Coupa Suppliers Portal

Frequently asked questions

1) Registration:

1: How much does it cost to join the Coupa Supplier Portal?

The Coupa Supplier Portal is completely free for suppliers to Guardian Industries (both Guardian Glass and SRG Global). Coupa does not charge providers to use the portal.

2: What is link where I can enter the Coupa Supplier Portal?

To enter the system, use the following link http://supplier.coupahost.com

3: "Who is going to provide the username and password?"

The user is an email. The Guardian Supplier Enablement Team is going to send you a Coupa Supplier Portal invitation.

When you receive the email invitation, click the "Join Coupa" button

Guardian Industries Registration Instructions - Action Required

Powered by

Iello GLASS   CO-C1311589,

'ou 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 020. 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.

'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 accountspayable@guardian.com and put 'COUPA' in the subject line.

Jeksandra Pozniak
iuardian Industries

| Join Coupa | Forward this invitation |

Then the registration screen appears, that is where you must enter your name, create the password and accept the privacy policy and terms of use. The email and company name are already filled in.

Once you have filled in that information, click on "Activate your account".

coupa

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	olisja@wp.pl
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

4: "If I already have a Coupa user, how should I register for Guardian / SRG Global?"
If you are already registered with Coupa, Guardian Industries will need the email you are already registered with. The Supplier Enablement Team will send you the invitation to that same email and the accounts will be automatically connected.

5: "Is there a maximum number of people in our company that can register on the portal?"
No, the number of users is not limited. New ones can be invited in the settings – Administrator – Users section. There you can also manage permissions and access for each of the users.

coupa supplier portal   KATIA ∨ | NOTIFICATIONS ❽ | HELP ∨

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

Admin | Customer Setup | Connection Requests

Admin Users   **Invite User**

Users	Users	Permissions	Customer Access
Users	Agata Burek	ASNs	
Merge Requests	aburek@guardian.com	Admin	
Legal Entity Setup	Status: Active	Business	
		Performance	
Fiscal	**Edit**	Catalogs	
Representatives		Invoices	
		Order Chang	

6:" If I manage 2 companies, should I have a portal access for each company name?
If you manage more than one company name, you can make the request to combine the accounts. The option can be found in the "Settings" section, the "Administrator" tab:
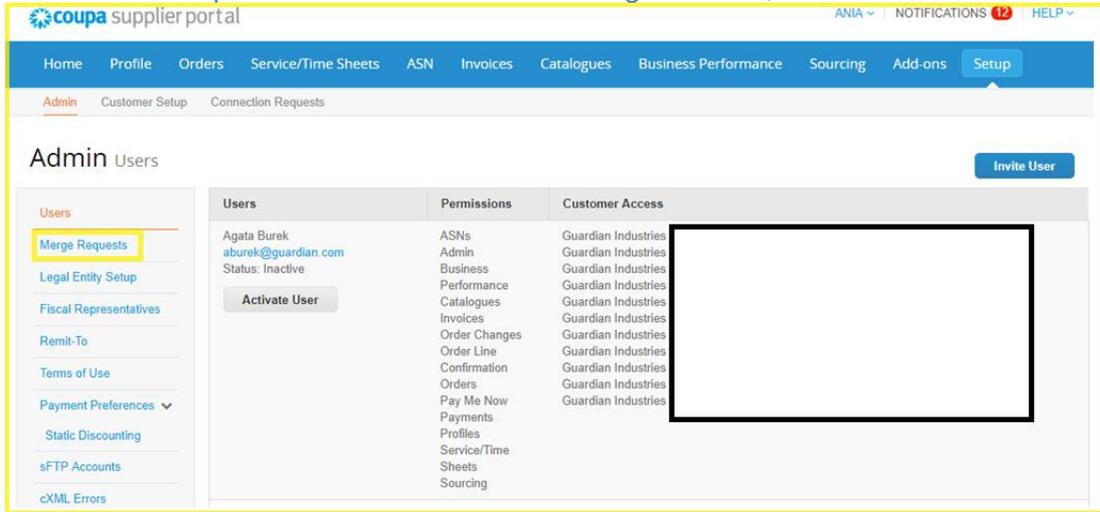
7: "Trying to create the legal entity, it asks me for VAT ID and invoice origin code, which I do not know what it refers to. Could you help me to solve this doubt?
VAT ID is your tax ID number, if you don't have any or are tax exempt, you can put N/A, the invoice source code is not a required field, you can leave it blank.

