**Sign Up on the CSP**

You will receive an email containing an invitation from Capital One to connect on the CSP. Click on the URL embedded in the email to create your CSP account.

1. Click on URL embedded in email from Capital One
2. On the Welcome screen, enter the following information to create your profile
   - First Name
   - Last Name
   - Your Company Name
   - Email Address
   - Password – Note: password must contain one letter and one number
   - Password confirmation
3. Click Ok

   *Note: if you are having trouble locating your CSP invite, please contact the ESM Ops Team!*

**Enter Remit-To Addresses**

You must enter your remit-to address before you can submit any invoices to Capital One.

1. From the blue navigation bar located at the upper part of the screen, click “Admin.”
2. From the left menu, click “E-Invoicing Setup.”
3. Click the “Add Legal Entity” button.
4. Enter the following information
   - Legal Entity Name
   - Country
   - Address Line 1
   - City
   - Postal Code
5. Under “Assign Customers,” select the customers you wish to connect with.
6. Click Done.

**Add Users to your CSP Profile**

You can add additional users to access and manage your supplier account.

1. From the blue navigation bar located at the upper part of the screen, click “Admin.”
2. From the left menu, click “Users.”
3. Click the “Invite User” button.
4. Enter the employee's email address and identify the appropriate permissions you wish to delegate.
5. Click the “Send Invitation” button to trigger an email with account activation instructions.
6. Restrict access to specific customers by checking/unchecking the box under the customer name in the user table.
**Manage Company Profile**

You can maintain information about your company in your Profile.

1. From the blue navigation bar located at the upper part of the screen, click “Profile.”
2. Click the “Edit Profile” button.
3. Enter relevant information, including company name, address, logo, description, and social media profile information.
4. Click Save.

**View Orders**

You can view all purchase orders (POs) issued by Capital One via Coupa.

1. From the blue navigation bar located at the upper part of the screen, click “Orders.”
2. Click on the PO# to view the PO.
3. If any changes are made, click “Save.”
4. Click “Print View” to print the PO.
5. If you wish to add a comment, type the desired text in the Comment field, then click “Add Comment.”

**Flip PO to Invoice**

You can create invoices/credit notes directly from POs.

1. From the blue navigation bar located at the upper part of the screen, click “Orders.”
2. Locate the PO that you want to flip into an invoice/credit note.
3. Click the gold coin stack to create an invoice, or the red coin stack to create a credit note.
4. Enter the Invoice #/Credit Note #.
5. Confirm the remaining fields.
6. Add an attachment of the invoice in the Attachments field (required) You can leave “Image Scan” blank.
7. Enter Quantities, Prices (for items), Amounts (for services), Shipping, Handling, Misc Fees, and Tax.
8. Click “Calculate” to update the Total.
9. Click Submit.
10. View Status to check the invoice status. Payment status may be viewed in the Payment details.