

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	
IIo GLASS- CO-C1311589,	
u 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 Janua 20. Within the next 48 hours, please send this request to the appropriate person by using the forward link.	٧
rou 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@quardian.com and put 'COUPA' in the subject line.	
aksandra Pozniak aardian 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".



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	supplie	erportal					KATIA - NOTIFIC	CATIONS (8) HELP
Home	Profile	Orders	Service/Time Sheets	ASN	Invoices	Catalogs	Business Performance	Sourcing
Add-ons	Setup							
Admin	Customer Se	etup Conn	ection Requests					
Admir	Users	Users		Perm	nissions	Customer	Access	Invite User
Admir Users Merge Requ	Users	Users Agata B aburek@	urek 2guardian.com	Perm ASN Adm	nissions Is	Customer	Access	Invite User
Admir Users Merge Requ Legal Entity	Users uests Setup	Users Agata B aburek@ Status: /	urek gguardian.com Active	Perm ASN Adm Busii Perfe	nissions is in ness ormance	Customer	Access	Invite User



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:

Home Profile Or	ders Service/Time Sheets	ASN Invoices	Catalogues Business Performance	Sourcing	Add-ons	Setup
Admin Customer Setup	Connection Requests					
dmin Users						Invite User
Users	Users	Permissions	Customer Access			
Merge Requests	Agata Burek aburek@guardian.com	ASNs Admin	Guardian Industries Guardian Industries			
Legal Entity Setup	Status: Inactive	Business Performance	Guardian Industries Guardian Industries			
Fiscal Representatives	Activate User	Catalogues Invoices	Guardian Industries Guardian Industries			
Remit-To		Order Changes Order Line	Guardian Industries Guardian Industries			
Terms of Use		Confirmation Orders	Guardian Industries Guardian Industries			
Payment Preferences 🗸		Pay Me Now Payments	Guardian Industries			
Static Discounting		Profiles Service/Time				
sFTP Accounts		Sheets				

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).



nome Profile Orders Prvice/Time Sneets ASN Invoices	Catalogs Business Performance Sourcing
ldd-ons Setup	
Order Lines Returns Order Changes Order Line Changes Shipm	ents
54	lect Customer Guardian Industries
urchase Orders	
tructions From Customer	
ardian Industries is now live with Coupa (beginning January 27, 2020). Please Note: All PC xild be used in Coupa for invoicing purposes only (post go-live).	Is in Coupa before January 27, 2020 are old orders (previously sent) and
Click the 📒 Action to Invoice from	n a Purchase Order
Export to -	🖊 🖌 🗸 Search 🔎

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:

	Choose Invoicing D	etails		;	×
.TIOO	* Legal Entity	Select	~	Add New	
	* Remit-To	Select	~		P
Clea	* Ship From Address	Select	~		
					1
					1
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ı					1

Save your settings.

• Billing and shipping addresses - Check if the data in the "FROM" and "TO" sections are

	correct.		
	🔗 From		
	* Supp	lier (
	Supplier VA	r id [
	* Invoice From Addr	ess	
	* Remit-To Addr	ess	
	* Ship From Addr	ess	
	⊘ To		
	Custor	ner (
	* Bill To Addr	ess	
The Breeze this is sub-services would all	ha ana dha an mar	t annala an amhar 15	
• The lines – this is where you must c	noose the correc	t purchase order li	ne
🔲 Lines			
Tura Department	05/ 110M	Price	
Type Description	Qty UOM	Price	,
The line should be selected here, if you s	ee "None" like in t	he screenshot	
below you need to use the magnifying g	lass icon and then	select the	PO Line
correct line		Select the	None O Clear
correct me.			



Pick Order I	Line(s)						>
Invoice Line							
Line	Туре	Description	NON	Quan	tity	Price	Total
1	Quantity	CLDMEC-444	PC - Piece	1.0		484.50	484.50
PO Lines							
FOLMES					_		
			View	All	~	Advanced Se	arch 🔎
Match Conditi	ons Match all co	nditions 🗸				Add a	roup of conditions
						Add g	oup of conditions
Filter By PO I	Number 🗸 Filter	Clause 265-UK081730 ×				Add g	• • • • • • • • • • • • • • • • • • •
Filter By PO N	Number 🖌 Filter	Clause 265-UK081730 ×				Add g	
Filter By PO I	Number 🗸 Filter	Clause 265-UK081730 ×					ancel Search
Filter By PO Number	Number 🗸 Filter	Clause 265-UK081730 ×	UOM	Qty	Price	Invoiced	ancel Search Actions
Filter By PO I PO Number 265-UK081730	Number V Filter	Clause 265-UK081730 x Item CLDMEC-444	UOM PC - Piece	Qty 1	Price 484.50	Invoiced 0	ancel Search Actions

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

Misc						
Tax		GB: GB-0	10-Ou 🗸	0.0	%	0.00
	Tax Refere	nce	Enter a tax i	reason de	escription	
Tax		GB: GB-0	15-Zei 🗸	0.0	%	0.00
Total Tax						22.2
Net Total						445.0
Total						467.30

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.

