User Management: Supplier Guide

Summary

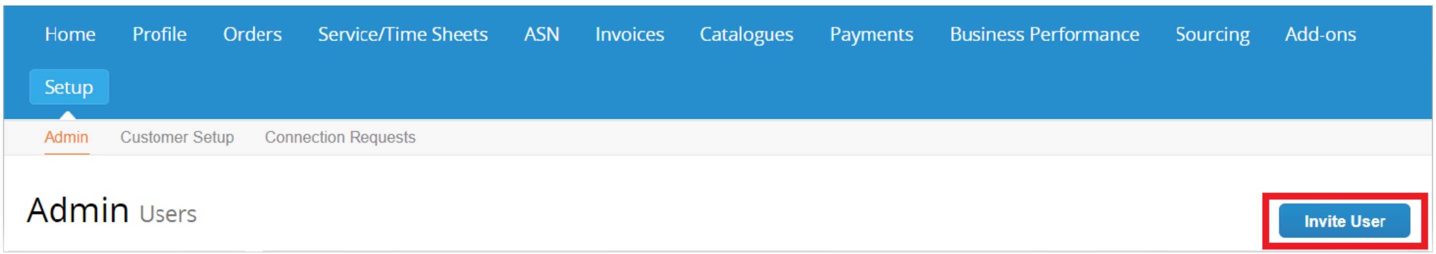
This document will guide you (the supplier) through the management of users on your Coupa Supplier Portal (CSP) account.

Contents

You will need to be the Admin (Primary Contact) user to make any changes to users

1. Inviting a New User

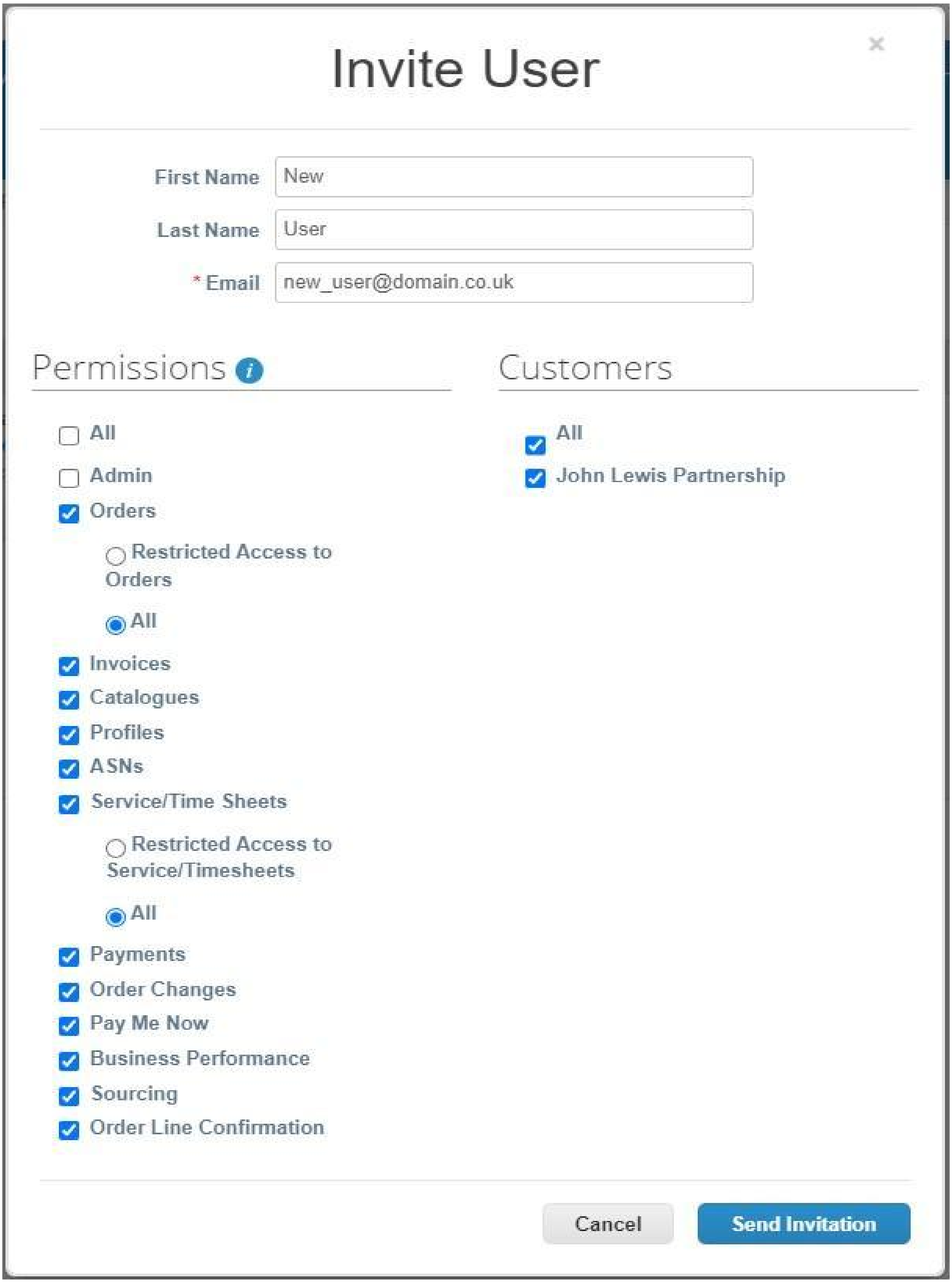
Navigate to the Setup tab, this will bring you to the Admin Users page. Click on 'Invite User'



