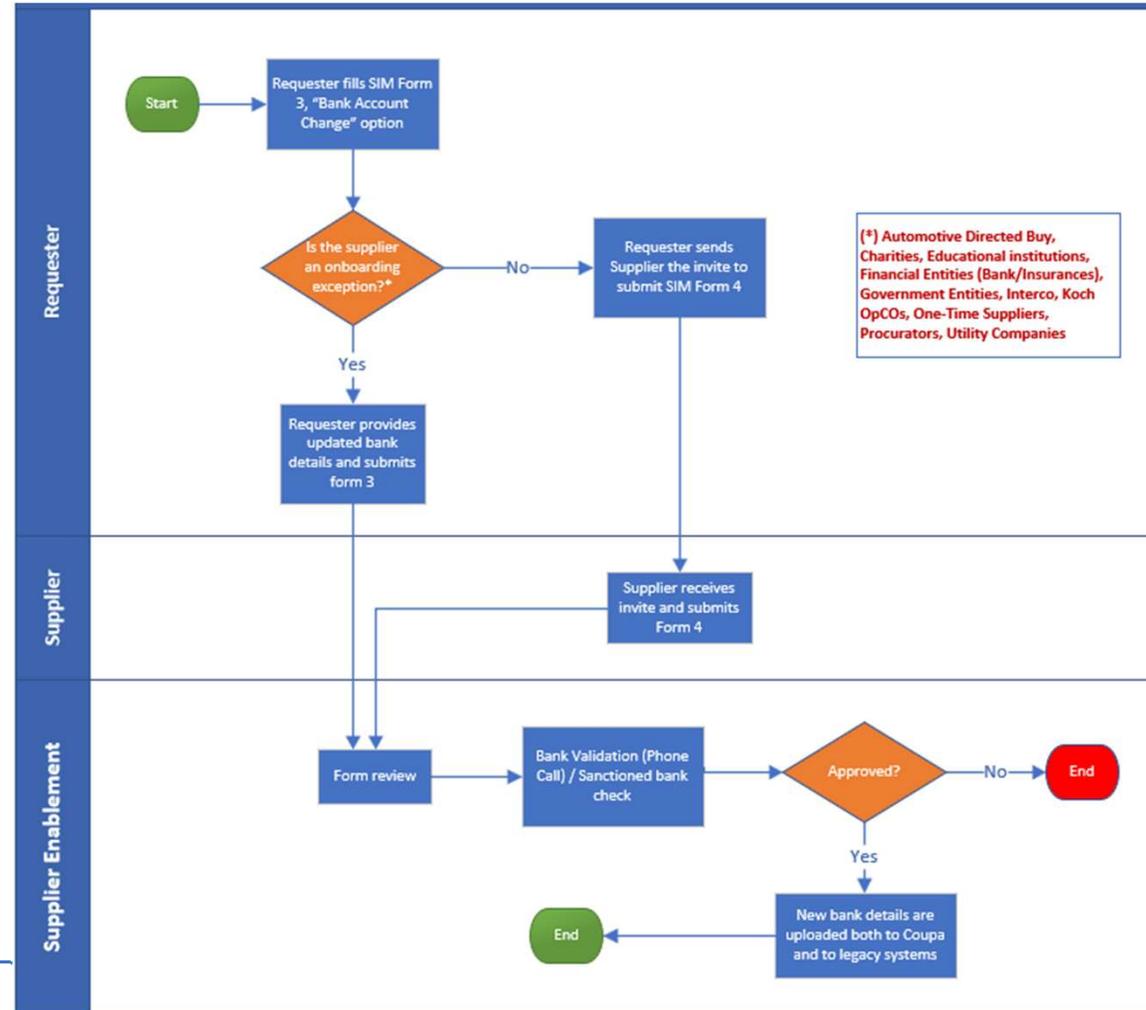


Supplier Update - Requester

Outside of these cases, the requester shall send the form 4 invitation to the supplier.

Instructions to send such an invitation email are available in this same form 3 or in the chapter f of this Playbook.

See for further infos: 



Supplier Update - Requester

After filling out the form, and clicking the **Review** button, Approval flow will be displayed. Form will be sent first to SE team (then, eventually, to the Category Manager, if a payment term change is requested).

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

Cancel

Delete

Edit

Save as Draft

Submit for Approval



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**Forms 4a, 4b - Bank Data Update
Supplier**

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Bank Data Update - Supplier

From January 2024, suppliers can submit the Update Form for bank account changes requests only.

Other supplier master data changes are requested by Guardian with the data the supplier provides.

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 Forms 2.

Bank Data Update - Supplier

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

Suppliers

Create Load from file Export to View All Advanced Search

Match Conditions Match all conditions Add group of conditions

Filter By Name Filter Clause contains Filter Text test supplier

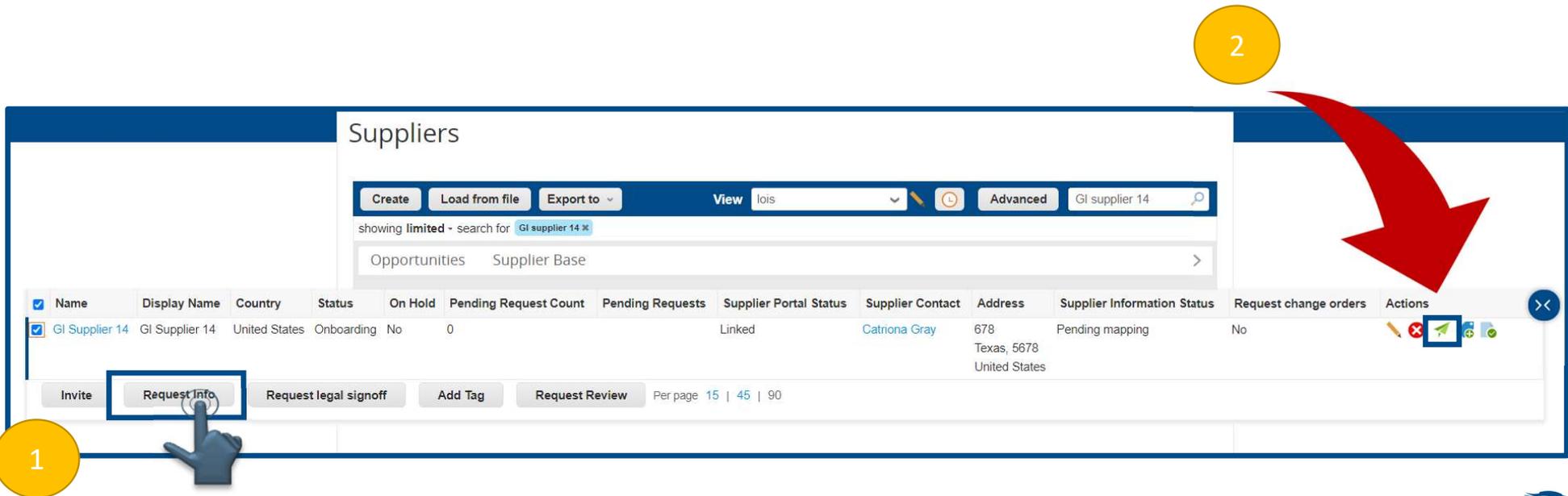
Cancel Search

Name	Display Name	Status	On Hold	Pending Request Count	Pending Requests	Supplier Portal Status	Supplier Contact	Address	Supplier Information Status	Request change orders	Actions
<input type="checkbox"/> SRG_Test Supplier 0-C123123	SRG_Test Supplier	Active	No	0		Invited	Pat Kapp	Sample Address Auburn Hills, michigan 48321 United States	Draft	No	
<input type="checkbox"/> Sanjeev Test Supplier	Sanjeev Test Supplier	Inactive	No	0		Linked	Sanjeev Rao	123 Main St Naperville, IL 60564 United States		No	
<input type="checkbox"/> SRG_SAN Test Supplier-C199999	SAN Test Supplier	Active	No	0		Not Linked	Test FN Test LN			No	
<input type="checkbox"/> Test Supplier 123	Test Supplier 123	Active	No	0		Linked				No	

Bank Data Update - Supplier

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.



