



## Managing Users on the CSP

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# 01

## Course Outline

### Description

This course explains to create and deactivate users on the Coupa Supplier Portal (CSP).

### Objectives

**After completing this course, you will be able to:**

1. Add users on the CSP
2. Deactivate a user on the CSP
3. Reactivate a user on the CSP



## Managing Users on the Coupa Supplier Portal

# Managing Users: Admin Role

How to manage users on the CSP account.

**It is extremely important that an Admin user considers the below when managing users on the CSP**

As an Admin user you can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform within their assigned role and for their assigned customers.

## **The Admin role will allow you to:**

- Change a user's name
- Modify a user's permissions
- Give users access to a customer
- Deactivate a user

For auditing purposes, Coupa does not allow users to be deleted, therefore 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.

If you deactivate a user you can always reactivate that user later. However, when a user is reactivated the customer access for that user is reset, so you'll have to assign customers to that user again.

**Note: The "Deactivate User" button is inactive when you edit your own access to avoid deactivating your own account.**

# Adding Users to the CSP

The first step to adding additional users is to login to the CSP.

## Process Steps:

- 1 Email address**  
Populate your email address (Username).
- 2 Password**  
Populate your password.
- 3 Log In**  
Click on log in to access your company's Coupa Portal.

The screenshot shows the 'coupa supplier portal' header with a 'Secure' indicator. The main content area is titled 'Login'. It contains three input fields: 'Email' (marked with a red asterisk), 'Password' (marked with a red asterisk), and a 'Forgot your password?' link. Below these fields is a blue 'Login' button. At the bottom, it says 'New to Coupa? CREATE AN ACCOUNT'. Three blue circular callouts with numbers 1, 2, and 3 are overlaid on the form: 1 points to the Email field, 2 points to the Password field, and 3 points to the Login button.

# Adding Users to the CSP

Access setup.

## Process Steps:

- 4 Once you have accessed the portal navigate to the "Setup" tab and select it.
- 5 Click "Invite User" to give another user in your organization EDF Renewables access

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, and Sourcing. The 'Setup' tab is highlighted under the 'Add-ons' section. The 'Admin Users' section is active, showing a list of users. The 'Invite User' button is highlighted in the left sidebar. A table lists existing users, including 'Deloitte Consulting' with email 'edfcoupatesting@gmail.com' and status 'Active'.

User name	Email	Status	Permissions	Customer Access	Actions
Deloitte Consulting	edfcoupatesting@gmail.com	Active	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	EDF Renewables (Pty) Ltd	Edit

# User Roles in Coupa

Role/Permission	Description
All	Gives the user full access to all CSP functions except for the user administration role / function.
Admin	The admin user 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. Note: The permissions on the invitation cannot exceed the permissions of the user creating the invitation.
Orders	Allows the user to view and manage Purchase Orders (POs) received from customers
Restricted access of orders	Allows the user to access POs and PO changes. Note: The permission is off by default.
Invoices	Allows the user to create and send invoices to customers.
Catalogues	Allows the user to create and manage customer-specific electronic catalogues.
Profiles	Allows the user to modify customer-specific profiles. Note: All users, regardless of permissions, can edit the public profile.
ASNs	Allows the user to create and send advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows the user to create and submit service/time sheets against POs.
Payments	Allows a user to view payments and download digital checks.
Order Changes	Allows a user to submit PO change requests.
Early Payment	Is available only if your customers use Coupa Pay and have 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.

# Assigning User Roles/ Permissions

Assign user permissions.

## Process Steps:

- 6 User details**  
Populate the user's First Name, Last Name and Email address.
- 7 Permissions and customers**  
Click on the tick box to assign roles and customers to the user.
- 8** Click on "Send Invitation" to send the registration to the user.
- 9** Admin users will be notified of all user creation via email

The 'Invite User' form is divided into two main sections: 'User details' and 'Permissions & Customers'.

