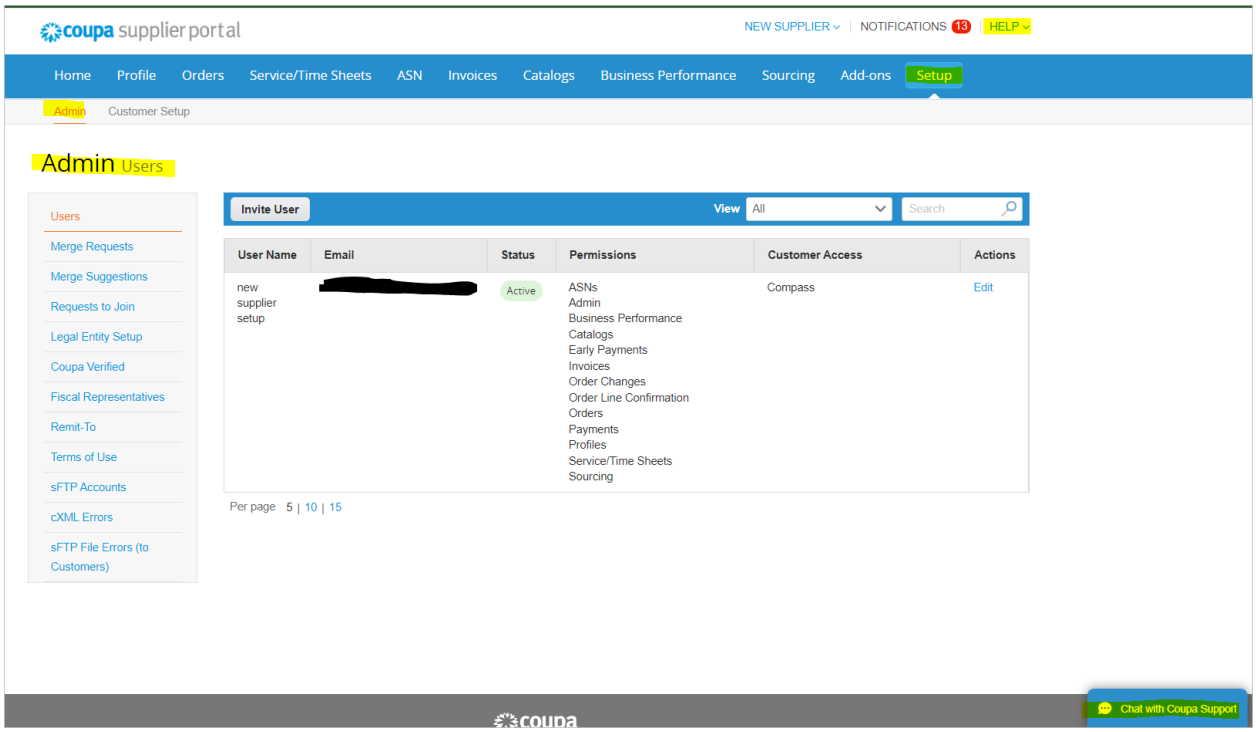
COMPASS

How to Access the CSP Admin Page & Invite a User to a Customer Account

To access your CSP Admin page click on Setup and then the Admin sub tab. *If you do not have access to perform this action, then your company has not designated you to be a CSP Administrator.*

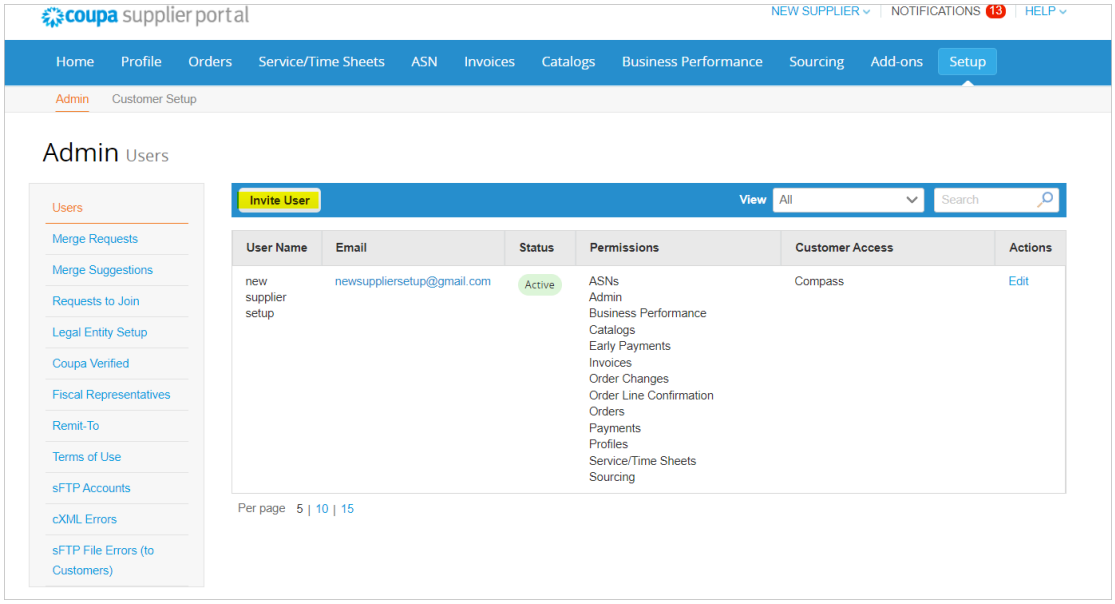
Please Note: *Compass **cannot** access your CSP page or provision access, help you modify legal entities, merge accounts, etc as this is your company's CSP page which is controlled by your CSP Administrator.*

