

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

- 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)

The screenshot displays the 'coupa supplier portal' interface. At the top, there's a navigation bar with 'Home', 'Profile' (selected), 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below this, a sub-navigation bar includes 'Your Profile', 'Information Requests', 'Performance Evaluation', and 'Coupa Verified'. The main content area is divided into a left sidebar and a right main section. The sidebar contains 'Company Profile' (with sub-items: Environmental, Social, Governance & Diversity; Risk & Compliance; Financial Performance; Ratings & References), 'Quick Links' (Manage payment information, Manage legal entities), 'Learning Center' (Add more customers, Create a discoverable profile), and 'Feedback' (Tell us what you think). The main section features a yellow banner: 'Complete your profile to get discovered by Coupa buyers that are looking for items in your category.' Below this is the 'New Supplier Setup' section with a 'Profile Progress' bar at 41% and an 'Edit Profile' button. A 'Verify Your Account' section with a 'Get Verified' button is also present. At the bottom, there's a 'Doing Business As' section with 'Is Ultimate Parent' set to 'No'.

- 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