The screenshot displays the 'Suppliers' management interface. At the top, there are buttons for 'Create', 'Load from file', and 'Export to'. A search bar contains 'lois' and 'GI supplier 14'. Below the search bar, there are tabs for 'Opportunities' and 'Supplier Base'. A table lists suppliers with columns: Name, Display Name, Country, Status, On Hold, Pending Request Count, Pending Requests, Supplier Portal Status, Supplier Contact, Address, Supplier Information Status, Request change orders, and Actions. The first row is for 'GI Supplier 14'. A blue box highlights the 'Request Info' button in the bottom toolbar, with a hand icon pointing to it and a yellow circle containing the number '1'. A red arrow points to the paper plane icon in the 'Actions' column of the first row, with a yellow circle containing the number '2' above it.

<input checked="" type="checkbox"/>	Name	Display Name	Country	Status	On Hold	Pending Request Count	Pending Requests	Supplier Portal Status	Supplier Contact	Address	Supplier Information Status	Request change orders	Actions
<input checked="" type="checkbox"/>	GI Supplier 14	GI Supplier 14	United States	Onboarding	No	0		Linked	Catriona Gray	678 Texas, 5678 United States	Pending mapping	No	

Invite **Request Info** Request legal signoff Add Tag Request Review Per page 15 | 45 | 90

Bank Data Update - Supplier

3. The request email pops up.
4. In **Select Supplier Information Form** dropdown, choose the appropriate **form 4**, depending on the Guardian division which the supplier is used by (**4a = Glass or 4b = SRG**) and the supplier preferred language.
5. Click **Send Info Request** button.

New!

Request Updated Information from Supplier(s)

Verdana 11pt

3

Hello Supplier,

Guardian wants you to respond by updating your company profile on Coupa. This information is required so they can transact with you electronically. You can find the Coupa instruction manual within our Supplier Portal:
https://www.guardian.com/en/supplier_portal.html

Use the "Update Profile" button to update your profile.

Massimo Tendi
Guardian

Select Supplier Information Form:

- 2a_Full Onboarding (Supplier)_German
- 4b_SRG_Bank Data Update Form (Supplier)_French
- 4a_GLASS_Bank Data Update Form (Supplier)_Thai
- 4b_SRG_Bank Data Update Form (Supplier)_Spanish
- 4a_GLASS_Bank Data Update Form (Supplier)_Spanish
- 4b_SRG_Bank Data Update Form (Supplier)_Portuguese**
- 4a_GLASS_Bank Data Update Form (Supplier)_Portuguese
- 4b_SRG_Bank Data Update Form (Supplier)_Polish
- 4a_GLASS_Bank Data Update Form (Supplier)_Polish
- 4b_SRG_Bank Data Update Form (Supplier)_Hungarian
- 4a_GLASS_Bank Data Update Form (Supplier)_Hungarian
- 4b_SRG_Bank Data Update Form (Supplier)_German
- 4a_GLASS_Bank Data Update Form (Supplier)_German
- 2a_Full Onboarding (Supplier)_French
- 4a_GLASS_Bank Data Update Form (Supplier)_French
- 4b_SRG_Bank Data Update Form (Supplier)_Chinese
- 4a_GLASS_Bank Data Update Form (Supplier)_Chinese
- 4b_SRG_Bank Data Update Form (Supplier)_Arabic
- 4a_GLASS_Bank Data Update Form (Supplier)_Arabic
- 2c_Full Onboarding (Supplier)_Thai1

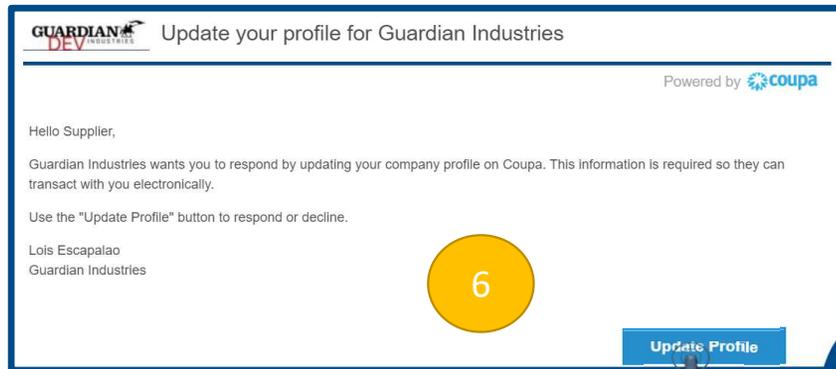
Select Supplier Information Form: 4a_GLASS_Bank Data Update Form (Supplier)

5

Cancel Send Info Request (1 Suppliers)



Bank Data Update - Supplier



Update your profile for Guardian Industries

Powered by 

Hello Supplier,

Guardian Industries wants you to respond by updating your company profile on Coupa. This information is required so they can transact with you electronically.

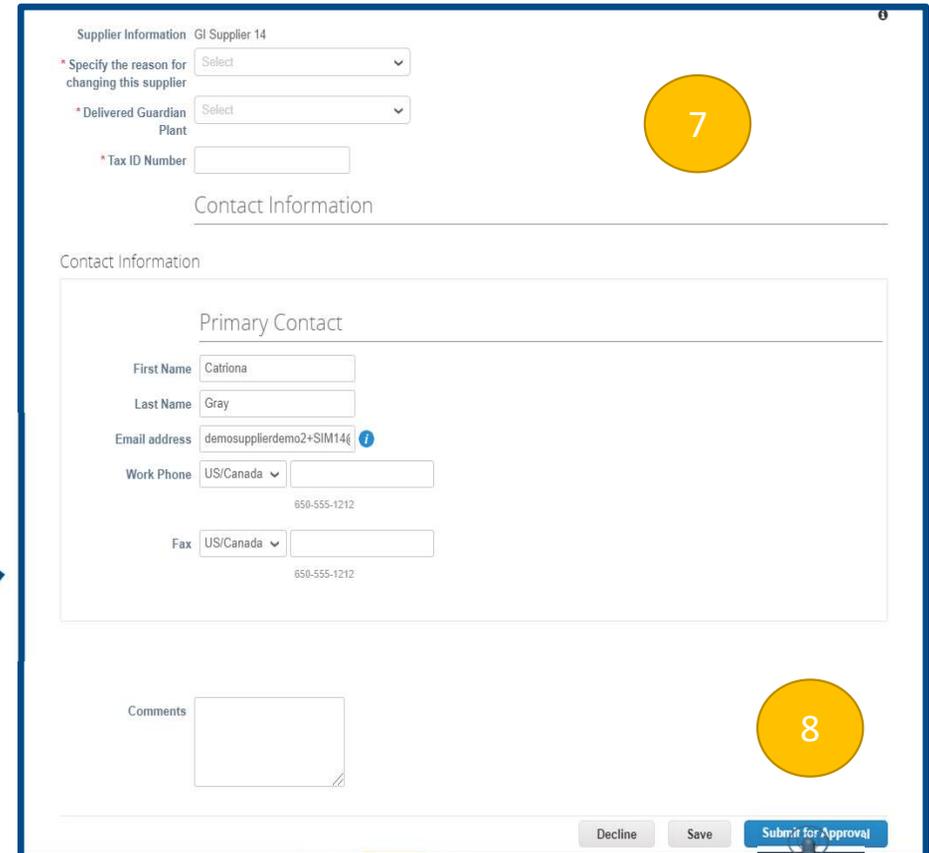
Use the "Update Profile" button to respond or decline.

