

## COUPA SUPPLIER PORTAL (CSP) JOB AIDS & RESOURCES

GETTING STARTED WITH COUPA SUPPLIER PORTAL (CSP).....	2
Registering for Coupa Supplier Portal.....	2
Adding a Payment Method.....	3
MANAGING YOUR CSP ACCOUNT .....	5
Managing Users: Adding a New User.....	5
Managing Users: Deactivating a User .....	6
Managing Notification Preferences .....	7
Adding Additional Payment Methods .....	8
MANAGING INVOICES .....	9
Submitting PO Based Invoices.....	9
Submitting Non-PO Based Invoices .....	11
Submitting Credit Notes .....	14
Checking the Status of Submitted Invoices.....	16
APPENDIX.....	18
Support Contacts & Additional Resources.....	18
Tax-Compliant Invoice Presentation Countries List.....	18

*Note: CTRL / click the items above to jump directly to the instructions or resources you need*

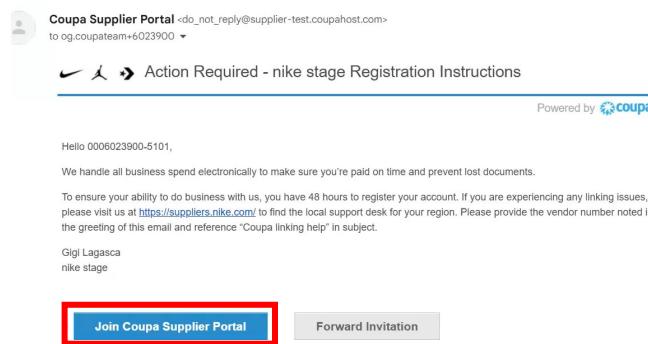
## GETTING STARTED WITH COUPA SUPPLIER PORTAL (CSP)

### Registering for Coupa Supplier Portal

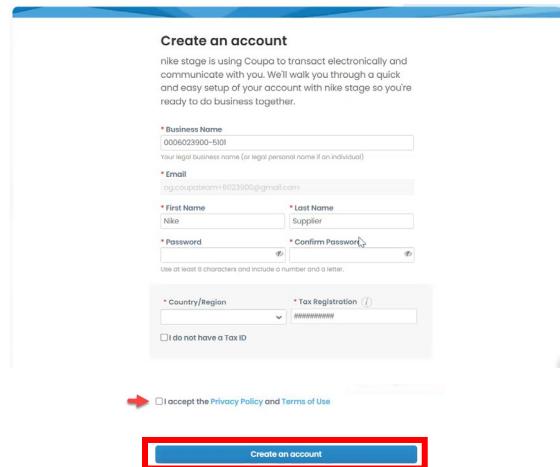
*Please Note: Coupa works best in Chrome and Firefox (IE is not recommended)*

**You will receive an email invitation**  
inviting you to set up your Coupa Supplier Portal (CSP) account.

**Select the 'Join Coupa Supplier Portal' link provided in the email to register.**



**When the Coupa Supplier Portal (CSP) opens complete the required fields (\*), accept the privacy policy and terms, then select 'Create an account'.**



**A verification screen will be displayed, and a verification code will be emailed to you. Input the code received in your email, then select 'Next' to proceed to the next step (adding a payment method).**



## Adding a Payment Method

Once you have completed the email verification step detailed above, you will be prompted to add a payment method.

From the Coupa Supplier Portal Onboarding screen, **complete all mandatory fields (\*) on the 'Account Details' tab**, then **select 'Save and next'** to continue.

### Coupa Supplier Portal Onboarding

Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal.

[Account Details](#) [Payment Information](#)

**Primary Address**

\* Country/Region:  \* Address Line 1:  Address Line 2:

\* City:  \* State:  \* Postal Code:

**Save and Next**

On the 'Payment Information' tab, **check the 'Do not accept Virtual Card payments' box**, then **select 'Save and Next'** to skip the virtual card section.

### Account Details Payment Information

Payment Method (Virtual Card | Bank Account | Remit-To Address)

**Virtual Card**

Please enter the following information to receive Virtual Card payments.

\* Payment Method Name:  \* Email Address:

Process credit cards automatically

Do not accept Virtual Card payments

**Save and Next**

On the 'Bank Transfer' screen, **complete the required fields (\*)**, then **select 'Save and Next'**.

### Bank Transfer

Please enter the following information to receive Bank Transfer payments.

\* Payment Method Name:  Bank transfer

Bank Account  
\* Country/Region:  Canada \* State:  Quebec \* Bank Account Currency:  CAD

Beneficiary Name:  hangerlogic

Bank Name:  RBC

Account Number:  Confirm Account Number:

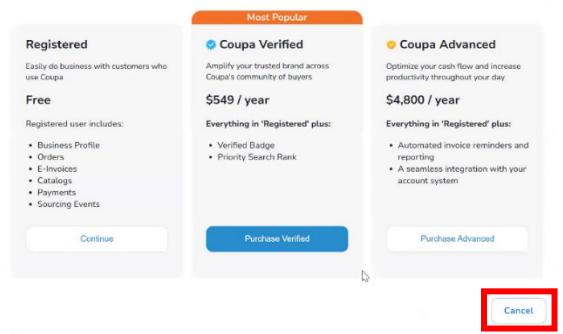
Transit/Institution Number:

My company expects to receive urgent/wire payments

Do not accept Bank Transfer payments

**Save and Next**

Select 'Cancel' to skip the registration for Coupa Verified, if prompted.



