1) How do I register for CSP (Coupa Supplier Portal)?

*Note - Coupa preferred browsers are Chrome and Firefox (IE is not recommended)

1. You will receive an email invitation asking to connect to the Coupa Supplier Portal.

If experiencing issues using Coupa to troubleshoot-log out/delete cookies/clear caches/log in again in new browser.

Coupa for Suppliers < do_not_reply@supplier.coupahost.com>

to marianne+coupa

Ace Corporation would like to be connected with you as a trading partner on Coupa Supplier Network. You will be able to manage your company information and collaborate more efficiently when we're connected.

Coupa Support
Ace Corporation

To confirm this request, please click the link below:

https://supplier.coupahost.com/signup/cba19cd2811fbee4d8b148fb2828dc8ed7091fb8

2. Click the link provided in the email to register.
If you want to use another e mail address you can forward the invitation to another e mail address during registration process.

Forward Your Invitation

Not the right person to register now? Want to ask a coworker to join quickly? Send a copy of your invitation to a colleague’s email below (must have same email domain).

Forward email Email @coupa.com

3. Once you have registered, log in using your credentials.

2) How do I add additional users to my CSP profile?

1. Click Setup / Invite User.
2. Enter user’s information

3. Select permissions user should have (see suggestions next page)

4. Select customer(s) user should be able to access (usually all – check all Nike entities).

All – rarely would a user need “All” access (except Admin)
Admin – access allows a user to update eInvoicing setup, banking, profiles, Legal Entities etc

Orders – most users will simply require this access, invoicing access and admin access

Invoices – most users will simply require this access, orders access and admin access

Catalogs – only a very few vendors / users will need this access

Profiles – Business Profiles (usually only Admins have access)

ASN – Nike Direct use only

Service/Time Sheet – Nike does not use

5. Click Send Invitation. The employee will receive an email notification, with a link to register like the one you received to initially register (see page 2).

*Note - if teammates are sharing a Coupa email only one user can be online at a time!

6. If a user is already active – click Merge Request under Users

7. Select one of buttons below – My Account means to your regular access / Their Account means merge to Admin account

8. Click Send Request
7. To deactivate a user, click **edit**

8. Click **Deactivate User**.

*Note – user will still be visible with no permissions granted*
3) How do I set up eInvoicing on my CSP profile?

1. Click Setup from Home page

2. Click Legal Entity Setup / Click Add Legal Entity
   a. Important Note: Within the Nike system, you will be listed under your legal entity.

3. Enter official name of your business that is registered with local government and country where it is located. Click continue.
4. In the appearing window fill in at least the mandatory fields (marked with a * red asterisk) and click **Done**. Move on to the next section to add a remit-to for payment (required).

In case you need to update your information like vat nr you need to delete the legal entity and create a new one.

How do I add a new remit to?
1. On the “Where do you want to receive payment” screen click on “Add Remit-To”
2. Complete the form then click “Save & Continue”

3. Then click next and then done.
4. Click return to admin.

5. To verify if banking is set up correctly, create a dummy “no contact” invoice and click on the magnifying glass icon on the remit to address section.
The credit card icon is an indicator that the remit to contains banking information.

4) How do I manage my legal entity or add a new remit to (with banking) if you have more accounts?

1. Click Setup / Click Legal Entity Setup
2. Click **Action**, select **Manage Remit to Accounts**

3. Click **Continue** to proceed

4. On the first “Tell your customers about your organization” screen click **continue** again
Tell your customers about your organization

5. On the “Where do you want to receive payment” click “Add Remit-to”

6. Fill in at least the mandatory fields (marked with a red * asterisk) / click Save & Continue (see full page screenshots on next two pages)
Tell your customers about your organization

Which customers do you want to see this?
- All
- Nike, Inc...0005091437.1000
- Nike, Inc...0005091437.4100
- Nike, Inc...4200802652-1000

What address do you invoice from?

Address Line 1 13666 SW MILLIKAN WAY
Address Line 2
City BEAVERTON
State OR
Postal Code 97065
Country 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

Banking information

Bank Name Wells Fargo
Name On Account PHOTOCRAFT - CORPORATE ACCOUNT
Country United States
Currency USD
Account Number 1234
IBAN
Routing Number 12100248
SWIFT No.
Bank Account Type Business

RECOMMENDED
Note: Banking info added here is NOT automatically sent to your customer(s). If they don't have it already, please use their payment info change process (which may be outside of Coupa for some buying organizations).

Bank address

Address Line 1
Address Line 2
City
State
Postal Code

What is your Tax ID?