Lois Escapalao
Guardian Industries

6

[Update Profile](#)

- Supplier will receive an email invitation to update its information.
- By clicking **Update Profile** button, it will be redirected to the Update Form.
- After filling out the form and clicking **Submit** button, Form is sent for approval to the SE team. By clicking **Save**, the form is saved as a draft, whereas clicking **Decline** means to reject answering the form.



Supplier Information GI Supplier 14

* Specify the reason for changing this supplier

* Delivered Guardian Plant

* Tax ID Number

Contact Information

Contact Information

Primary Contact

First Name

Last Name

Email address 

Work Phone

Fax

Comments

[Decline](#) [Save](#) [Submit for Approval](#)

7

8

Bank Data Update - Supplier

To request a bank account change, the supplier needs to follow this process.

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 auto-filled by the system.

Guardian

✓ We have auto-filled some information from your Public Profile.

Supplier Information Test Supplier7BIS

* Send to ERP?

This should be checked for supplier update to be interfaced to client ERP. Please check.

* Specify the reason for changing this supplier

BANK ACCOUNT CHANGE x v

* Tax ID Number

7777777777

Contact Information

Contact Information

First Name

Test

Last Name

Supplier7

Email address

Supplier7.UAT@gmail.com

Work Phone

US/Canada v

650-555-1212

Fax

US/Canada v

650-555-1212

Bank Data Update - Supplier

A contact person at supplier's is needed for banking validation purposes.

Currency type must be selected.

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.

Supplier's Banking
Validation Contact -
Name

Provide contact for someone other than person filling out this form.

Supplier's Banking
Validation Contact -
Email

Provide contact for someone other than person filling out this form.

Supplier's Banking
Validation Contact -
Phone

Provide contact for someone other than person filling out this form.

* What currency you
would like to be paid
in?

Has the currency of
your new bank account
changed?



Bank Data Update - Supplier

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

Banking Information (Only)

* Banking Region

* For Bank account change, attach bank documents here: No file chosen

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.

Bank Data Update - Supplier

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.

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.

Choose Remit-To Address

Choose a Remit-to Location below - Recommended
It's a few more fields, but provides compliance, verification, and re-usability. Otherwise, click 'Cancel' to add info to your customer's form manually.

Create new Compliant Remit-To Address

X

X

X, 11111

Thailand

Thailand

Bank Data Update - Supplier

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, 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.

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)

Cancel Save & Continue

Bank Data Update - Supplier

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?

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 111111
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 111111 United States	Active	Manage

Deactivate Legal Entity Cancel Next

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)

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 test test 111111 United States	Active	Manage

Deactivate Legal Entity Done

Setup Complete

1 2 3 4

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

Add Later Add Now

Click Add Now



Bank Data Update - Supplier

The following group of fields (**New Remit To Address**) 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 **Current Remit To Address**. The old account needs to be switched to **Inactive** status.

Active **Inactive** ▼

Bank Name X

* GI - Remit To New

Active Active ▼

Bank Name

Bank Branch

Bank Address

Name on Bank Account

Bank Routing Number (ABA) ⓘ

SWIFT Code (BIC) ⓘ

Swift Address

Bank Account Number ⓘ

Correspondent Account

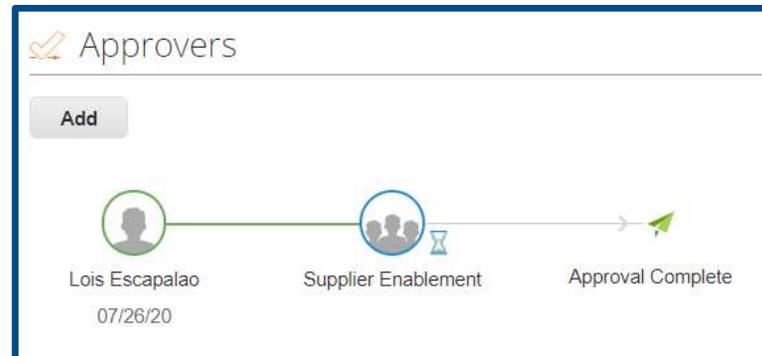
Clearing Code
(branch/transit number for banks located in Canada)

IBAN Number ⓘ

CLABE Number

Bank Data Update - Supplier

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



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**Form 5 - Urgent & Exception Onboarding
Requester**

GUARDIAN 
INDUSTRIES

Urgent & Exception Onboarding - Requester

Urgent Onboarding is meant for those suppliers which suppose:

Significant risk exposure for the business:

- Infrastructure, building or production equipment risk
- Likely inability to meet customer demand expectations
- Employee health and wellbeing at risk

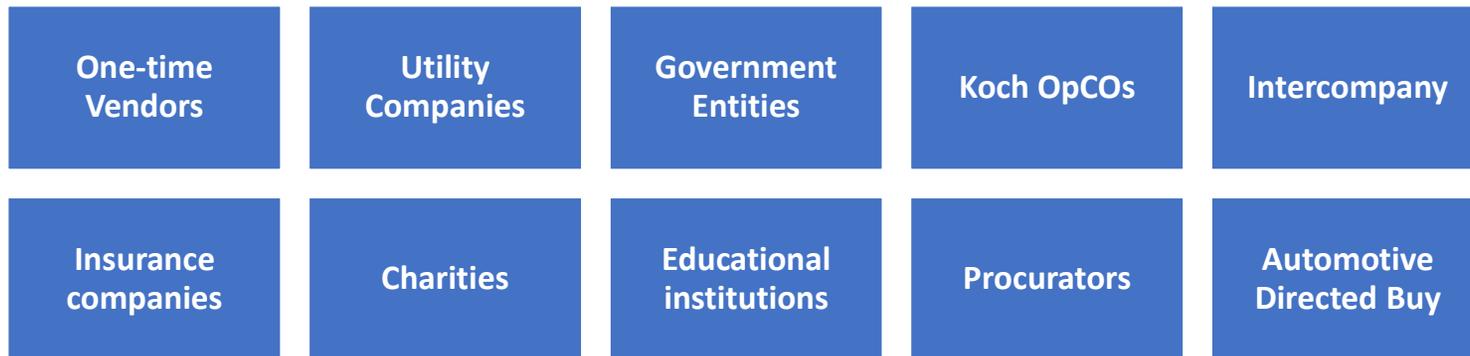
Urgency previously unknown:

- Supplier needed same day or within 2-3 days.
- Use of PCard is not available.

Outside of these hypotheses, a supplier cannot be not considered as urgent and must be onboarded through the full onboarding process.