Once you have registered, you may **log in using your credentials**. For quick access to CSP going forward, **bookmark this link**: <https://supplier.couphost.com/sessions/new>

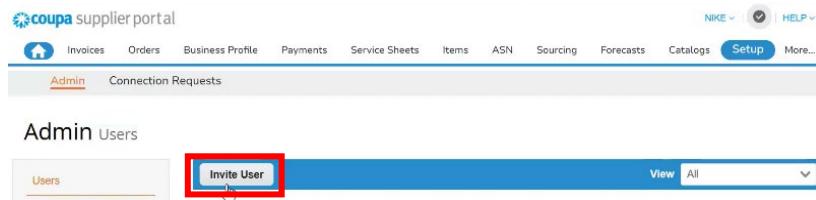
*Please Note:*

- *Your login information is private – Nike will not have access to this information.*
- *If you have not received an email invitation to register for CSP, please reach out to [your local support mailbox](#) for additional support with account registration.*

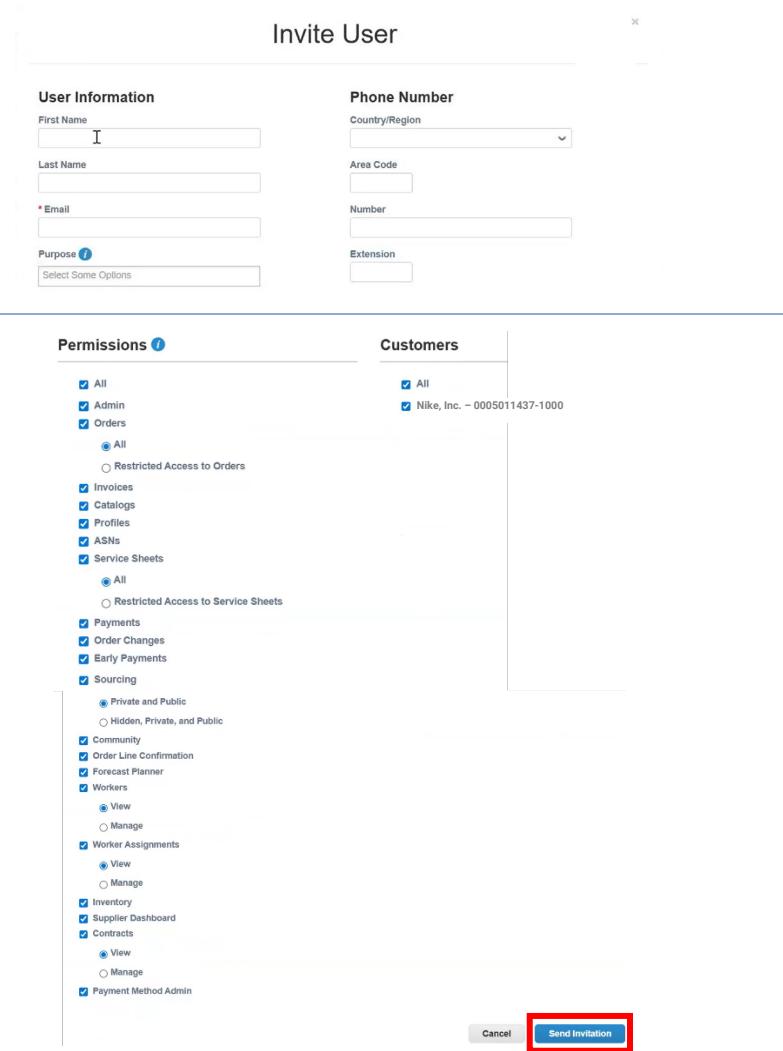
## MANAGING YOUR CSP ACCOUNT

### Managing Users: Adding a New User

Under 'Setup' > 'Admin' > 'Users', select 'Invite User'.



In the 'Invite User' popup window, enter the new user's information.



The 'Invite User' window contains the following fields:

- User Information:** First Name, Last Name, \*Email, Purpose (Select Some Options)
- Phone Number:** Country/Region, Area Code, Number, Extension
- Permissions:**
  - General:** All, Admin, Orders
  - Orders:** Invoices, Catalogs, Profiles, ASNs, Service Sheets
  - Payments:** Payments, Order Changes, Early Payments, Sourcing
  - Community:** Order Line Confirmation, Forecast Planner, Workers
  - Workers:** View, Manage
  - Worker Assignments:** View, Manage
  - Inventory:** View, Manage
  - Supplier Dashboard:** View, Manage
  - Contracts:** View, Manage
  - Payment Method Admin:** View, Manage
- Customers:** All, Nike, Inc. - 0005011437-1000

Select the permissions the new user should have (see descriptions of the most commonly used permissions below), and the customers the new user should be able to access (in most cases, 'All').

Then select 'Send Invitation'.

The new user will receive an email notification, including a link to register for CSP.

Below are descriptions of key CSP Permissions.

A full list of CSP Permissions can be found on [Coupa Compass](#).

