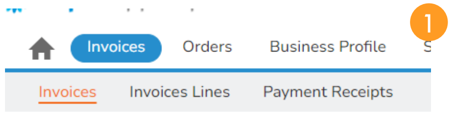
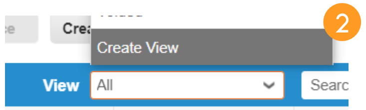
Supplier Quick Reference Guide #3: **Creating views in CSP and account management**

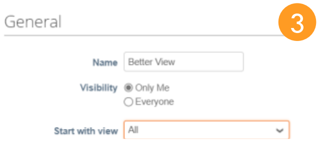
Creating views in CSP

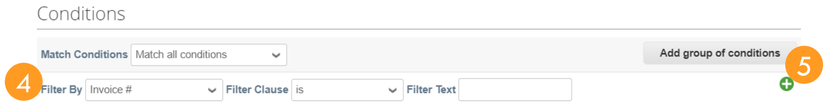
To see additional data (e.g. Invoice payment status) you have the opportunity to **create custom views** in Orders and Invoices tabs of your CSP account.

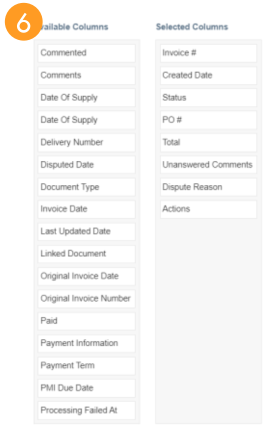
1. Click on **Invoices** or **Orders** tab on the Homepage.
2. Select Create view option from the View dropdown list.
3. Choose the name of your view.
4. Choose needed conditions.
5. Use ➕ button to add more conditions.





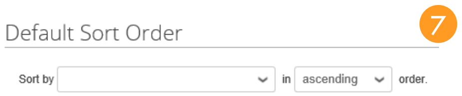






6. Drag and drop columns to be displayed in the view to 'Selected columns' (e.g. Select Paid)

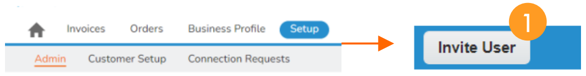
7. Select Sort order if needed

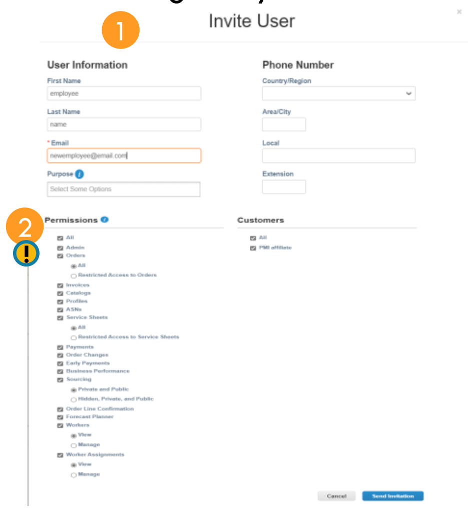


8. Click **Save** button. Then the created view should be available in the View dropdown

Managing CSP account

It is possible to have your Company CSP account managed by several **Users.**

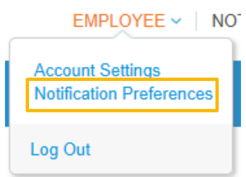


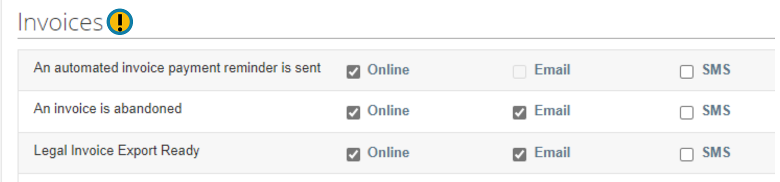


1. Go to **Setup** tab, **Admin** subtab, Users section and click *Invite User.*
2. If you untick some permissions, a user will not see corresponding CSP tas **complet**
3. Make sure **users and permissions** are **updated.**

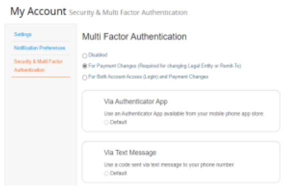
❗ A user needs both **Orders and Invoices** permissions to issue invoices

Any user in CSP can **manage notifications.**





By default, **Online and Email** notifications are enabled. To enable **SMS,** you need to go to verify your phone number.



❗ PMI recommends to keep **New comment** notifications enabled for both **Invoices** and **Orders.** Comment functionality is a useful feature to interact with PMI PO requestors or Accountants.