Home Profile Orders Service/Time Sheet	ts ASN Invoices Catalog	ps Business Performance	Sourcing
Add-ons Setup			
Involces Involces Lines Payment Receipts			
	Select Custo	mer Guardian Industries -	,
Payment Receipts			
Upload Receipt Export to -	View Al	✓ Advanced Set	iarch 🔎
Receipt #Number Date Payment Received Date Currence	y Amount Invoice #Number(s) Sup	plier Tax ID Number Buyer Tax ID	Number Status Action



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"

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Hon	ne Profile	Orders Service/Tin	e Sheets	ASN Invol	ces Catalogs	Business Performa	nce Sourcing
Invoi	ces Invoices Lin	es Payment Receipts					
Instruct When s Creat	OICES autions From Cust submitting your invo ate Invoices the Invoice from PC	omer ce through the Coupa Supp Create Invoice from	ier Portal, yo	u must now attach t Create Blank In	Select Custon he pdf document u	NI Abandoned Approved Zredit Notes Disputes Disputes with a supplier re- Disputes with a supplier re- Disputes without supplier re- Draft Draft Invoices Payment Information Panding Approval Processing Jnpaid invoices /oided Create View	PFIVES STEIN-C1(↓
Exp	ort to ~				View	Payment Information	Search ,0
	P() II	Invoice #	Status	Invoice Date	Payment Term	Date Of Supply	Payment Information
No	G000224207	280 tax0	Draft	10/21/21	NET 30	10/21/21	

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

d Comment notification to	a user by typing @name	(ex. @JohnSmith)		
achments Add File	IURL			
				Add Comment
Payments				V
Status	s Ready to Pay			
Paid-in-Full Date	B None			
Payment Re	conciliation Det	ails		
			Description	Amount

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 <u>globalSE@guardian.com</u> 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.

Lines						Line Level Taxation
Type Des ≅ I	cription	Qty UC	OM A - Each →	Price 59	1.34	296.55 8
PO Line None ₂ O Clear	Cor	Aract	Receip	ĸ	Bill of Lading	
Supplier Part Nur	nber PO Non	Tax Reference	Ancilla	ry Part Number	Tax Legal Work	ling (Reqd for EU)
Billing						

Error 4: The address must be present on the invoice

The first step is to correctly create the legal entity in the administrator section



💫 coupa supplier portal						KATIA - NOTIFICATIONS 3 HELP -	
Home Profile	Orders	Service/Time Sheets	ASN	Invoices	Catalogs	Business Performance	Sourcing
Add-ons Setu							
Admin Customer	Setup Conr	ection Requests					
Admin Legal	Entity Setu	qı					Add Legal Entity
Users	Legal E	intity					
Merge Requests	v 1	hames					Actions -
Local Fails Robert		(7)					Actions
Legal Entity Setup	×)	02.1					

What address do you invoice from?

* Address Line 1		
Address Line 2		REQUIRED FOR INVOICING
* City State	Select an Option	Enter the registered address of your legal entity. This is the
* Postal Code		receive government documents.
Country/Region	United States	
	🛛 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

∏ipo ∰	Descripción	Cantidad 5.0	Unidad de medida Precio H87 - MX ON 🗸	
importe d	e descuento	Unidad de medida de la empresa PIEZA	Cuenta de impuesto sobre el patrimonio	Número de la declaración de aduana
UNSPSC		Línea de orden de compra	Contrato	Recibo

Create the invoice from the orders tab> actions> yellow coins.

	Dealis	Outres	Constant (Constant)	Acres 100	d becauters	Cataloga	Duringer Derfer		Courseline or	
tome	Profile	Orders	Service/Times	neets Asr	N Invoices	Catalogs	Business Perfor	mance	sourcing	
Add-ons	Setup									
Indens	Order Lines	Return	order Changes	Order Line C	hanges Shipm	onts				
					Se	ect Customer	Guardian Indust	ios -		
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urch truction en submit	ase O	tomer	the Coupa Supplier	Portal, you must	now attach the pdf	document using	g the Image Scan but	on		
urch truction en submit	ase O From Cus ting your inv	tomer	the Coupa Supplier	Portal, you must	now attach the pdf	document using	g the Image Scan butt	on		
urch truction en submi	ase O From Cus ting your inv	tomer sice through	the Coupa Supplier Click the	Portal, you must	now attach the pdf	document using	g the Image Scan but ie Order	on		
urch struction en submit	ase O From Cust ting your inv	tomer sice through	the Coupe Supplier Click the	Portal, you must	now attach the pdf Invoice from	document using h a Purchas View At	g the image Scan but the Order	on v S	earch	p
urch struction en submit Export to 0 Numbe	ase O From Cus ting your inv r Order Da	tomer bice through	the Coupa Supplier I	Portal, you must Action to Items	now attach the pdf	document using a Purchas View At Unansv	g the Image Scan but the Order wered Comments	on V S Total	earch Assigned To	ر. Action
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If after having followed the steps mentioned above you still experience problems, please write to us at <u>globalSE@guardia.com</u>