**All** : Full access to all CSP functions - rarely would a user need "All" access (except Admin)

**Admin:** Full access to all CSP functions, including Admin - allows a user to update eInvoicing set up, banking, profiles, Legal Entities, etc

**Orders:** Allows viewing/managing of PO's - most users will require this access

**Invoices:** Allows creating/sending invoices to customers – most users will require this access

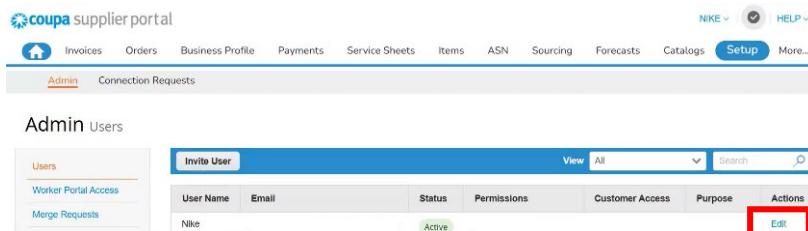
**Profiles** – Allows modifying Business Profiles - usually only Admins have access

*Please Note:*

- *If multiple users are sharing a Coupa email/login, only one user may be logged into Coupa at a time.*
- *If your request to add a new user is unsuccessful because the user already has an active CSP account, you will need to request to merge the accounts. For more information on Merge Requests, please refer to the [Coupa Compass resources here](#).*

## Managing Users: Deactivating a User

Under '**Setup**' > '**Admin**' > '**Users**', select '**Edit**' next to the user you wish to deactivate.



Scroll to the bottom of the popup window and select '**Deactivate User**'.

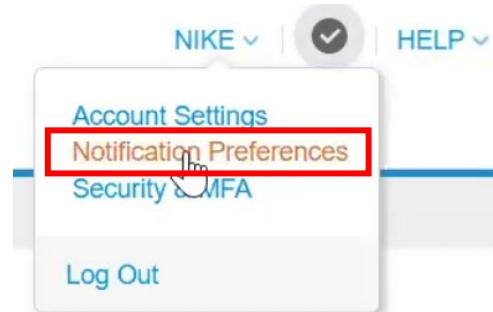
**Cancel** **Deactivate User** **Save**

*Please Note: Deactivated users will still be visible, but will have no CSP permissions*

## Managing Notification Preferences

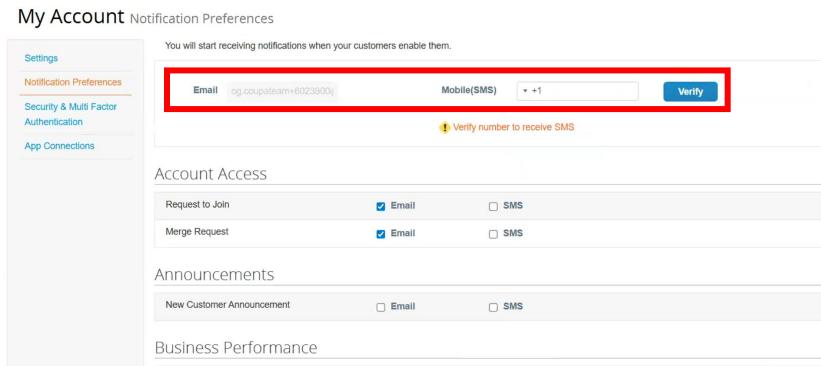
*Please Note: Coupa notification preferences may only be managed by Coupa admins.*

From your profile dropdown (located in the upper right corner of any CSP page), **select 'Notification Preferences'**.



If your contact information is not already populated, **enter your email address and/or mobile phone number, then click 'Verify'**.

**Review the list of available notification options and select the notifications you would like to receive** via email and/or SMS. A few example options are shown here.



My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email:  Mobile(SMS):

Verify number to receive SMS

Account Access

Request to Join	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Merge Request	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

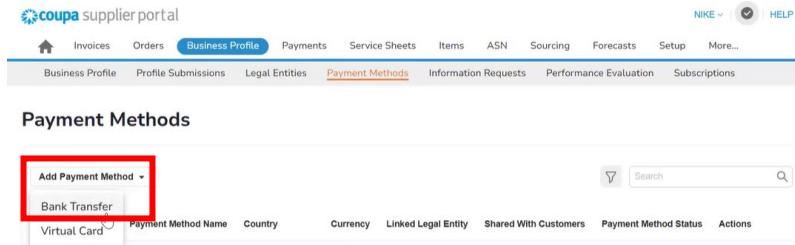
Announcements

New Customer Announcement	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
---------------------------	--------------------------------	------------------------------

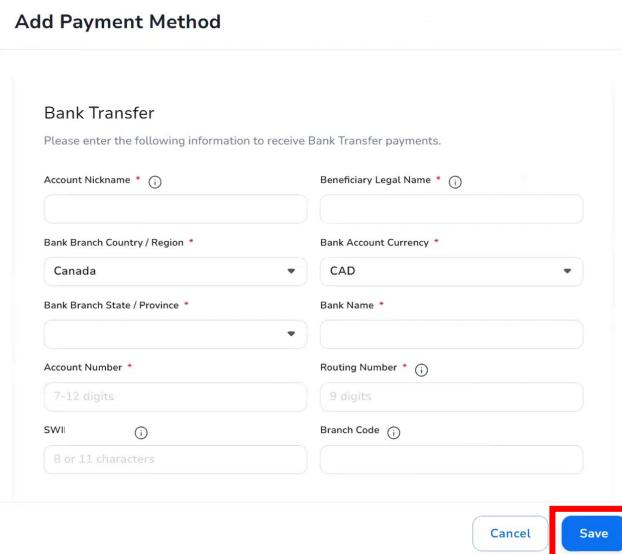
Business Performance

## Adding Additional Payment Methods

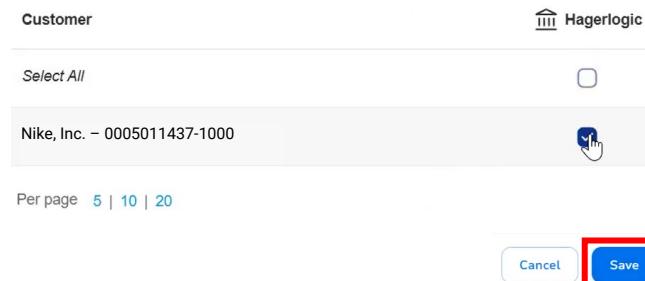
**Under 'Business Profile' > 'Payment Methods', select 'Add Payment Method', then select 'Bank Transfer' from the dropdown menu.**



