SUPPLIER GUIDE

Coupa Supplier Portal (CSP)
Managing users

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Managing users

Manage users

1	Manage users
1.1	Log into the Coupa Suppler Portal and click on the '**Setup**' tab on the main menu to open the '**Admin users**' page. **Note**: Admin users can use this functionality to add additional users from their organization. Some of the possible scenarios you may want to add a colleague to the CSP; • Someone new joins your organisation that requires access to the CSP. • Someone goes on leave and you need someone to stand in. • You have different account clerks for different customers. • Someone leaves the organisation

Invite user

coupa supplier portal

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Admin   Customer Setup

Admin Users

Invite User

Users	Permissions	Customer Access
Mandy Quinn Mandyquins@testing.s2pconsulting.co.za Status: Active Edit	ASNs Admin Business Performance Catalogues Invoices Order Changes Orders - Restricted Access to Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	**THE FOSCHINI GROUP LIMITED**

- Users
- Merge Requests
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- Remit-To
- Terms of Use
- Payment Preferences ∨
-   Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors

2.1

2	Invite user
2.1	In the 'Admin Users' page, click on the 'Invite Users' button to add a user to the CSP.

Invite user

Invite User

First Name: Jude
Last Name: Parker
*Email: Jude@testing.s2pconsulting.co.za

Permissions ⓘ

- ☑ All
- ☑ Admin
- ☑ Orders
  - ○ Restricted Access to Orders
  - ◉ All
- ☑ Invoices
- ☑ Catalogues
- ☑ Profiles
- ☑ ASNs
- ☑ Service/Time Sheets
  - ○ Restricted Access to Service/Timesheets
  - ◉ All
- ☑ Payments
- ☑ Order Changes
- ☑ Pay Me Now
- ☑ Business Performance
- ☑ Sourcing

Customers

- ☑ All
- ☑ THE FOSCHINI GROUP LIMITED

[Cancel] [Send Invitation]

2.2	Enter the user's details, namely: • First Name • Last Name • Email Note: Users email address is mandatory
2.3	Allocate permissions to the user selecting or deselecting the check boxes.
2.4	Select which customers you'd like the user to have access to by selecting and deselecting the check boxes.
2.5	Click on '**Send Invitation**' to invite the new user to the CSP.

Edit user access

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Admin   Customer Setup

Admin Users

Invite User

Users	Permissions	Customer Access
Users	**Permissions**	**Customer Access**
Jude Parker Jude@testing.s2pconsulting.co.za Status: Active **Edit**	ASNs Admin Business Performance Catalogues Invoices Order Changes Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	THE FOSCHINI GROUP LIMITED
Mandy Quinn Mandyquins@testing.s2pconsulting.co.za Status: Active **Edit**	ASNs Admin Business Performance Catalogues Invoices Order Changes Orders - Restricted Access to Orders Pay Me Now Payments Profiles	THE FOSCHINI GROUP LIMITED

Sidebar menu:
- Users
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  - Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors

3.1

3	Edit user access
3.1	Click on the '**Edit**' button to open and edit permissions for existing users.

Edit user access

Edit user access for Jude Parker

User info

* First Name: Jude
* Last Name: Parker
* Email: Jude@testing.s2pconsulting.co.za

3.2

Permissions ⓘ

- ☑ All
- ☑ Admin
- ☑ Orders
  - ○ Restricted Access to Orders
  - ◉ All
- ☑ Invoices
- ☑ Catalogues
- ☑ Profiles
- ☑ ASNs
- ☑ Service/Time Sheets
  - ○ Restricted Access to Service/Timesheets
  - ◉ All
- ☑ Payments
- ☑ Order Changes
- ☑ Pay Me Now
- ☑ Business Performance
- ☑ Sourcing

Customers

- ☑ All
- ☑ THE FOSCHINI GROUP LIMITED

Cancel | **Deactivate User** (3.3) | **Save** (3.4)

You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

3.2	Complete all the mandatory fields marked by an Asterix. **Note**: You cannot change the user's email address when editing. If a user wants to change the email address, send a new invitation to that user. Refer to step 2.1 – 2-5 on how to add a user.
3.3	To deactivate a user, click on the '**Deactivate User**' button. The button is inactive when you edit your own access to avoid deactivating your account. **Note:** For auditing purposes, Coupa does not allow users to be deleted from your profile. Instead, you can deactivate a user if there is no longer a need for them to access the account. **Note:** If you deactivate users, you can always reactivate them at a later stage. When reactivating a user, you will need to reassign the relevant permissions and customer access.
3.4	Click on '**Save**' to save the changes to the edited profile.

User Permissions

All: Gives full access to all CSP functions, except for user administration.

Admin: Has full access to all CSP functions, including user administration. Non-admin users can still view the Users tab of the Admin page and invite users, but they cannot edit existing users. The permissions on the invitation cannot exceed the permissions of the user creating the invitation.

Orders: Allows viewing and managing of Purchase Orders (POs) received from customers.

Invoices: Allows creating and sending of invoices to customers.

Catalogues: Allows creating and managing of customer-specific electronic catalogs.

Profiles: Allows modifying customer-specific profiles.

Note: All users, regardless of permissions, can edit the public profile.

ASNs: Allows creating and sending of Advanced Ship Notices (ASNs) to customers.

Service/ Time Sheets : Allows creating and submitting of service/time sheets against POs.

Payments: Allows viewing of payments and downloading digital checks.

Order Changes: Allows submitting of PO change requests.

HOME

THANK YOU