

# How to Add a New User in CSP for Suppliers

Coupa



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## Table of Contents

Purpose .....	2
How to Invite Users to the CSP .....	2
Change Version .....	4



Your screen in Coupa may differ slightly from this training, but the steps to complete the activity will be the same.

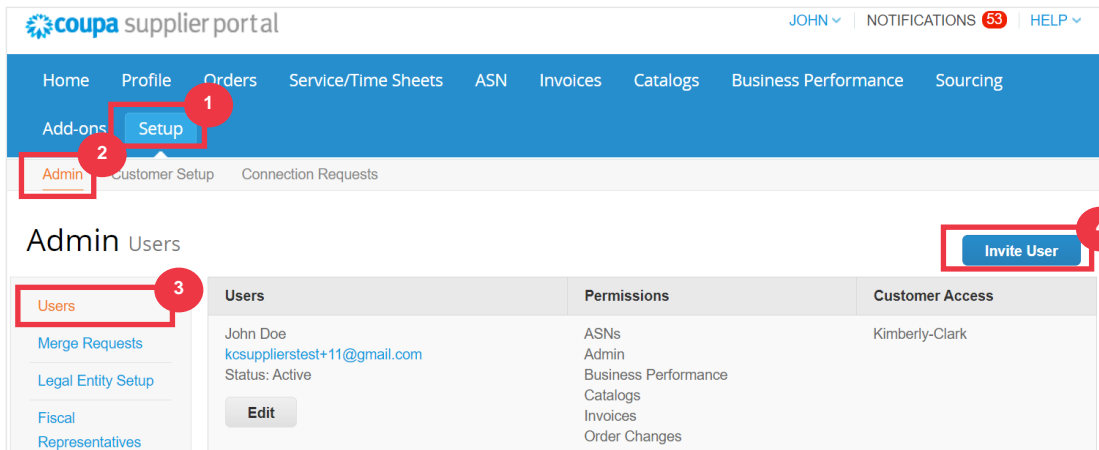
## Purpose

This Quick Reference Card (QRC) explains the process for adding new company contacts to your organization's Coupa Supplier Portal account. Please see the following quick reference guides, which contain a comprehensive view on supplier onboarding and information management.

- [How to Onboard as a New Supplier for Suppliers](#)
- [How to Navigate and Use the Coupa Supplier Portal \(CSP\)](#)

## How to Invite Users to the CSP

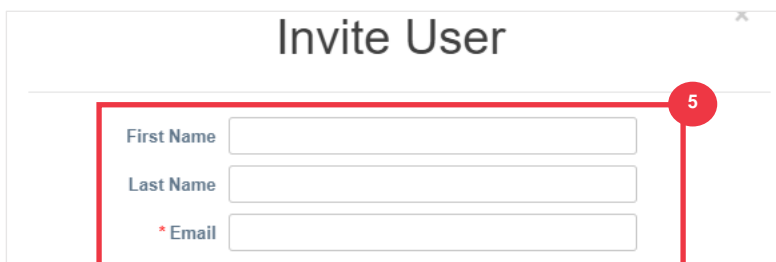
1. From your **CSP Home** screen, click the **Setup** tab.
2. Click the **Admin** tab.
3. Select **Users**.
  - a. You can review all users who are associated to your account on the **Users** screen.
4. Click the **Invite User** button.



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Setup' (1) and 'Admin' (2) tabs. Below 'Admin', there are sub-tabs for 'Users' (3), 'Customer Setup', and 'Connection Requests'. The 'Users' sub-tab is active, showing a table of users. In the top right corner of the 'Users' section, there is an 'Invite User' button (4).

Users	Permissions	Customer Access
John Doe kcsupplierstest+11@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Invoices Order Changes Order Line Confirmation	Kimberly-Clark

5. The **Invite User** screen appears. Enter the invitee's contact information.



The 'Invite User' form contains three input fields: 'First Name', 'Last Name', and '\* Email'. A red box highlights these fields, and a red circle with the number 5 is next to it.

6. Define the **Permissions** (levels of access) for the invitee by selecting the following check boxes:
- **All** (gives full access to all your CSP functions, except for user administration)
  - **Admin** (gives full access to all your CSP functions)
  - **Orders** (allows viewing and managing of Purchase Orders)
  - **Orders - Restricted Access** (allows accessing specific Purchase Orders)
  - **Orders - All** (allows viewing and managing of all Purchase Orders)
  - **Invoices** (allows creating and sending of invoices to customers)
  - **Catalogs** (allows creating and managing customer-specific electronic catalogs)
  - **Profiles** (allows modifying of customer-specific profiles).



**Note:** When **a supplier** is inviting another user from their organization to CSP, **the Profiles checkbox MUST be selected**. This allows the invited user to make edits and manage their company profile.

- **ASN** (allows creating and sending advanced ship notices (ASN) to customers)
  - **Service/Time Sheets** (allows creating and submitting service/time sheets against Purchase Orders)
  - **Service/Time Sheets - Restricted Access to Service/Time Sheets** (allows accessing specific service/time sheets)
  - **Service/Time Sheets – All** (allows creating and submitting any service/time sheets against Purchase Orders)
  - **Payments** (allows viewing payments and downloading digital checks)
  - **Order Changes** (allows submitting PO change requests)
  - **Pay Me Now** (Available only if your customers use Coupa Pay and enabled the feature related to this permission)
  - **Business Performance** (allows viewing business performance information, e.g., order, invoice and delivery trends)
  - **Sourcing** (allows viewing public sourcing events)
  - **Order Line Confirmation** (allows viewing of Purchase Order lines within ASN)
7. Define which **Customers are visible** to the invitee by selecting the following check boxes:
- a. **All** (allows viewing of all customers within your CSP)
  - b. **Kimberly-Clark** (allows viewing of only K-C within your CSP)
8. Click the **Send Invitation** button.

### Permissions 6

- 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
- Order Line Confirmation

### Customers 7

- All
- Kimberly-Clark

Cancel
Send Invitation 8

Once a new user has accepted the invitation, they will appear within the **Users** table (Step 3). New users can be [delegated tasks](#) within the CSP such as completing the **Supplier External Form** and or any **due diligence questionnaire (DDQ)**.

**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.

## Change Version

Version History			
Version	Date	Change Description	Author
1.0	6/5/2023	Created stand-alone material from current supplier guides.	Halaina Jimenez (KPMG)