**On the 'Bank Transfer' screen, complete all required fields (\*), then select 'Save'.**



**Select the customer account(s) this payment info should be assigned to, then select 'Save' again.**



*Please Note: Additional information on sharing payment methods can be found in [Coupa Compass](#).*

## MANAGING INVOICES

### Submitting PO Based Invoices

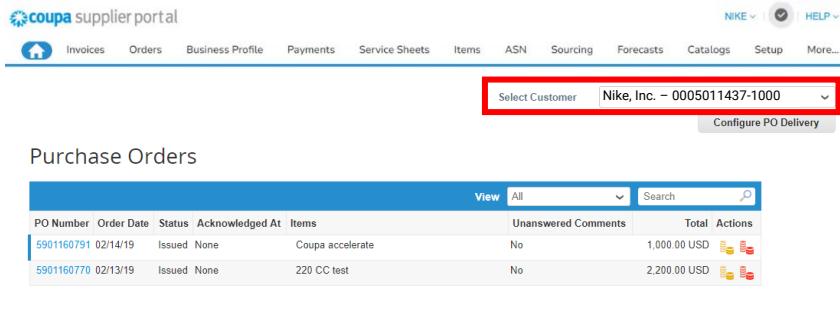
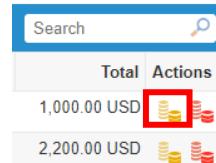
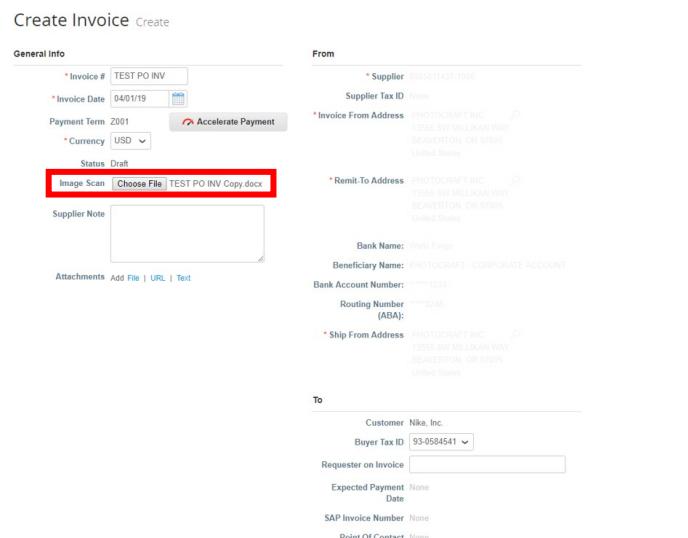
*Please Note: It is always best practice to obtain a Purchase Order (PO), and obtaining a PO is mandatory for invoices totaling over \$5k USD (or local currency equivalent).*

**Under 'Orders', select the correct Nike Entity from the 'Customer' dropdown to view a list of all POs from that customer.**

If the PO you are looking for is not listed, reach out to your Nike contact for more information.

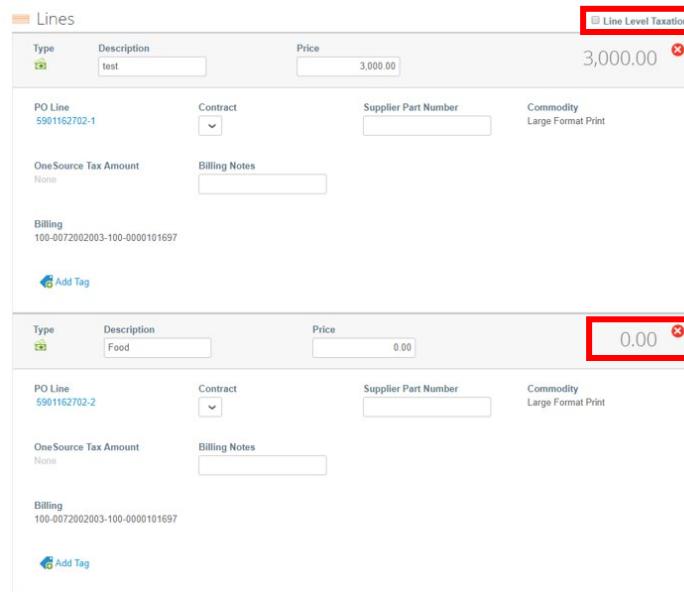
After locating the correct PO, **select the gold coin icon in the 'Actions' column** (on the far right of each listing) to begin creating an invoice.

In the 'General Info' section, **complete all required fields (\*)** and **attach invoice copies via 'Image Scan'** (acceptable invoice formats include JPG, PDF, PNG, TIFF, and GIF).

