How to Delegate Tasks in CSP for Suppliers

Coupa

*For the best learning experience, please click the **Editing** button and select **Open in Desktop** to view this document in your desktop application of Microsoft Word. Viewing this document in SharePoint or in-browser may distort the placement of images and text.*

Table of Contents

Your screen in Coupa may differ slightly from this training, but the steps to complete the activity will be the same.

Purpose

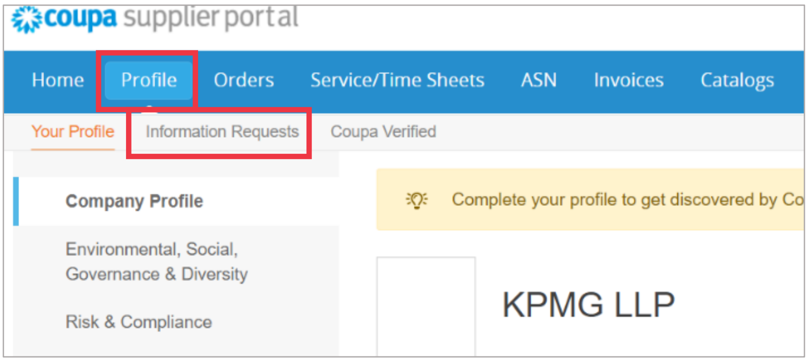
This Quick Reference Card (QRC) explains the process for delegating the **Supplier External Form** and any **due diligence questionnaire (DDQ)** within CSP. Please see the following quick reference guides, which contain a comprehensive view on supplier onboarding and information management.

- **How to Onboard as a New Supplier for Suppliers**
- **How to Navigate and Use the Coupa Supplier Portal (CSP)**

How to Delegate the Supplier External Form

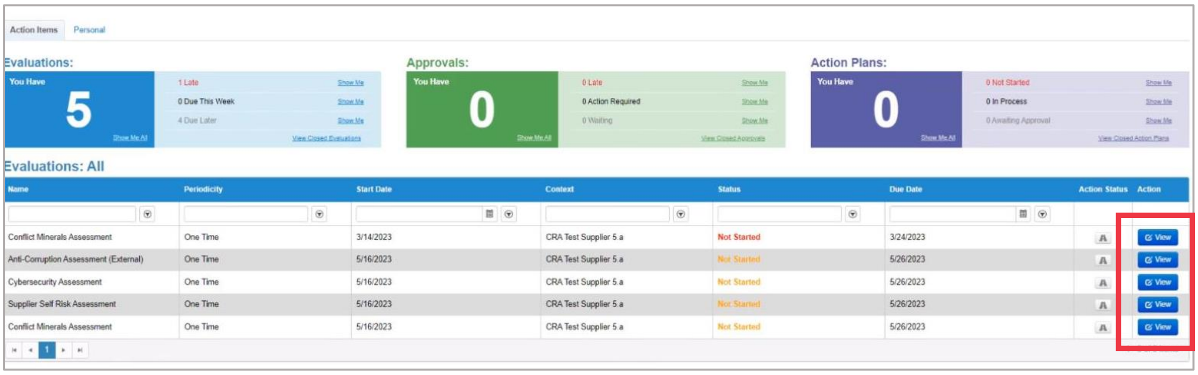
When the Supplier receives the **External Form** to be completed for the first time, it will be sent to the supplier primary contact. To allow another user to complete the External Form, you will need to add a new user to your company's CSP profile. Please **see How to Add a New User in CSP** for Suppliers training for more details.

Once added, a new contact will be able to access the External Form from the CSP homepage under **Information Requests.**

