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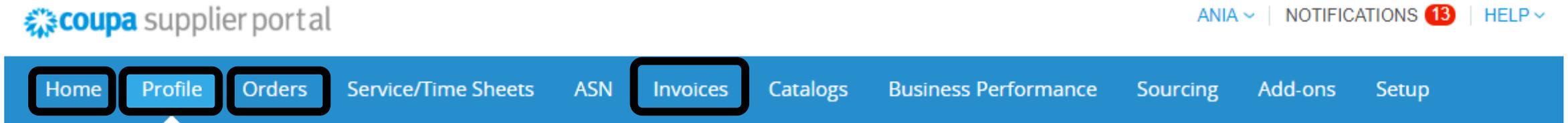


**Coupa Supplier Portal
Supplier Manual**
October 25th, 2023



Introduction to Coupa Supplier Portal (CSP)

- HOME** - on the **Home** page you can see the information about your company
- PROFILE** - in the **Profile** section you can configure your profile. Your profile can be set up as public or customized for each Customer separately
- ORDERS** - in the **Orders** section you can find the Orders you receive, organized by Customer
- INVOICES** -in the **Invoices** section you can view all created invoices and verify their current status



Two-Factor Authentication

Beginning in May of 2023, you **must** enable two-factor authentication for additional security. The Coupa supplier portal will now require you to use two-factor authentication to access their data in the CSP, such as:

- Legal entity
- bank details
- Remit to addresses
- Manage accesses and assign permissions to new and existing users.

*you can enable it for login into your account, this is optional

The screenshot shows the 'coupa supplier portal' interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Business Performance. A user profile dropdown for 'KATIA' is visible, with options for Account Settings, Notification Preferences, and Log Out. The main content area is titled 'My Account Security & Two-Factor Authentication'. On the left, a sidebar menu lists Settings, Notification Preferences, and Security & Two-Factor Authentication (which is highlighted). The main content area is titled 'Two-Factor Authentication' and contains the following options:

- Enable only for Payment Changes (Required for changing Legal Entity or Remit-To)
- Enable for Both Account Access (Login) and Payment Changes

Below these options, there are two sections for authentication methods:

- Via Authenticator App** (Status: Enabled)
 - Enabled: Using an Authenticator App available from your mobile phone app store. A link for 'Change Authentication App' is provided.
- Via SMS** (Status: Disabled)
 - Enable: Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.

At the bottom of the page, there are two buttons: 'Show Recovery Codes' and 'Regenerate Recovery Codes'.

Two-Factor Authentication

To enable two-factor authentication, click on account settings under your username, it will take you to **My Account page** then click on **Security & Two-Factor Authentication** link on the **My Account page**.

When you enable two-factor authentication, you can choose from the following options:

- ✓ For Payment Changes (Required for Changing Legal Entity or Remit-To)
- ✓ For both account access (login) and payment changes

Depending on how you want to receive the verification codes, you can select one of the following options, and set your preference as the default:

Via Authenticator App to use an authenticator app available from the app store on your mobile phone.

OR

Via Text Message to use a code sent via text message to your phone number.

The screenshot shows the 'coupa supplier portal' interface. At the top right, there is a user profile for 'KATIA' with a dropdown menu containing 'Account Settings', 'Notification Preferences', and 'Log Out'. A 'NOTIFICATIONS 6' badge is also present. The main navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Business Performance. The page title is 'My Account Security & Two-Factor Authentication'. On the left, a sidebar menu lists 'Settings', 'Notification Preferences', and 'Security & Two-Factor Authentication' (which is highlighted). The main content area is titled 'Two-Factor Authentication' and contains the following options:

- Enable only for Payment Changes (Required for changing Legal Entity or Remit-To)
- Enable for Both Account Access (Login) and Payment Changes

Below these options, the status is 'Via Authenticator App Enabled'. There is a section for 'Via Authenticator App' with a checked 'Enabled' checkbox and the text 'Using an Authenticator App available from your mobile phone app store'. A 'Change Authentication App' link is provided. Below that, the status is 'Via SMS Disabled'. There is a section for 'Via SMS' with an unchecked 'Enable' checkbox and the text 'Using SMS, a code will be sent to your mobile phone number. Enter verification code when prompted and select OK. SMS rates apply.' At the bottom of the page, there are two buttons: 'Show Recovery Codes' and 'Regenerate Recovery Codes'.

