TOGETHER TOWARDS TOMORROW

HOW TO ADD USERS ON THE COUPA SUPPLIER PORTAL

DISTELL

Course Outline

Description

This course explains the process of managing your company users on the Coupa Supplier Portal.

Objectives

After completing this course, you will be able to:

1. Manage users on the Coupa Supplier Portal (CSP)
2. Add users on the CSP
3. Define user roles on the CSP
4. Assign roles to a user on the CSP
5. Assign a customer to a user on the CSP
6. Deactivate a user on the CSP

Managing Users: The Admin Role

It is extremely important that an Admin user considers the below when managing users on the CSP

As an Admin user you can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform within their assigned role and for their assigned customers.

The Admin role will allow you to:

- Change a user's name
- Modify a user's permissions
- Give users access to a customer
- Deactivate a user

For auditing purposes, Coupa does not allow users to be deleted, therefore you cannot delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

If you deactivate a user you can always reactivate that user later. However, when a user is reactivated the customer access for that user is reset, so you'll have to assign customers to that user again.

Note: The "Deactivate User" button is inactive when you edit your own access to avoid deactivating your own account

Adding a User to the CSP

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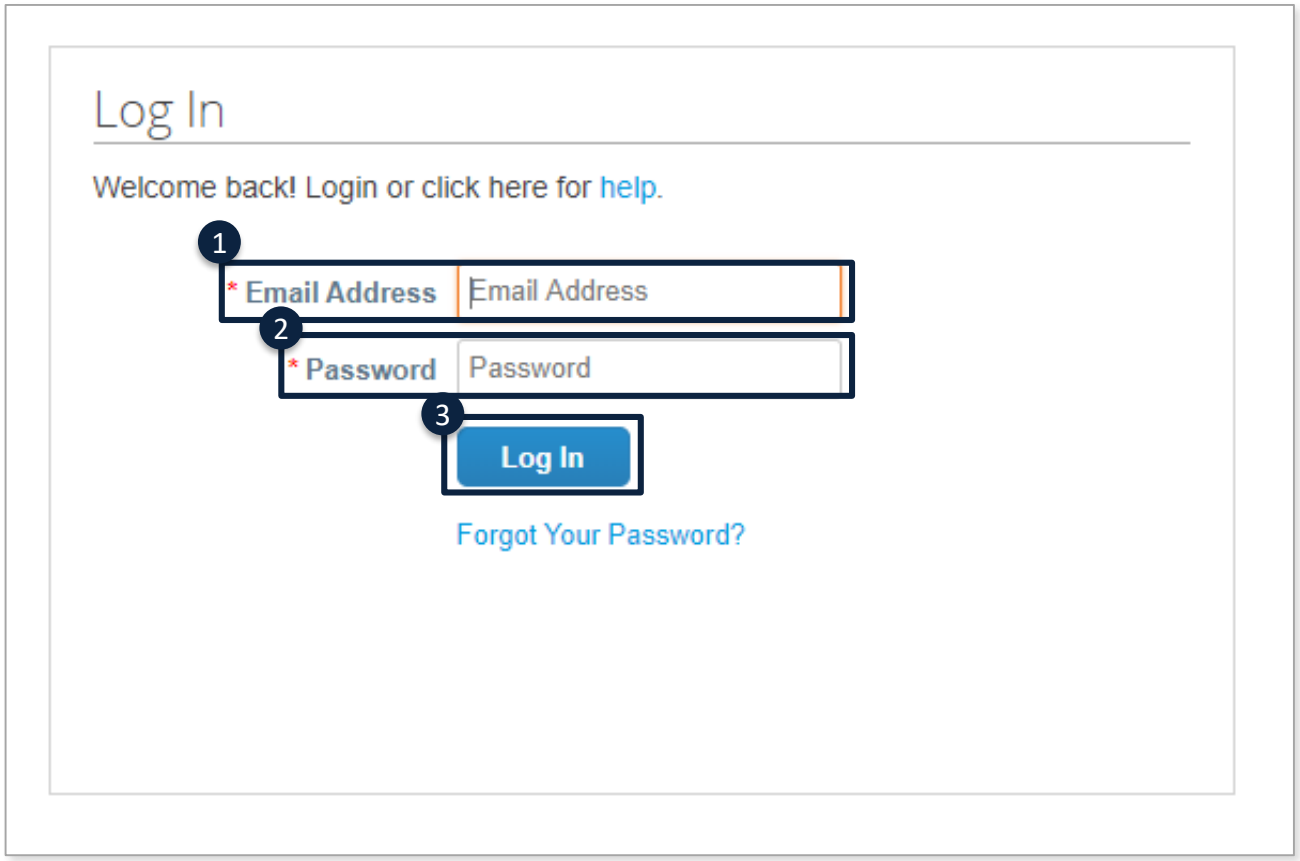
The first step in adding a user is logging onto the CSP