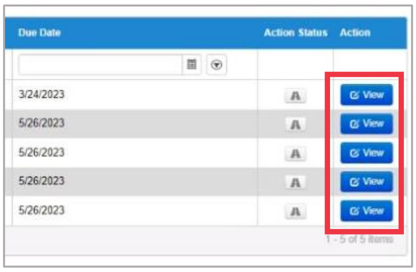


How to Delegate a DDQ

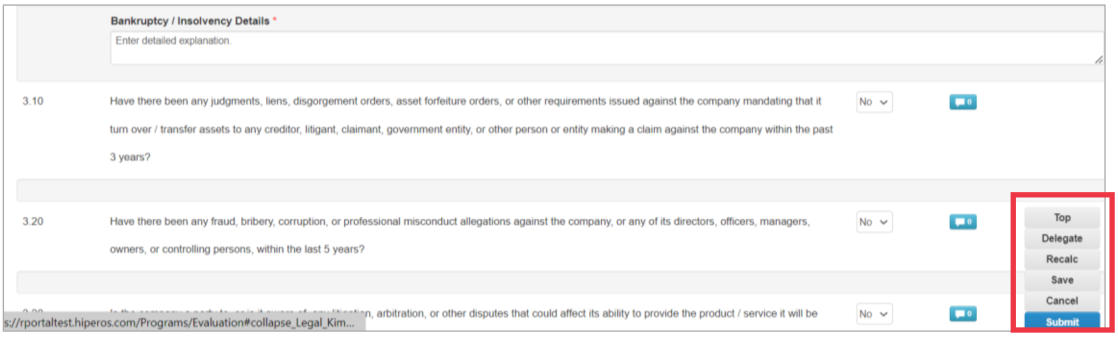
1. Open the due diligence questionnaire (DDQ).



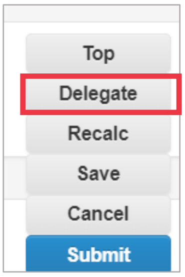
Magnified view:



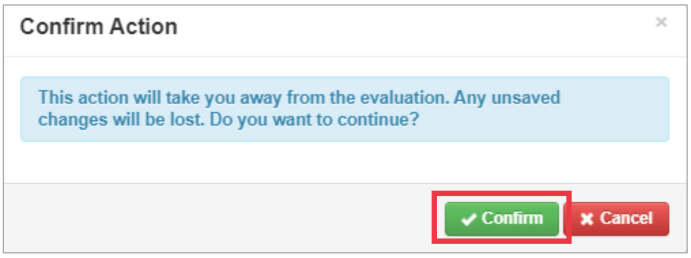
2. At the bottom of the assessment screen, click the **Delegate** button.



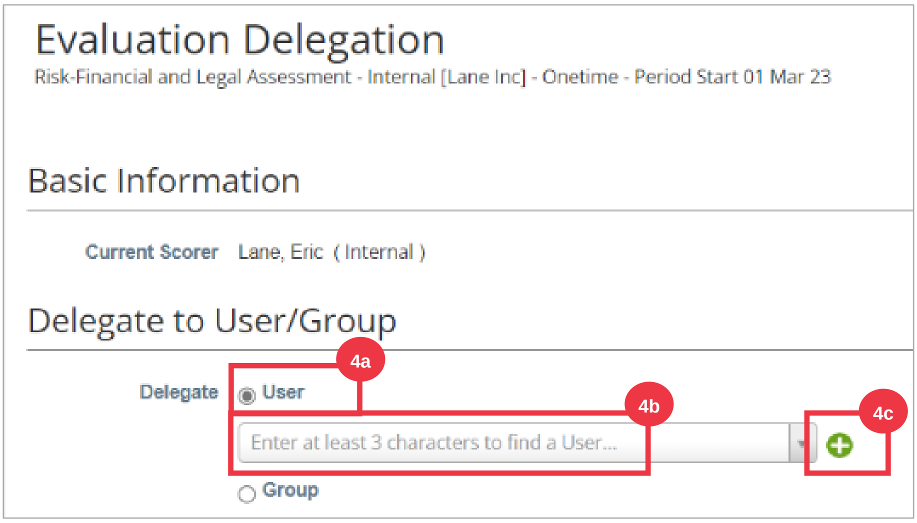
Magnified image:



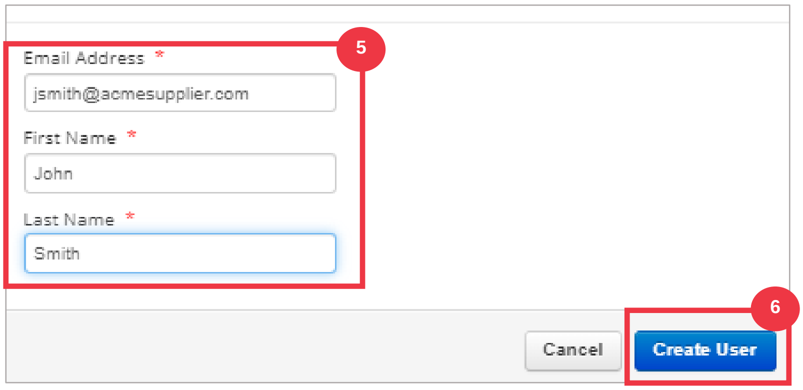
3. Click **Confirm** within the pop-up.



