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TOWARDS
TOMORROW

HOW TO NAVIGATE THE CSP HOME DASHBOARD

DISTELL

Course Outline

Description

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

Objectives

After completing this course, you will be able to:

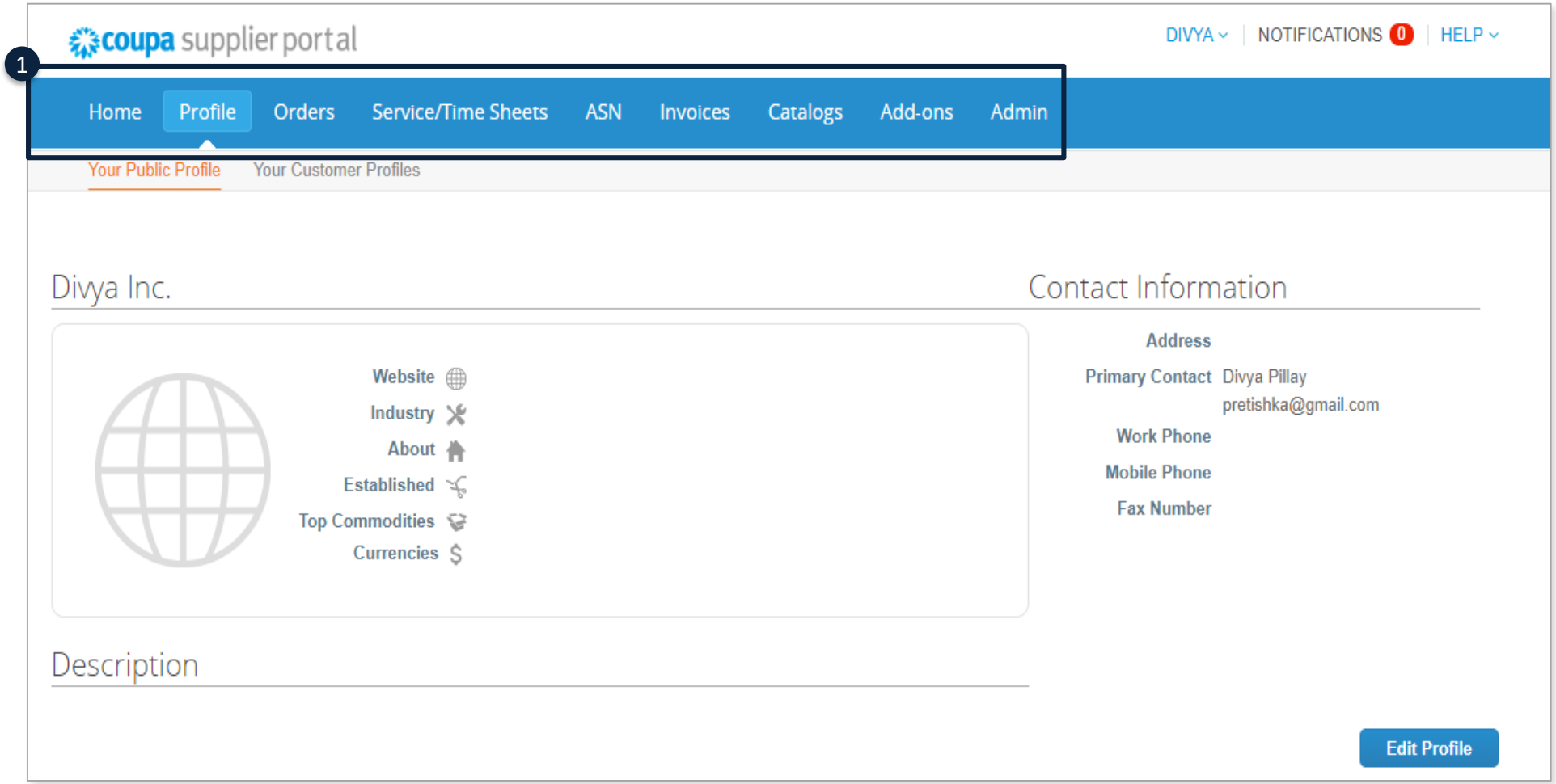
1. Navigate the CSP dashboard
2. Understand the navigation of tabs
3. Set up notification preferences
4. Find support on and from Coupa

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.