Two-Factor Authentication via text message

if you want to receive text message (SMS) notifications or verification codes, you **must** enter and validate your phone number under My Account > Notification Preferences.

After you verify your phone number, enter the verification code in the pop-up window.

Once successful validation, you receive the verification codes in text messages

The screenshot shows the 'My Account Notification Preferences' page in the Coupa Supplier Portal. The header includes the Coupa logo and 'supplier portal', along with user information 'KATIA' and a notification count of '6'. A navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The main content area has a left sidebar with 'Settings', 'Notification Preferences' (highlighted), and 'Security & Two-Factor Authentication'. The main content shows a message: 'You will start receiving notifications when your customers enable them.' Below this are input fields for 'Email' (katia.madrid@kochgs.com) and 'Mobile(SMS)' (+1 201-555-5555), with a 'Verify' button. A warning icon and text state: 'Verify number to receive SMS'. Below the form is an 'Announcements' section.

The screenshot shows a pop-up window titled 'Enter the code that you received by SMS'. It features a green message box stating: 'Your verification code has been sent to: +1 201-555-5555'. Below the message is a text input field labeled '* Code'. At the bottom of the window are three buttons: 'Cancel', 'Resend Code', and 'OK'.

Two-Factor Authentication via Authenticator App

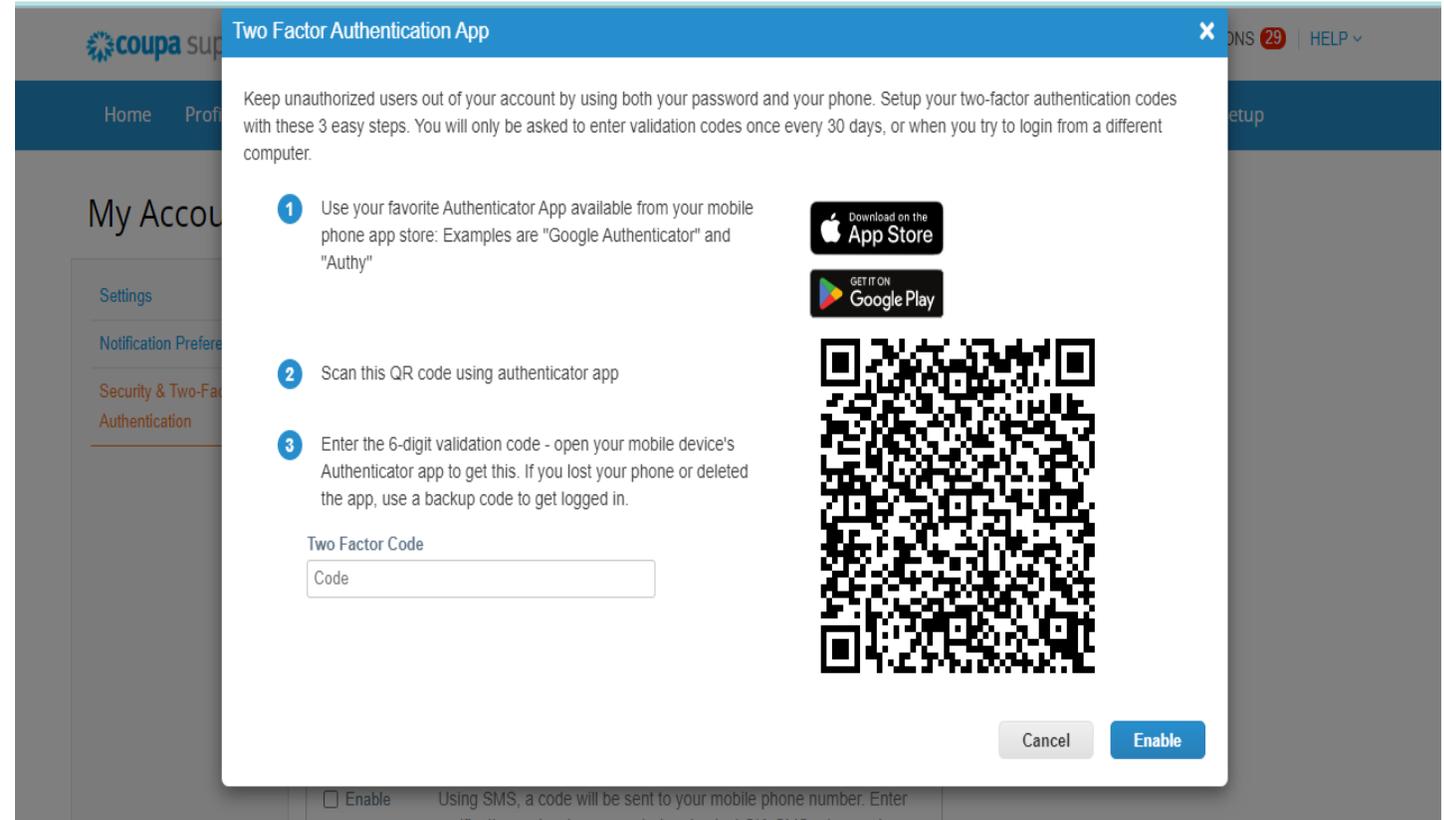
For the authentication via app, you will need to download an additional app on your phone, through your app store or google play store,