Process Steps:

1. **Email address**
   Populate your email address (Username).
2. **Password**
   Populate your password.
3. **Log In**
   Click on log in to access your company's Coupa Portal.

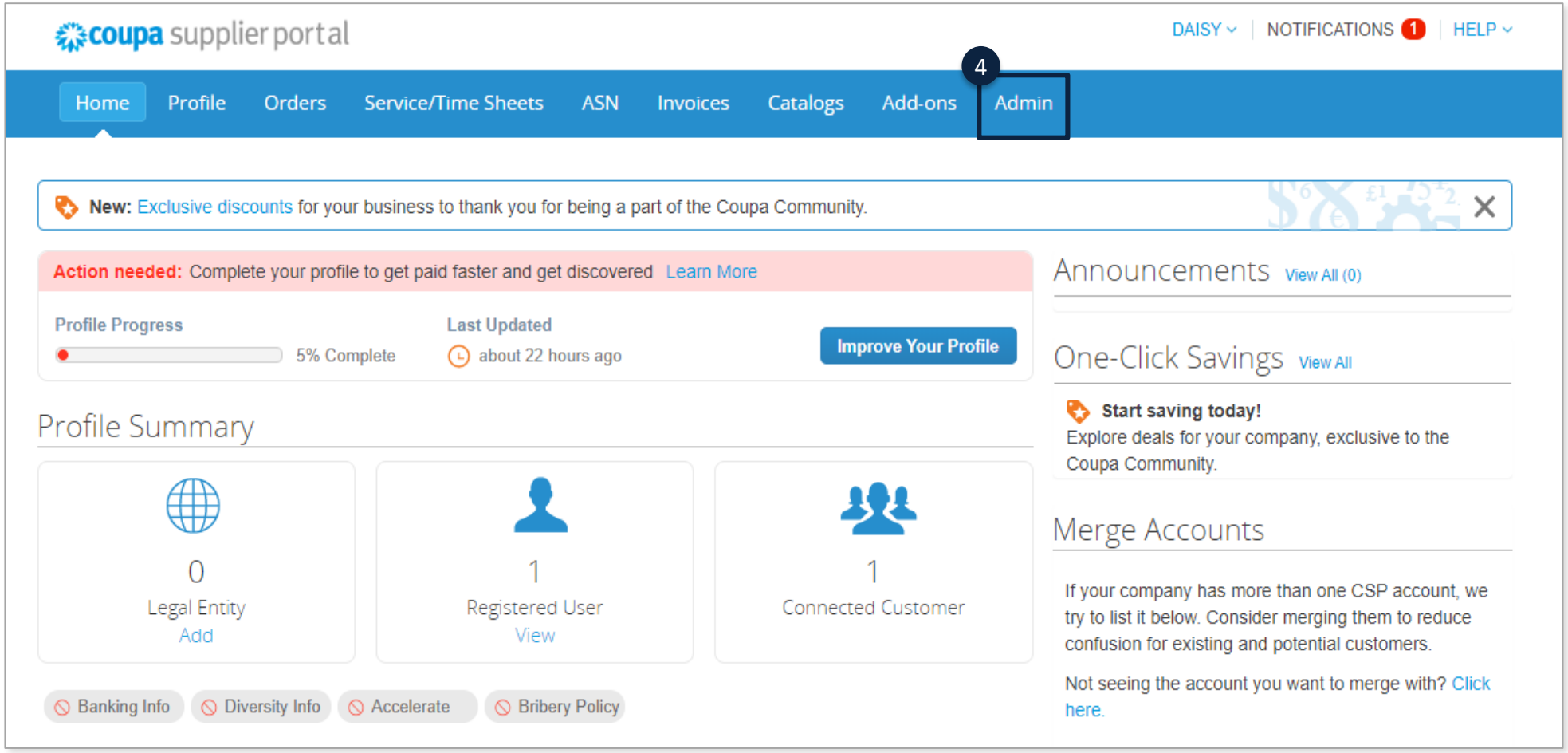


Adding a User to the CSP

Access Admin

Process Steps:

4 Once you have accessed the portal navigate to the "**Admin**" tab and select it.

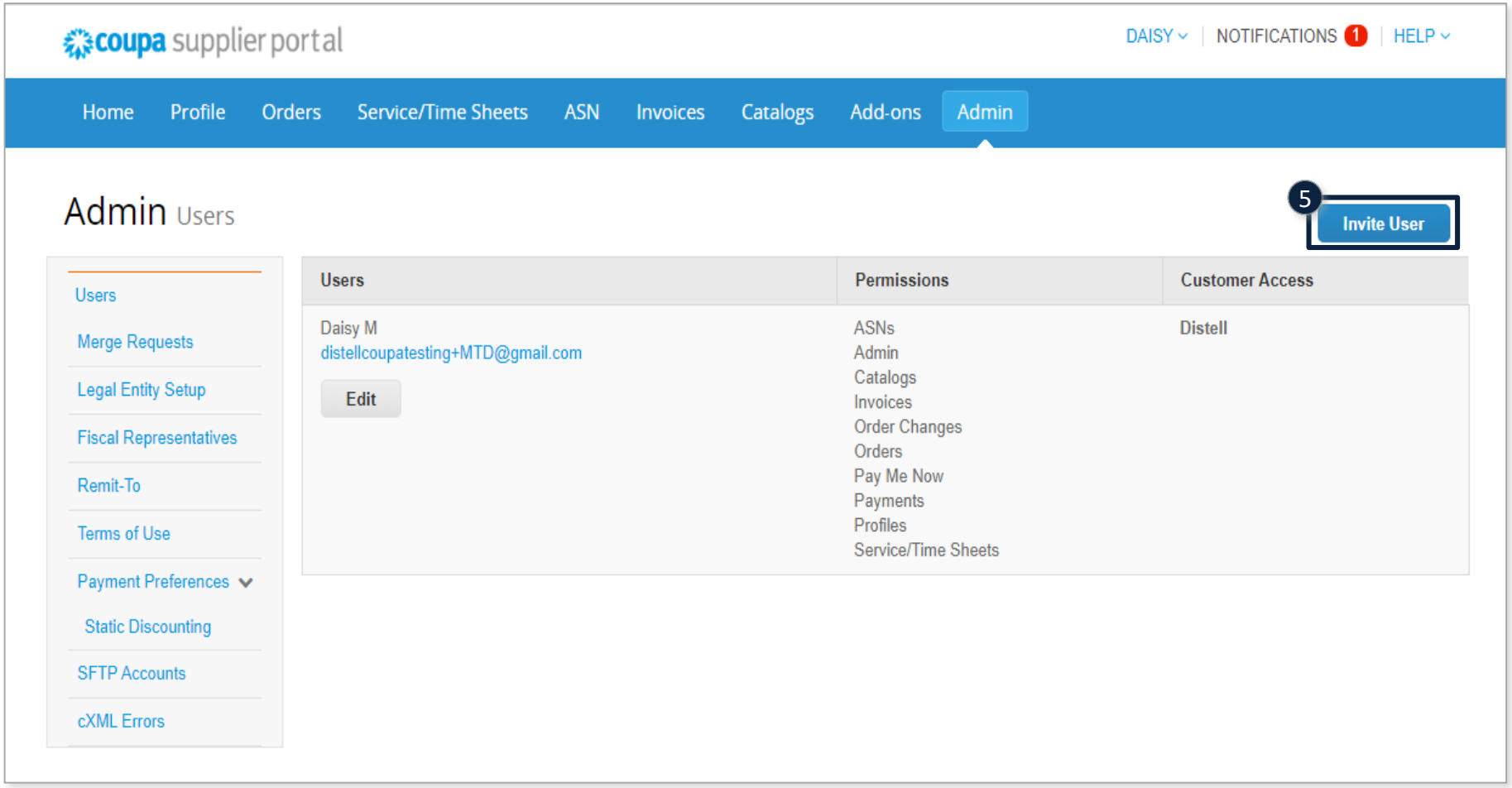


Adding a User to the CSP

Invite a user

Process Steps:

5 Click "**Invite User**" to give another user in your organization access.



User Roles on the CSP

Role/Permission	Description
All	Gives the user full access to all CSP functions with the exception of the user administration role / function.
Admin	The admin user 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. Note: The permissions on the invitation cannot exceed the permissions of the user creating the invitation.
Orders	Allows the user to view and manage Purchase Orders (POs) received from customers
Restricted access of orders	Allows the user to access POs and PO changes. Note: The permission is off by default.
Invoices	Allows the user to create and send invoices to customers.
Catalogues	Allows the user to create and manage customer-specific electronic catalogues.
Profiles	Allows the user to modify customer-specific profiles. Note: All users, regardless of permissions, can edit the public profile.
ASNs	Allows the user to create and send advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows the user to create and submit service/time sheets against POs.
Payments	Allows a user to view payments and download digital checks.
Order Changes	Allows a user to submit PO change requests.
Pay Me Now	Is available only if your customers use Coupa Pay and have enabled the feature related to this permission