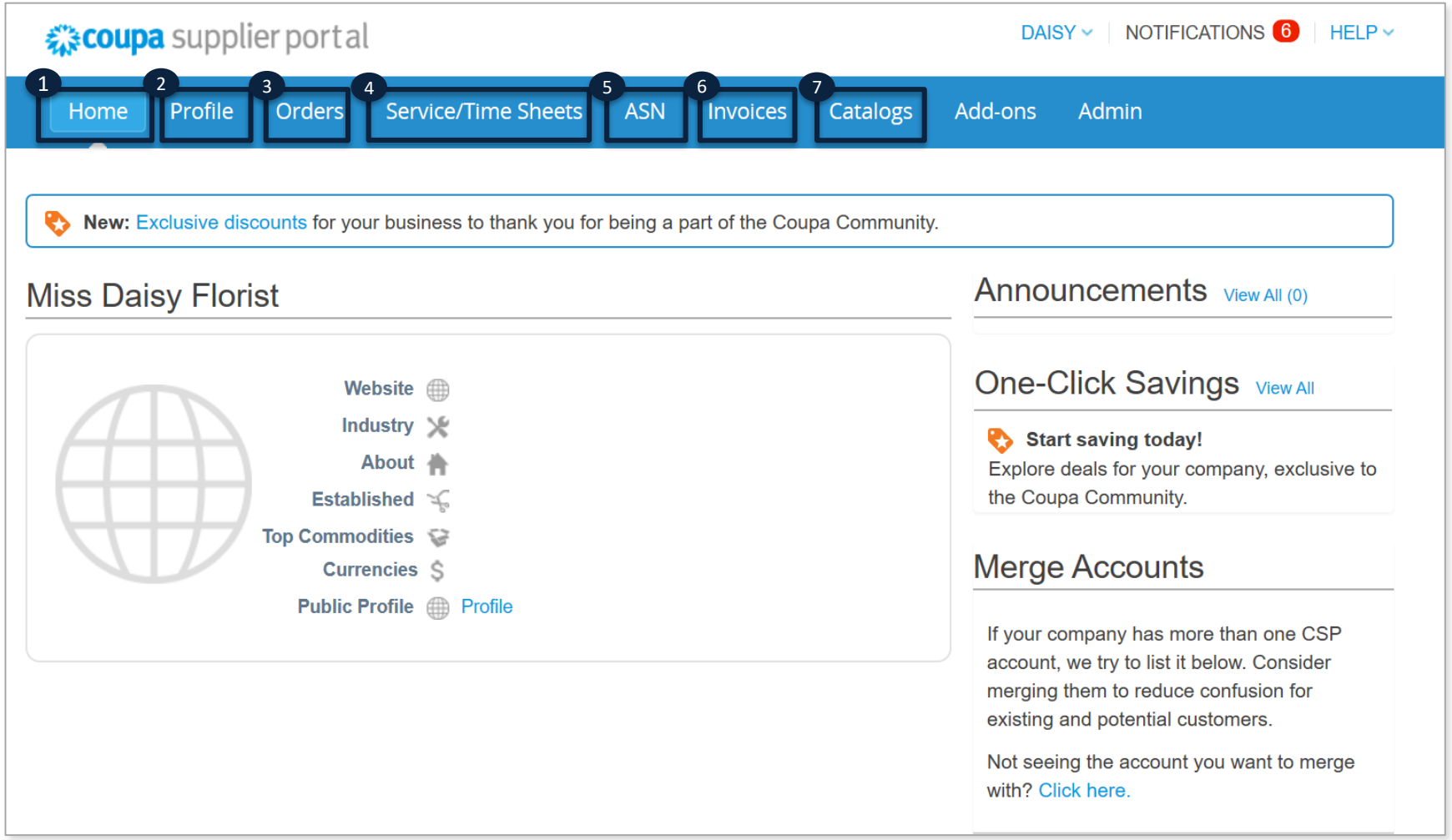


Home Page Navigation

RAINMAKER
POWERED BY coupa

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.