You can choose between available apps; we recommend you these two:

✓ “google authenticator” and “authy”

Once you have the app:

1. Open the app
2. Scan the QR code using the app
3. Enter the 6-digit validation code
4. Click enable.



Two-Factor Authentication via Authenticator App

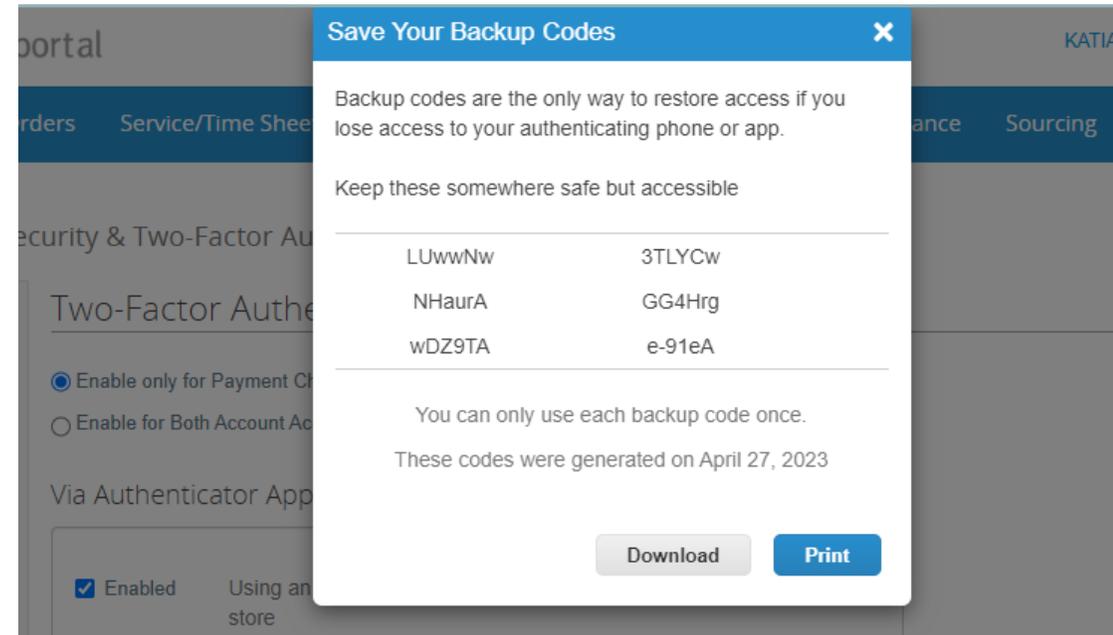
The portal will give you back up codes in case you lost, delete the app, or changed your phone,

Print this backup codes or email them to yourself before you click OK.

