

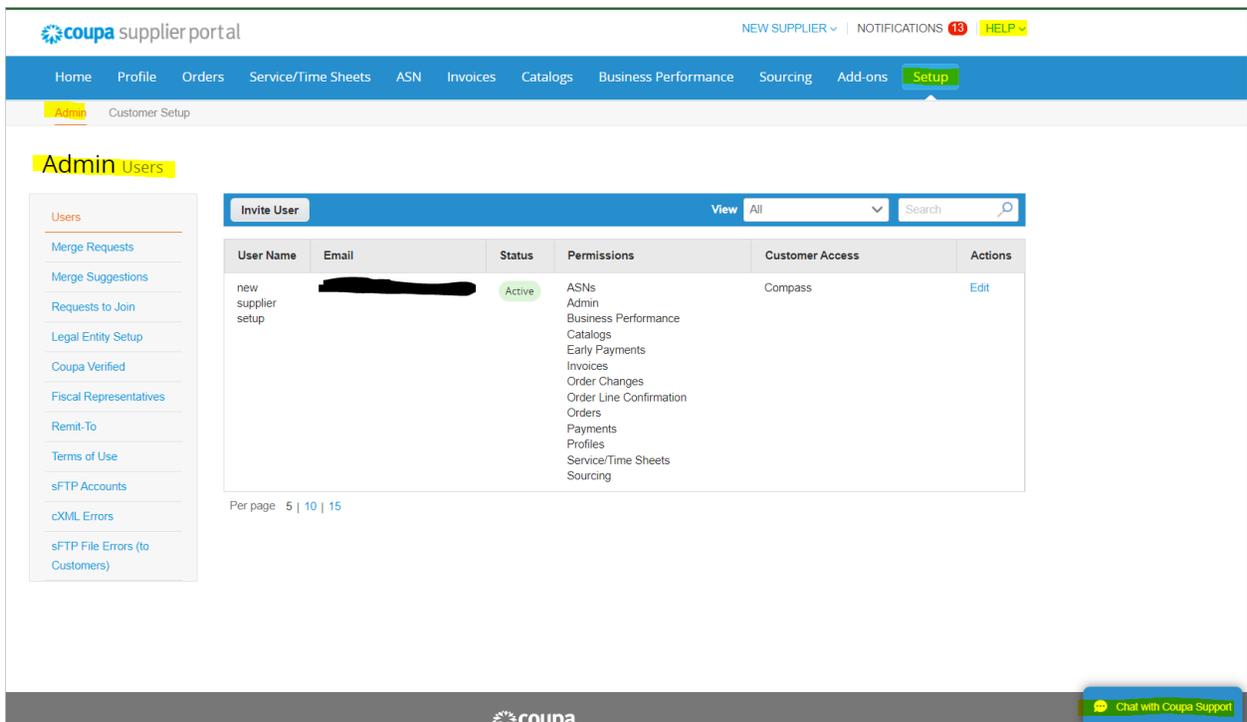
COMPASS

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.



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. The Setup link is highlighted. Below the navigation bar, there is a sub-tab for Admin, and the main content area is titled Admin Users. On the left side, there is a sidebar menu with various options like Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup, Coupa Verified, Fiscal Representatives, Remit-To, Terms of Use, sFTP Accounts, cXML Errors, and sFTP File Errors (to Customers). The main content area displays a table of users with columns for User Name, Email, Status, Permissions, Customer Access, and Actions. The table contains one user entry: 'new supplier setup' with a status of 'Active' and a list of permissions including ASNs, Admin, Business Performance, Catalogs, Early Payments, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, Profiles, Service/Time Sheets, and Sourcing. The Customer Access is listed as 'Compass'. There is an 'Edit' link in the Actions column. At the bottom of the table, it says 'Per page: 5 | 10 | 15'. In the bottom right corner, there is a 'Chat with Coupa Support' button.