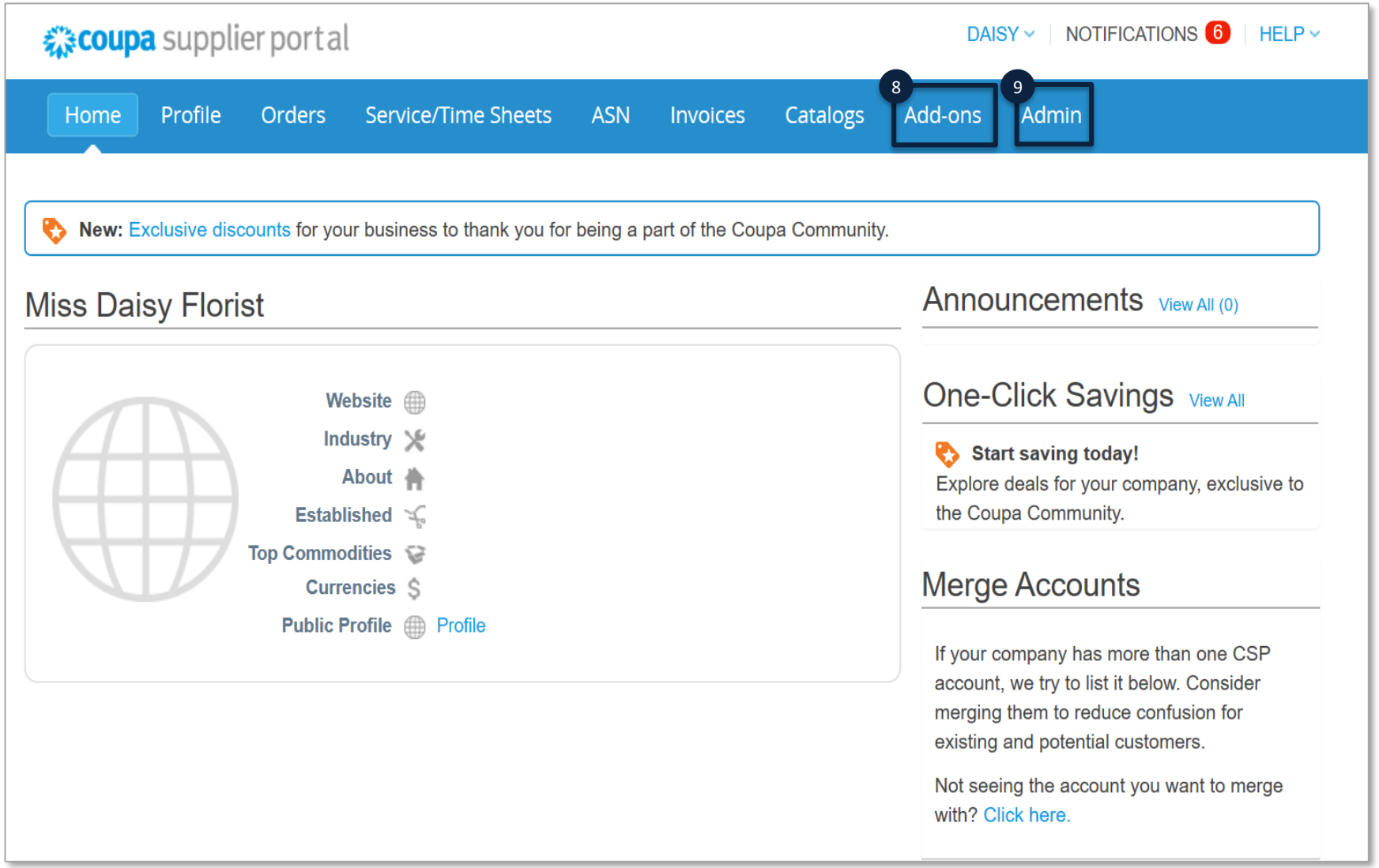


Home Page Navigation

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.