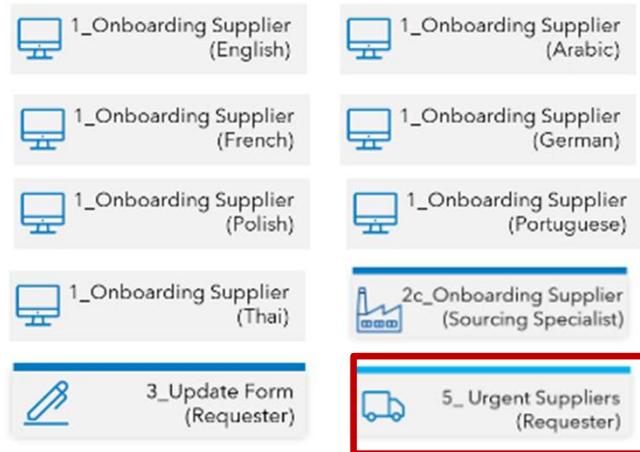
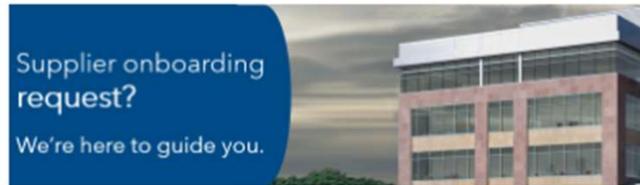
Urgent & Exception Onboarding - Requester

Exception onboarding is intended for those suppliers which are not going to join Coupa to onboard:



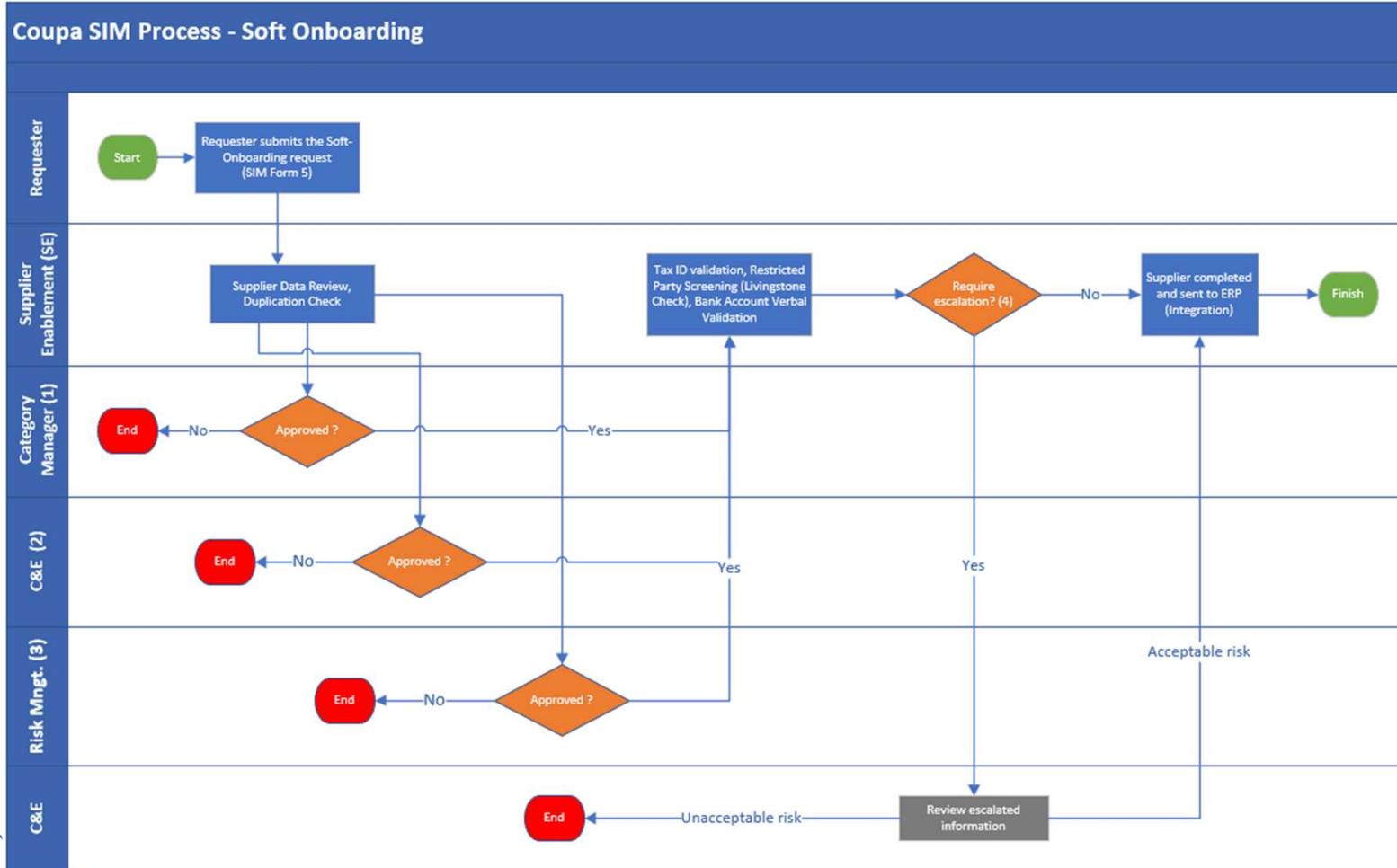
Urgent & Exception Onboarding - Requester

1. Click the Forms dropdown and select the name of the form



2. Or Click the 5_Urgent Onboarding button

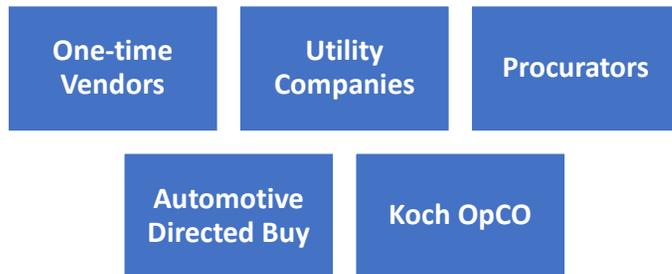
Urgent & Exception Onboarding - Requester



Urgent & Exception Onboarding - Requester

Exception approvals are setup according to the supplier type:

1) Supplier groups to be approved by **Category Managers**:



2) Supplier groups to be approved by **Compliance & Ethics (C&E)**:



3) Supplier group approved by **Risk Management**:



4) Supplier group **not approved**:



Further details about questions asked in this form, please, see [Chapter c\), "Forms 2a, 2b, 2c"](#)

Urgent & Exception Onboarding - Requester

Charitable Contributions:

All charitable contributions of any amount (including in-kind contributions) must be pre-approved by sending a request to the email address charitable@guardian.com, due to the potential concerns they may cause.

This pre-request must be sent and the approved received prior to Coupa form submission. The approval email must be attached to form 1, as an evidence.

Once approved, all charitable contributions will be paid through the Koch Companies Community Fund (for U.S. and Canada contributions) or through our ERP systems (all other regions) and recorded appropriately.

PCards are not to be used for charitable contributions.

For further information and details, please check the [Charitable Policy](#).

Urgent & Exception Onboarding - Requester

To finalize the process, submit the form for your **Review**.

Other required documents for supplier creation: **1**

* Please attach the Tax ID / W9 / W8 validation document Guardian_Term...ondition.docx

To be filled up by Supplier Enablement Team (please do not populate):

Compliance Approval

Duplicates Exist A Duplicate supplier check will be done here

Once all information is final, click **Submit for Approval**.

2

3

Approvers

Added by the approval chain [redacted]

Add

Krezell Mayo 07/28/20

Supplier Enablement

Approval Complete

* Comment (required to reject)
Provide approval/rejection comment here:

Once the form is approved, the supplier is created in Tibco/CMS, although some fields need to be manually updated by SE in our systems.

The Supplier turns into **Active** status and is now ready for transactions.



