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Inviting and managing additional users in Coupa Supplier Portal

Coupa Supplier Guide

Inviting additional users

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Sourcing. Below this is a secondary navigation bar with 'Add-ons' and 'Setup' (highlighted with a red box). Under 'Add-ons', there are sub-tabs for 'Admin' and 'Customer Setup'. The main content area is titled 'Admin Users' and contains a sidebar with various options: Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, and Additional CaaS Information. The 'Users' sub-tab is highlighted with a red box. In the top right of the 'Users' section, there is a blue button labeled 'Invite User' (highlighted with a red box and a blue '1' in a square above it), a 'View' dropdown menu set to 'All', and a search box. Below these elements is a table with the following columns: User Name, Email, Status, Permissions, Customer Access, and Actions. The table contains one row for a user named 'supplier demo' with email 'sherwinsupplieremeai+AV@gmail.com', status 'Active', and a list of permissions including ASNs, Admin, Business Performance, Catalogs, Early Payments, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, and Profiles. The 'Customer Access' is 'Sherwin-Williams' and the 'Actions' column has an 'Edit' link. At the bottom right, there is a blue button labeled 'Chat with Coupa Support'.

1. To add more users who have access to the CSP, navigate to the Setup tab and there to the users subsection. Click on the Invite User button at the top.

User Name	Email	Status	Permissions	Customer Access	Actions
supplier demo	sherwinsupplieremeai+AV@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles	Sherwin-Williams	Edit

Coupa Supplier Guide

Inviting additional users

2. Fill in the details of the user you want to add and select their permissions.

2

Invite User

First Name

Last Name

* Email

Permissions ⓘ

All

Admin

Orders

Restricted Access to Orders

All

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Restricted Access to Service/Time Sheets

All

Payments

Order Changes

Early Payments

Business Performance

Sourcing

Order Line Confirmation

Customers

All

Sherwin-Williams

Cancel Send Invitation

1. **All:** Gives full access to all CSP functions, except for user administration.
2. **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.
3. **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.
4. **Invoices:** Allows creating and sending invoices to customers.
5. **Catalogs:** Allows creating and managing customer-specific electronic catalogs.
6. **Profiles:** Allows modifying customer-specific profiles. Note: All users, regardless of permissions, can edit the public profile.

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Inviting additional users

2. Fill in the details of the user you want to add and select their permissions.

2

Invite User

First Name

Last Name

* Email

Permissions ⓘ

Customers

All

Admin

Orders

Restricted Access to Orders

All

Invoices

Catalogs

Profiles

ASNs

Service/Time Sheets

Restricted Access to Service/Time Sheets

All

Payments

Order Changes

Early Payments

Business Performance

Sourcing

Order Line Confirmation

All

Sherwin-Williams

Cancel Send Invitation

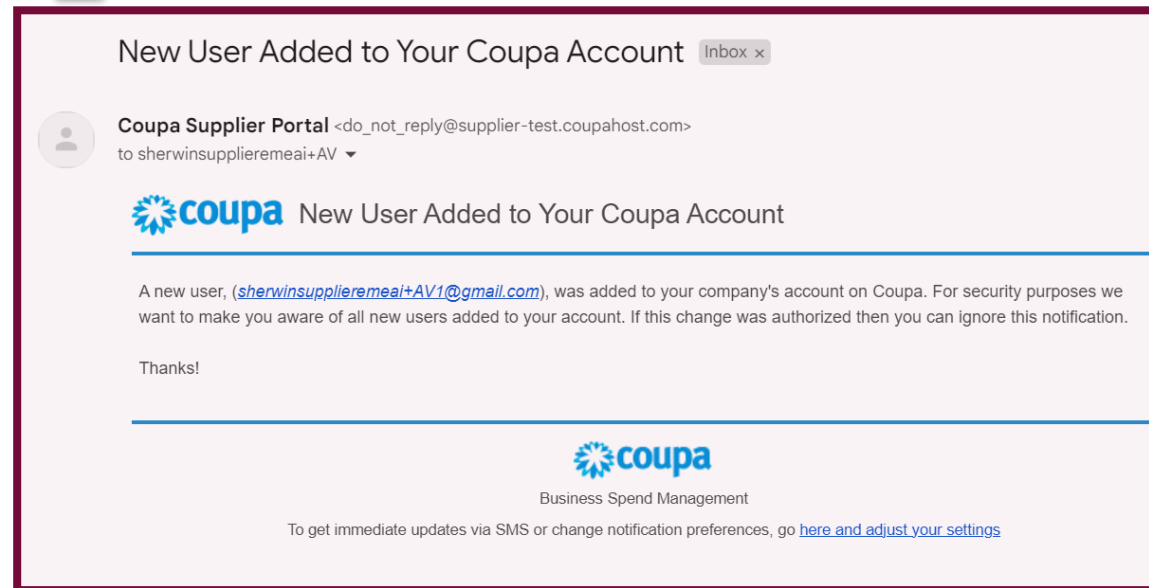
- ASNs:** Allows creating and sending advance ship notices (ASNs) to customers.
- Service/Time Sheets:** Allows creating and submitting service/time sheets against POs. When selected, All is on by default.
Restricted Access to Service/Time Sheets: Allows accessing specific service/time sheets (assigned 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.
- Early Payments:** Available only if your customers use Coupa Pay and enabled 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.
- Order line confirmation:** Allow sending out order line confirmations

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Inviting additional users

3. After clicking on send invitation, you will receive the below confirmation email

3





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Inviting additional users

4. The user you added will receive the following email. If they click on the Join Coupa button, they have to enter their name and a password to set up their Coupa account. The other data will come from the account you already set up.

Action Required for AV demo Supplier - Click Below to Join Coupa Inbox x

 **Coupa Supplier Portal** <do_not_reply@supplier-test.coupahost.com> 4
to sherwinsupplieremeai+AV1 ▾

 **Action Required for AV demo Supplier - Click Below to Join Coupa**


Hi sherwinsupplieremeai+AV1@gmail.com,

A coworker invited you to join their account on Coupa. Once registered, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more when working with buying organizations that use Coupa.

The Coupa Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the button to register. Welcome!

[Join Coupa](#) [Forward this invitation](#)

Overview Learn more about the Coupa Supplier Portal	Need Help? Answers to common questions and issues	Coupa Info Learn more about how companies use Coupa
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Business Spend Management

Coupa Supplier Guide

Managing additional users

coupa supplier portal SUPPLIER ▾ | NOTIFICATIONS 10 | HELP ▾

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons **Setup**

Admin Customer Setup

Admin Users

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Invite User View All ▾ Search 🔍

User Name	Email	Status	Permissions	Customer Access	Actions
supplier demo	sherwinsupplieremeai+AV@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Sherwin-Williams	Edit
Supplier user 2 Demo	sherwinsupplieremeai+AV1@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Sherwin-Williams	Edit

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Once the newly added user set up their account, they will pop up in the users tab in Admin setup

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Managing additional users

By clicking on edit, you can change their permissions or deactivate the user if desired.

Edit user access for Supplier user 2 ×

Demo

User info

* First Name

* Last Name

* Email

Permissions i

- All
- Admin
- Orders
 - Restricted Access to Orders
 - All
- Invoices
- Catalogs
- Profiles
- ASNs
- Service/Time Sheets
 - Restricted Access to Service/Time Sheets
 - All
- Payments
- Order Changes
- Early Payments
- Business Performance
- Sourcing
- Order Line Confirmation

Customers

- All
- Sherwin-Williams

Cancel

Deactivate User

Save