This will bring you to the screen on the next page where you will be able to set the permissions and rights for the user.

Permissions grant access for users to corresponding menu items. As an admin user, you have all the permissions by default.

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 with their assigned customers.



On the next two pages is a list of all the permissions and their descriptions.

Permissions	Description
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 purchase orders (POs) received from customers. When selected, All is on by default.
Restricted Access to Orders	Allows accessing specific POs (assigned to specific users).The permission is off by default.
All	Allows viewing and managing all POs received from customers.When Orders is selected, it is on by default.
Invoices	Allows creating and sending invoices to customers.
Catalogs	Allows creating and managing customer-specific electronic catalogues.
Profiles	Allows modifying customer-specific profiles. Note: All users, regardless of permissions, can edit the public profile.
ASNs	Allows creating and sending advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows creating and submitting service/time sheets against POs.When selected, All is on by default.

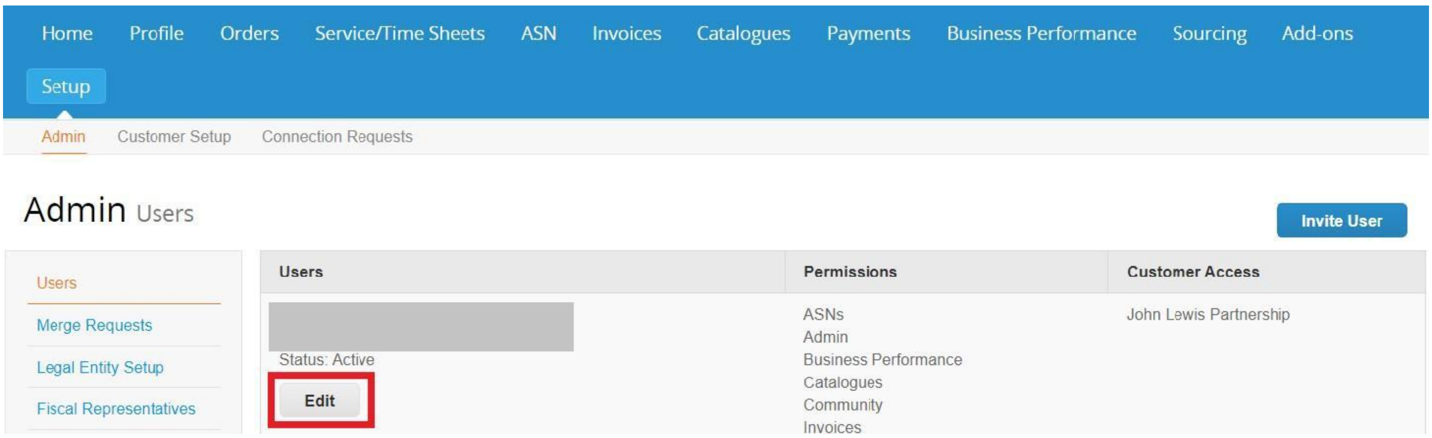
Restricted Access to Service/Time Sheets	Allows accessing specific service/time sheets (assigned to specific users).The permission is off by default.

All	Allows creating and submitting any service/time sheets against POs.When Service/Time Sheets is selected, it is on by default.
Payments	Allows viewing payments and downloading digital checks.
Order Changes	Allows submitting PO change requests.
Pay Me Now	Available only if your customers use Coupa Pay and enable the feature related to this permission.
Business Performance	Allows viewing business performance information, for example, order, invoice, and delivery trends.
Sourcing	Allows viewing public sourcing events.