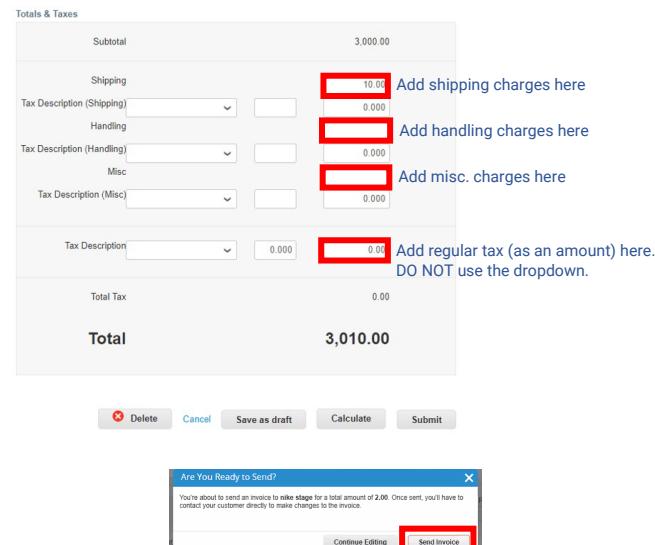




**In the 'Lines' section:**

- **Verify that any pre-populated information is accurate.**
- **DO NOT add discounts or credits to 'Price' calculations,** as they will fail to post to the payment system – simply incorporate these into the line total. Details on discounts or credits can be added in the 'Note' section of the invoice, if needed.
- **Delete any lines not currently billing by selecting the red 'X' icon.** Invoice lines totaling \$0 cannot be posted for payment and will therefore be disputed.
- **If your country's regulations require line-item taxation, check the 'Line Level Taxation' box.**


**Under 'Totals & Taxes':**

- **Add any shipping, handling, and misc. charges** in the appropriate fields, as shown here.
- **Then select 'Calculate' to update the invoice total**, then review the updated total to verify accuracy.
- **To save your work for later, select 'Save as draft'.**
- **If you are ready to submit the invoice, select 'Submit', then select 'Send Invoice' in the popup box to finalize submission.**

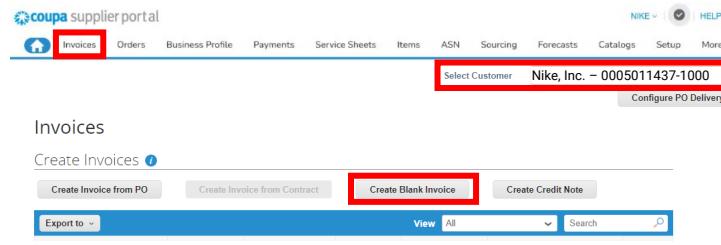


## Submitting Non-PO Based Invoices (Not Available in All Areas)

**Obtaining a Purchase Order (PO) is always recommended, and a PO is mandatory for Invoices with total amounts equal to or greater than \$5k USD (or local currency equivalent).**

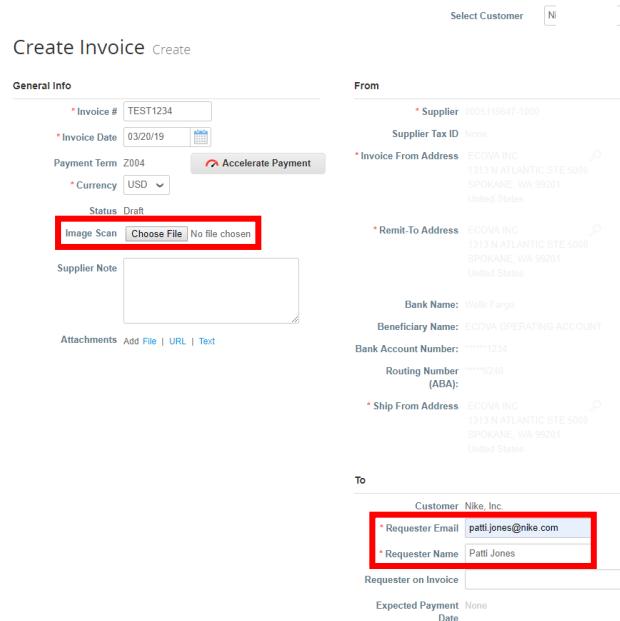
**Suppliers in some areas must also obtain a PO, regardless of total invoice amount. Please see the Appendix for a [full list of countries with tax-compliant invoice presentations](#).**

**Under 'Invoices', ensure the correct Nike Entity is selected from the 'Select Customer' dropdown, then select 'Create Blank Invoice'.**



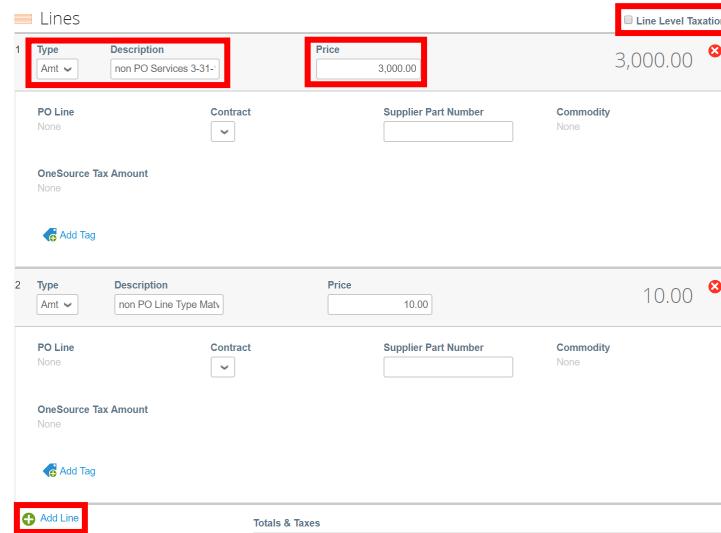
**On the 'Create Invoice' screen, in the 'General Info' section, complete all required fields (\*) and attach invoice copies via 'Image Scan' (acceptable invoice formats include JPG, PDF, PNG, TIFF, and GIF).**

**In the 'To' section, enter your Nike Business partner's email address and name.** Take care to ensure that this information is accurate, as invoices without accurate Nike contact information cannot move for payment processing.

