MANAGE USERS IN COUPA SUPPLIER PORTAL

Coupa Supplier Portal (CSP) – User Guide

Version 1.0 (August 2023)

1. General Information

If you are the Primary Contact "Administrator", you will need to check the permissions assigned to users.
Permissions grant access for users to corresponding menu items. As an admin user, you have all the permissions by default.
Administrators can manage user permissions and customer access by:

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- Assigning certain users to only certain customers
- Limiting the types of documents, they are able to access
  What functions they can perform with their assigned customers

In the "Setup" > Admin Users table, there is the option to invite new users. You need to select the "Invite User" button and completing the appropriate fields that appear.

Once they accept your invite, you will be able to locate them in the "Admin Users" table and manage their access by updating the permissions required to perform their role.

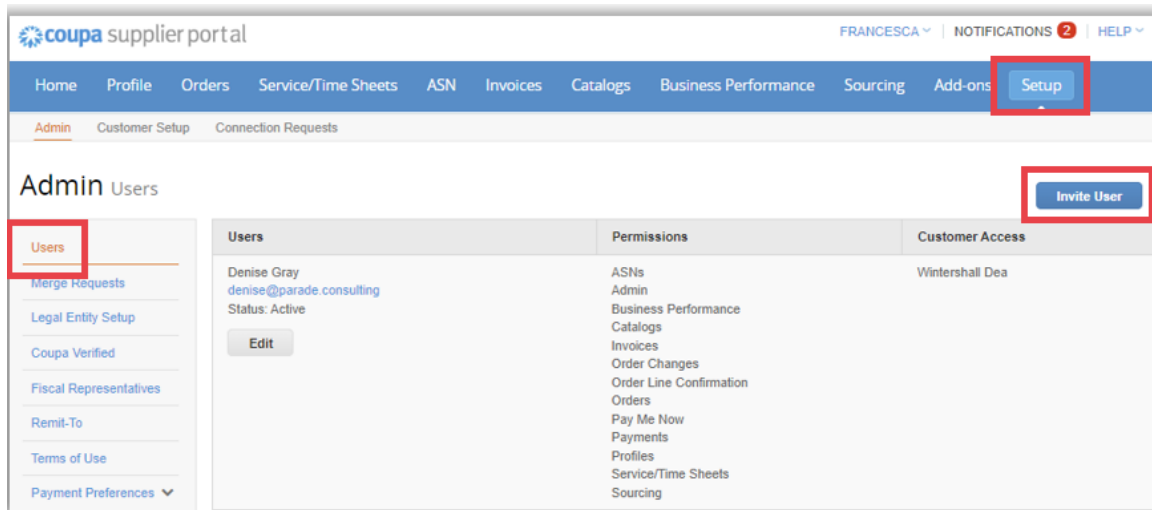You will also be able to deactivate users.

Please ensure, that you have more than one administrator. This will avoid issues during periods of absence or if an employee leaves your company, and ensures user access can continue to be managed.
The Admin User(s) must delegate the role before they leave company to ensure, that another person can take over the task!
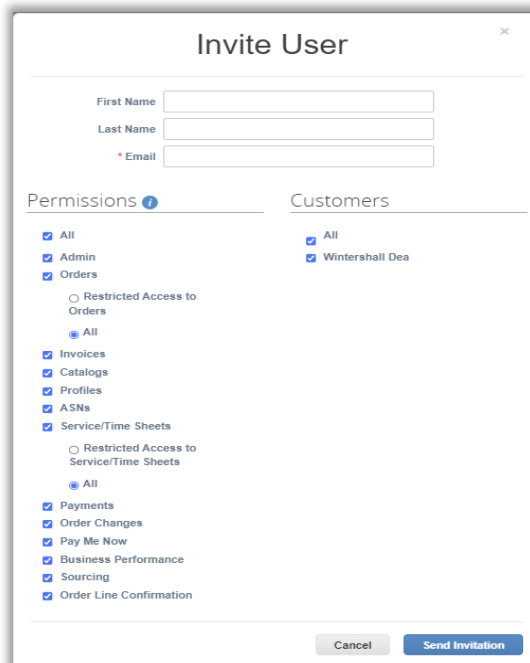
2. How to set up a new user

To create a new user in the portal, your administrator will need to "Invite" them to register. Go to "Setup" > Admin Users and click the button Invite User.

This is an Example for Illustrative Purposes only

Once the Invite User button is selected you will see the following Invite User screen:

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Here you should enter the first and last name and full email address of the individual who requires access.

You will also be able to select what access should be given to the individual.

For example, the difference between a sales role for managing POs and an Accounts Payable role which only requires access to invoices and payments.

Once you have completed the access rights, you will need to select the "Send Invitation" button. This action will send an email to the individual.