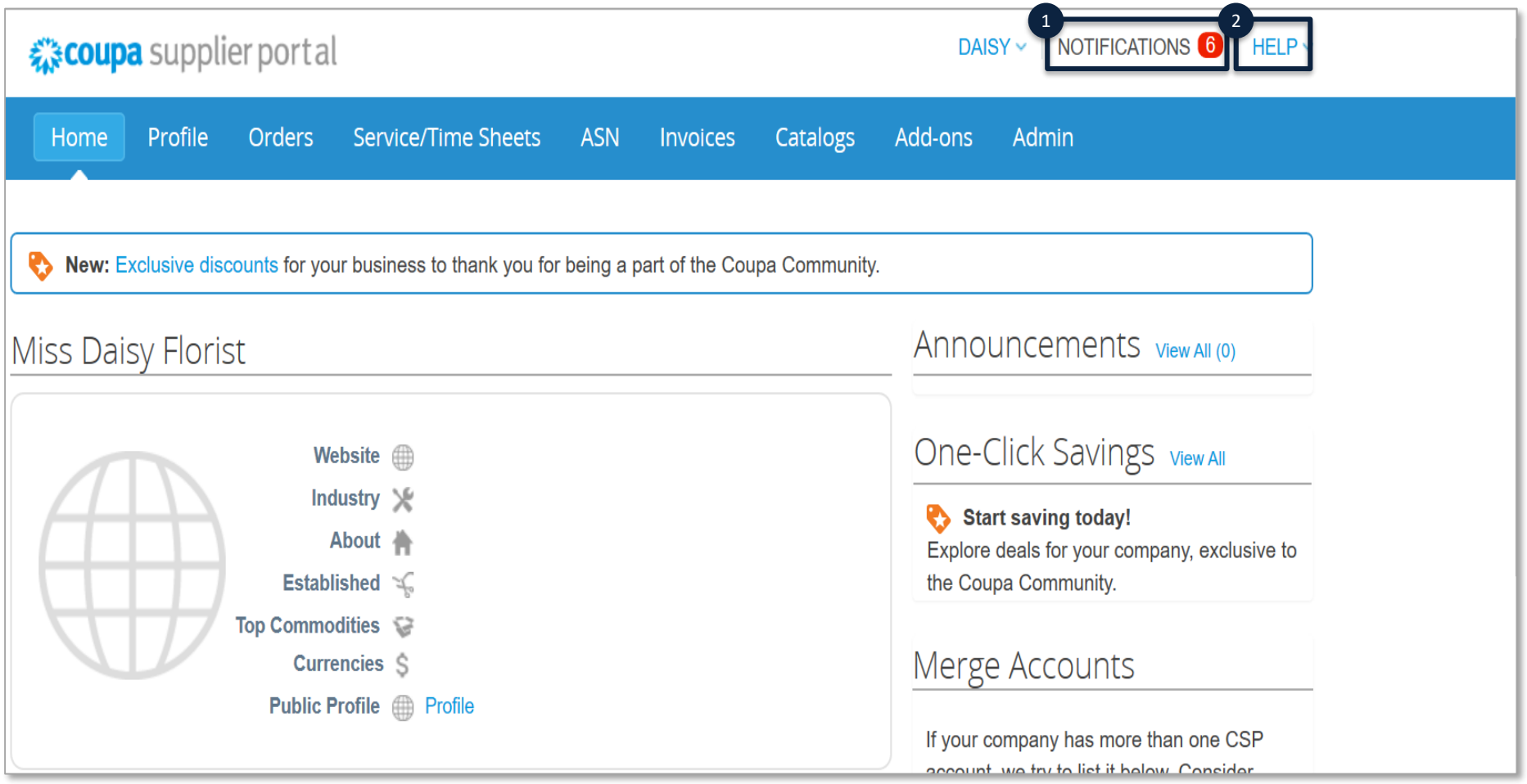


Home Page Navigation

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).