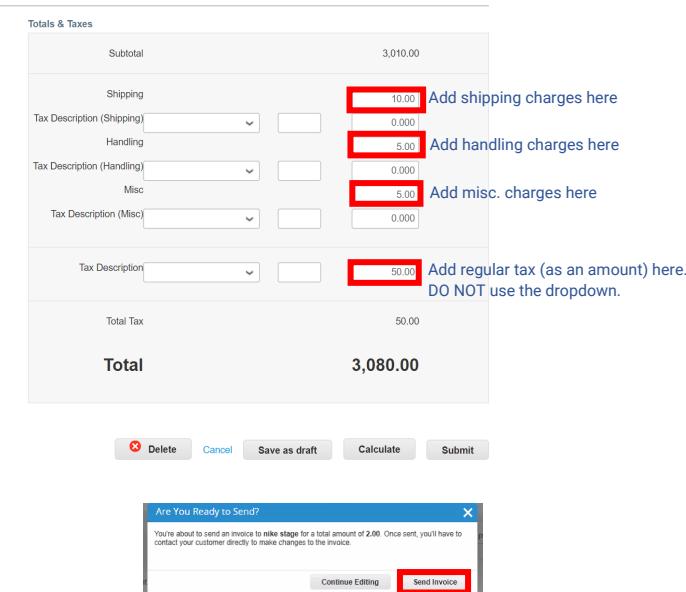


**In the 'Lines' section:**

- Select the **invoice 'Type'** (AMT or QTY) and add a brief **'Description'**.
- Enter the **'Price'**. **DO NOT add discounts or credits to your calculations**, as they will fail to post to the payment system – simply incorporate these into the line total. Details on discounts or credits can be added in the **'Note'** section of the invoice, if needed.
- **Select 'Add Line' (+)** if **additional lines are needed**, then follow the steps above for all new lines. Please note that **all lines must have the same invoice 'Type'** (AMT and QTY lines cannot be included together on the same invoice).
- **If your country's regulations require line-item taxation, check the 'Line Level Taxation' box.**


**Under 'Totals & Taxes':**

- **Add any shipping, handling, and misc. charges** in the appropriate fields, as shown here.
- **Then select 'Calculate'** to **update the invoice total**, then review the updated total to verify accuracy.
- **To save your work for later, select 'Save as draft'.**
- **If you are ready to submit the invoice, select 'Submit', then select 'Send Invoice'** in the popup box to finalize submission.



## Resubmitting an Invoice Following a Dispute

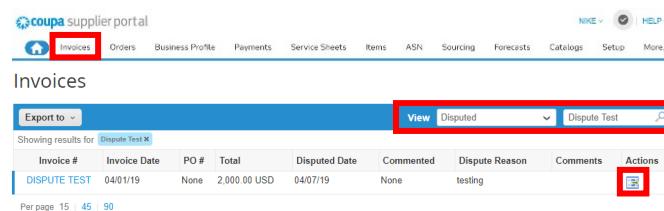
### *Please Note:*

- *Unresolved invoices may prevent other invoices from posting for payment processing.*
- *Invoices disputed due to banking issues must be voided, then resubmitted after banking information has been corrected. Please ask your Nike contact to submit a banking maintenance ticket in Aravo, if you need to update your banking information. For additional banking support or questions, please contact [your Aravo support team](#).*
- *Depending on your notification preferences, you may receive an email notification, including the dispute reason and a link to view the invoice in CSP. If you are accessing the disputed invoice from this email link, you may skip the first step below.*

**Under 'Invoices', select the disputed invoice.** To filter the list, select 'Disputed' in the 'View' dropdown. To search for the invoice, enter the invoice number in the 'Search' bar.

Once you have located the invoice, **select the icon in the 'Actions' column.**

Once the invoice opens, **review the 'Dispute Reason(s)', then scroll to the bottom of the page to proceed.**



### Invoice #DISPUTE TEST 2 [Back](#)

Please review the invoice and determine the resolution option:

**Void**  
If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.

**Correct Invoice**  
If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.



On the bottom of the page, **select the appropriate button to either 'Void' or 'Correct Invoice'.**

**Void**

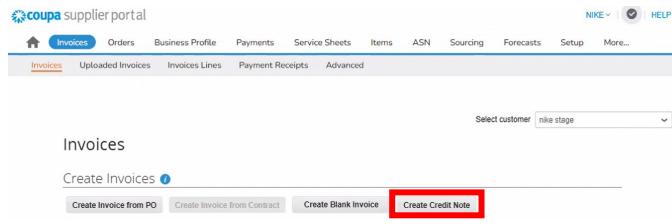
Select for duplicate invoices or invoices that have already been paid. After selecting 'Void', select 'Submit' to finish voiding the invoice.

**Correct Invoice**

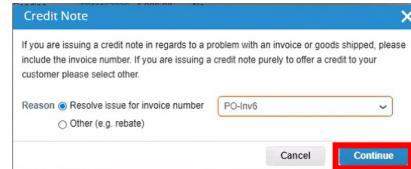
Select for all other dispute reasons. After selecting 'Correct Invoice', edit the details as needed, then select 'Submit' to resubmit the invoice.