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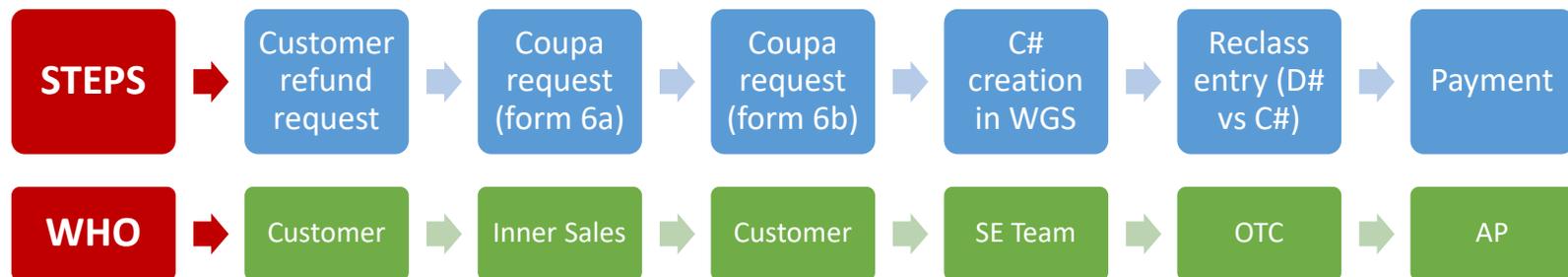
Form 6a - Customer Onboarding Requester

GUARDIAN 
INDUSTRIES

Customer Onboarding

E2E flow:

- Coupa process is started by the Inner Sales person, who collects the customer data and fills form 6a. This triggers the sending of form 6b to customer, who provides the bank details and tax ID validation document.
- SE Team validates the customer data and creates the C# in WGS.
- OTC matches bank details provided by customer with recent payment received and reclasses entry to allow automatic payment (GRDCashApp.eu@guardian.com)
- Payment to customer is done by AP (accountspayable@guardian.com)

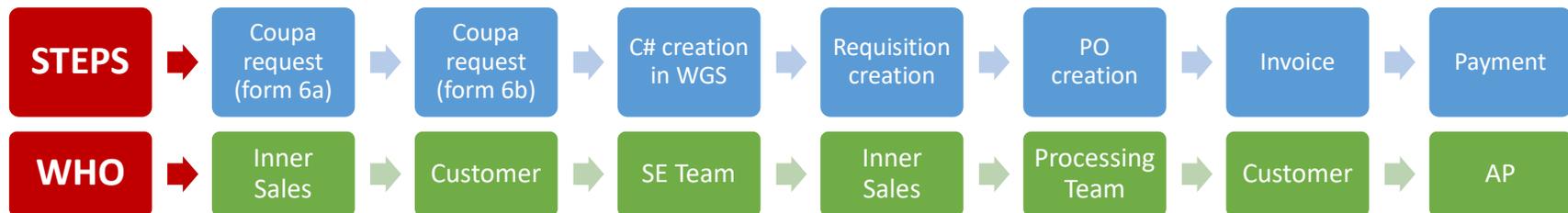


Customer Onboarding

E2E flow:

If customer sells subcontracted glass to Guardian, then the process is slightly different: after C# creation in WGS, a PO is needed. Inner Sales raises the requisition, Processing Team creates a PO in Coupa, the customer (now, turned into a supplier) issues the invoice and AP processes its payment.

- Onboarding and PO creation should be done before the delivery
- PO number reference should be mentioned on the customer invoice
- Invoice must be sent to invoice@guardian.com
- Inner Sales person receives the product in the system once delivery is completed

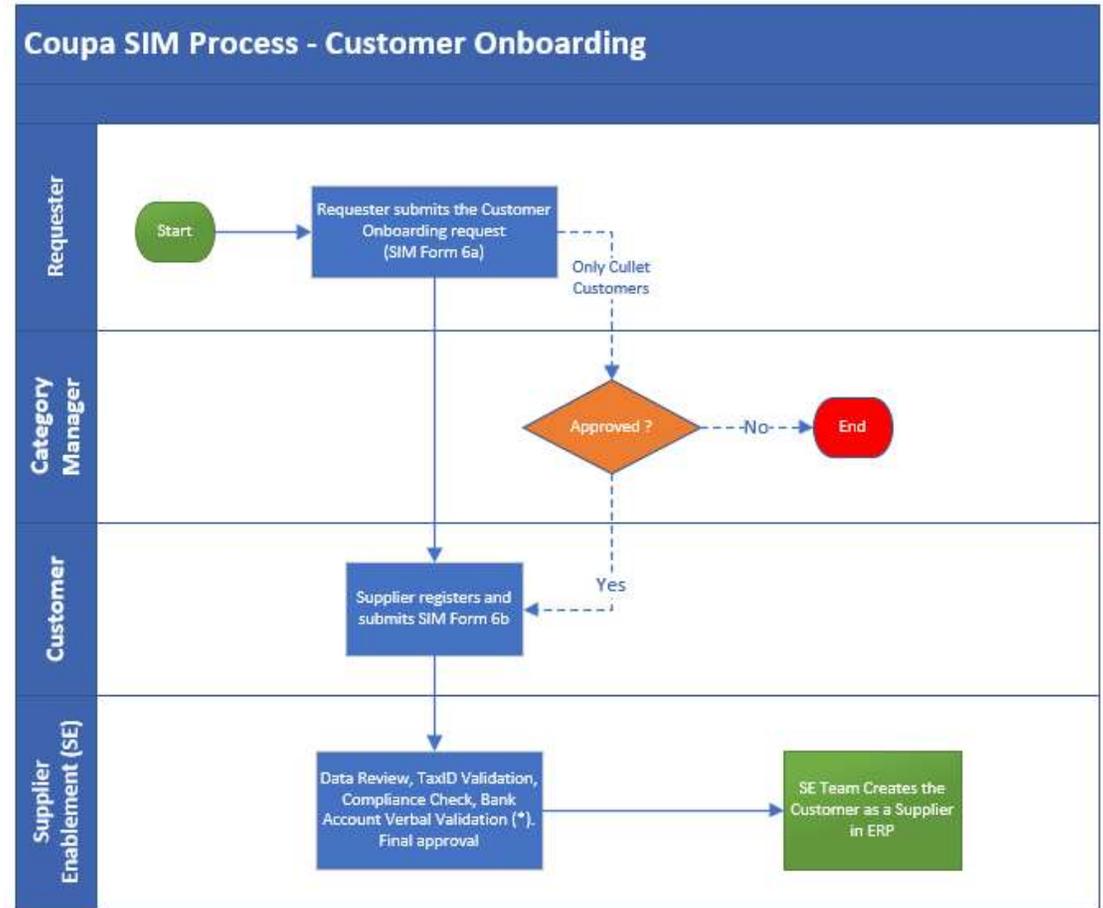


Customer Onboarding

Forms 6 can be used for all customer-related on-boarding processes:

1. Customer reimbursement
2. On-boarding cullet suppliers
3. On-boarding customers for ShipTo purposes (no payment, customer is only mentioned as ShipTo location in the PO).

The customer is onboarded in Coupa through a simplified process (**forms 6a-6b**), which ensures anyway all the necessary control steps (RPS, Tax ID validation, bank account verbal validation).