User Name	Email	Status	Permissions	Customer Access	Actions
new supplier setup	[REDACTED]	Active	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Compass	Edit

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

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The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Setup' menu is expanded to show 'Admin' and 'Customer Setup'. The main content area is titled 'Admin Users' and features a sidebar with various setup options like 'Merge Requests', 'Legal Entity Setup', and 'Coupa Verified'. The main table lists users with columns for 'User Name', 'Email', 'Status', 'Permissions', 'Customer Access', and 'Actions'. A table entry for 'new supplier setup' is shown with an 'Active' status and a list of permissions including ASNs, Admin, Business Performance, Catalogs, Early Payments, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, Profiles, Service/Time Sheets, and Sourcing. The 'Customer Access' is set to 'Compass' and there is an 'Edit' link in the 'Actions' column.

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.

The 'Invite User' dialog box contains input fields for 'First Name', 'Last Name', and '*Email'. Below these are two sections: 'Permissions' and 'Customers'. The 'Permissions' section has a list of checkboxes for various system areas, with 'All' selected. The 'Customers' section has checkboxes for 'All' and 'Compass', with 'All' selected. At the bottom, there are 'Cancel' and 'Send Invitation' buttons.

Permissions	Customers
<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All
<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> Compass
<input checked="" type="checkbox"/> Orders	
<input type="radio"/> Restricted Access to Orders	
<input checked="" type="radio"/> All	
<input checked="" type="checkbox"/> Invoices	
<input checked="" type="checkbox"/> Catalogs	
<input checked="" type="checkbox"/> Profiles	
<input checked="" type="checkbox"/> ASNs	
<input checked="" type="checkbox"/> Service/Time Sheets	
<input type="radio"/> Restricted Access to Service/Time Sheets	
<input checked="" type="radio"/> All	
<input checked="" type="checkbox"/> Payments	
<input checked="" type="checkbox"/> Order Changes	
<input checked="" type="checkbox"/> Early Payments	
<input checked="" type="checkbox"/> Business Performance	
<input checked="" type="checkbox"/> Sourcing	
<input checked="" type="checkbox"/> Order Line Confirmation	

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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.**

Invite User

First Name

Last Name

* Email

Permissions i Customers

<input type="checkbox"/> All	<input type="checkbox"/> All
<input type="checkbox"/> Admin	<input checked="" type="checkbox"/> Compass
<input checked="" type="checkbox"/> Orders	
<input checked="" type="radio"/> Restricted Access to Orders	
<input type="radio"/> All	
<input checked="" type="checkbox"/> Invoices	
<input type="checkbox"/> Catalogs	
<input checked="" type="checkbox"/> Profiles	
<input checked="" type="checkbox"/> ASNs	
<input type="checkbox"/> Service/Time Sheets	
<input type="radio"/> Restricted Access to Service/Time Sheets	
<input type="radio"/> All	
<input checked="" type="checkbox"/> Payments	
<input checked="" type="checkbox"/> Order Changes	
<input type="checkbox"/> Early Payments	
<input type="checkbox"/> Business Performance	
<input type="checkbox"/> Sourcing	
<input checked="" type="checkbox"/> Order Line Confirmation	

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).

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Action Required for New Supplier Setup Supplier - Click Below to Join  

Coupa External Inbox x

Coupa Supplier Portal <do_not_reply@supplier-test.coupahost.com> 12:47 PM (0 minutes ago)   

to me ▾

 Action Required for New Supplier Setup Supplier - Click Below to Join
Coupa

Hi chandra Gebert,

A coworker invited you to join their account on Coupa. Once registered, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more when working with buying organizations that use Coupa.

The Coupa Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the button to register. Welcome!

[Join Coupa](#) [Forward this invitation](#)

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

 supplier portal

Create an Account

Grow your Business on Coupa with a Free Account

* Business Name

Your legal business name (or legal personal name if an individual)

* Email

* First Name * Last Name

* Password * Confirm Password
Use at least 8 characters and include a number and a letter.

I accept the [Privacy Policy](#) and the [Terms of Use](#)

[Create an Account](#)

Already have an account? [LOG IN](#)