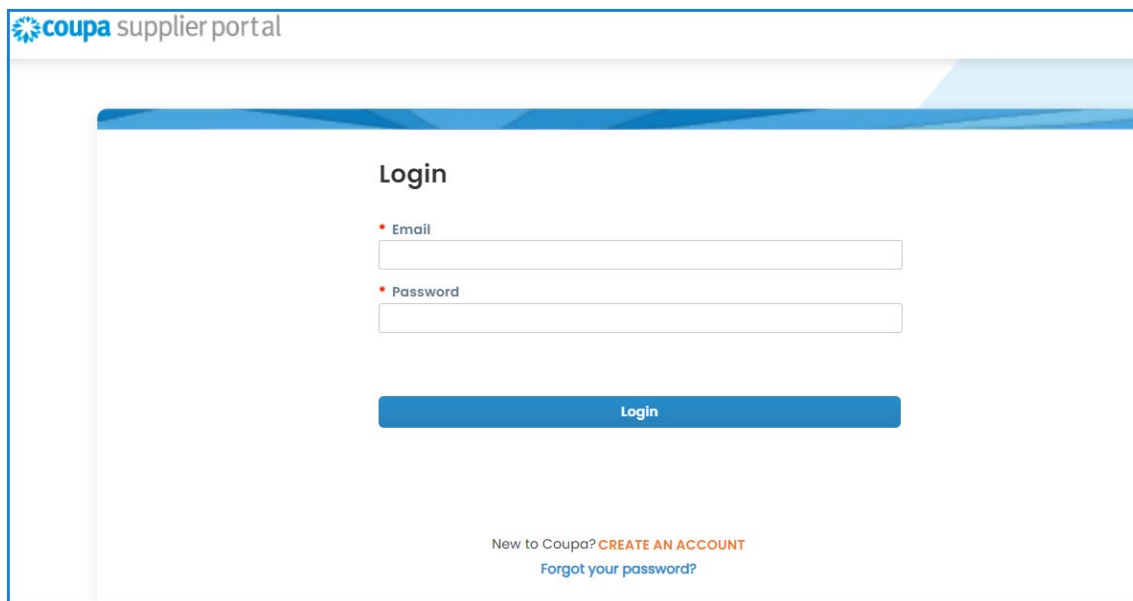


## Adding a User to the Coupa Supplier Portal

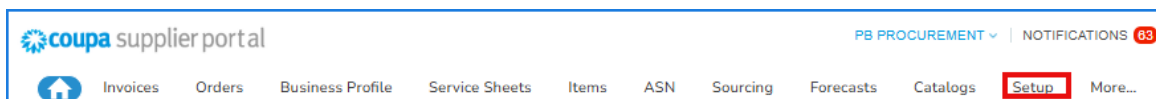
As an admin within the Coupa Supplier Portal (CSP), you can invite/add additional users within your company to have access to the CSP. Follow the steps below to add additional users to your account. The Admin can also deactivate or remove users previously added to your company's CSP account. The steps in this document outline how to add a user or deactivate a user.

**NOTE:** When all supplier account's admins have been inactive for 90 days, users can request Admin status. This triggers a process to send a notification to all admins on the account, alerting them of the request and allowing them two weeks to reply. If no reply is given, the request is granted, and the user becomes the admin.

1. Log into the **Coupa Supplier Portal** at <http://supplier.coupahost.com/> by entering your email address and your password.

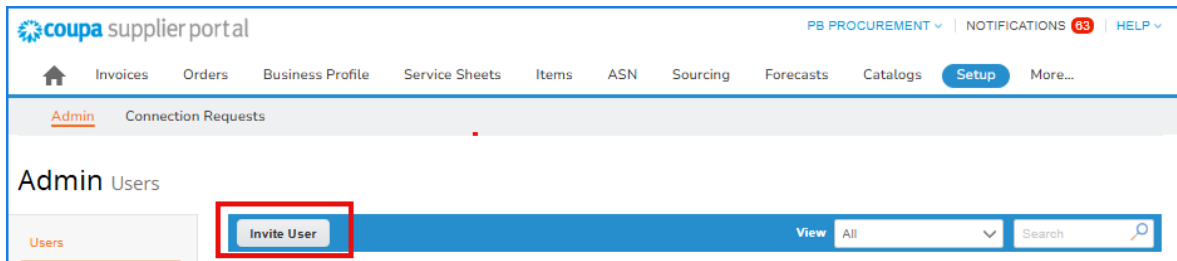


2. From the **Home** page, go to the **Setup** tab located in the top tool bar.

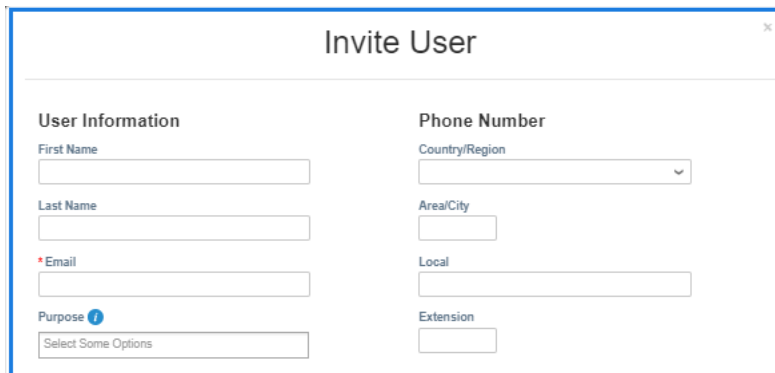


3. Select **Invite User** on the **Admin** page.

**Note:** If a primary contact has not been added to your account, you will receive the message: **You have not assigned a Primary Contact for your Business Profile. Please click edit on a user below to assign as a Primary Contact.**