(*) The SE Team needs to check that the bank account number is the same we have in the Customer record in ERP

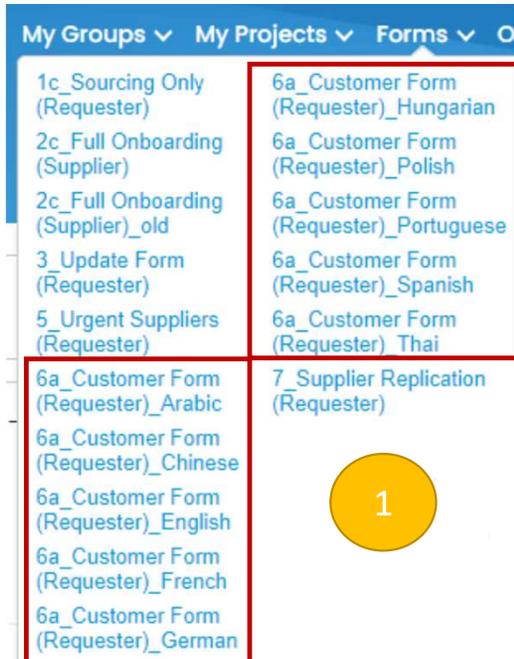
Customer Onboarding

For customer onboarding the following SLA applies:

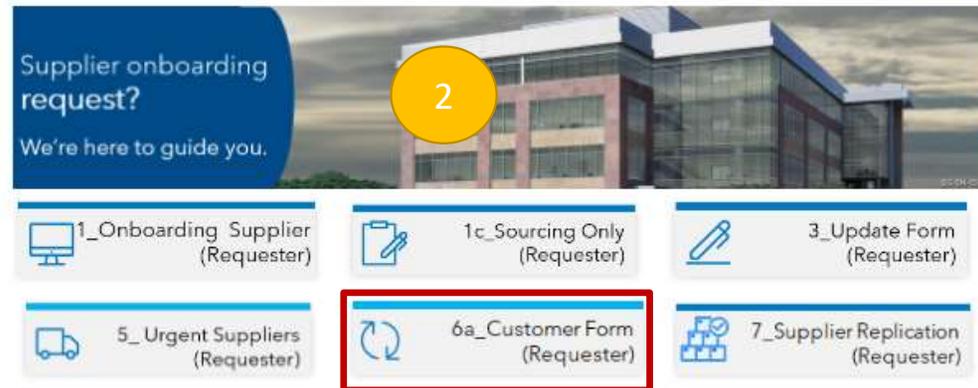
- **Form 6a** – 1 to 2 days
- **Form 6b** – 1 to 2 days (if customer submits the form promptly and no issues are detected when confirming bank details)

It is important to let the customer know the SE Team will be calling to verify banking details verbally and their accounting teams need to be prepared for the call.

Customer Onboarding



1. Click the Forms dropdown and select the name of the form, or
2. Click the 6a_Customer Form button



Customer Onboarding

1. Fill out the form. Select the **Onboarding Request Type**:
 - a) Customer reimbursement
 - b) Cullet suppliers
 - c) Ship-To customers

Definitions of these three types are indicated in the form itself

1. Category is only required for Cullet customers. The free-text field for this purpose is **Goods Provided** and the answer to write is **CULLET**.

Request Form: 6a_Customer Form (Requester)_English

This form is used to request the creation of a customer as new Guardian supplier.

* Customer Legal Name
Naming convention to follow: Customer_[Customer Name] - not applicable for Cullet Customers

* Customer Common Name

* Select the Onboarding Request Type

Customer Reimbursement: amount due, which cannot be deducted from the following Guardian's invoice. The cash disbursement process requires the onboarding of the customer as if it were a supplier.

Cullet Customer: Guardian's customer selling cullet to our plants.

Ship-to Only Customer: the customer creation in our systems is needed for expedition only ("Ship-to only"). Usually, it's glass purchased by Guardian from a supplier and delivered to our customer, without despatching at our warehouse. Guardian pays the invoice, so customer's banking details are not required.

* Request Plant

* Supplier Region

* Country

* Goods Provided
Please, type only "CULLET"

Customer Onboarding

3. The below questions are asked for a matter of supplier classification

Additional Questions

* Supplier Preferred Status

Select

Non Addressable

Preferred

Non Preferred

Additional Questions

* Supplier Preferred Status

Select

Supplier Classification

Select

Government

Competitor

Critical

Intercompany

Customer Only

The Preferred Status means if the supplier should be considered as Preferred/Non-Preferred for the specific item it is going to provide us with, or rather, Guardian has no different choice to purchase that product (the so-called “Non-Addressable spend”: government authority, market monopolist, etc.).

This classification refers to the type of supplier:

- Government entity
- Competitor of another supplier we already work with
- Vendor disruption could halt our Production
- Intercompany supplier
- Supplier record created to process refunds to customers

Customer Onboarding

- 4. Payment term, payment method and tax ID validation document are required only for Cullet customers.
- 5. Click **Review**. After the form review, click **Submit**.
- 6. The form is approved by the Category Manager (cullet sales only) and validated by the SE Team.
- 7. **If the customer is for Ship-To Only, the onboarding process ends here**, form 6b is not needed.

Payment Terms and Method

* Payment Terms

* Payment Method

Tax ID Details

* Tax ID Type

* Tax ID

[Cancel](#) [Delete](#) [Save as Draft](#) [Review](#)



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Form 6b - Customer Onboarding Supplier

GUARDIAN 
INDUSTRIES

Customer 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

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

Reply Reply All Forward

Sun 11/29/2020 8:04 AM

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

Customer Onboarding

GUARDIAN INDUSTRIES Guardian Industries Profile Information Request - Action Required
Powered by **coupa**

Hello Supplier,

Guardian Industries 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 48 hours, please respond below to provide this information.

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!

Lois Escapalao
Guardian Industries

Join and Respond

1. Email will be sent to the customer. “Join and Respond” button will be available.
2. Upon clicking the **Join and Respond**, Customer will be redirected to the **Join the Coupa Supplier Portal** page. Required fields must be filled out. Upon clicking Submit, it will direct to the 6b_Customer form.

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).