## Submitting Credit Notes

Under '**Invoices**', ensure the correct Nike Entity is selected from the 'Select Customer' dropdown, then **select 'Create Credit Note'**.

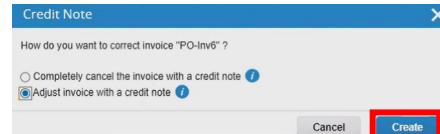


**Select the correct invoice number** from the dropdown menu (or select 'Other', if your credit note is not associated with an existing invoice), then **select 'Continue'**.

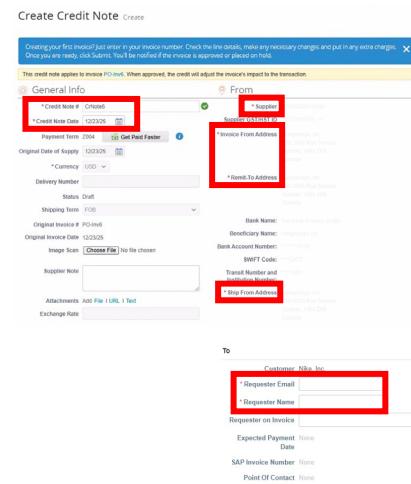


**Select the type of credit note** you wish to create, then **select 'Create'**:

- To create a **PARTIAL** credit note, **select 'Adjust the invoice with a credit note'**
- To create a **FULL** credit note, **select 'Completely cancel the invoice with a credit note'**

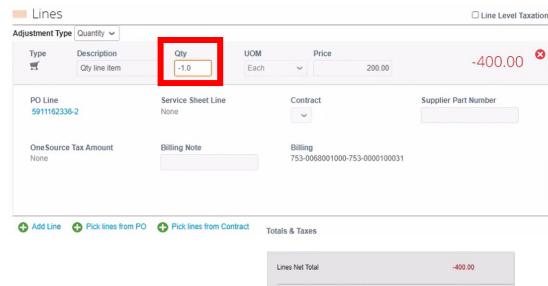


On the '**Create Credit Note**' screen, **complete all required fields (\*)** in the '**General Info**', '**From**', and '**To**' sections.



### For PARTIAL credit notes:

- In the 'Lines' section, **adjust the Qty or Amt field, using a subtraction sign (-) in front of the Qty or Amt you wish to reduce.**
- **For Qty invoices, only use whole numbers.**



Lines  
Adjustment Type: Quantity

Type	Description	Qty	UOM	Price	Amount
Line Item	None	-1.0	Each	200.00	-400.00

PO Line: 5911162336-2 Service Sheet Line: None Contract: Supplier Part Number:

OneSource Tax Amount: None Billing Note: Billing: 753-0068001000-753-0000100031

Add Line Pick lines from PO Pick lines from Contract Totals & Taxes

Lines Net Total: -400.00

In this PARTIAL credit note example, the line includes 2 items priced at \$200 each, and the supplier is submitting a credit note to remove one item.

### For FULL credit notes:

- **This field will not be editable –** CSP will default to reducing the line item by its full Amt or Qty.

**Select 'Calculate' to update totals, then review the updated totals for accuracy.**

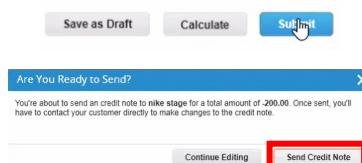


Total Tax: 0.00	Net Total: -200.00
Total: -200.00	

Delete Cancel Save as Draft Calculate Submit

Here you can see that the total has been updated to -\$200 after the supplier adjusted the Qty field above to remove one item.

**To save your work for later, select 'Save as draft'.**



Save as Draft Calculate Submit

Are You Ready to Send? X

You're about to send a credit note to Nike Stage for a total amount of 200.00. Once sent, you'll have to contact your customer directly to make changes to the credit note.

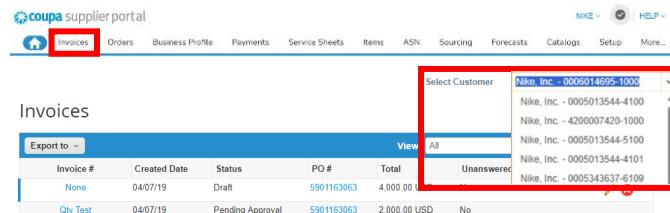
Continue Editing Send Credit Note

**Please Note:**

- If you require assistance with submitting your credit note, please [contact your local support mailbox](#).

## Checking the Status of Submitted Invoices

Under 'Invoices', select the correct Nike Entity from the 'Select Customer' dropdown.



A list of your invoices will be displayed, along with the status of each invoice.

