



RFS

Coupa Supplier Portal- CSP

How to Invite users (co-workers) & edit users in your CSP account

Feb 2024

Background

This guide will explain how Suppliers can invite a coworker (other users) into their existing Coupa Supplier Portal Account & change users. Once you are connected on the CSP with the RFS, you may need to add an additional user to your account or edit existing users.

Outline

RFS sends an invitation to register on the CSP. The supplier user registers and links their CSP account but then needs to add in additional or edit users to assist with this function.

You can add other users, define the user's role/permissions, and customise the customer accounts they can see and interact with.

Note – For audit purposes, Coupa does not allow users to be deleted, so you cannot delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

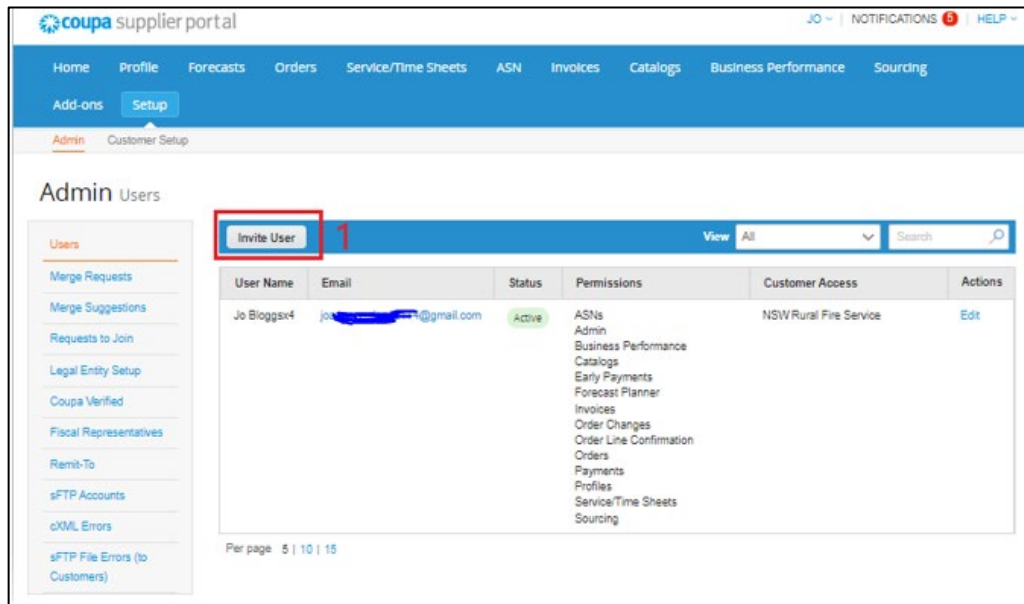
Warning – Invitations to the CSP expire after 30 days

Supplier: Invite users “Co-worker” users to CSP account – Step 1/2/3/4

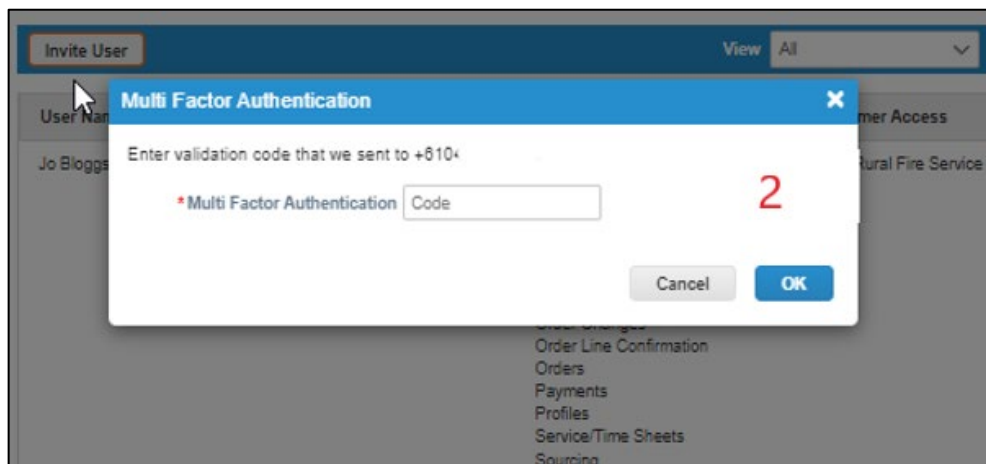
Below are the steps to be followed to invite additional users:

As a Supplier “admin user”, you have all the permissions by default.

1. The supplier admin user who registered the Supplier on the CSP has the home page screen open. The Supplier user then selects the **Setup & Admin** tab and then selects **invite user**.
2. If you have Multi factor authentication turned on you will need to add the code which has been sent to your phone or email into the box and then click ok
3. Enter the basic info in the fields - add the **first/last name** and **email** address of the user who you would like to add into your CSP account.
4. You can also provide the permissions and customers that you would like the user to have by selecting the checkboxes under **permissions** and **customers**, once done click **send invitation**. The invited user will receive an email.



The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The 'Invite User' button is highlighted with a red box and a red number 1. The page displays a table of users with the following columns: User Name, Email, Status, Permissions, Customer Access, and Actions. A user named 'Jo Bloggsx4' is listed with an email address and a status of 'Active'. The permissions listed for this user include: ASNs, Admin, Business Performance, Catalogs, Early Payments, Forecast Planner, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, Profiles, Service/Time Sheets, and Sourcing. The customer access is 'NSW Rural Fire Service'. The page also shows a search bar and a 'View' dropdown set to 'All'.



The screenshot shows the 'Invite User' dialog box. A 'Multi Factor Authentication' modal is open, prompting the user to enter a validation code. The modal has a red number 2 next to it. The background shows the 'Invite User' form with fields for User Name and Email.

Invite User 3

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
- Forecast Planner

Customers

- All
- NSW Rural Fire Service

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Cancel
Send Invitation

Supplier: Edit users to CSP account – Step 5/6/7/8

Below are the steps to be followed to edit existing users:

The “user” section will allow you to manager those users account currently in CSP for your organisation.

5. You can also limit the access of users by editing “exisitng users”.
Click on the **edit** button to open the **edit user access** screen - select [user name]

coupa supplier portal
JO ~ | NOTIFICATIONS 3 | HELP ~

Home
Profile
Forecasts
Orders
Service/Time Sheets
ASN
Invoices
Catalogs
Business Performance
Sourcing

Add-ons
Setup

Admin
Customer Setup

Admin Users

Invite User

View: All

Search

User Name	Email	Status	Permissions	Customer Access	Actions
Jo Bloggsx4	jo...@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	NSW Rural Fire Service	Edit 5

Per page 5 | 10 | 15

6. In the **edit user access** screen you can change the user's name, modify the user's permissions and customer access,
7. or **deactivate** the user.
8. Once changes have been made click the **save** button

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

Edit user access for Jo Bloggsx4 ^x6

User info

* 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
- Forecast Planner

Customers

- All
- NSW Rural Fire Service

For further information – go to the [Coupa Supplier Portal](#) or contact Coupa via email sourcing.support@coupa.com