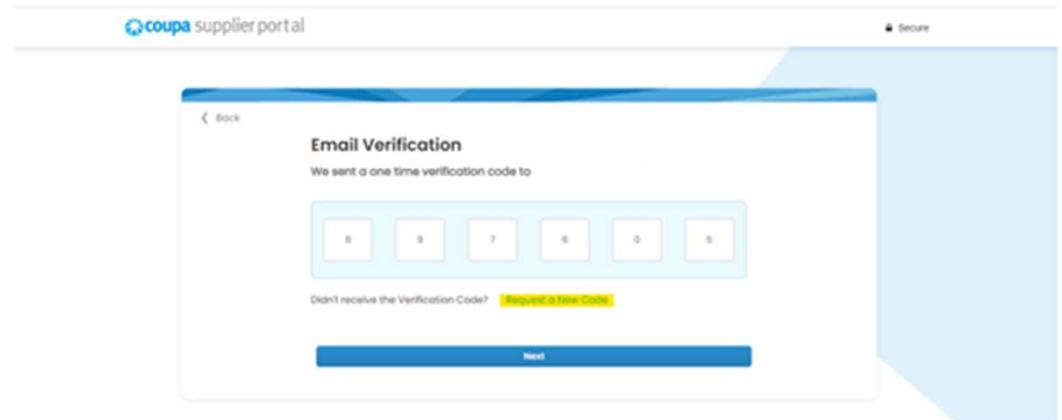
Forward Email

Submit

Customer Onboarding

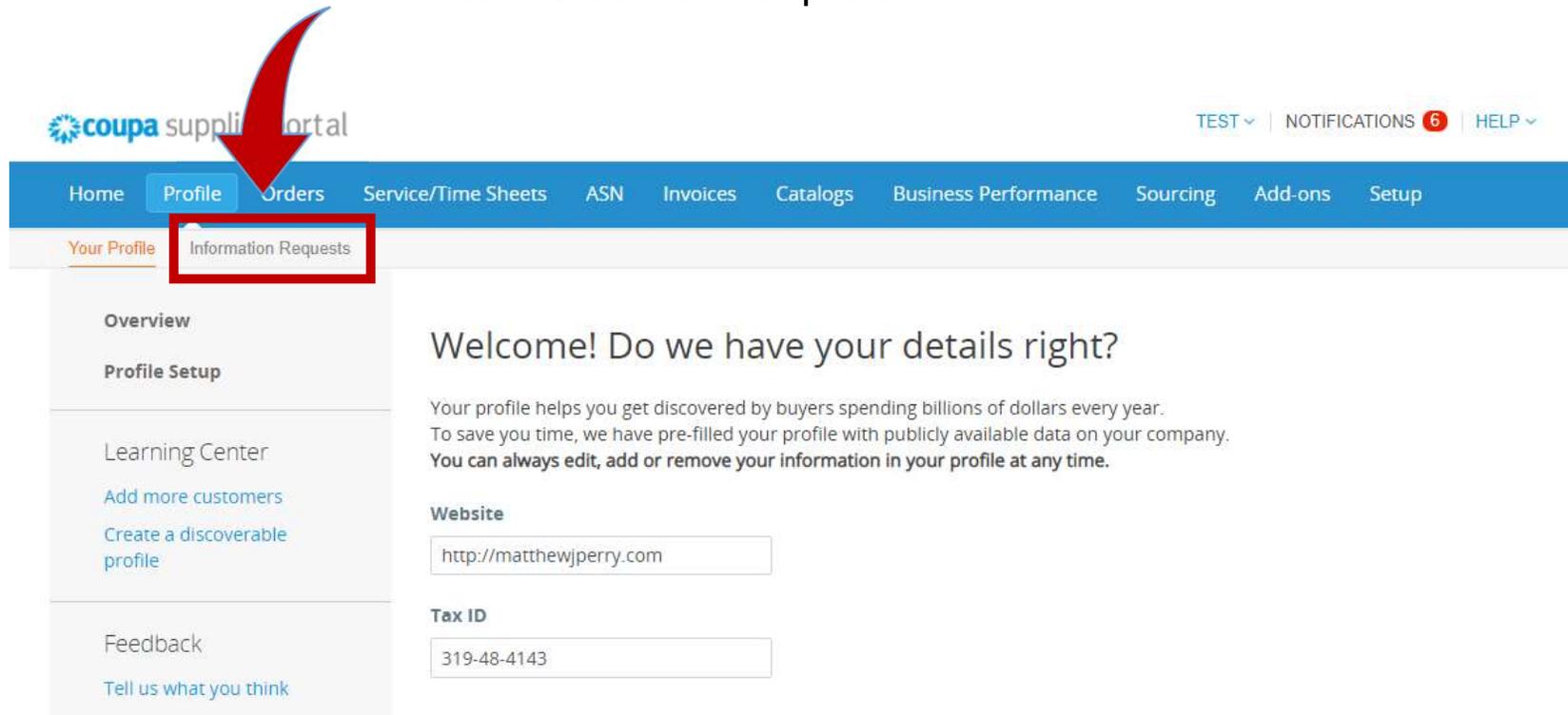
The Customer is then required to verify its email address. Coupa sends the provided email a six-digit code to be set in this page.

After clicking **Next**, the Customer is prompted to its public profile in Coupa Supplier Portal (CSP).



Customer Onboarding

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



The screenshot displays the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the right side of the header, there are links for "TEST", "NOTIFICATIONS 6", and "HELP". The main navigation bar includes "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", "Business Performance", "Sourcing", "Add-ons", and "Setup". Under the "Profile" menu, "Information Requests" is highlighted with a red box, and a red arrow points to it from above. The "Your Profile" sub-menu includes "Overview", "Profile Setup", "Learning Center", "Add more customers", "Create a discoverable profile", "Feedback", and "Tell us what you think". The main content area features 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 form fields: "Website" with the value "http://matthewjperry.com" and "Tax ID" with the value "319-48-4143".

Customer Onboarding

3. Customer fills Form 6b and provides:

- Bank letter/statement
- Bank validation contact person
- Purchase Order language



Contact Information

Banking Validation -
Name
(Provide contact for someone other than person filling out this form.)

Banking Validation -
Email
(Provide contact for someone other than person filling out this form.)

Banking Validation -
Phone
(Provide contact for someone other than person filling out this form.)

PO Language

Language field

Label or Question

- EN
- PL
- HU
- PT
- ES
- FR
- DE

* Send to Guardian's ERP
Please, ensure this box is checked

Country of Operation

Banking Information

* Currency

* Banking Region

Bank Validation Documents to attach:

Customer Onboarding

4. Click **Submit for Approval**. Form will be sent to SE team for approval.
5. When Form is fully approved, SE manually creates the Customer in Guardian's ERP. After that, the customer is ready for transactions.

Your information has been submitted

Pending Approval

Supplier Information GI Supplier 12

Organization Name GI Supplier 12

Legal Name

5



Approvers

Viktoriya Shornikova
09/30/20

Massimo Tendi acting
as Agata Burek
On behalf of Supplier
Enablement.
09/30/20

Approval Complete

6



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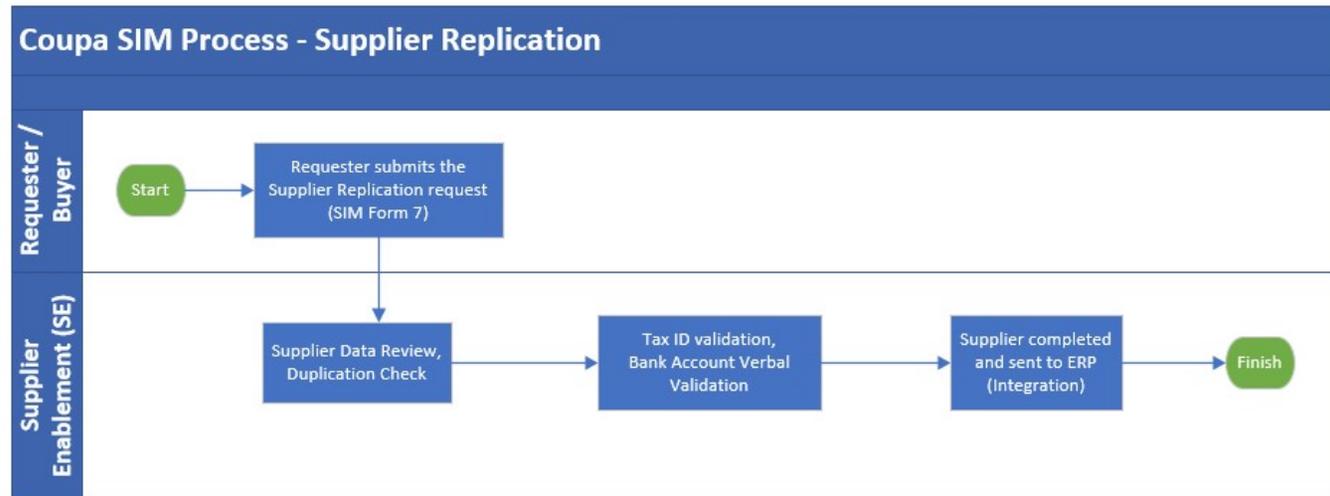
Form 7 - Supplier Replication Requester

GUARDIAN 
INDUSTRIES

Supplier Replication

Sharing a supplier in different regions or Guardian divisions is constrained, since we use separate ERP's (Tibco/WGS in Glass and CMS in SRG) and 7 different regional databases (4 in Glass and 3 in SRG).

A supplier needs to be “replicated” from one system database to another in order to purchase from in different regions/divisions.