2) The Purchase Orders:

"Is a purchase order generated by invoice or by the total service?"
A purchase order can include different services separated by different lines; therefore, a purchase order can include several invoices.

Question 9: "How can I view my purchase orders from Guardian / SRG Global?
In the Orders tab, select the Guardian or SRG Global name from the dropdown menu. The orders of the customer you have selected will be displayed. You can also use the filters to view only a group of purchase orders (for example view only unvoiced orders).
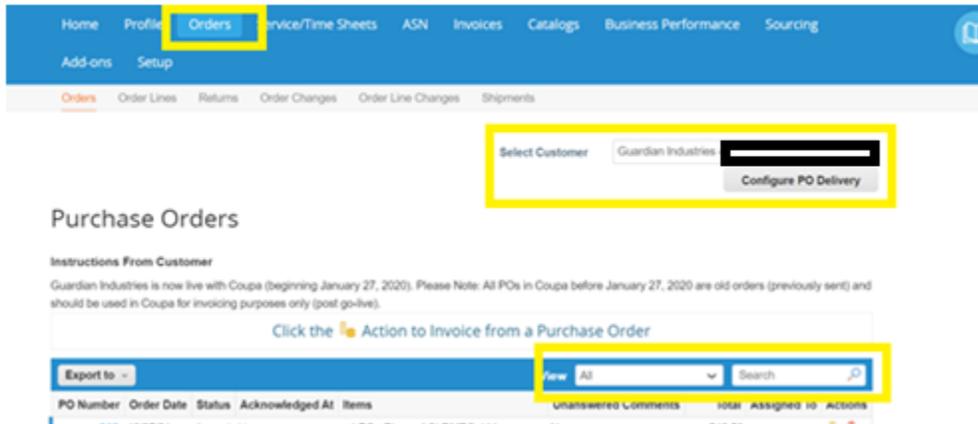
10: "Why don't I see CMS purchase orders in CSP?"
This is because for this type of order, the user must first make the receipt in the system for this purchase order to be visible.

12: "If my purchase order was issued in CMS, should I upload it to COUPA?"
Yes, regardless of the system where the PO was issued, the invoice must be uploaded to CSP

3) invoices:

SHORT STEPS TO CREATE AN INVOICE:

0 - (only once) - create a legal entity with the Tax ID. (in case you don't have one or you are exempt put N/A)

1 - In the Invoices section click on 'Create invoice from purchase order' (or go directly to the Purchase Orders section), click on the 'gold coin' icon on the purchase order

3- Attach the invoice copy from your internal system on the *scanned image* field in "General Information".

4 – Fill out the delivery number field with your internal folio number.

4 - Select the "Ship To" address using the magnifying glass

5 - Select the PO Line on each invoice line using a magnifying glass

6 - Enter the folio number in the "Bill of Lading" field on each invoice line.

7- Add the corresponding VAT taxes and press the calculate button

7 – Click the Send button, warning messages may appear, review them, and send the invoice

Question 13: "How do I create an invoice?" In the CSP, select Orders. From the drop down menu select Guardian / SRG Global and choose the order for which you wish to upload an invoice. You can click on the gold coin icon to create the invoice.

