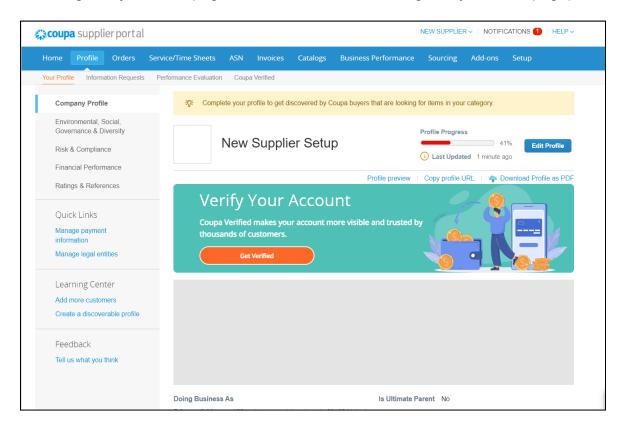# COMPASS

## How to Edit your CSP Profile and Customer Navigation

Once you have completed the setup of your CSP profile you may have options to "Edit Profile" to explore the various options Coupa Community has to offer and/or complete the setup if you skipped some sections.

**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. <u>If you have any other issues with your CSP setup, please contact your Coupa Administrator or Coupa Help.</u>*

- Tabs on the blue ribbon and sub tabs below the blue ribbon are solely controlled via permissions by your company's CSP Admin. This can either be you or someone else which your company has delegated.

- Should you need to update your TIN or EIN number on your CSP profile please contact either your CSP Administrator or Coupa Help (via HELP link on the top right of your CSP page or via Chat on the lower right of your CSP page)



- If you are having trouble selecting a specific Customer to view their Orders or Invoices - you will need to speak to your CSP Admin to provision you access to

# COMPASS

that customer, via Invite User. Or if you are the CSP Admin click on Setup and then Customer to make sure you are linked





## Purchase Orders are Listed by Customer

1. **Choose your customer at the top right**
   Only shows linked customers. You must be linked to transact, so if not listed, contact your customer offline to get linked.

2. **Create invoices from POs**
   Act or invoice from a PO   Use the actions in the table or on the PO to manage orders or send invoices to your customer(s). Your customer may or may not be enabled for these actions. Contact them offline if an expected action is not available to you.

Got It



## Invoices are Separated by Customer

1. **Choose your customer at the top right**
   Only shows linked customers. You must be linked to transact, so if not listed, contact your customer offline to get linked.

2. **Create new invoices**
   Your customer may or may not use Coupa for invoicing. Contact them offline if an expected action is not available to you. Remember, you can't edit or delete invoices once submitted, and contact your customer directly for payment info.

Got It