Note

You can only use a recovery code once, so refresh your list if you must use a recovery code. Go to Account Settings > Security & Two-Factor Authentication and

click **Regenerate Recovery Codes** to get a new list of codes.



! **IMPORTANT:**

- ! THE USE OF THE CSP IS COMPLETELY **FREE**. YOU DON'T HAVE TO PAY ANYTHING TO REGISTER, HAVE ACCESS TO YOUR POs, INVOICES, etc. ,
- ! Right now, the portal is offering to get your profile verified with an additional cost. This is totally optional. We, Guardian/SRG don't require this verification.
- ! Starting May 2023, two-factor authentication will be **mandatory** for viewing or making changes to the legal entity, remit to address or bank account information on the CSP. This two-factor authentication is completely FREE (for more information visit pages 3-7)

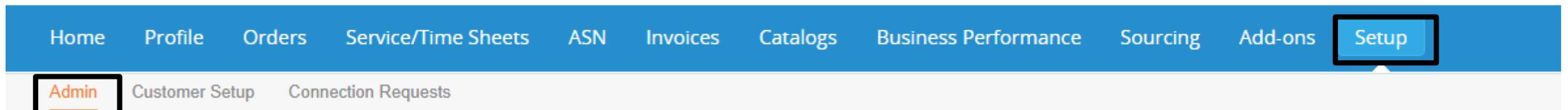
Introduction to Coupa Supplier Portal (CSP)

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

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

 coupa supplier portal

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



You can change the language at the bottom of each page:



Notifications

NOTIFICATIONS – You can set your notifications preferences in the top right corner by clicking in your username, then notification preferences. window:

To receive notifications about a particular action, check the relevant box in the **Online** (to receive notifications in CSP) or **Email** column, or if you have a cellphone number added in the portal you can also receive notifications via SMS. **If no option is selected, then no notification will be sent.**

coupa supplier portal

KATIA | NOTIFICATIONS 40 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Setup

Account Settings
Notification Preferences
Log Out

My Account Notification Preferences

Settings
Notification Preferences

You will start receiving notifications when your customers enable them.

My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Announcements

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

Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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To save your settings, click **Save**



Registering to Coupa Supplier Portal

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



Guardian Industries Registration Instructions - Action Required



Powered by

Hello GLASS- [redacted] CO-C1311589,

You have been identified as a supplier who would benefit from our Coupa Supplier Portal. This provides the ability for us to share electronic documents with regard to PO delivery and invoice submission. Guardian has launched this process in January 2020. Within the next 48 hours, please click the button below to register your account with us. If you are not the right person to receive this communication, please send this request to the appropriate person by using the forward link.

If you are unable to register for any reason or have questions regarding CSP (Coupa Supplier Portal) or Coupa in general please reach out to our Supplier Enablement Team at accounts payable@guardian.com and put 'COUPA' in the subject line.

Aleksandra Pozniak
Guardian Industries

You can forward the invitation to another person who will be responsible for registering your company to CSP; just click the **Forward this invitation** button and provide that person's details.

After clicking the button, you will see the registration form. Please, fill in your name, surname, create a password, accept the Privacy Policy and Terms of Use. Your company name and email will already be populated. Then click the **Get Started** button.



Create your business account

Guardian Industries is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Guardian Industries so you're ready to do business together.