Assigning User Roles / Customer permissions

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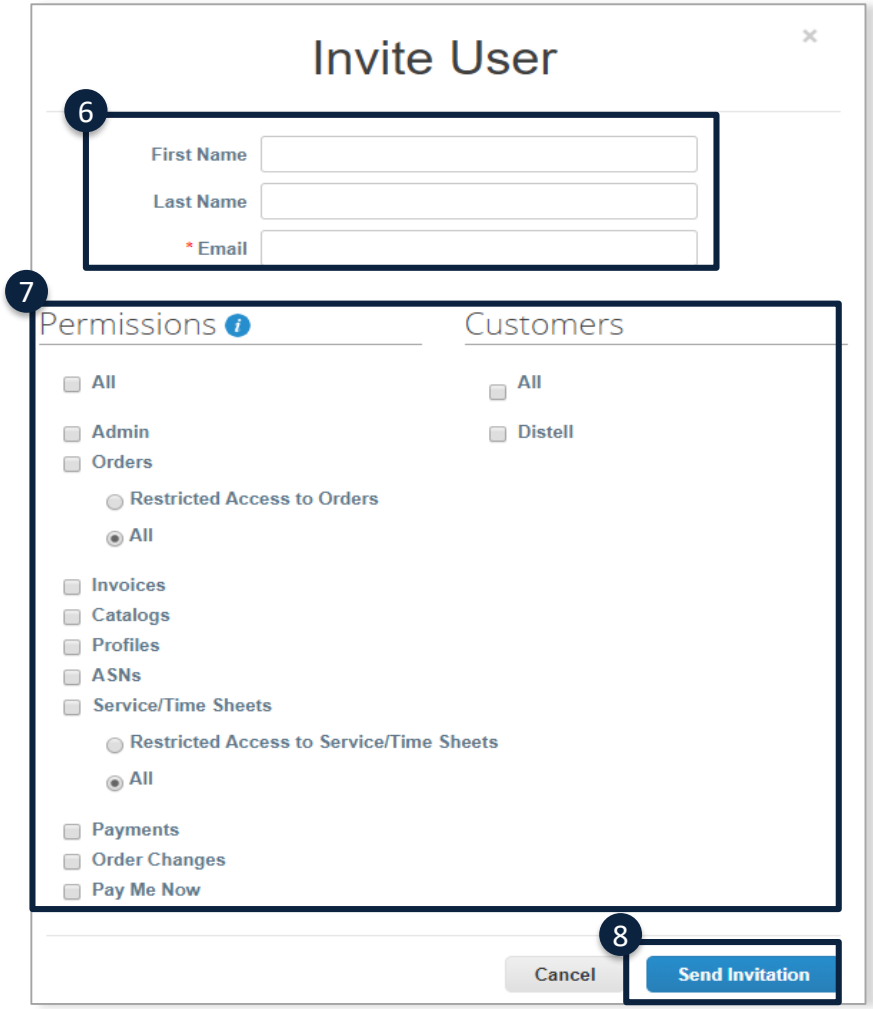
Assign user permissions

Process Steps:

6. **User details**
   Populate the user's First Name, Last Name and Email address.

7. **Permissions and customers**
   Click on the tick box to assign roles and customers to the user.