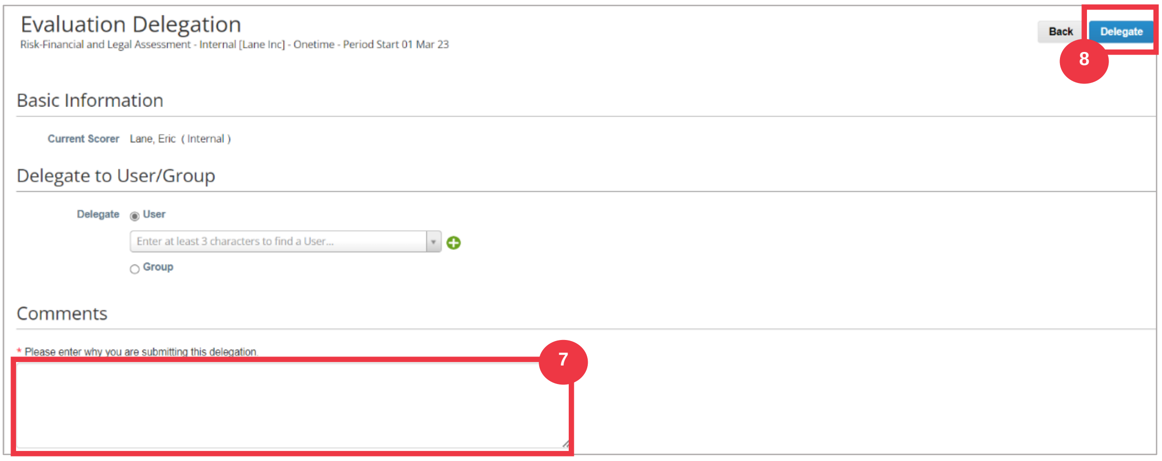
4. Add a delegate.
    a. Select **Delegate User** within the **Delegate to User/Group** section.
    b. If you are adding a current contact, search for and select a user within the search bar.
    c. If you are adding a user who is not a current contact, select the **+ button** and continue to **Steps 5-6**.



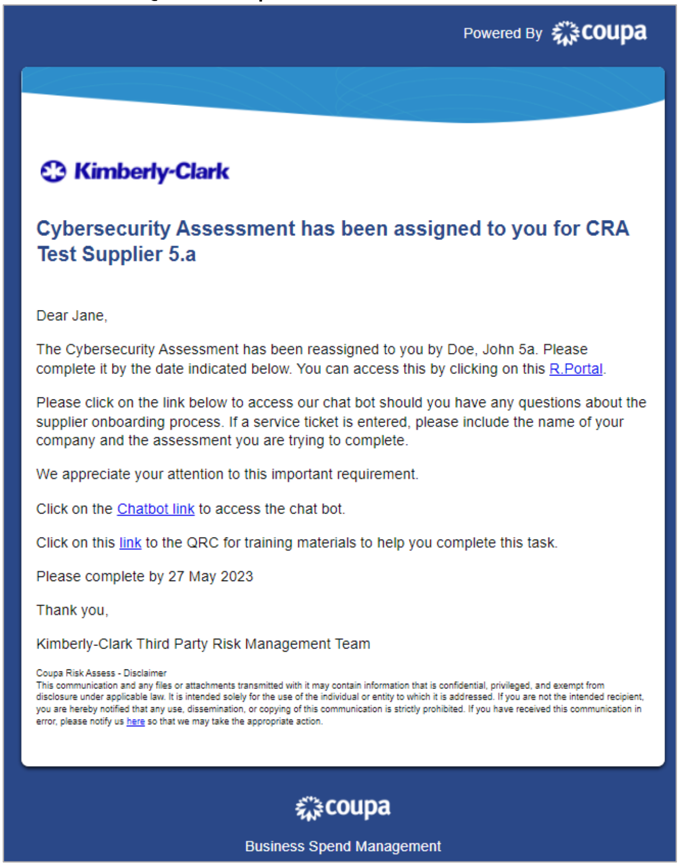
5. Enter the delegate's details within the required fields.
6. Click **Create User**.



7. Enter an **Explanation** for submitting the delegation in the comments field (*required).
8. Click the **Delegate** button when complete.



9. The delegate will receive an **email notification** that they have received a delegated DDQ to complete.



Note: If you are repeatedly delegating tasks to another user at your organization, you may want to invite them to join CSP under your organization, instead. For information on how to add users to your organization's CSP profile, please see the **How to Add Users in CSP** training guide.

Change Version

Version History			
Version	**Date**	**Change Description**	**Author**
1.0	6/5/2023	Created stand-alone material from current supplier guides.	Halaina Jimenez (KPMG)