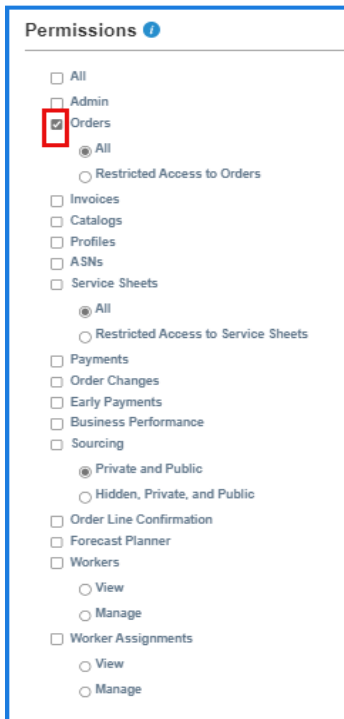


4. Add the new user's **Email** address. Optional fields are **First Name**, **Last Name**, **Purpose** and additional contact information.



The 'Invite User' form is displayed in a modal window. It is divided into two main sections: 'User Information' and 'Phone Number'. The 'User Information' section includes fields for 'First Name', 'Last Name', '\*Email', and 'Purpose'. The 'Phone Number' section includes fields for 'Country/Region', 'Area/City', 'Local', and 'Extension'. The 'Purpose' field has a dropdown menu with the option 'Select Some Options'.

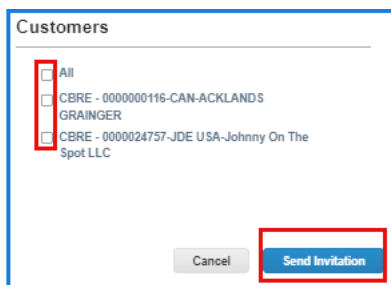
5. Click the box next to the **Permissions** that the user should have.



Permissions ⓘ

- All
- Admin
- Orders
- All
  - Restricted Access to Orders
- Invoices
- Catalogs
- Profiles
- ASNs
- Service Sheets
- All
  - Restricted Access to Service Sheets
- Payments
- Order Changes
- Early Payments
- Business Performance
- Sourcing
- Private and Public
  - Hidden, Private, and Public
- Order Line Confirmation
- Forecast Planner
- Workers
  - View
  - Manage
- Worker Assignments
  - View
  - Manage

6. In **Customers** section, select **CBRE**. Click **Send Invitation**. An email notification with a registration link will be sent to the user.

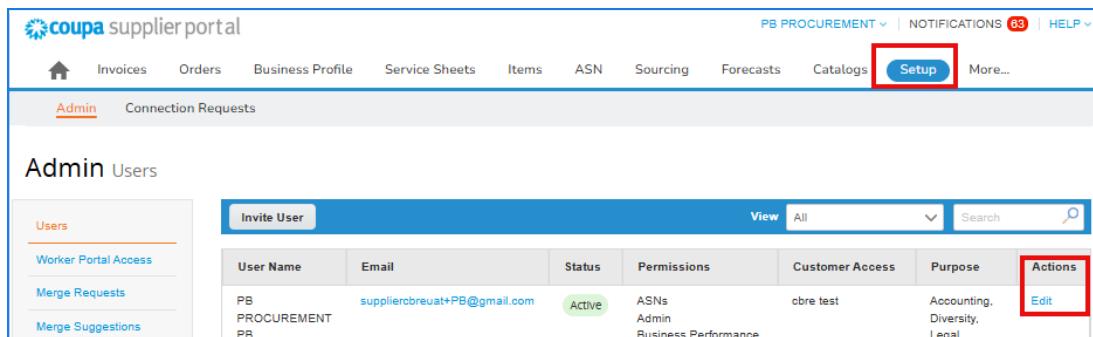


Customers

- All
- CBRE - 000000116-CAN-ACKLANDS GRAINGER
- CBRE - 0000024757-JDE USA-Johnny On The Spot LLC

## Removing a User from the Coupa Supplier Portal

1. From the **Home** page, select **Setup**. Under the **Admin Users** screen, select the **Edit** option for the user you want to remove.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'PB PROCUREMENT', 'NOTIFICATIONS 63', and 'HELP'. The main navigation menu has 'Setup' highlighted with a red box. Below this, the 'Admin' section is active, showing 'Admin Users'. A table lists users with columns: User Name, Email, Status, Permissions, Customer Access, Purpose, and Actions. The 'Edit' link in the 'Actions' column for the user 'PB PROCUREMENT' is highlighted with a red box.

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
PB PROCUREMENT	suppliercbreuat+PB@gmail.com	Active	ASNs Admin Business Performance	cbre test	Accounting, Diversity, Legal.	Edit

2. Select **Deactivate User**.

### Edit user access for John Smith

#### User Information

\* First Name:

\* Last Name:

\* Email:

Purpose:

Primary Contact:    
 Current primary contact: **CBRE Test**

#### