For Suppliers - How to Manage Users and Roles in Coupa

Sometimes, more than one person from your company needs access to your account in the Coupa Supplier Portal (CSP). Here are some steps to manage those users and roles.

1. **Log into the CSP and navigate to the Setup Tab.**
   o It will automatically default you to the Admin tab.
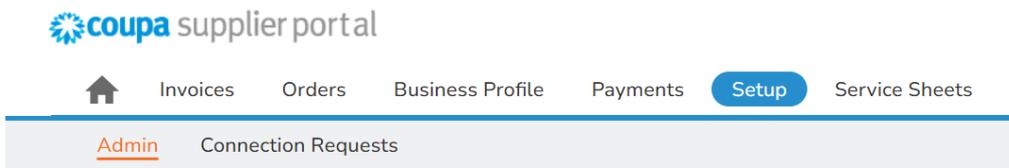
2. **If you have no additional users:**
   o You can click on "Invite User" and fill out the new user information.
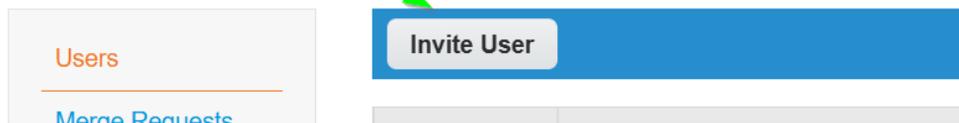
   o See number 4 for the Permissions definitions and "Send Invitation" – <u>but ensure that the permissions you grant new users do not exceed your own permissions.</u>
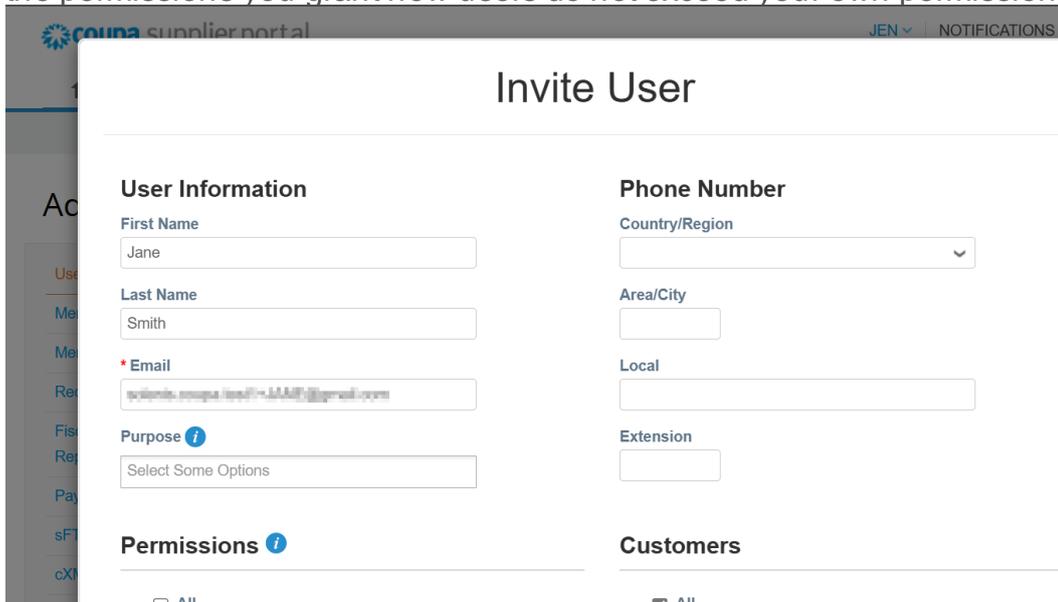
3. If you have existing users:

o You can click on the Edit button to manage their permissions at any time.

o 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.

4. Common Permissions Definitions:

o All – Full access to all CSP functions except user administration.

o Admin – Full access to all CSP functions, including user administration

o Orders – View and manage purchase orders (POs) received from customers

o Invoices – Allows creating and sending invoices to customers

o Catalogs – Create and manage customer-specific electronic catalogs

o Profiles – Allows modifying customer-specific profiles

o ASNs – Allows creating and sending advance ship notices (ASNs) to customers

o Payments – Allows viewing payments and downloading digital checks

Rev.	Author	Description of change	Date	Training required	
0	Ana Panduru	Document creation	Feb. 3, 2025	Yes	xx No
1					
2					
3					
4					