- If you need help please contact the 'HELP' link on the top right of the page or click "Chat with Coupa Support" on the lower right of the page.

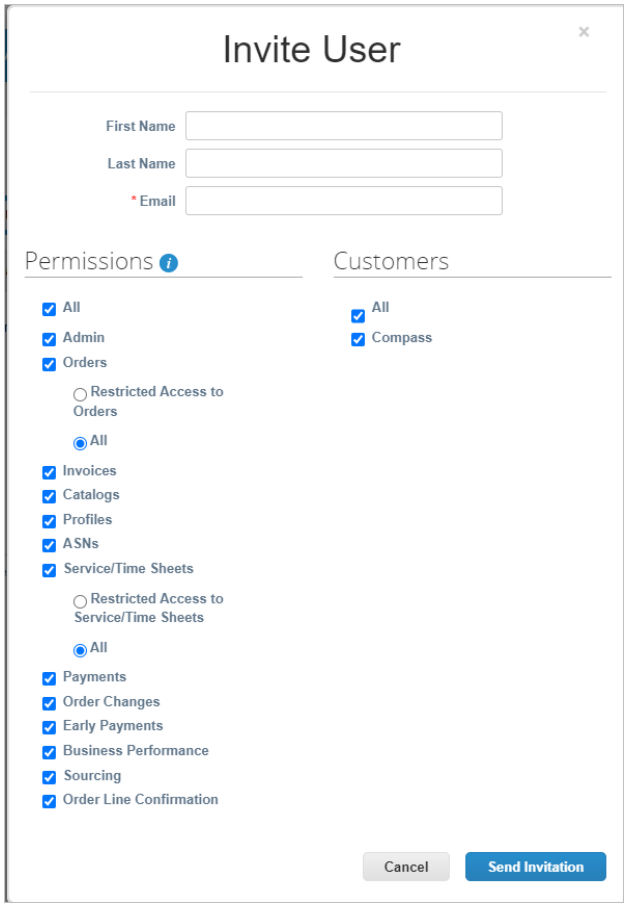


How to Invite a User to a Customer Account in the CSP: If you are the CSP Administrator at your Company and you need to add a User to a specific Customer account please follow the steps below:

Go to Setup
Click the Admin subtab
Click Invite User



The following screen will appear. You as the CSP Administrator control what your CSP users (co-workers) see, what they can access, and the actions they can perform on your CSP platform. This has no bearing on what your Customers see.



