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TABLE OF CONTENTS

Manage users	
Invite user	
Edit user access	
User permissions	



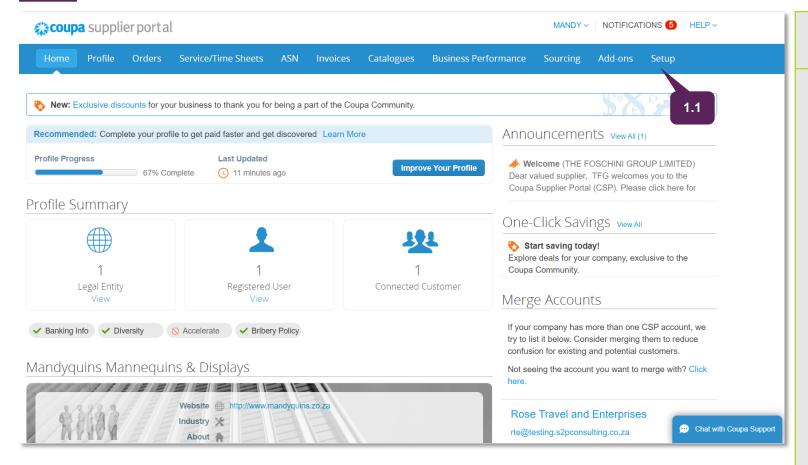
Managing users **F**





Manage users



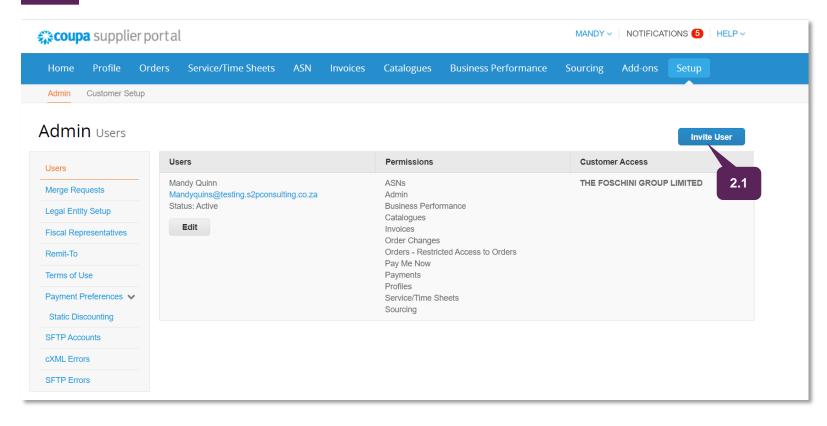


1	Manage users					
	Log into the Coupa Suppler Portal and click on the 'Setup' tab on the main menu to open the 'Admin users' page.					
	Note : Admin users can use this functionality to add additional users from their organization. Some of the possible scenarios you may want to add a colleague to the CSP;					
1.1	 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





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 Last Name *Email	Jude Parker Jude@testing.s2pconsulting.co.za	
Permissions 0	Customers	
☑ All	✓ AII	
		UP LIMITED
 ♠ All ✓ Payments ✓ Order Changes ✓ Pay Me Now ✓ Business Performa ✓ Sourcing 	nce	2.5
	Cancel	end Invitation

2.2

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



Coupa supplier portal MANDY NOTIFICATIONS 6 HELP								
Home Profile	Orders Service/Time She	ets ASN	Invoices	Catalogues	Business Performance	Sourcing	Add-ons	Setup
Admin Customer Setu	р							
Admin Users								Invite User
Users	Users			Permissions		Custom	er Access	
Merge Requests	Jude Parker Jude@testing.s2pconsulting.co.za		ASNs Admin		THE FOSCHINI GROUP LIMITED			
Legal Entity Setup	Status: Active			Business Performance Catalogues				
Fiscal Representatives	Edit			Invoices Order Changes				
Remit-To	4			Orders	•			
Terms of Use	3.1			Pay Me Now Payments				
Payment Preferences ✓			Profiles Service/Time S	heets				
Static Discounting				Sourcing				
SFTP Accounts	Mandy Quinn Mandyquins@testing.s2pconsulting.co.za Status: Active Edit		ASNs Admin		THE FOSCHINI GROUP LIMITED		PLIMITED	
cXML Errors			Business Perfo	rmance				
SFTP Errors			Catalogues Invoices Order Changes					
				Orders - Restri	cted Access to Orders			
				Payments Profiles				

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

Edit user access





You can change the user's name, modify the user's permissions and customer access, or deactivate the user.				
	Complete all the mandatory fields marked by an Asterix.			
3.2	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.			
	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			
3.3	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.



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THANK YOU