Email

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

Get Started

[Having an issue with signup?](#)

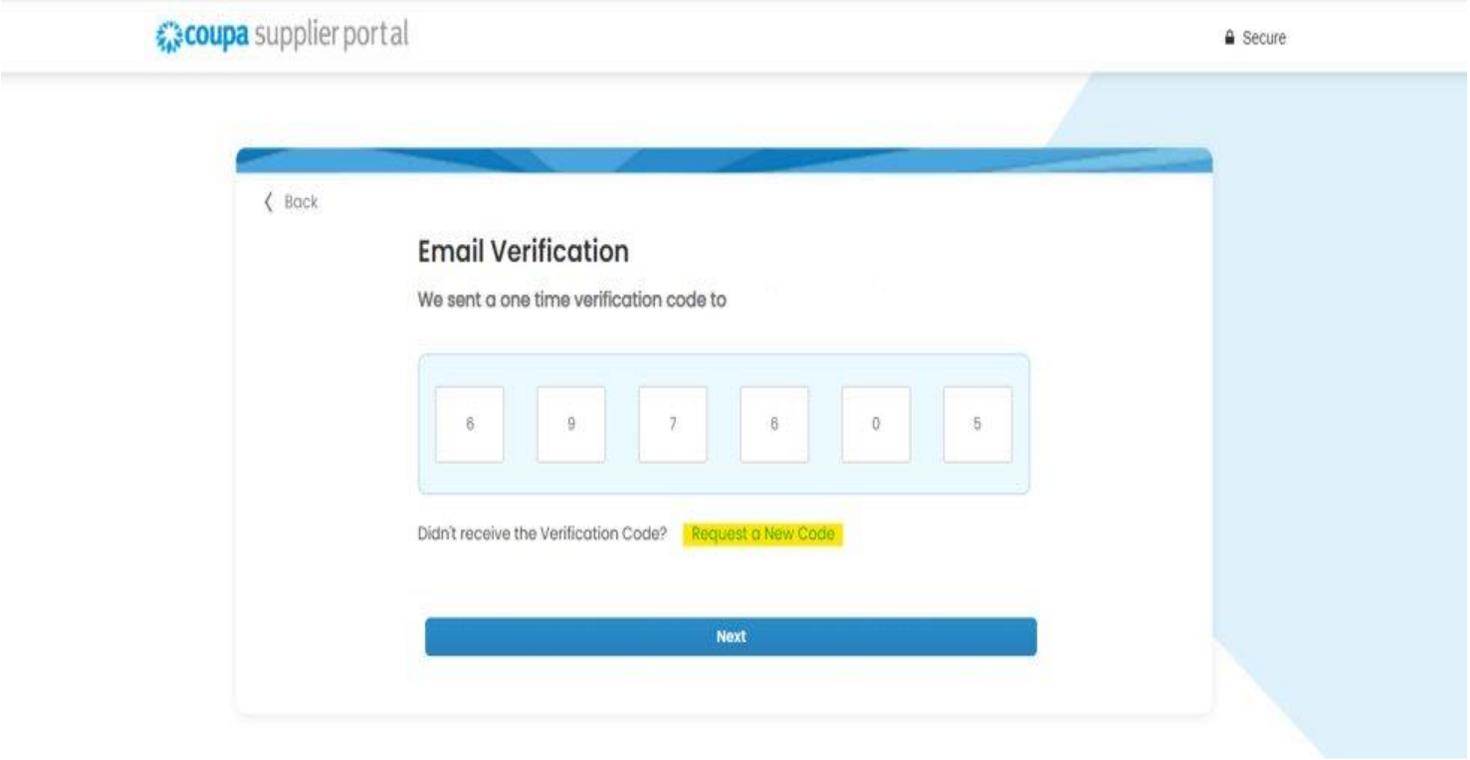
[Forward this to someone](#)

Verify your email

After completing your business information, you will be prompted into a new page to verify your e-mail address.

Coupa will send you an e-mail that contains a six-digit code to verify you are the owner of the email address.

Check your e-mail address to see if you receive the six-digit code if you didn't you can click on "Request a new code".