*Please Note: Invoices are unable to be submitted for payment if they are in 'Disputed' or 'Draft' status. For 'Disputed' invoices, you must resolve the issue(s) and resubmit the invoice. 'Draft' invoices must be submitted.*

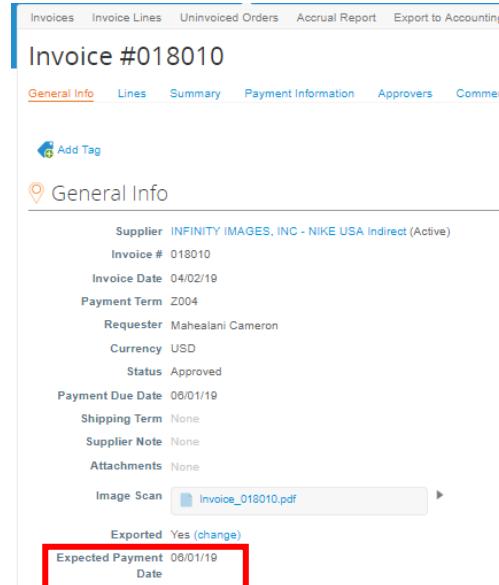


### Description of invoice statuses:

- Approved:** All necessary actions have been taken by the Nike end user. The invoice includes information on payment scheduling.
- Pending Approval:** The Nike end user still needs to complete outstanding invoice approval actions, or banking validation is pending.
- Disputed:** The invoice has been disputed, and the supplier must take action to resolve the issue(s) and resubmit the invoice. The invoice includes information on the dispute reason.
- Void:** The non-PO invoice was voided, or the PO invoice was applied against a full credit note.
- Draft:** The invoice has not yet been submitted.

To view payment info for a specific invoice, select the desired 'Invoice #' from the list.

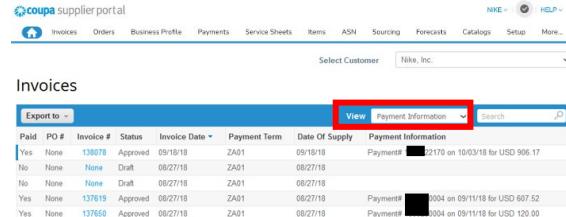
Under 'General Info', review the 'Expected Payment Date' field.



Once the invoice has been paid, **payment details will be available** further down the invoice in the '**Payment Information**' section.

Paid: Yes
Payment Date 09/17/17
Payment Notes Paid. Expect deposit within 3 business days
Amount Paid 200.00
Payment No. 1500623004
Payment Date 09/17/17
Line Description Supplier Part Number Commodity UOM Net Weight Price/Weight Quantity Price Total PO Line
1 Split Line EA 1 200.00 200.00 None
Ship To Country United States
Ship To Postal Code 97209

To review payment information for all invoices, **select 'Payment Information'** from the '**View**' dropdown.



*Please Note:*

- *Remittance advice is available for submitted invoices. Your company's primary user can log into Aravo (Nike's supplier information management system) and add one or more Accounts Receivable email contacts to receive remittance advice.*



Additional Contact Information

Enter as many contacts as needed by clicking the **Add a new contact** button. Edit or delete contacts by clicking on the **Actions** button. To receive remittance advice add an Accounts Receivable Contact Type.

Additional Contacts

No items found.

**Add a new Contact**

- *If you do not know your Aravo password or primary user, your Nike contact may submit an Aravo maintenance ticket to add Accounts Receivable contact(s) on your behalf.*




- *For questions related to Remittance Advice, please [contact your Aravo support team](#).*

## APPENDIX

---

### Support Contacts & Additional Resources

#### Support Contacts

- For support with [Aravo](#), supplier registration or onboarding, or supplier maintenance (e.g., updating banking/address/email information, adding Accounts Receivable remittance contacts), please [contact your local Nike Vendor Portal support mailbox](#).
- For support with Coupa password resets, new account owner access, or multifactor authentication (MFA) setup or maintenance, please [contact Coupa support](#).
- For support with Coupa access, purchase orders, invoice or credit note submission, payment processing, or if you're unsure who to contact about another topic area, please reach out to your local Nike Supplier Support mailbox, listed below by country:

North America and LATAM:  
[NA.Finance.SupplierSupport@Nike.com](mailto:NA.Finance.SupplierSupport@Nike.com)

Korea:  
[CoupaSupportKR@Nike.com](mailto:CoupaSupportKR@Nike.com)

Europe:  
[EMEA.PTP.Helpdesk@Nike.com](mailto:EMEA.PTP.Helpdesk@Nike.com)

Greater China:  
[CN.Finance.Helpdesk@Nike.com](mailto:CN.Finance.Helpdesk@Nike.com)

Asia Pacific (excl. Japan & Korea):  
[APAC.Finance.Support@Nike.com](mailto:APAC.Finance.Support@Nike.com)

Hong Kong:  
[HK.Finance.Helpdesk@Nike.com](mailto:HK.Finance.Helpdesk@Nike.com)

Japan:  
[CoupaSupportJP@Nike.com](mailto:CoupaSupportJP@Nike.com)

Taiwan:  
[TW.Finance.Helpdesk@Nike.com](mailto:TW.Finance.Helpdesk@Nike.com)

- If your Nike contact expresses a need for support with creating Purchase Orders or managing invoices, they can find detailed information on [Nike's internal P2P website](#). *Please note that this link is not accessible outside of Nike.*

#### Additional Resources

- Please review the [Doing Business with Nike](#) website for up-to-date supplier information.
- Additional Coupa Supplier Portal training materials are available via [Coupa Compass](#).

## Tax-Compliant Invoice Presentation Countries List

**Suppliers operating in the countries listed below must adhere to statutory requirements set forth by their governments. The invoice presentation in Coupa ensures adherence. A Purchase Order (PO) is the best way to ensure the suppliers meet governmental requirements.**

Australia, Austria, Belgium, Brazil, Croatia, Czech Republic, Denmark, Finland, France, Germany, Greece, India, Ireland, Italy, Japan, Korea (South/Republic of), Malaysia, Netherlands, New Zealand, Norway, Poland, Singapore, Slovakia, Slovenia, South Africa, Spain (incl. Canary Islands), Sweden, Switzerland, United Kingdom