- 6** Points to the 'First Name', 'Last Name', and 'Email' input fields in the 'User details' section.
- 7** Points to the 'Permissions' and 'Customers' sections. The 'Permissions' section has a list of checkboxes: 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'All' (selected), 'Invoices', 'Catalogues', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Timesheets', 'All' (selected), 'Payments', 'Order Changes', 'Early Payments', 'Business Performance', 'Sourcing', 'Order Line Confirmation', and 'Forecast Planner'. The 'Customers' section has checkboxes for 'All' and 'EDF Renewables (Pty) Ltd'.
- 8** Points to the 'Send Invitation' button at the bottom right of the form.

The confirmation message displays the Coupa logo and the title 'New Coupa User Added'.

Hello Deloitte,

A new user, Carol Smith ([edfcoupatesting+carol@gmail.com](mailto:edfcoupatesting+carol@gmail.com)), has been added to your company's Coupa account.

This user will now have access to the Coupa Supplier Portal.

If you do not recognise this user or would like to cancel this invitation, please reach out to [Coupa Support](#)

If you would like to remove this user, or make any changes to their permissions in your company's account, please click the button below.

**Manage Users**

**9** Points to the 'Manage Users' button at the bottom of the message.

# 02

## Deactivating Users on the Coupa Supplier Portal

# Deactivating Users on the CSP

Assign user permissions

## Process Steps:

- 1 To deactivate a user navigate to the "Setup"
- 2 Once you have accessed the setup tab navigate to the user you want to deactivate and click "Edit".
- 3 Click on "Deactivate user" to deactivate the user on the CSP.
- 4 User status will be updated from active to "Deactivated"

\*For auditing purposes Coupa does not delete user records

The image displays three screenshots from the Coupa Supplier Portal illustrating the user deactivation process.

**Top Screenshot:** Shows the 'coupa supplier portal' header with navigation tabs: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, and Sourcing. The 'Setup' tab is highlighted with a red box and a '1' icon.

**Middle Screenshot:** Shows the 'Admin Users' section. A table lists users, including Carol Smith (email: edicoupatesting+carol@gmail.com) with status 'Active'. The 'Edit' button for Carol Smith is highlighted with a red box and a '2' icon.

**Bottom Screenshot:** Shows the 'Edit user access for Carol Smith' form. The 'Permissions' section is expanded, showing a list of permissions with checkboxes. The 'Deactivate User' button is highlighted with a red box and a '3' icon.

**Bottom Screenshot (continued):** Shows the 'Admin Users' section again, where Carol Smith's status is now 'Deactivated'.

# Reactivating Users on the CSP

Assign user permissions

## Process Steps:

- 1 To reactivate a user navigate to the "Setup"
- 2 Once you have accessed the setup tab navigate to the user you want to activate and click "Activate".
- 3 The user will receive an email to "Reactivate Account "
- 4 The user will not be active

The screenshot shows the Coupa Supplier Portal Admin Users page. The 'Setup' tab is selected in the top navigation bar, indicated by a red circle with the number 1. The 'Admin Users' section is active, showing a table of users. The user 'Carol Smith' is listed with a status of 'Deactivated'. A red circle with the number 2 highlights the 'Activate' button in the 'Actions' column. Below the table, a confirmation message states: 'Hello Carol, Your account admin has requested that you reactivate your account. Once activated, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more. Click the button below to reactivate your account.' A red circle with the number 3 highlights the 'Reactivate Account' button. The table shows the user's status has changed to 'Active', indicated by a red circle with the number 4.

User name	Email	Status	Permissions	Customer Access	Actions
Carol Smith	edfcoupatesting+carol@gmail.com	Deactivated	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	EDF Renewables (Pty) Ltd	Activate

Reactivate your Coupa Supplier Portal Account

Hello Carol,

Your account admin has requested that you reactivate your account.

Once activated, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more. Click the button below to reactivate your account.

Reactivate Account



Thank You!