Users

The **Admin** section, which is located under the **Setup** tab, provides a list of users who have access to Coupa Supplier Portal. In this section you can deactivate users, invite new users and configure the accesses of current users.

coupa supplier portal

ANIA | NOTIFICATIONS 12 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons **Setup**

Admin Customer Setup Connection Requests

Admin Users

[Invite User](#)

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

Inviting new users

To invite a new user, use the **Invite User** button



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

Invite User

First Name

Last Name

* Email

Permissions i

- All
- Admin
- Orders
 - Restricted Access to Orders
 - All
- Invoices
- Catalogues
- Profiles

Customers

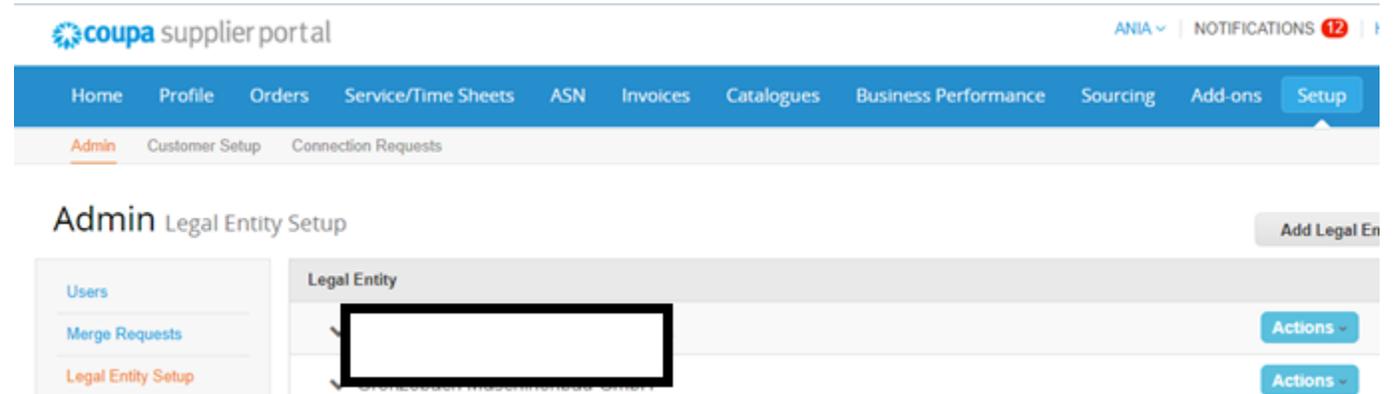
All

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



Legal Entity Setup

To setup a legal entity, go to the **Legal Entity Setup** option. Then click **Add Legal Entity** and fill in all the fields marked with a red asterisk.



On the first page enter the Legal Entity Name and Country, and then click the **Continue** button.

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/Region

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

In the next window, you need to fill in the address from which the invoices will be issued, as well as indicate whether the address provided is used for remittances or as a sender address. Unchecking these options allows you to add other addresses.

Miscellaneous Information

1 2 3 4

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country/Region

Place of Reg.

Type of Company

Permit Number

Permit Date

Enter a date with the following specification: YYYY-MM-DD (eg 1984-05-30)

Share Capital

Enter a number with two decimal points (eg 15096,00)

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

Tell your customers about your organisation

1 2 3 4

Which customers do you want to see this?

All

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Post Code

Country/Region

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 as where you receive government documents.

It is also mandatory to enter your Tax ID number and country of registration. In the **Miscellaneous** section you can select your preferred language. After updating all the fields, save the data by clicking the **Save & Continue** button.

What is your Tax ID? [i](#)

Country/Region ✕

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice-From Code [i](#)

Preferred Language

[Cancel](#) [Save & Continue](#)

Setup complete

1 2 3 4



Congratulations!

This legal entity can now be used on new invoices.

To get paid – Most customers require that you send them this payment info in in addition to providing it on the invoice. [i](#)

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

[Go to Orders](#) [Go to Invoices](#) [Return to Admin](#) [Done](#)

After approving the changes, a message will appear on the screen indicating that the created legal entity can be used in the invoice creation process.

Orders

In the **Orders** tab you can find the Orders you receive, organized by Customer

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogues Business Performance Sourcing Add-ons Setup

Orders Order lines Returns Order Changes Order Line Changes Deliveries

Select Customer

Guardian Industries -

Configure PO Delivery

Purchase Orders

Instructions From Customer

When submitting your invoice through the Coupa Supplier Portal, you must now attach the pdf document using the Image Scan button

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
-----------	------------	--------	-----------------	-------	---------------------	-------	-------------	---------

Orders

You can open an order by clicking on its number. Once you open an order, you can verify the details. Each order contains the following data: number, status, order date, payment terms, shipping address. If the order was not created correctly, please contact the person who created the order - their data can be found in the **Requester** and **Email** fields.

