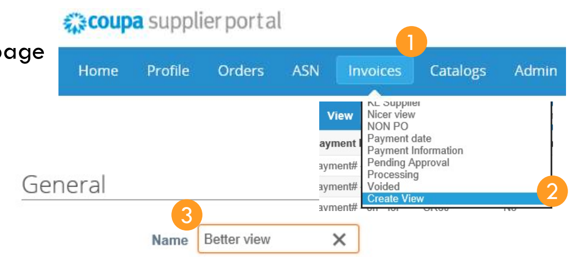
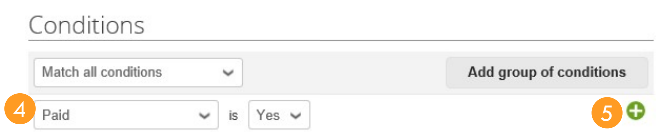
Supplier Quick Reference Guide #3: **Creating views in CSP and account management**

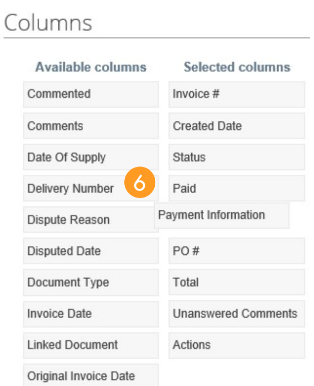
Creating views in CSP

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



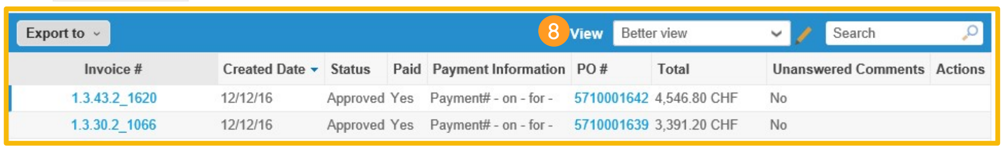
1. Click on **Invoices** tab on the Homepage
2. Select Create view option from the View dropdown list
3. Choose the name of your view.
4. Choose needed conditions
5. Use ➕ button to add more conditions





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

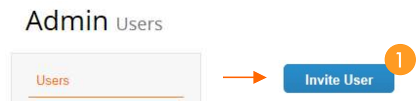
8. Click **Save** button

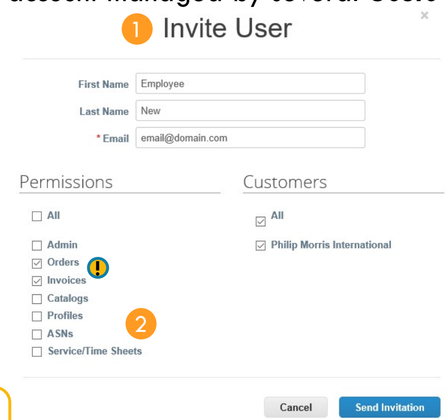


Invoice #	Created Date	Status	Paid	Payment Information	PO #	Total	Unanswered Comments	Actions
1.3.43.2_1620	12/12/16	Approved	Yes	Payment# - on - for -	5710001642	4,546.80 CHF	No	
1.3.30.2_1066	12/12/16	Approved	Yes	Payment# - on - for -	5710001639	3,391.20 CHF	No	

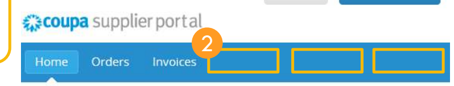
Managing CSP account

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



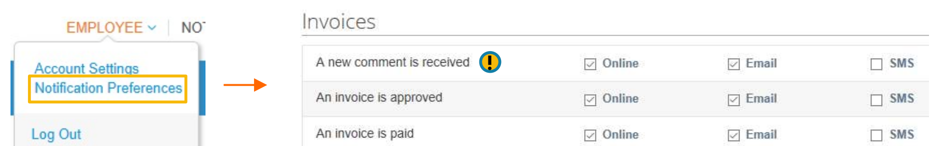


1. Go to **Admin** tab, **Users** section and click *Invite User*
2. If you untick some permissions, a user will not see corresponding CSP tab **completely**
3. Make sure **users and permissions** are **updated**



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 *Account Settings* → *Security and Two-factor Authentication*

PMI recommends to keep **New comment** notifications enabled for both **Invoices** and **Orders**
Comment functionality is a useful feature to interact with PMI