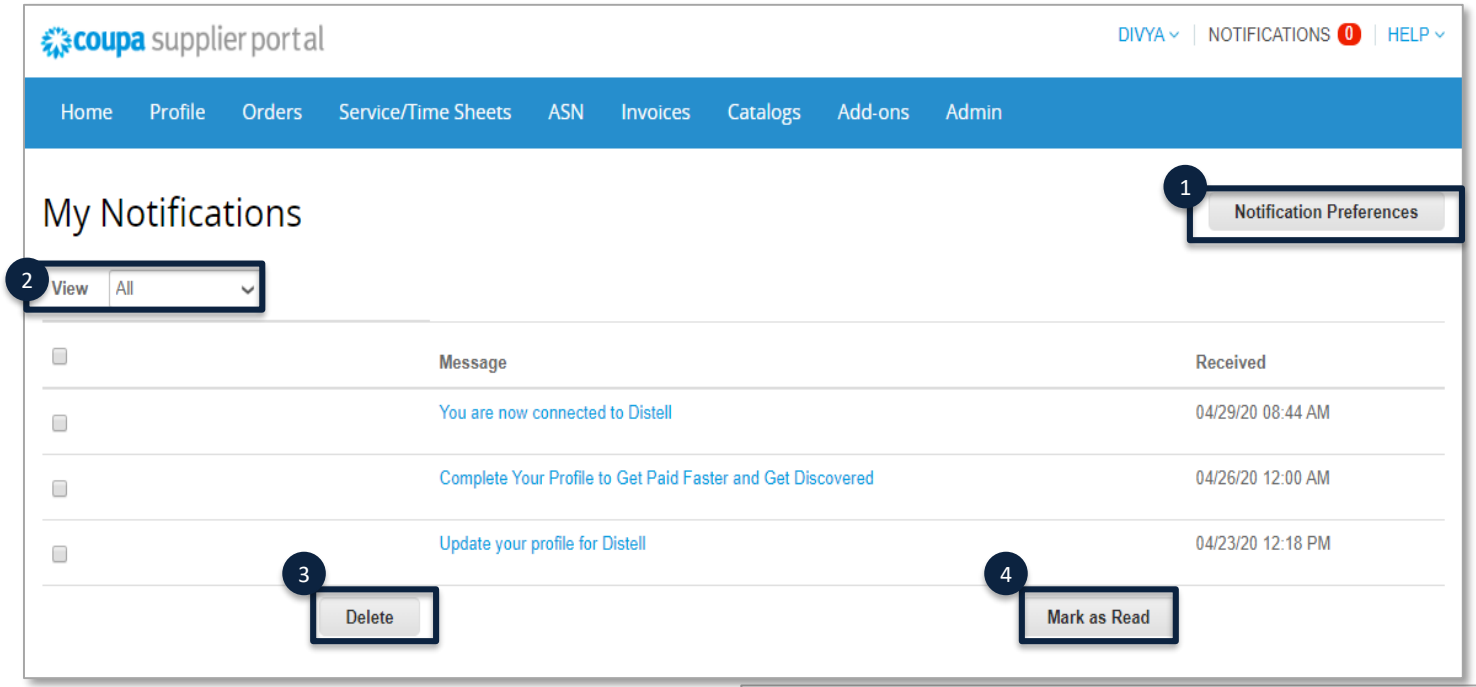
2. The **"Help"** tab gives access to the Coupa Success Portal for suppliers to search for any information.

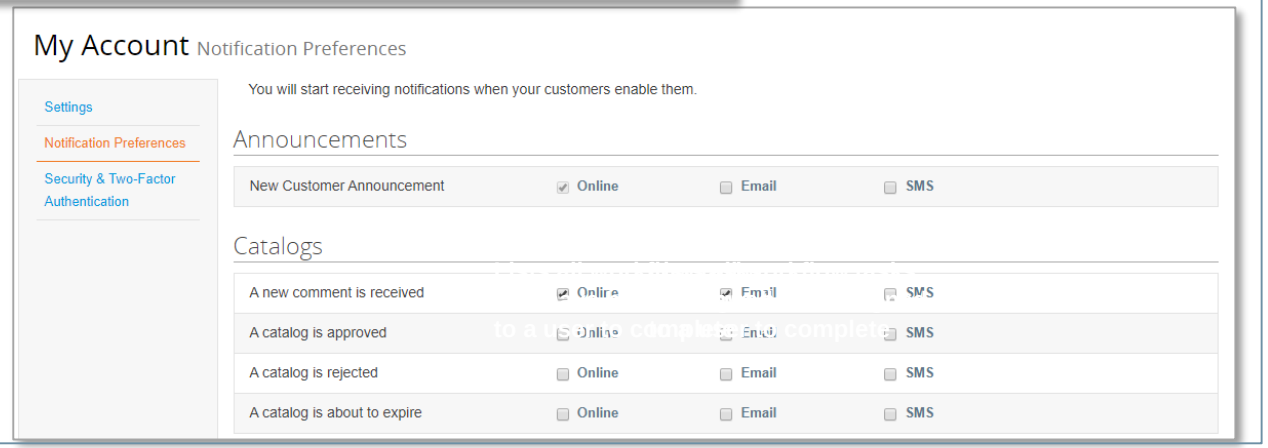


Setting up notification preferences

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**".