Tax Country United States
Tax ID

I don't have a VAT/GST Number
7. Then click **next** and complete same steps as Remit to for **Add Ship From**.

8. Click **Done**
9. Click return to admin.

*Note – Banking updates also require change in ARAVO – Nike’s vendor information system.

To verify if banking is set up correctly, create a “test” invoice by:

10. Clicking Invoices / Create / click magnifying glass icon on the remit to address section.

The credit card icon is an indicator that the remit to contains banking information.

11. Don’t forget to delete your test invoice by using the red X on far-right hand side.
5) How do I update my notification preferences (Coupa admins only)?

*Note – supplier responsible for notification preferences

1. Hover over your name and select Notification Preferences.

2. Here, you can see types of notifications you can select from, and how you want to view them, via email, the CSP, or SMS. If none are selected, notifications for that item will not be sent.

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6) How do I submit a PO based invoice?

1. From the CSP home page.
   Select Customer (Nike)
   Click on the Orders

2. From Purchase Orders, click the gold coin icon in the Action’s column of the PO you wish you create an invoice from.
- Add new or choose existing invoicing details, that is, add or select an invoice from, remit-to, and/or ship from address. This step will appear only in case of multiple payment/bank accounts that you have added on Coupa in your Legal entity setup. Then you will see multiple Remit-To addresses for the different payment/bank accounts.

3. Fill out any required fields marked with an asterisk (*). Do not change currency. This data is picked automatically from PO.
Fill in from top to bottom:

### General Info
- Invoice number and invoice date
- Currency – Cannot be changed from PO currency. If you would like to get paid in a different currency, contact the PO requester to change it in the PO first.
- You can also attach files (invoice accompanying documents such as delivery note, etc.) to an invoice using Image Scan.

### From (top right section)- company information
- Make sure you see all three addresses: Invoice from, Remit-to and Ship from address and your bank information, incl. Bank name, Beneficiary name (Your company name), IBAN, SWIFT. For UK also SORT code and Account number. Depending on the location of supplier required information may be different.
- If you have added two or more different bank accounts, choose the Remit-to address along with the bank information by clicking on the magnifier glass next to Remit-to address.

### To (beneath From)- customer information
- Choose Buyer Tax ID (VAT ID)
- For all Nike entities except **Nike European Operations Netherlands (NEON 730)**, there will be only one possible TAX ID to select. For NEON select the correct Tax ID depending on the country you are invoicing from and the tax rate applied. If your tax rate is 0%, the Nike Tax ID **YOU** should
select is NL8028.20.323.B01 for all countries. If you apply a Local tax rate, please visit Nike Address Tool at https://about.nike.com/pages/eu-invoicing to find the correct one to use according to your country.

Lines section
- Check the NET amount you want to invoice. If you need to change the amount, you can do so by entering the desired amount in the Price box. If the amount in the PO is the same as the one you would like to invoice, go to the next step
- Select the tax rate to apply. The system will automatically fill in the tax amount in the Tax Amount box
- Please check the auto generated description and adjust it to show description reflecting nature of purchase.
- Under category you can choose what you are delivering. If you are delivering services, you are able to select it under category tab. The PO should be created to reflect what you are delivering.
• Select tax rate on the line level.

4. Use the **Calculate** button to see invoice totals prior to submitting.
5 Click **Submit** to send the invoice. (If you want to save a draft now, and continue to work on the form later, click **Save as draft** instead.)
7) I have submitted my invoice. How do I check on the status?

1. From CSP home page, click on the invoices tab.

2. Note on above screenshot it shows the status of invoice.

   a. Approved: Appropriate action has been taken by Nike end user and invoice should show payment dates if paid, etc.

   b. Pending approval: Action still needed by Nike end user to move invoice to approved.

3. If invoice is approved, click on the invoice hyperlink to view payment info. (Example below)
8) How do I submit a PO based credit note?

1. From the menu, click invoices.

2. Select Create Credit Note. (screenshot below)

   ![Create Credit Note](screenshot)

3. Select option that applies in below screenshot.
4. Select completely cancel if you want to submit full credit note or adjust invoice if you only want to submit a partial credit note.
Create Credit Note

5. Fill out any required fields marked with an asterisk (*).

This credit note applies to invoice 19.08.2020.2.JS. When approved, the credit will be applied to this invoice.