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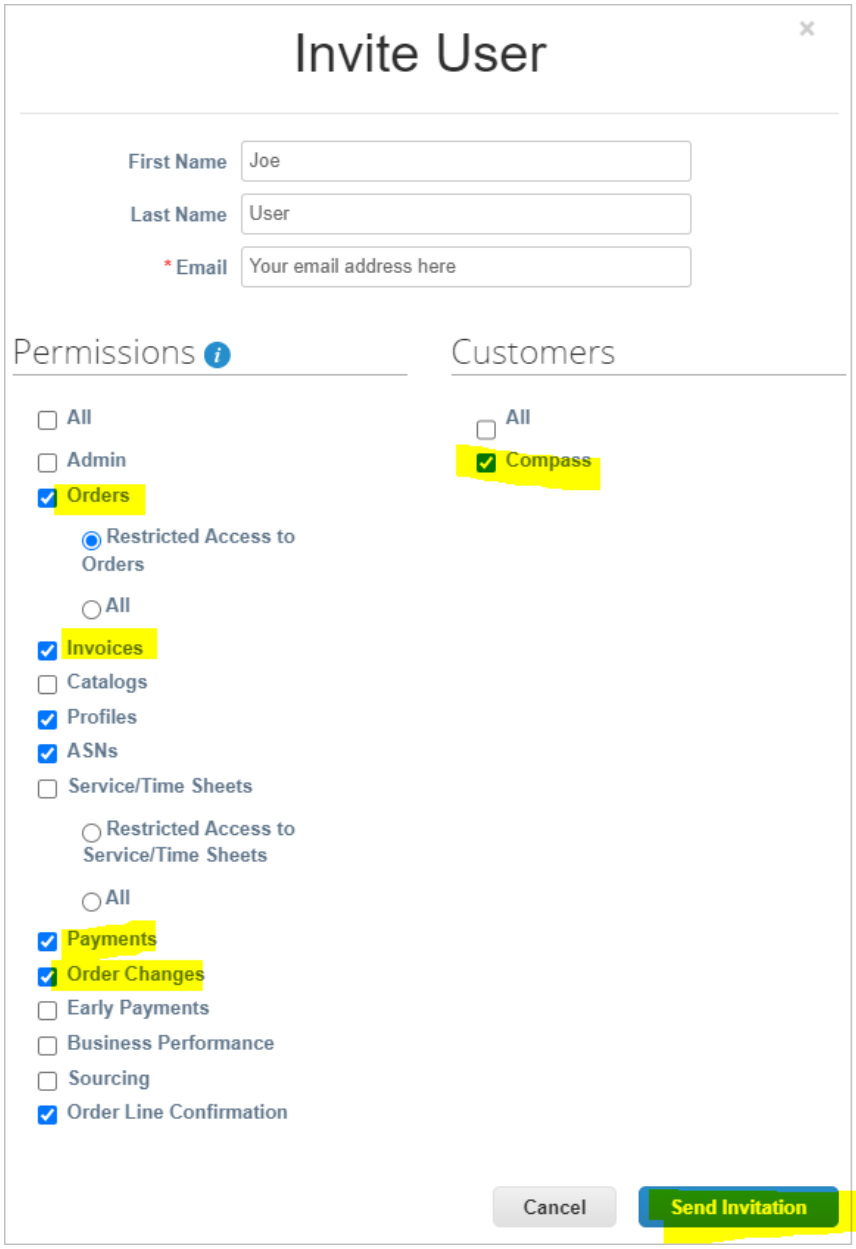
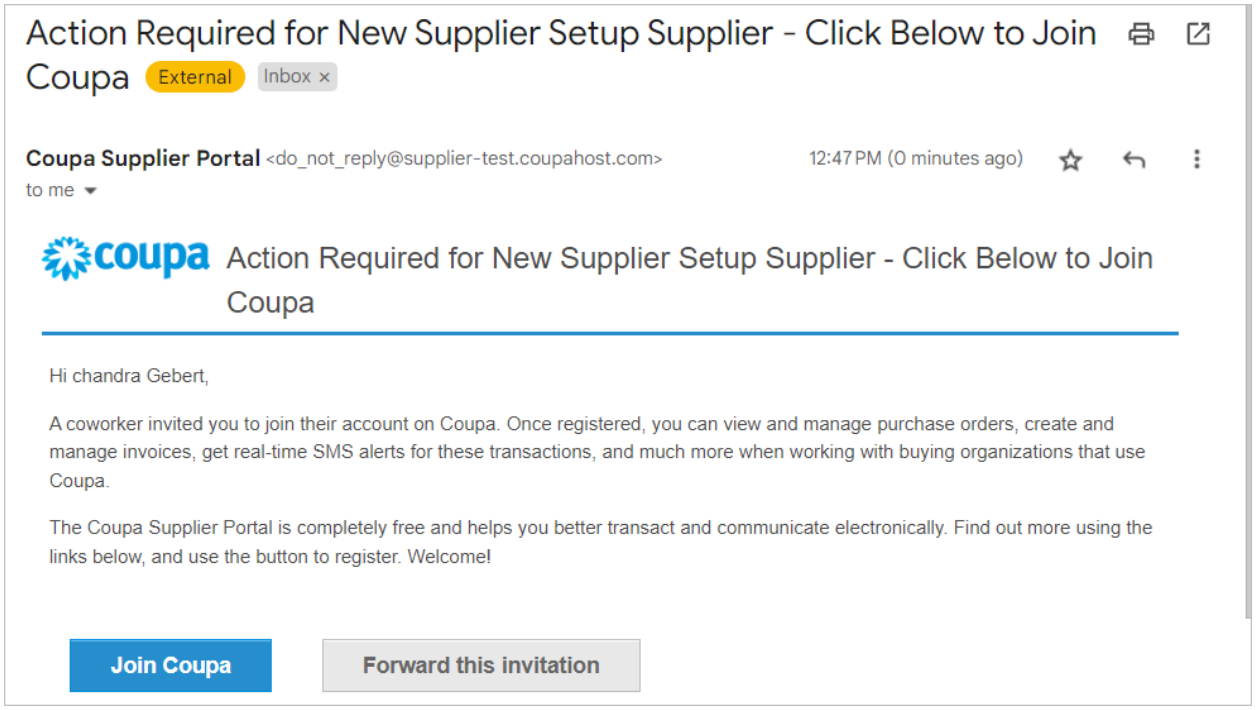
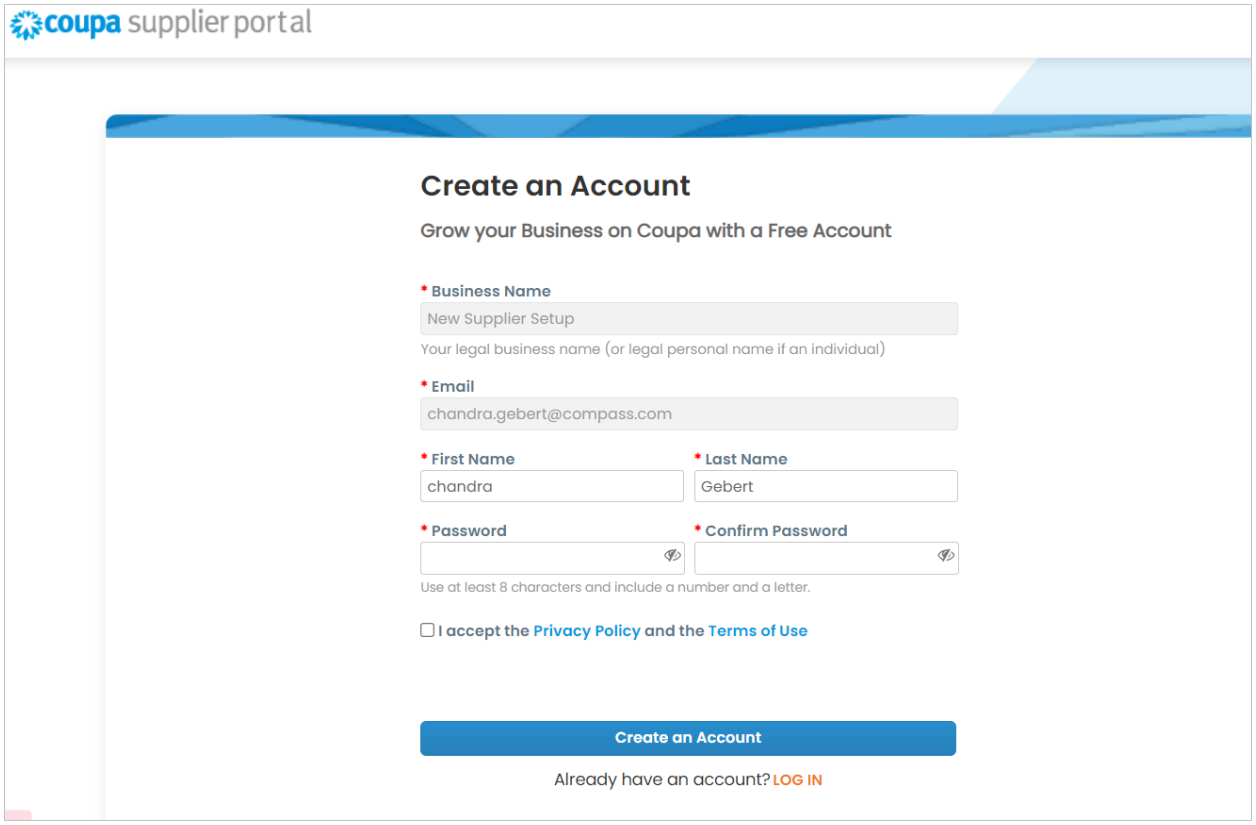
Complete the contact information and select the actions for the user to take.

NOTE: The only way your Users (co-workers) can see ALL Customers or Select Customers orders, invoices, payments, etc is by you the CSP Admin completing this Invite User section and sending the invite. **COMPASS cannot perform this action on your behalf.**



After you click Send Invitation. The name recipient (your co-worker) will receive an email (please also have them check their spam and junk folders if you have not whitelisted the Coupa domains).



The recipient will need to click Join Coupa and complete a User profile before they can access anything on your CSP account.