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## 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:

- 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.

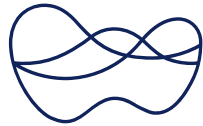
Once they accept your invite, you will be able to locate them in the **"Admin Users"** table and manage their access by updating the permissions required to perform their role.

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!**



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## 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**.

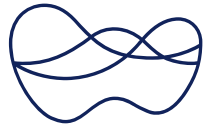
The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as FRANCESCA. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup (highlighted with a red box). Below the navigation bar, the 'Admin' section is active, showing 'Admin Users'. The 'Users' tab is selected and highlighted with a red box. A table lists the current user, Denise Gray, with an 'Edit' button. An 'Invite User' button is highlighted with a red box in the top right corner of the table area.

Users	Permissions	Customer Access
Denise Gray denise@parade.consulting Status: Active <a href="#">Edit</a>	ASNs Admin Business Performance Catalogs Invoices Order Changes Order Line Confirmation Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	Wintershall Dea

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

The 'Invite User' modal form includes the following fields and sections:

- First Name:
- Last Name:
- \* Email:
- Permissions:  All,  Admin,  Orders,  Restricted Access to Orders,  Invoices,  Catalogs,  Profiles,  ASNs,  Service/Time Sheets,  Restricted Access to Service/Time Sheets,  Payments,  Order Changes,  Pay Me Now,  Business Performance,  Sourcing,  Order Line Confirmation
- Customers:  All,  Wintershall Dea
- Buttons: [Cancel](#), [Send Invitation](#)



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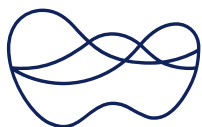
Here you should enter the **first and last name** and **full email address** of the individual who requires access.

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.

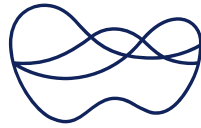


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## User Permissions Explained

The following table explains the different permissions:

<b>All</b>	Gives full access to all CSP functions, except for user administration.
<b>Admin</b>	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. Note: All users, regardless of permissions, can edit the public profile
<b>Orders</b>	Allows viewing and managing of Purchase Orders (POs) received from customers.
<b>Invoices</b>	Allows creating and sending of invoices to customers.
<b>Catalogues</b>	Allows creating and managing of customer-specific electronic catalogues
<b>Profiles</b>	Allows modifying customer-specific profiles.
<b>ASNs</b>	Allows creating and sending of Advanced Ship Notices (ASNs) to customers.
<b>Service/Time Sheets</b>	Allows creating and submitting of service/time sheets against POs.
<b>Payments</b>	Allows viewing of payments and downloading digital checks.
<b>Order Changes</b>	Allows submitting of PO change requests.
<b>Pay Me Now</b>	Available only if your customers use Coupa Pay and have enabled the feature related to this permission.
<b>Business Performance</b>	Allows individuals to see a Coupa generated report which shows, for example, the number of Purchase Orders received, invoices sent to customers etc.
<b>Sourcing</b>	This permission allows participation and views of any sourcing events created by the customers you have, who are also registered in Coupa
<b>Order Line Confirmation</b>	This permission allows you to acknowledge an order



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### 3. Edit / Change a user

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

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Setup' highlighted. Below it, a sub-menu shows 'Admin' selected. The main content area is titled 'Admin Users' and contains a table of users. The table has columns for 'User name', 'Email', 'Status', 'Permissions', 'Customer Access', and 'Actions'. One user is listed: 'bill finger' with email 'wd2021uat+billfinger@gmail.com', status 'Active', and a list of permissions including ASNs, Admin, Business Performance, Catalogues, Early Payments, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, Profiles, Service/Time Sheets, and Sourcing. An 'Edit' button is visible in the Actions column.

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.**

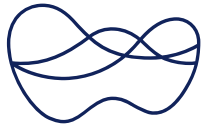
### 4. Deactivate a User

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 starting page you can click the button **"Forgot your Password?"** to create a new one.



**Wintershall Dea cannot reset a password on behalf of a user.**