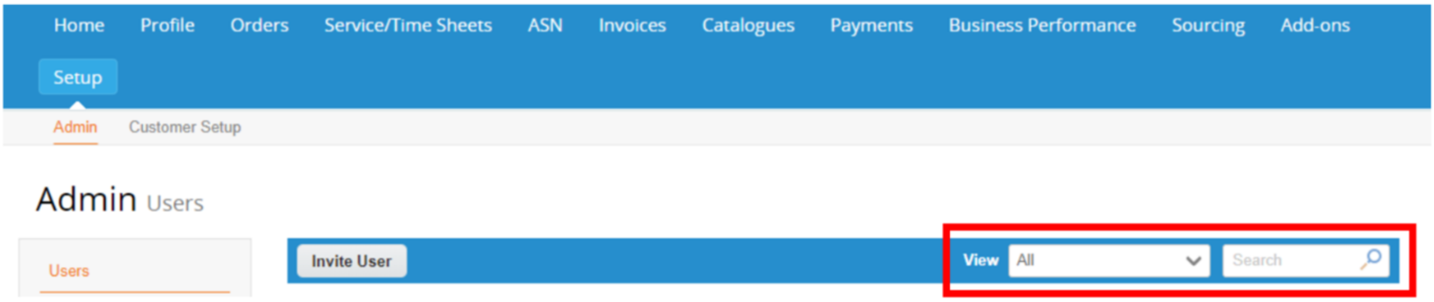
Once you have selected the permissions click on 'Send Invitation' and this will invite the new user.

2. Manage User Permissions

Navigate to the Setup tab, this will bring you to the Admin Users page. Click on 'Edit' on the user you wish to amend.



You can search for the user you would like to edit by using the search bar on the top right of this page. You can also filter to show 'Active', 'Inactive' and 'Deactivated'.

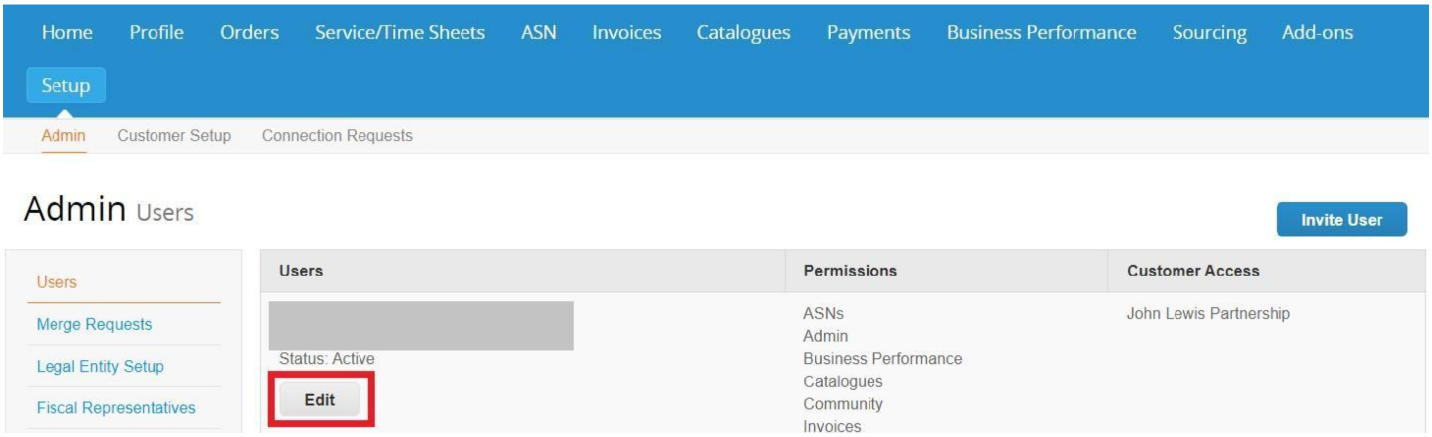


You cannot change the user's email address. If a user wants to change the email address, send a new invitation to that user.

However you can amend the name and permissions. (Use the permissions detail in section 1)

3. Deactivate a User

Navigate to the Setup tab, this will bring you to the Admin Users page. Click on 'Edit' on the user you wish to deactivate.



At the bottom of the screen you will have a 'Deactivate User' button, click this to deactivate the user.
Note:The Deactivate User button is inactive when you edit your own access to avoid deactivating your own account.

4. Reactivate a User

Navigate to the Setup tab, this will bring you to the Admin Users page. Click on 'Activate User' on the user you wish to reactivate.This will send an activation email to the user.