Choose the legal entity from the list or add a new one:
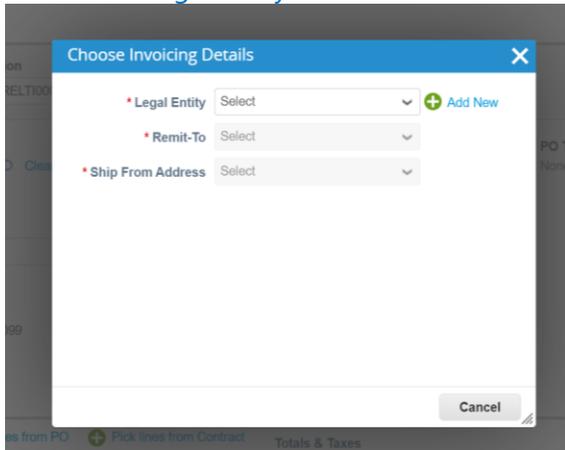
Save your settings.

- **Billing and shipping addresses - Check if the data in the "FROM" and "TO" sections are correct.**

- **The lines – this is where you must choose the correct purchase order line**

The line should be selected here, if you see "None" like in the screenshot below, you need to use the magnifying glass icon and then select the correct line.

Pick Order Line(s)

Invoice Line

Line	Type	Description	UOM	Quantity	Price	Total
1	Quantity	CLDMEC-444	PC - Piece	1.0	484.50	484.50

PO Lines

View [All ▼] [Advanced] [Search 🔍]

Match Conditions [Match all conditions ▼]   [Add group of conditions]

Filter By [PO Number ▼] Filter Clause [265-UK081730 ✕]   ➕

Cancel [Search]

PO Number	Line ▲	Item	UOM	Qty	Price	Invoiced	Actions
265-UK081730	I001	CLDMEC-444	PC - Piece	1	484.50	0	✅ Choose
265-UK081730	I002	PFRT.FRELTI0006	UN - Unit	1	64.00	0	✅ Choose

• Totals and Taxes: You will need to put the corresponding tax rates, and click calculate button

Misc			
Tax	[GB: GB-00-Ou ▼]	0.0 %	0.00
Tax Reference	[Enter a tax reason description.]		
Tax	[GB: GB-05-Zei ▼]	0.0 %	0.00

Total Tax   22.25

Net Total   445.05

Total   **467.30**

[Delete] [Cancel] [Save as Draft] [Calculate] [Submit]

You need to check if the total amount balances and if it is correct, you can send the invoice.

14: "Is the invoice uploaded to COUPA before or after the good or service is delivered?"
"The invoice is uploaded to Coupa after delivering the good or service"

15: "For the same purchase order, can more than one invoice be uploaded to the portal?"
Yes, for the same purchase order you can upload more than one invoice to the portal. You can choose one or more lines of the order.

16: "What is the deadline for entering invoices?
According to the schedule of accounts payable provided by the AP team of the Guardian / SRG Global company with which you have a business relationship.

17: "Will you no longer receive invoices other than through this portal?", "Are invoices going to be created in the portal?"
From the date of implementation, all invoices for which the order was created in Coupa must be sent through the Coupa Supplier Portal.

18: How can I create (upload) a credit note?
Login to the Coupa Supplier Portal and select Orders. Choose the PO you want to create a credit for and select the red coins.

19: "What do I do if an invoice is rejected?"
When the invoice is rejected, you can see a comment of the reason why the invoice has been rejected and information on the next steps to be taken.

