

Coupa Supplier User Invitation

How to invite additional users to the CSP

19 March, 2019

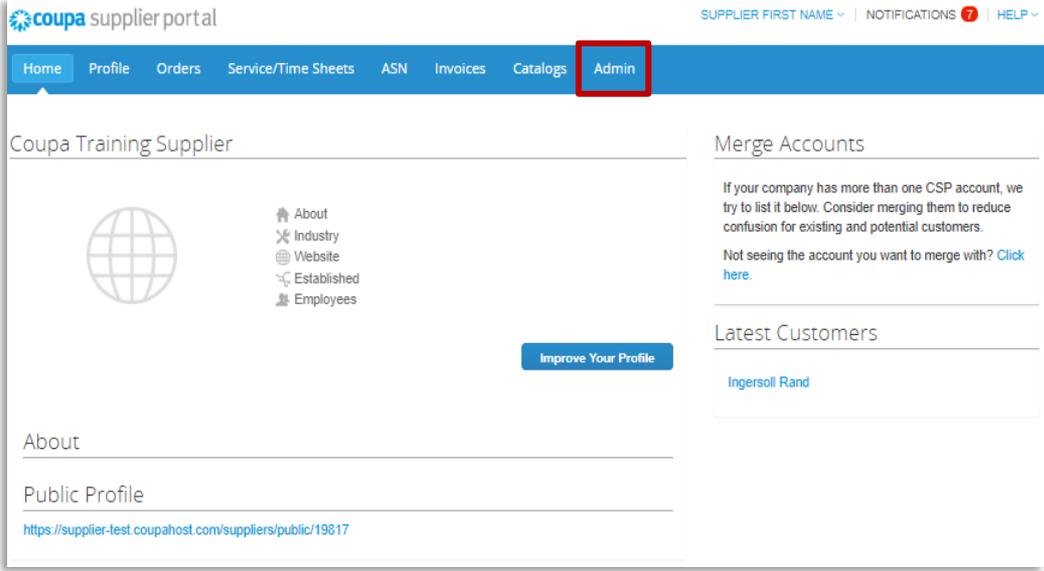
Coupa Supplier Portal (CSP) User Invitation

Start by logging into your CSP Account [HERE](#)

The screenshot displays the Coupa Supplier Portal interface. At the top left is the 'coupa supplier portal' logo. On the top right, there are user details: 'LYNN' with a dropdown arrow, 'NOTIFICATIONS 20' with a red badge, and 'HELP' with a dropdown arrow. Below this is a blue navigation bar with tabs for 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Profile' tab is active. The main content area is split into two columns. The left column features a globe icon and a list of profile-related links: 'About', 'Industry', 'Website', 'Established', and 'Employees'. Below these links is a blue button labeled 'Improve Your Profile'. Underneath the button are sections for 'About' and 'Public Profile', with the latter including a URL: 'https://supplier-test.coupahost.com/suppliers/public/24391'. The right column has a section titled 'Merge Accounts' with explanatory text and a 'Click here' link. Below that is a 'Coupa Training Supplier' section with 'Request Merge' and 'Remove' buttons. At the bottom right of the main content area is a section titled 'Latest Customers'.

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- Click the **Admin** tab



- This will bring you into the users screen.
 - If not, you can click the **Users** link on the left

Admin Users

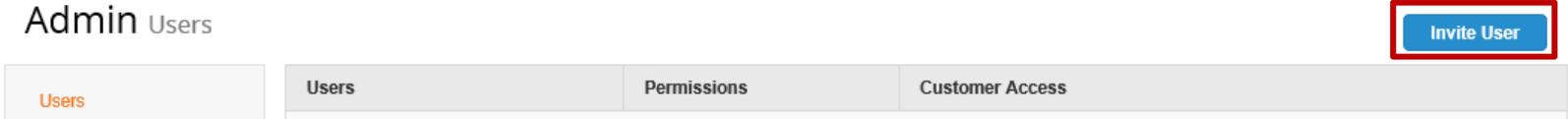
- Users**
- Merge Requests
- E-Invoicing Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Coupa Accelerate Preferences

Invite User

Users	Permissions	Customer Access
John Doe irtestsupplier2@gmail.com <input type="button" value="Edit"/>	ASNs Admin Catalogs Invoices Orders Profiles Service/Time Sheets	Ingersoll Rand - TEST SUPPLIER (NC-DAVIDS-01)-456 Ingersoll Rand - TEST SUPPLIER (NC-DAVIDS-01)-88 Ingersoll Rand - TEST SUPPLIER (NC-DAVIDS-01)-89

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- Click the **Invite User** button on the right side of the page



- Enter first and last names in the fields indicated
- Enter their e-mail
 - Please note, if the user has an existing Coupa account you will need to use the **Merge** function.
- Select the customers this user will have access to.
- Click **Send**.

First Name

Last Name

* Email

Permissions

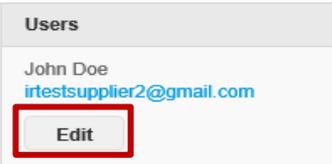
- All
- Admin
- Orders
- Invoices
- Catalogs
- Profiles
- ASNs
- Service/Time Sheets

Customers

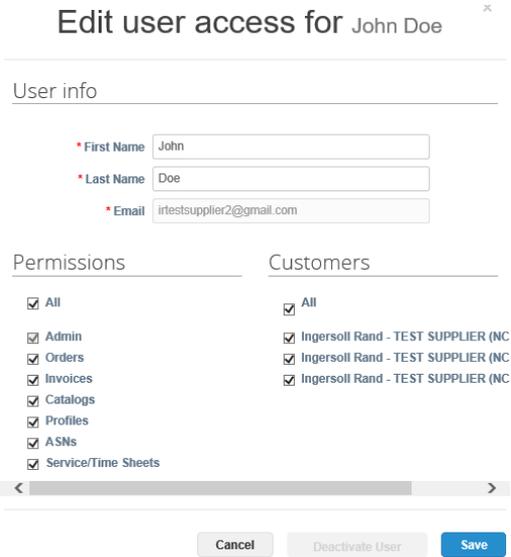
- All
- TEST SUPPLIER (NC-I
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- If you need to edit a user's details or change their access, click the **Edit** button under their name.



- Edit the details as needed and click **Save**



The screenshot shows a form titled 'Edit user access for John Doe'. It is divided into two main sections: 'User info' and 'Permissions'.
Under 'User info', there are three input fields: 'First Name' (John), 'Last Name' (Doe), and 'Email' (irtestsupplier2@gmail.com).
Under 'Permissions', there are two columns: 'Permissions' and 'Customers'.
The 'Permissions' column has a list of checkboxes, all of which are checked: All, Admin, Orders, Invoices, Catalogs, Profiles, ASNs, and Service/Time Sheets.
The 'Customers' column has a list of checkboxes, all of which are checked: All, Ingersoll Rand - TEST SUPPLIER (NC), Ingersoll Rand - TEST SUPPLIER (NC), and Ingersoll Rand - TEST SUPPLIER (NC).
At the bottom of the form, there are three buttons: 'Cancel', 'Deactivate User', and 'Save'.

- Once the updates are made and saved you will receive a confirmation

User John Doe was successfully updated. ✕

For any questions regarding this process or issue with the Coupa CSP, please reach out to us at CoupaTeam@tranetechnologies.com



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