8. Click on "**Send Invitation**" to send the registration to the user.



Deactivating a User on the CSP

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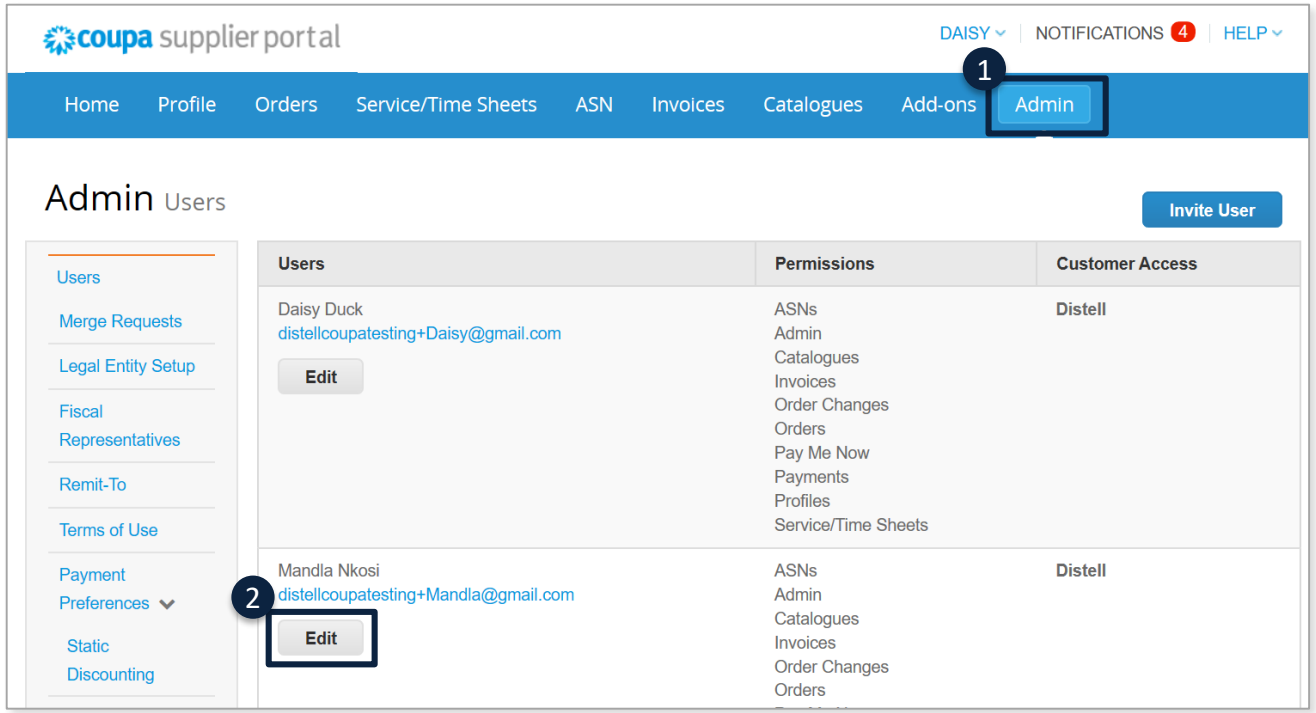
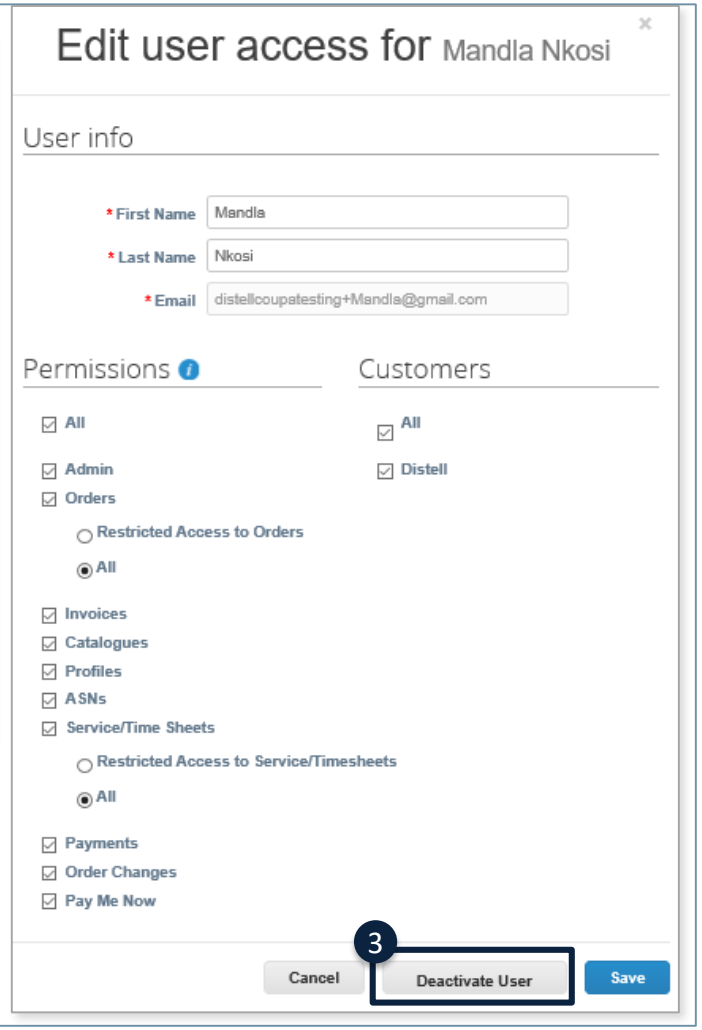
Deactivating a user that has left your organisation or that has changed roles:

Process Steps:

1. To deactivate a user navigate to the "**Admin**" tab and click on "**Users**".
2. **Permissions and customers** Once you have accessed the admin tab navigate to the user you want to deactivate and click "**Edit**".
3. Click on "**Deactivate user**" to deactivate the user on the CSP.





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END- THANK YOU

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