Coupa Supplier Portal User Guide

How to manage users on CSP
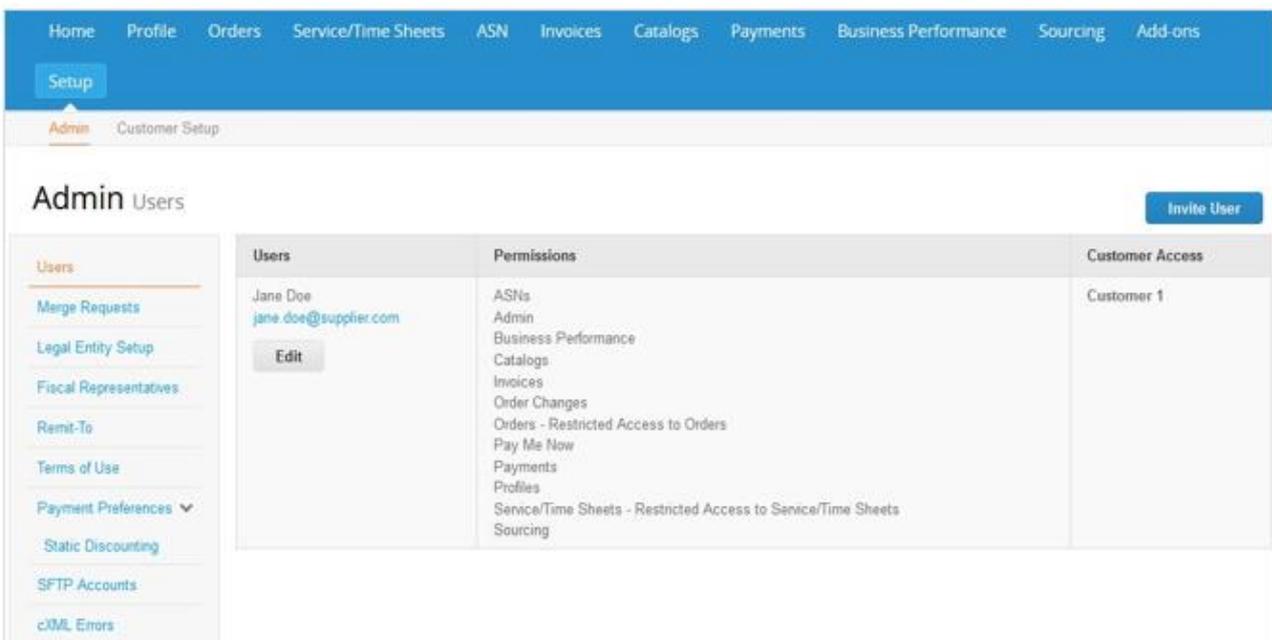
Manage Users

Permissions grant access for users to corresponding menu items. As an admin user, you have all the permissions by default.

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 with their assigned customers.

Go to Setup > Admin. The Admin Users page appears.

Click on the Edit button to open the Edit user access for [User Name] 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.

The Invite User and Edit user access for [User Name] windows are almost identical, but when you invite a user, you can specify an email address.

Edit user access for Jane Doe

User info

* First Name: Jane
* Last Name: Doe
* Email: jane.doe@supplier.com

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
- ☑ Pay Me Now
- ☑ Business Performance
- ☑ Sourcing

Customers

- ☑ All
- ☑ Customer 1

[Cancel] [Deactivate User] [Save]

Permissions grant access for the user to the corresponding menu items.

For Orders and Service/Time Sheets, an additional level of granularity allows restricting a user's access to documents that are specifically assigned to them. If you want to apply this restriction, select the Restricted Access to Orders and Restricted Access to Service/Time Sheets permissions.

Note: For auditing 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.

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal