

Coupa Suppliers Portal

Frequently asked questions

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

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 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.

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

Jekandra Pozniak
Guardian 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

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. Do I need to enable the 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:

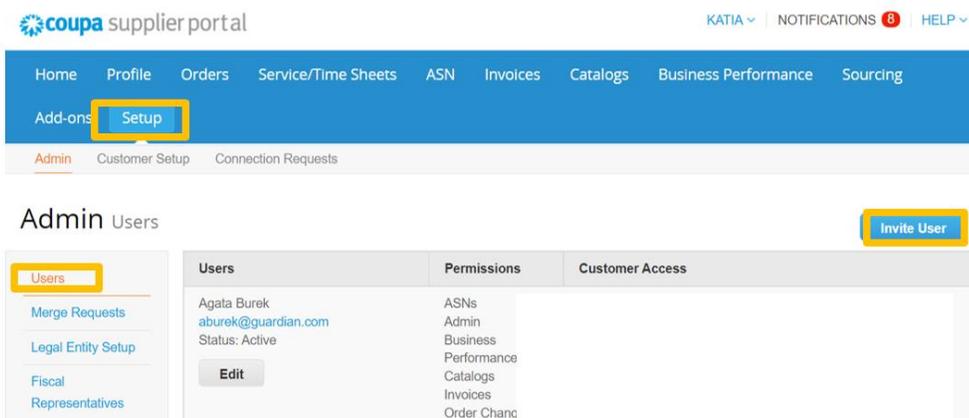
- Legal entity
- bank details
- Remit to addresses
- Manage accesses and assign permissions to new and existing users.

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

For more information on how to enable it, please review the Coupa Supplier Portal manual, or send us an email to globalSE@guardian.com

6. “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.

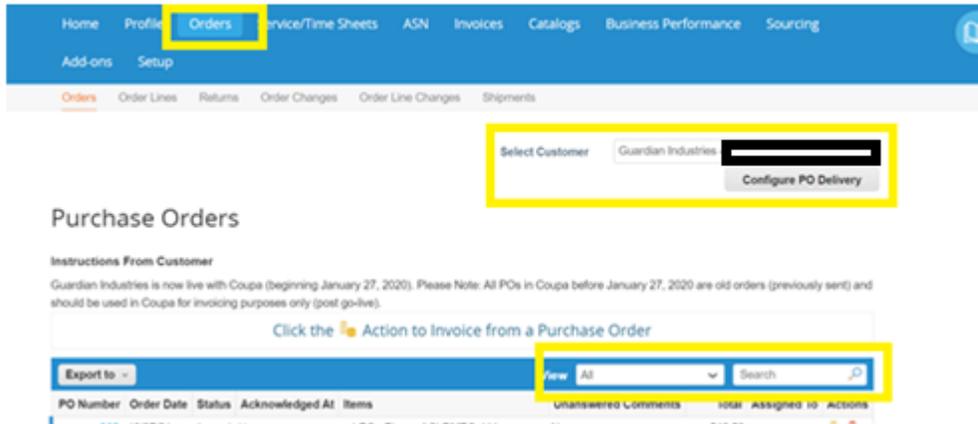


The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Sourcing. Below this is an 'Add-ons' section with a 'Setup' button highlighted in yellow. Underneath, there are tabs for 'Admin', 'Customer Setup', and 'Connection Requests'. The main content area is titled 'Admin Users' and features an 'Invite User' button in yellow. On the left, there is a sidebar menu with 'Users' highlighted in yellow, and other options like 'Merge Requests', 'Legal Entity Setup', 'Fiscal', and 'Representatives'. The main table displays user information:

| Users | Permissions | Customer Access |
|---|---|-----------------|
| Agata Burek aburek@guardian.com Status: Active <input type="button" value="Edit"/> | ASNs Admin Business Performance Catalogs Invoices Order Chang | |

7. 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:



Invoices:

SHORT STEPS TO CREATE AN INVOICE:

- a) (only once) - create a legal entity with the Tax ID. (in case you don't have one or you are exempt put N/A)
- b) 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.
- c) Attach the invoice copy from your internal system on the *scanned image* field in "General Information" all the information you put in Coupa may be the exact same as the information in your invoice copy (invoice number, date, TAX id, price and totals, PO)
- d) Make sure the PO Lines are selected on each invoice line using a magnifying glass.
- e) Enter the folio number in the "Bill of Lading" field on each invoice line.
- f) Add the corresponding VAT taxes on the **totals section** and press the calculate button.
- g) Click the Send button, warning messages may appear, review them, and send the invoice.

10. "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.

- **All fields marked with a red asterisk are mandatory. Verify whether the General Information and From and To sections are filled out correctly (everything should match with the information contained on your invoice copy)**

| | | |
|---|---|---|
| <p> General Info</p> <p>* Invoice # <input type="text"/></p> <p>* Invoice Date <input type="text" value="03/03/2022"/> </p> <p>Payment Term NET 60</p> <p>* Currency <input type="text" value="EUR"/> </p> <p>Delivery Number <input type="text"/></p> <p>Status Draft</p> <p>* Image Scan <input type="button" value="Choose File"/> No file chosen</p> <p>Supplier Note <input type="text"/></p> <p>Attachments Add File URL Text</p> | <p> From</p> <p>* Supplier</p> <p>Supplier Tax ID</p> <p>* Invoice-From Address</p> <p>* Remit-To Address</p> <p>* Ship-From Address</p> | <p> To</p> <p>Customer</p> <p>* Bill-To Address</p> <p>Address Location Name</p> <p>Buyer VAT ID/VAT</p> <p>Ship To Address</p> <p>Address Location Name</p> <p>Procurement Specialist</p> <p>Purchase Order</p> |
|---|---|---|

- The lines – this is where you must choose the correct purchase order line and put the Bill of Lading

Lines Line Level Taxation

| Type | Description | Qty | UOM | Price | |
|------|-------------|----------|-----------|-------|---|
| | | 5.000000 | EA - Each | 59.31 | 296.55 ✖ |

PO Line 🔍 Clear

Contract

Receipt
 None

Bill of Lading

Supplier Part Number

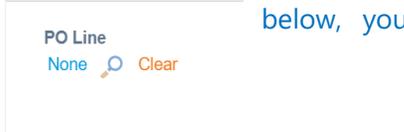
PO Tax Reference
 None

Ancillary Part Number

Tax Legal Wording (Reqd for EU)

Billing

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

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.FRELT10006 | UN - Unit | 1 | 64.00 | 0 | ✔ Choose |

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

| | |
|---------------|---|
| Misc | <input type="text"/> |
| Tax | <input type="text" value="GB: GB-00-Ou"/> <input type="text" value="0.0"/> % <input type="text" value="0.00"/> |
| Tax Reference | <input type="text" value="Enter a tax reason description."/> |
| Tax | <input type="text" value="GB: GB-05-Zei"/> <input type="text" value="0.0"/> % <input type="text" value="0.00"/> |
| Total Tax | 22.25 |
| Net Total | 445.05 |
| 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 should be submitted 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. (If you are not invoicing all PO lines at the same time please erase the lines you will not be invoicing, you can invoice those later)

16: "What is the deadline for entering invoices?"

Invoices should be sent in a lapse 48 hours after the goods were delivered.

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. If you are unsure of what your delivery invoice method should be send us an email to globalSE@guardian.com

18: How can I create (upload) a credit note?

A credit note can be created to either cancel the whole amount of an invoice or cancel a partial amount in case of a refund is needed. To create 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.



Then you need to select the legal entity details (your addresses) just like when creating an invoice, and filled out the mandatory field marked with * (you will need to use a different invoice number, so you can put the original invoice number and then add a CN at the end, f.ex xxx-CN)

 General Info

* Credit Note #

* Credit Note Date 

Payment Term NET 60

* Currency 

Delivery Number

Status Draft

* Original Invoice #

* Original Invoice Date 

* Image Scan Sin archivos seleccionados

Supplier Note

Make sure you are entering the amount you want to apply to the original invoice at a line level (in case you have more than one line make sure to use the correct line you want to make the adjustment, and delete the

rest of the lines clicking on the ) , the amount must be **negative**, you can select by quantity of items or just the price, f,ex

Lines

Adjustment Type: Quantity

| 1 | Type | Description | Qty | UOM | Price |
|---|------|-----------------------|---|------------|-------|
| | | 617-1PLTL.0000.0400 0 |  | LB - Pound | 1.192 |

PO Line: SRG NA-100000526-11 Clear Service/Time Sheet Line: None Contract: ▼ Supplier Part Number: 01598700

PO Tax Reference: (Rec Tax Amount= 00,NonRec Tax Amount= 00,TaxGroupCode=EXE,GoodsTaxRateCode=1) Ancillary Part Number: Tax Legal Wording (Reqd for EU): Select

Billing: 6173100050000000

*Remember to add your taxes at the totals section, these will be negative as well

And then submit, and that’s it! You will see it in your invoice tab, but it will be negative.

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 

| Invoice # | Created Date | Status | PO # | Total | Unanswered Comments | Dispute Reason | Actions |
|-----------|--------------|------------------|------------------|-----------|---------------------|----------------|---------|
| 12301 | 05/26/23 | Pending Approval | SRG NA-100000526 | -1.19 USD | No | | |

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.

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”

Invoices

Instructions From Customer
When submitting your invoice through the Coupa Supplier Portal, you must now attach the pdf document to the invoice.

Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Invoice from PO

Export to View: Payment Information Search

| Paid | PO # | Invoice # | Status | Invoice Date | Payment Term | Date Of Supply | Payment Information |
|------|------------|------------------|----------|--------------|--------------|----------------|---------------------|
| No | G000224207 | 280 lax0 | Draft | 10/21/21 | NET 30 | 10/21/21 | |
| No | G000224042 | EUW4SIT_GLA024.4 | Approved | 09/07/21 | NET 60 | 09/07/21 | |

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

Enter Comment

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

Attachments Add File | URL

Add Comment

Payments ▾

Status Ready to Pay

Paid-in-Full Date None

Payment Reconciliation Details

| Status | Date | Type | Description | Amount |
|--------|------|------|-------------|--------|
|--------|------|------|-------------|--------|

History >

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 your user 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

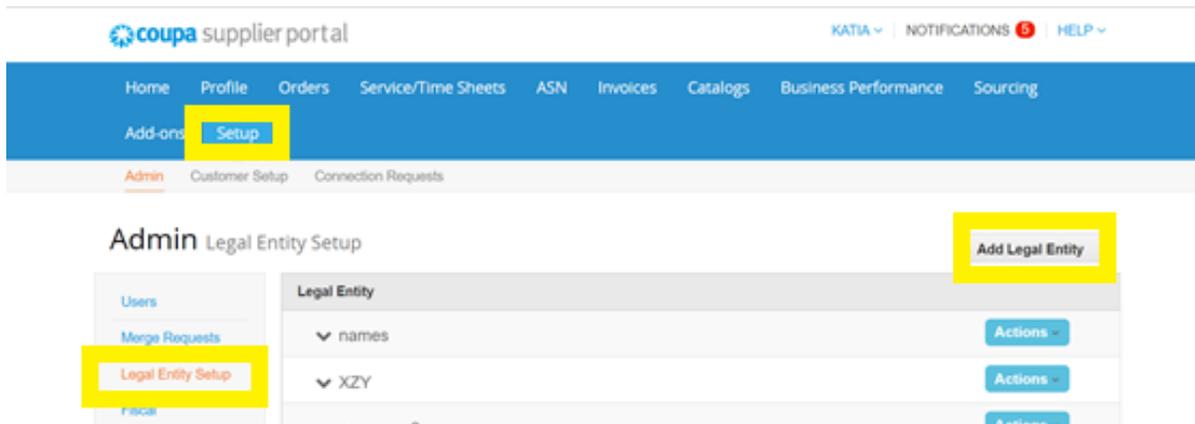
A Purchase order line corresponds to an invoice line. It is necessary to check in all the lines of the invoice if it has been selected correctly for all the fields.

Lines Line Level Taxation

| Type | Description | Qty | UOM | Price | |
|--|-------------|------------------|-----------------------|---------------------------------|---|
| | I _ | | EA - Each | 59.31 | 296.55 ✖ |
| PO Line None <input type="radio"/> Clear | | Contract | Receipt | Bill of Lading | |
| Supplier Part Number | | PO Tax Reference | Ancillary Part Number | Tax Legal Wording (Reqd for EU) | |
| Billing | | None | | Select | |

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

* 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. *i*

- Use this address for Remit-To *i*
- Use this for Ship From address *i*

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.

I. For any clarification regarding the purchase order, please contact the requester, the information is found in the order.

II. For any payment inquiries please email AccountsPayable@guardian.com

III. For any inquiries regarding invoicing in the Coupa supplier portal, send us an email to globalSE@guardian.com