Inviting and managing additional users in Coupa Supplier Portal

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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.

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

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.

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
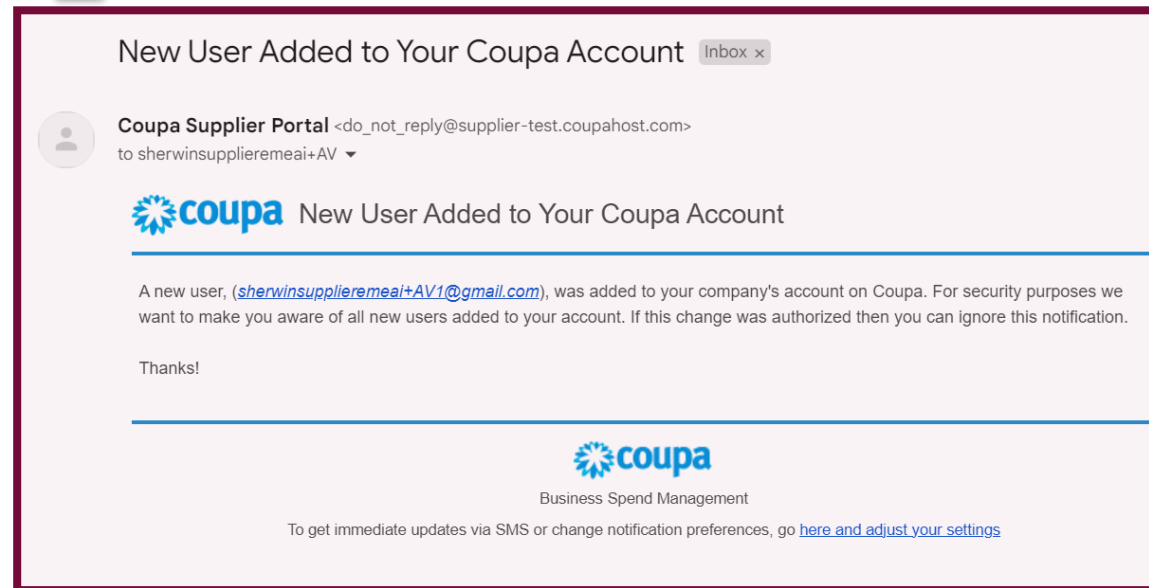- ☑ Sherwin-Williams

Cancel   Send Invitation

7. **ASNs:** Allows creating and sending advance ship notices (ASNs) to customers.
8. **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.
9. **Payments:** Allows viewing payments and downloading digital checks.
10. **Order Changes:** Allows submitting PO change requests.
11. **Early Payments:** Available only if your customers use Coupa Pay and enabled the feature related to this permission.
12. **Business Performance:** Allows viewing business performance information, for example, order, invoice, and delivery trends.
13. **Sourcing:** Allows viewing public sourcing events.
14. **Order line confirmation:** Allow sending out order line confirmations

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

3

New User Added to Your Coupa Account Inbox ×

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

coupa New User Added to Your Coupa Account

A new user, (sherwinsupplieremeai+AV1@gmail.com), was added to your company's account on Coupa. For security purposes we want to make you aware of all new users added to your account. If this change was authorized then you can ignore this notification.

Thanks!

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To get immediate updates via SMS or change notification preferences, go here and adjust your settings

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 ×

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

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

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Coupa Supplier Guide
Managing additional users

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

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 [Supplier user 2]

* Last Name [Demo]

* Email [sherwinsupplieremeai+AV1@gmail.com]

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   **Deactivate User**   Save

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