Getting help on Coupa

Navigation

1 **Help**

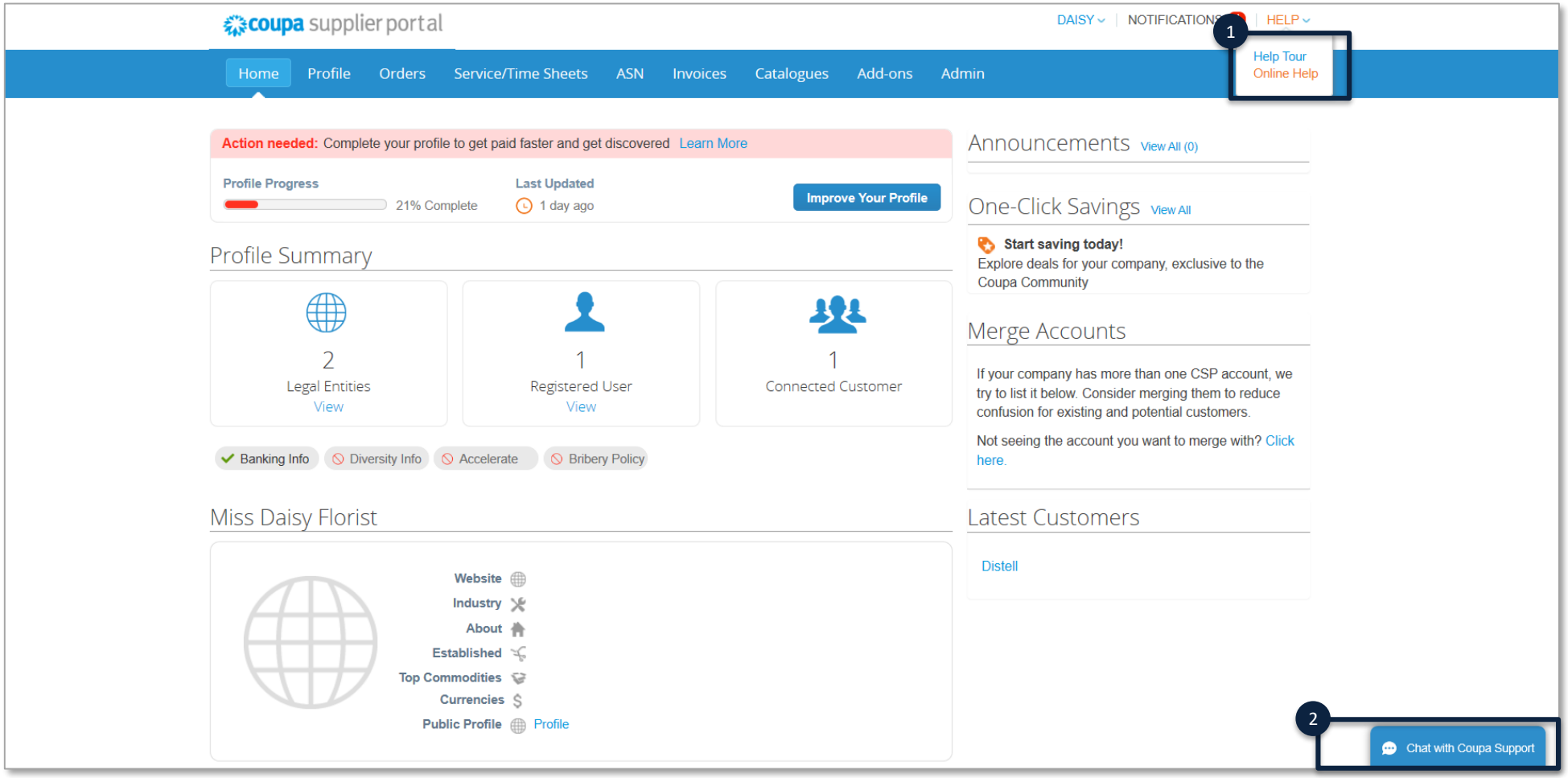
For assistance on Coupa click **"Help"** and 2 options are displayed

"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



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END- THANK YOU

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