

Job Aid – How to Invite Additional Coupa Users – Coupa Tool

How to Invite Additional Coupa Users

In this job aid:

✓ **How to Invite Additional Coupa Users**

This guide demonstrates how to invite additional users within your company to the Coupa Supplier Portal (CSP).

Inviting Users Overview

- To link with DaVita within the Coupa Supplier Portal (CSP), an invitation must be initiated.
- Invitations sent from DaVita can only be sent to one CSP user within a company.
 - Once an admin user has been identified and connected to DaVita within the CSP, they are responsible with inviting additional users within their company to join the CSP.

NOTE: Inviting additional users only works for NEW CSP users – meaning the email address you are inviting CANNOT already be associated with an existing CSP account. If you are needing to invite a user within your company who already has an existing CSP account, please see the job aid titled *How to Initiate a Merge Request within the Coupa Supplier Portal*.

Process – Inviting Users to the Coupa Supplier Portal

1. Login to your Coupa Supplier Portal (<https://supplier.coupahost.com/sessions/new>) account and navigate to the ‘Setup’ tab on the righthand side of the homepage.
2. Ensure ‘Admin’ is selected, then select ‘Users’ in the menu on the left-hand side.
3. Select ‘Invite User’

The screenshot shows the Coupa Supplier Portal interface. At the top right, there are user details (KENNY), notifications (4), and a help icon. The main navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup (highlighted with a yellow box and a circled '1'). Below the navigation bar, the 'Admin' menu is open, showing options like Customer Setup and Connection Requests. The 'Users' menu item is highlighted with a yellow box and a circled '2'. On the right side of the 'Users' menu, the 'Invite User' button is highlighted with a yellow box and a circled '3'. The main content area shows a table of users with columns for Users, Permissions, and Customer Access. The first user listed is Kenny Booser with email coupatest1124@gmail.com and status Active. An 'Edit' button is visible next to the user name.

Users	Permissions	Customer Access
Kenny Booser coupatest1124@gmail.com Status: Active <input type="button" value="Edit"/>	ASNs Admin Business Performance Catalogs Invoices Order Changes Order Line Confirmation Orders Pay Me Now Payments Profiles Service/Time Sheets Sourcing	DaVita Inc - DEV ENV

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4. Enter the information of the colleague in which you are attempting to invite.
5. As the Admin user, you have the authority to assign/restrict certain permissions and customers for your additional users. These settings can be adjusted at an time.
6. Click “Send Invitation”

Invite User ×

First Name

Last Name

* Email

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
- Order Line Confirmation

Customers

- All
- DaVita Inc - DEV ENV

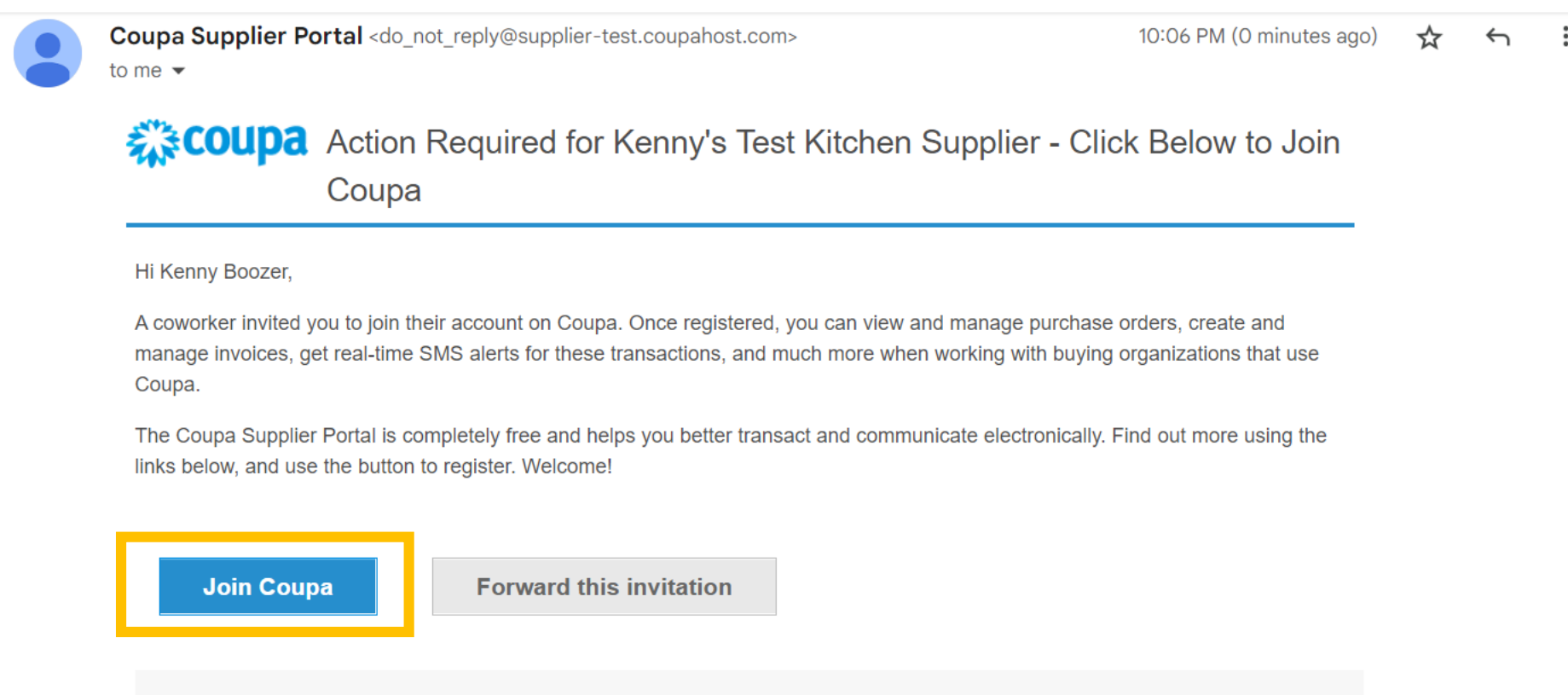
Cancel Send Invitation

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Process – How to Accept an Invite to the Coupa Supplier Portal

1. Once an Admin users sends an invitation for someone to join the Coupa Supplier Portal, the invited user will receive an actionable email. Upon receipt of the email, please select “Join Coupa”. (Users can also forward invitations to the appropriate recipient within their company)



2. After selecting “Join Coupa’, the user will be prompted to the account setup portion of this process. Once all fields are complete, please select “Create an Account”. Upon account creation, the invited user will automatically have access to their company within the Coupa Supplier Portal (given the assigned permissions and customers).