General Info

- **Credit Note #**
- **Credit Note Date**: 08/20/20
- **Payment Term**: E001
- **Original Date of Supply**: 08/19/20
- **Currency**: EUR
- **Delivery Number**
- **Status**: Draft
- **Original Invoice #**: 19.08.2020.2.JS
- **Original Invoice Date**: 08/19/20
- **Image Scan**: Browse...
- **Supplier Note**

Attachments

- **Cash Accounting Scheme**
- **Credit Reason**
- **Margin Scheme**
6. When it is a partial credit note, one must enter the credit note number. A minus sign **MUST** precede the amount to credit. Check if vale shows “-“ if not correct it.

7. Use the **Calculate** button to see invoice totals prior to submitting.

8. Click **Submit**. If you want to save a draft now, and continue to work on the form later, click **Save as draft** instead.
9) My invoice was disputed. How do I resubmit my invoice?

1. Once you receive a note that your invoice has been disputed, log into the CSP and click on invoices from the home screen.

2. Type the invoice # in the search field that is being disputed.
3. Once complete, click on the icon under actions for resolve.

4. Investigate reason invoice was disputed. Listed below in dispute reason.
5. On this particular invoice, the issue was that tax was either missing or incorrect. A supplier must issue a credit note to correct or cancel invoice.
6. Click correct invoice.
7. Enter credit number and in case you fully cancel the invoice and want to create a new one, complete the same steps.
8. Once done click submit.

10) How do I check the status of my POs?
1. From the home screen of the CSP, click on orders.

3. Lists all POs sent to supplier (Order date, Status, Item, and Total amount.)
I have submitted my invoice. How do I check on the status?

1. From CSP home page, click on the invoices tab.

2. Note on above screenshot it shows the status of invoice.
   a. Approved: Appropriate action has been taken by Nike end user and invoice if already paid will show payment dates, etc.
   b. Pending approval: Action still needed by Nike end user to move invoice to approved.
1. If invoice is approved, click on the invoice hyperlink to view payment info. (Example below)

![Payments](image)

11) I need to submit a credit note on a PO invoice. How do I do this?

1. From the home screen of the CSP, click on orders.

2. From **Purchase Orders**, click the red coin icon in the Action’s column of the PO you wish to create a credit note from.

3. Fill out any required fields marked with an asterisk (*).

   a. Check if vale shows "-" if not correct it
4. Use the **Calculate** button to see credit note totals prior to submitting.
5. Click **Submit**. If you want to save a draft now, and continue to work on the form later, click **Save as draft** instead.
6. If you want to check on the status, follow same steps as you would to check on an invoice.

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**Important rules to consider for Nike invoicing:**

1. The invoice created on Coupa is the ONLY invoice recognized by Nike for approval, payment, tax filing and tax audits. Coupa creates legally compliant invoices in line with the country specific requirements.
2. Nike process requires that you ALWAYS back your invoice with a PO. Invoices without a PO will not be accepted. Do not use **Create Blank Invoice** button under Invoices. This will create an invoice without PO and the invoice will be rejected/disputed.
3. The amounts in the POs are always NET amounts. You will have to add your tax rate on the Create invoice page in the Lines section.
4. You can use one PO multiple times to partially invoice against it until the net amount in the PO gets completely depleted. Please do not accept PO’s which are ordered as goods instead of services. In this case please contact your PO requester to provide the correct PO.
5. If your invoice contains items with different tax rates, e.g. part of the invoice amount is taxed with 20% and the other part with 7%, and your PO has only one line, please choose one of the following options to issue the invoice:
• Use the same PO twice and issue two invoices with the respective tax rate applied to each invoice or
• Contact your PO-requester and ask them to edit/create the PO so that it contains two or more lines (as per your needs). Then, you will be able to issue only one invoice using the two or more different lines to enter your amount separately and choose a different tax rate in each line.

DO NOT USE the Add Line button. It will open a new line but that line will not contain the PO number. Invoices with lines without a PO number get rejected/disputed.
6. If you have a PO with multiple lines but you would like to issue an invoice against one or part of the lines/positions, on the Create invoice page you need to close all lines/positions that you are not going to invoice by clicking on the red button in the top left corner of each line you want to close.

7. An invoice that has been once submitted cannot be edited. The only way to correct the invoice is to create a credit note and then issue the invoice again.
Coupa will not allow you to use the same invoice number. Credit note must show (-) minus.

8. If an invoice gets disputed, you will have to completely cancel the invoice with a credit note and create a new one or you can adjust it in the cases when you need to change the amount (partially credit the invoice) Credit note must show (-) minus.

9. Important! Issuing invoice with intra-community charges

In case you issue invoice with Intra-Community supply of goods, please add the following text in the tax description field- “Free from VAT – Intra-Community supply of goods”

In case you issue invoice with Intra-Community supply of services – please select 0% “Reverse charge” from dropdown list.