



TOGETHER
TOWARDS
TOMORROW

HOW TO NAVIGATE THE CSP HOME DASHBOARD

Description

This course explains the Coupa Supplier Portal (CSP) Dashboard.

Objectives

After completing this course, you will be able to:


1. Navigate the CSP dashboard
2. Understand the navigation of tabs
3. Set up notification preferences
4. Find support on and from Coupa

How to Navigate the CSP Dashboard

The CSP Home Page and Dashboard is shown below. This can be accessed once you have registered on the CSP:

Navigation:

- 1
- The different tabs you see in the portal depends on the permissions you have. If you need more roles on the portal, request your portal admin to update your user.

 supplier portal

DIVYA ▾

NOTIFICATIONS 0


HELP ▾


HomeProfileOrdersService/Time SheetsASNInvoicesCatalogsAdd-onsAdmin


Your Public Profile


Your Customer Profiles


Diya Inc.





Website 

Industry 

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Established 

Top Commodities 

Currencies 

Contact Information

Address

Primary Contact

Divya Pillay

pretishka@gmail.com

Work Phone

Mobile Phone

Fax Number

Description


Edit Profile

3

Home Page Navigation

Navigation

- 1 **"Home"**- this is the landing page when you log in to the portal.
- 2 **"Profile"** allows you to create, modify, and manage your public and customer-specific profiles, and specify which remit-to addresses each customer can use.
- 3 You can view the purchase orders you received from your customers by clicking on **"Orders"**.
- 4 Click on **"Service/Time Sheets"** to view the list of service / time sheets and related purchase order lines.
- 5 **"ASN"** allows you to send advance ship notices, that is notifications about when you ship items to your customers.
- 6 **"Invoices"** allows you to create and manage invoices to send to your customers.
- 7 **"Catalogs"** allows you to create and manage customer-specific catalogues.

 **coupa** supplier portal

DAISY ▾ | NOTIFICATIONS **6** | HELP ▾

1 Home

2 Profile

3 Orders


4 Service/Time Sheets

5 ASN


6 Invoices


7 Catalogs


Add-ons Admin


 **New:** Exclusive discounts for your business to thank you for being a part of the Coupa Community.


Miss Daisy Florist





Website 


Industry 

About 

Established 


Top Commodities 

Currencies 

Public Profile  Profile

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Merge Accounts


If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

4


Navigation

- 8
- You can accept payment through digital checks from your customers if they use Coupa Pay through “Add-ons”.
- 9
- “Admin”
Allows you to manage users, merge requests, and remit-to addresses, set up electronic invoicing, add fiscal representatives, view and accept the Terms of Use, and set preferred accelerated payment terms.


 supplier portal


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Home | Profile | Orders | Service/Time Sheets | ASN | Invoices | Catalogs | 8 Add-ons | 9 Admin


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Website 


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Navigation

- 1
- The “My Notifications” tab allows you to view all your (read and unread) notifications. You can also filter your notifications by category (FYI, To-do, or Unread).
- 2
- The “Help” tab gives access to the Coupa Success Portal for suppliers to search for any information.

coupa supplier portal

DAISY 1 NOTIFICATIONS 6 2 HELP 3

Home

Profile

Orders

Service/Time Sheets

ASN

Invoices

Catalogs


Add-ons


Admin


New: Exclusive discounts


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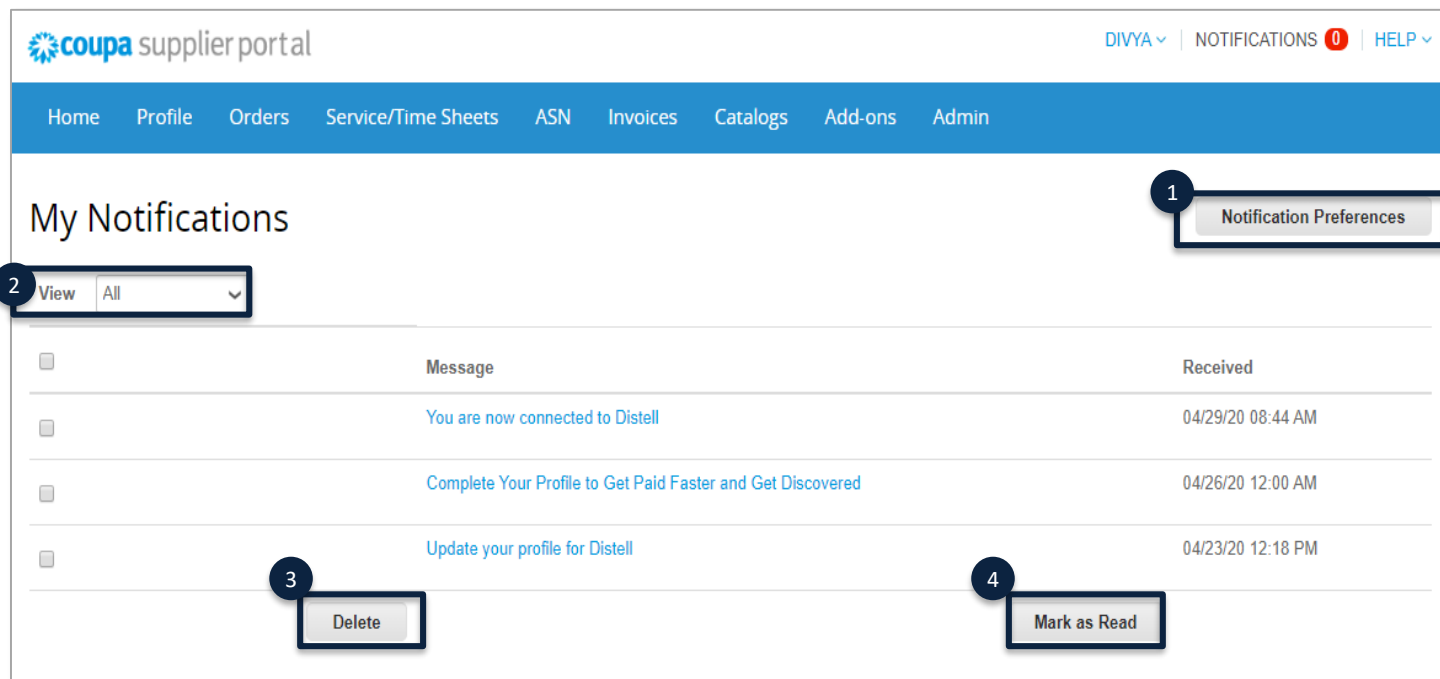
Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider

Setting up notification preferences

Navigation

- 1 Navigate to **“Notification Preferences”** to set up notifications - Online, Email and SMS.
- 2 **“View”** allows you to view and filter between All, FYI, To-do, Unread and Announcement notifications.
- 3 Check the box corresponding to a notification and click on **“Delete”** to delete a notification from the portal. You can delete multiple notifications by selecting multiple check boxes.
- 4 Check the box corresponding to a notification and click on **“Mark as Read”** to mark the notification as having been read. To mark multiple notifications as read, select the corresponding check boxes and then click on **“Mark as Read”**.



coupa supplier portal DIVYA | NOTIFICATIONS 0 | HELP

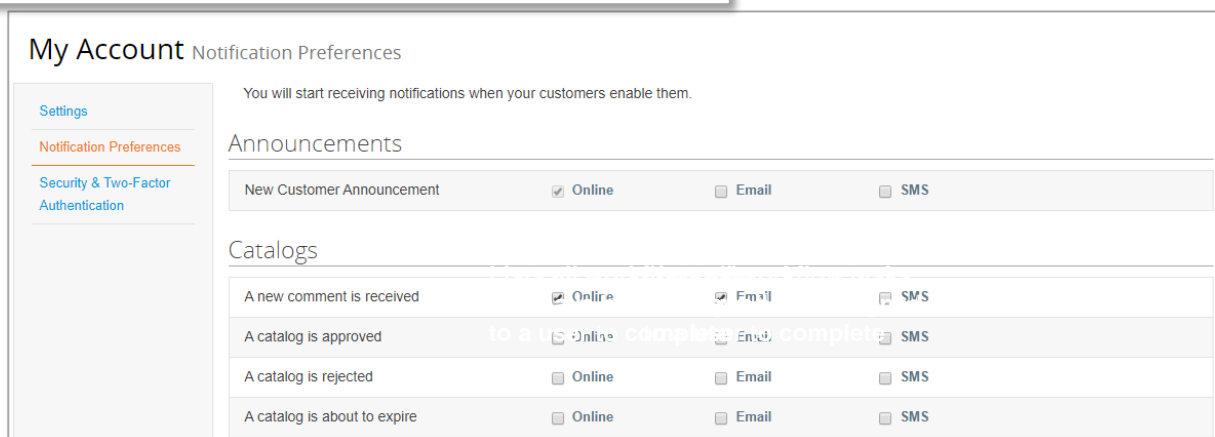
Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

My Notifications

View All

<input type="checkbox"/>	Message	Received
<input type="checkbox"/>	You are now connected to Distell	04/29/20 08:44 AM
<input type="checkbox"/>	Complete Your Profile to Get Paid Faster and Get Discovered	04/26/20 12:00 AM
<input type="checkbox"/>	Update your profile for Distell	04/23/20 12:18 PM

Delete Mark as Read



My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Announcements

New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
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Catalogs

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> SMS
A catalog is approved	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> SMS
A catalog is rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS

Navigation

- 1

Help


For assistance on Coupa click **“Help”** and 2 options are displayed

“Help tour” : gives you a tour of the CSP

“Online Help” : routes you to the Coupa Success Portal where you can search for information
- 2

Chat with Coupa support

Allows you to chat with Coupa support agents

 supplier portal

DAISY | NOTIFICATIONS | **HELP**

Home | Profile | Orders | Service/Time Sheets | ASN | Invoices | Catalogues | Add-ons | Admin

Action needed: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress

21% Complete

Last Updated 1 day ago

Improve Your Profile

Profile Summary

2

Legal Entities

View

1

Registered User

View

1

Connected Customer


Banking Info

Diversity Info

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Bribery Policy

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Latest Customers

Distell

Help Tour

Online Help

2

Chat with Coupa Support

8



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TOWARDS
TOMORROW

»»» END- THANK YOU