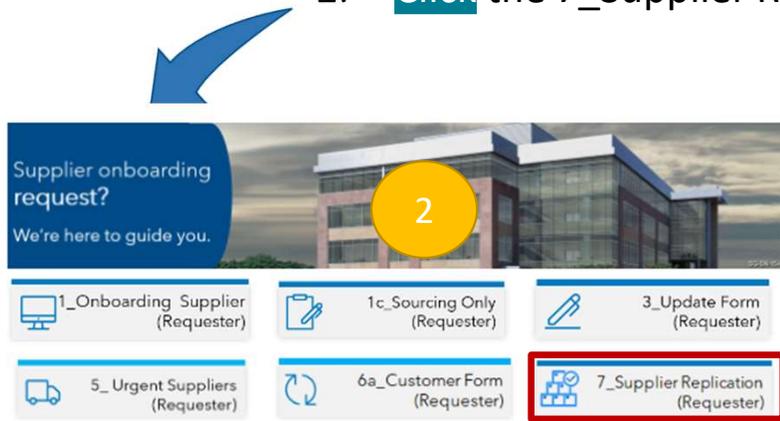
The purposes of this form 7 are:

- Minimize the Requester effort
- Speed up the supplier replication process
- Ensure anyway the supplier data validation

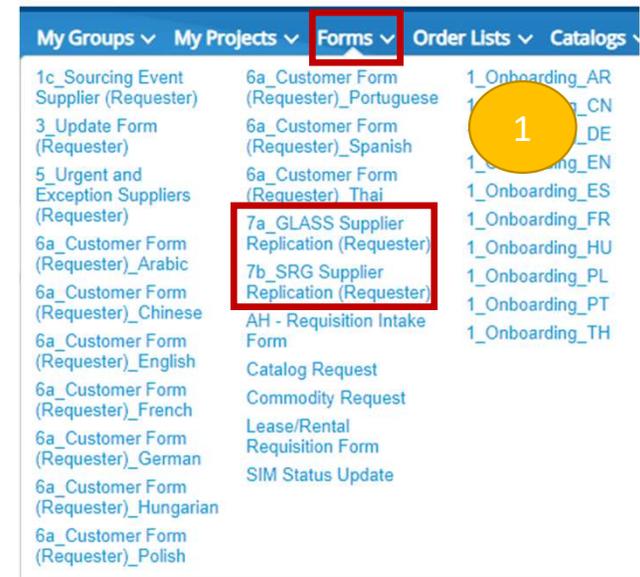
Supplier Replication

After logging in Coupa, the requester can:

1. Click the **Forms** dropdown and select the name of the form or
2. **Click** the 7_Supplier Replication button



New!



From January 2024, requester must choose the appropriate form 7, depending on the Guardian division which the supplier is used by (Glass or SRG)



Supplier Replication

The requester needs to provide:

- Supplier's name
- C# of the supplier to replicate
- Bank details
- Tax ID
- Address
- Contacts
- Few additional info (PO method, PO language, invoice match level, currency)

The requester must select the **source system** where the supplier is currently active and the WGS or CMS instance where it shall be replicated to.

* Select the source system where the supplier is replicated from

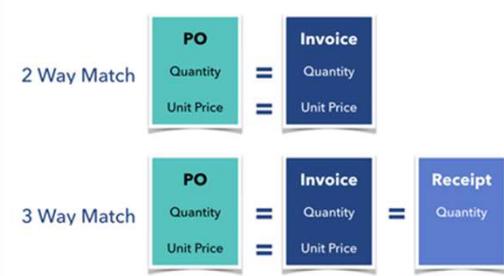
* Select the WGS instance where the supplier is replicated to

* Select the source system where the supplier is replicated from

* Select the CMS instance where the supplier is replicated to

- Select
- Tibco
- WGS NA
- CMS NA
- WGS EU
- CMS EU
- WGS LA
- WGS AMEA
- CMS AP

The **Invoice Match Level** field refers to the different types of invoice matching:



Supplier Replication

The requester submits it to SE Team for the data validation and match.

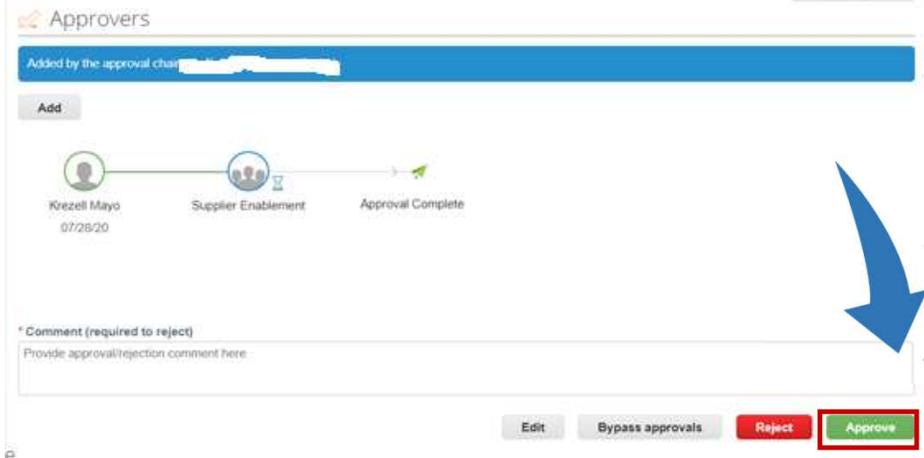
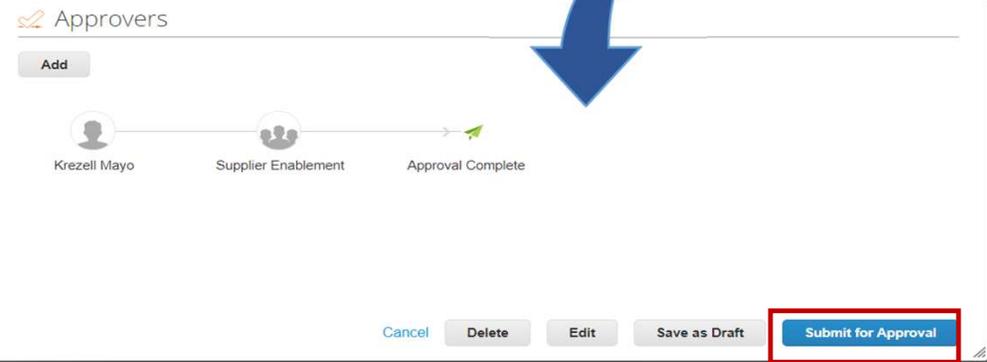
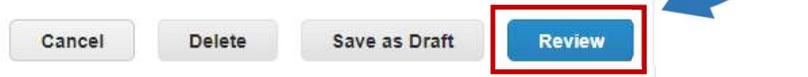
SE first matches supplier's bank details with the existing ones. If they don't match with WGS/CMS data, then the SE shall validate them through phone call to the supplier - as usually done in full onboarding process - what minimize fraud attempts.

If all company data match with the existing supplier, then form 7 is approved and integrated in the requested WGS/CMS instance. Supplier is created with a new C# and is available in Coupa.

Vice-versa, if company data don't match, then the requester should begin a full onboarding process, being it a different supplier.

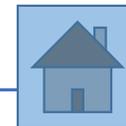
Supplier Replication

1. Submit the form for your **Review**
2. Once all information is final, click **submit for approval** to send the form to the SE Team.



3. Once the form is approved the supplier is created in WGS/CMS, although some fields need to be manually updated by SE in our systems.

The Supplier turns into **Active** status and is now ready for transactions.



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Appendix

GUARDIAN 
INDUSTRIES

Coupa SIM - Manuals & Demos

- The following manuals and demos are published in the SS&P Hub
- The Supplier's Manual is also posted in the Supplier Portal

Coupa
Playbook

Supplier
Manual

Approver
Manual

Customer
Manual

Links are available in next slide

Coupa SIM - Useful Links

