

Understanding the Coupa Supplier Portal (CSP) Homepage

Purpose:

The purpose of this help guide is to show you how to operate the Coupa Supplier Portal (CSP) Homepage

Scope:

- How to navigate the CSP homepage
- Reviewing your profile health

How to Navigate the Coupa Supplier Portal (CSP) Homepage

Once you log into the Coupa Supplier Portal the dashboard will display the following actionable categories:

- Home
- Profile
- Orders
- Service/Time Sheets
- ASN
- Invoices
- Catalogs
- Business Performance
- Sourcing
- Add-Ons
- Setup

1

Coupa supplier port al											HELP V
Home	Profile	Orders	Service/Time Sheets	ASN	Invoices	Catalogs	Business Performance	Sourcing	Add-ons	Setup	

Tab	Description				
Home	View and improve public company profile, see customers, edit customer-specific company profile, and merge accounts.				
Profile	Create, modify, and manage public and customer-specific profiles, and specify which remit-to addresses customers can use.				
Orders	View customer purchase orders				
Service/Time Sheets	View service/time sheets and related purchase order lines.				
ASN	Send advance ship notice (ASN) notifications				
Invoices	Create, send, and manage invoices				
Catalogs	Create and manage customer-specific catalogs.				
Payments	Accept payment through digital checks from customers who use Coupa Pay.				
Business Performance	View order summaries and invoices, year-to-date order and invoice trends, and shipping lead time performance.				
Add-ons	Access Coupa supplier add-ons, ex. Coupa Advantage, Early Payment Discounts, supplier profile update, and more.				
Setup	Manage users, merge requests, and remit-to addresses, set up electronic invoicing, add fisca representatives, view, and accept the <u>Terms of Use</u> , and set up preferred early paymen discount terms.				



Understanding the CSP homepage tiles

In this section, you will find the following:

- Improving your profile
- Accessing your profile summary •
- Viewing your Coupa Public Profile •
- CBRE and other announcements •
- Merging multiple profiles .

	Coupa supplier portal		ANTOINETTE - NOTIFICATIONS () HELP -			
	Home Profile Orders	Service/Time Sheets ASN	Invoices Catalogs	Business Performance	Sourcing Add-ons	Setup
		Account your account more visible an	d trusted by thousand	s of customers.		•••• •••• ••••
Review profile health . To make	New: Exclusive discounts for you	r business to thank you for being a p	ity.			
updates, select "Improve Your	Action needed: Complete your profile	e to get paid faster and get discover	An	Announcements Yew All (2)		
Profile".	Profile Progress 24% Cor	Last Updated npiete i day ago	SI	Coupa Verification (CBRE) Supplier verification on the Coupa Supplier Portal is completely optional and not required to transact with Invoice copy to Colombia General Mailbox (CBRE)		
View legal entities, users,	Profile Summary					
and customers belonging to your business. Other data		1	4	R	equired to also email Invoice copy olombia mailbox following Coupa	
like banking and diversity —	1 Legal Entity	1 Registered User	Canada	1 Or	ne-Click Savings verA	
status are also accessible.	View	View	Connect	4	Start saving today! Explore deals for your company, exclusive to the	
	S Banking Info S Diversity	Early Payments S Bribery Policy		Coupa Community.		
lick the " Profile" link in the	PP Manuala		Me	Merge Suggestions		
Public Profile section to see a preview of what customers	F5 Networks	Websile () http://okyspacesoldi.o	ha co	No merge suggestions were found. If your company has multiple GSP accounts, merge them to reduce confusion for your customers. Request Marge Latest Clustomers		
see when viewing your		About 🚔	La			
profile. ————	Top Cor	c	CERE			

CBRE may communicate actions and changes through announcements. Check this regularly for any relevant information.

Option to merge data for those who have more than one account/profile in the CSP.