4) Payment information:

21: "Are payment receipts uploaded to the portal? "
Yes, the payment receipts are uploaded in the Invoices section, in the "Payment receipts" tab.
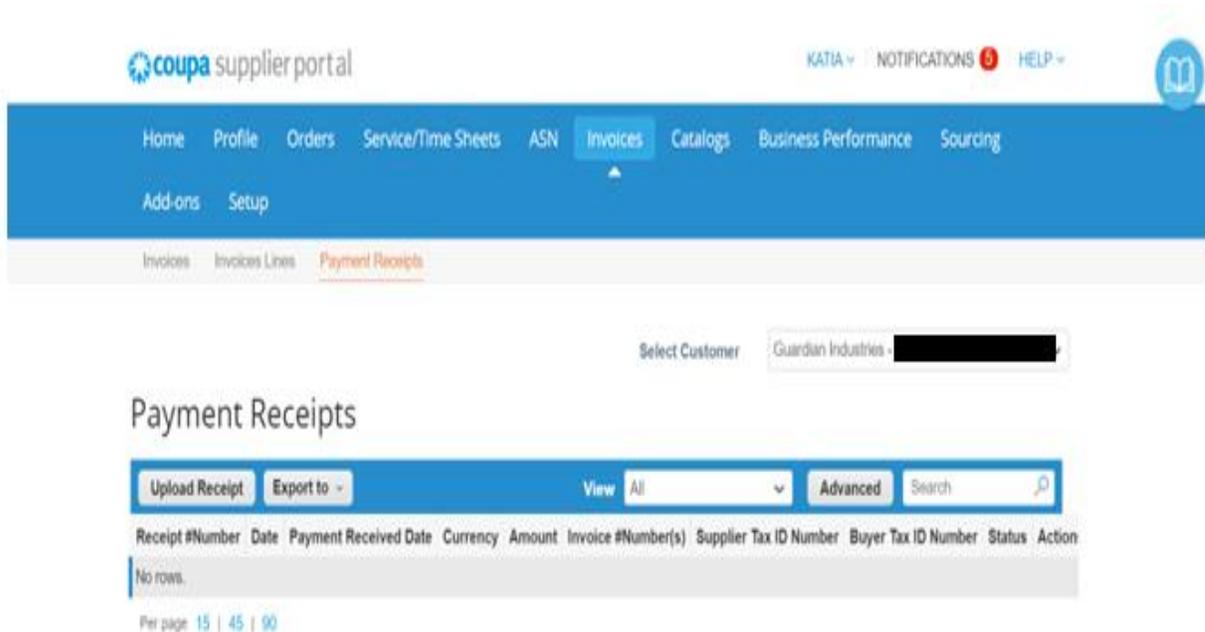
22:"How can I check the payment status?"

There are two ways to check payment information. In the Invoices section, you can choose the view and select "payment information"

If you are in the "invoices" tab, you can also check the payment status in the section below the page:

4) Other questions:

23: "are the payment conditions changed?"

There are no changes with the payment terms. Suppliers will keep their payment conditions as they are now

24: "Is the bank information that is requested when creating my entity in CSP the account to which we are going to be paid?"

No, the payment is going to be made to the account that was previously provided at the beginning of the relationship with Guardian or SRG.

Most common mistakes

Error 1: **"To access this page, you must associate a client and assign the permission in the administration panel to access this page"**

In the Users section (inside Administrator tab) you can check if you have access to Guardian ./ SRG Global. If you still can't see Guardian / SRG Global, please contact globalSE@guardian.com Our team will check if we sent the invitation to the correct email.

Error 2: "You may not add unbacked lines to backed invoice"

Please fix the errors below
- You may not add unbacked lines to a backed invoice

A Purchase order line corresponds to an invoice line. It is necessary to check in all the lines of the invoice if it has been selected correctly for all the fields.