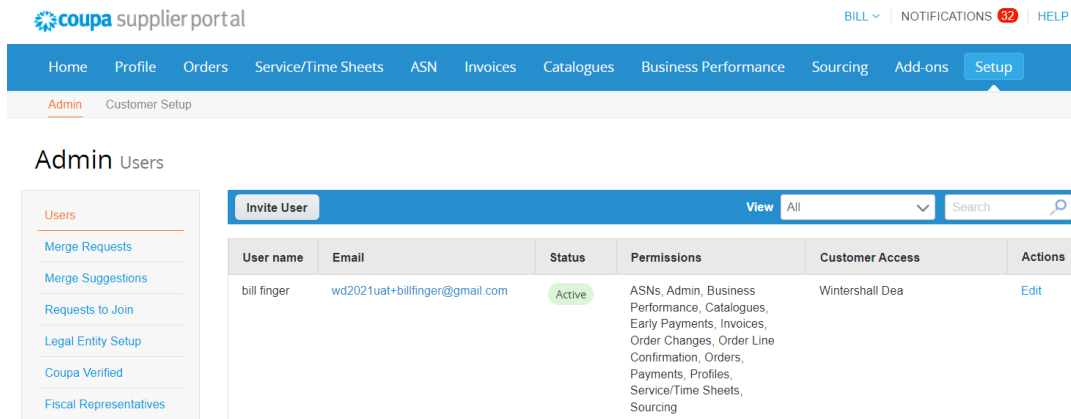They will then be asked to accept the invitation and set a password.

User Permissions Explained

The following table explains the different 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 catalogues
Profiles	Allows modifying customer-specific profiles
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 of digital cheques
Order Changes	Allows submitting of PO change requests
Pay Me Now	Available only if your customers use Coupa Pay and have enabled the feature related to this Permission
Business Performance	Allows individuals to see a Coupa generated report which shows, for example, the number of Purchase Orders received, invoices sent to customers etc.
Sourcing	This permission allows participation and views of any sourcing event created by the customers you have, who are also registered in Coupa.
Order Line Confirmation	This permission allows you to acknowledge an order

3. Edit / Change a user

Go to "Setup" > "Admin Users" page.

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Click on the "Edit" button to open the "Edit user" window.

You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

> ⚠️ You cannot change the user's email address. If a user wants to change the email address, send a new invitation to that user, using their alternative email address.
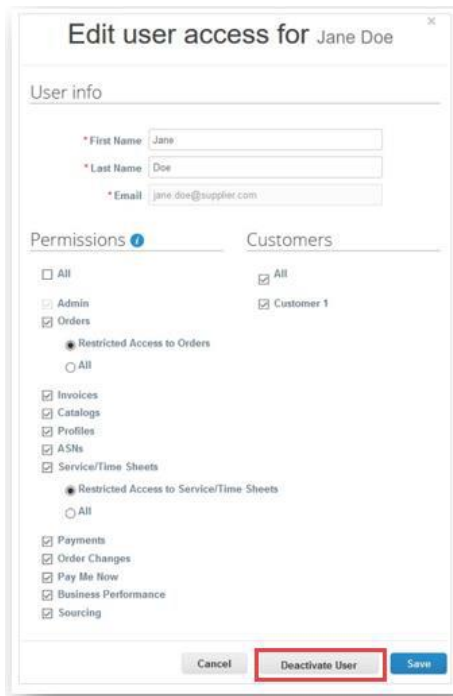
4. Deactivate a User

For auditing purposes, Coupa does not allow users to be deleted, so you cannot delete a user from your supplier profile.
Instead, you will need to deactivate a user when you no longer want that user to be able to access the account.
Go to "Setup" > "Admin Users" page.
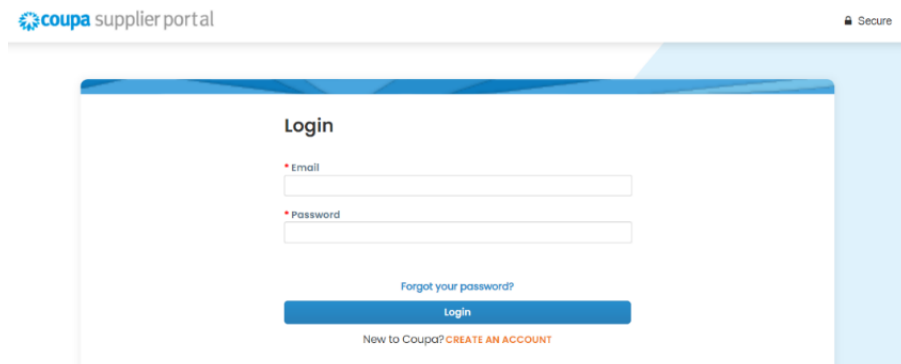Select the respective user name and click the button "Edit" and select "Deactivate User".

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5. Reset a passwords

You can reset your password by your own. On the staring page you can click the button "Forgot your Password?" to create a new one.

 Harbour Energy cannot reset a password on behalf of a user.

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