Please click the “Acknowledged” checkbox to confirm the order acknowledgement.

Purchase Order #G000224425

General Info

Status

Order Date

Revision Date

Requester

Email

Payment Term

Comments to Supplier

Attachments

Acknowledged

Assigned to

Shipping

Ship-To Address

Address Location Name

Terms

Orders

In the Lines section you can see the list of Coupe goods/services included in the order. Please make sure that the unit prices and totals are correct.

☰ Lines

Advanced Search  Sort by Line Number: 0 → 9 ▼

I1	Type	Item	Qty	Unit	Price	Total	Invoiced
		COMPUTER SOFTWARE	6	PC - Piece	100.00	600.00	0.00

Need By	Part Number	Manufacturer Name	Manufacturer Part Number	Incoterms	Location
07/10/2019	None	None	None	None	None

Tax Reference	Item Description
Rec Tax Amount=0;NonRec Tax Amount=.00;TaxGroupCode=VES;GoodsTaxRateCode=1	None

Invoices

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

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
123	03/03/2022	Draft	S000224498	119.00 EUR	No		 

You can also see the comments and history of the selected invoice in the invoice details.

Comments

Mute Comments 

Enter Comment

Send comment notification to a user by typing @name (ex. @JohnSmith)

Attachments [Add File](#) | [URL](#)

History

Invoice statuses:

- **Draft**– the invoice has not yet been sent to the customer
- **Pending Approval**– the invoice has not yet been fully approved by the customer
- **Disputed** – the invoice has been disputed by the Accounts Payable team
- **Voided** – the invoice was cancelled after it was fully approved
- **Approved** – the invoice has been approved and will be paid in accordance with the payment terms

In the **Invoices** tab you can create and customize your own view. After modifying the view and applying the **Approved** filter, you can check the payment information. You can also check the **Dispute reason** for any Disputed invoices by using the **Disputed** filter.

Invoices

Instructions From Customer

When submitting your invoice through the Coupa Supplier Portal, you must now attach the pdf document using the Image Scan button
[Create Invoices](#)

[Create Invoice from PO](#)
[Create Invoice from Contract](#)
[Create Blank Invoice](#)
[Create Credit Note](#)

Export to		View		Payment Information	Search
Paid	PO #	Invoice #	Status	Invoice Date	Pa
No	G000224610	None	Draft	3/3/22	NE
No	S000224382	SRG 1	Pending Approval	4/10/21	NE
No	S000224382	None	Draft	4/10/21	NE
No	S000224382	test KCK 1.09.csp negative unit price	Pending Approval	1/10/21	NE
No	S000224382	CN test 1.01.2021 csp r2o	Pending Approval	1/10/21	NE
No	S000224382	None	Draft	1/10/21	NE
No	S000224382	None	Draft	1/10/21	NE
No	S000224382	CN test for r20 approval 1.10.2021	Pending Approval	1/10/21	NE

Payment Information

- All
- Abandoned
- Approved
- Credit notes
- Disputed
- Disputes with a supplier response
- Disputes without supplier response
- Draft
- Overdue invoices
- Payment Information**
- Pending Approval
- Processing
- Unpaid invoices
- Voided
- Create View

Invoices

Instructions From Customer

When submitting your invoice through the Coupa Supplier Portal, you must now attach the pdf document using the Image Scan button
[Create Invoices](#)

[Create Invoice from PO](#)
[Create Invoice from Contract](#)
[Create Blank Invoice](#)
[Create Credit Note](#)

Export to		View		Search
		Disputed		

Dispute reason

Quantity different from
PO/Contract or
Catalog

Quantity different from
PO/Contract or
Catalog

If you have any additional questions or comments, please let us know, we would like to hear from you. Please send us an email to globalSE@guardian.com