Error 4: The address must be present on the invoice

The first step is to correctly create the legal entity in the administrator section
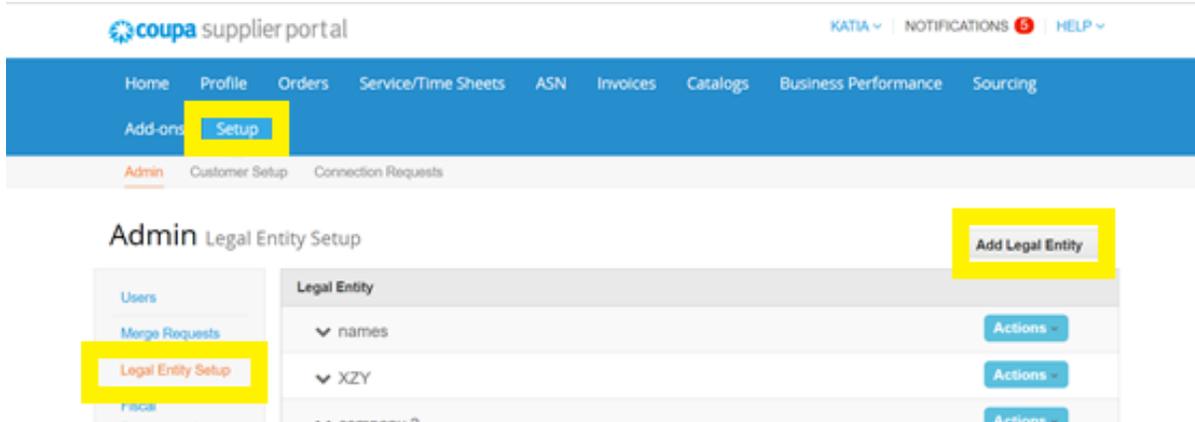
What address do you invoice from?

* **Address Line 1**

Address Line 2

* **City**

State [Select an Option ▼]

* **Postal Code**

Country/Region United States

REQUIRED FOR INVOICING

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

☑ Use this address for Remit-To ⓘ

☑ Use this for Ship From address ⓘ

Error 5: The shipping address must be present on the invoice

Make sure you are using the latest version of the browsers listed below:

May 2022 Release (R33) supports the latest versions of these web browsers:

- Google Chrome 99.0
- Mozilla Firefox 98.0
- Microsoft Edge 99.0

Have checked if you have correctly selected the order lines in the "Purchase order lines" field

Create the invoice from the orders tab> actions> yellow coins.
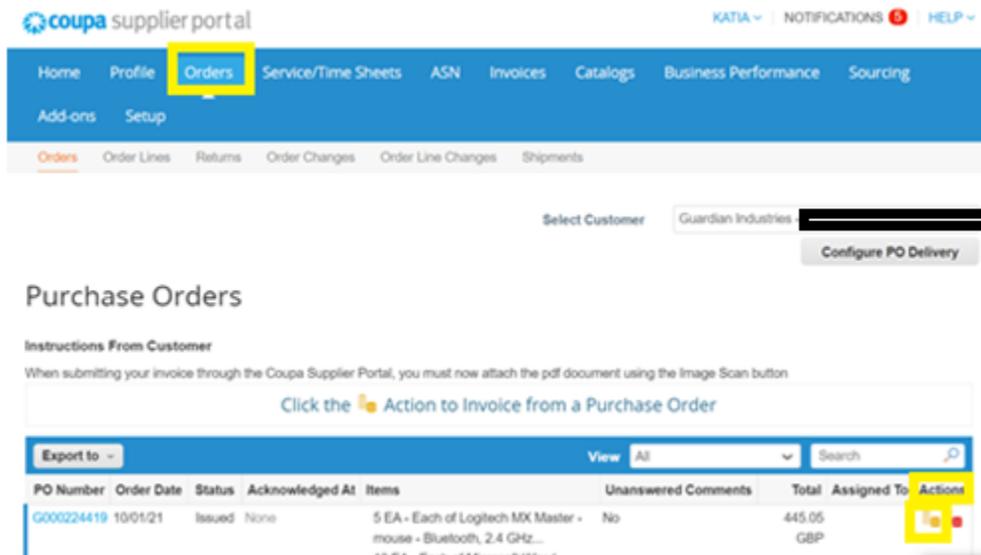
If after having followed the steps mentioned above you still experience problems, please write to us at globalSE@guardia.com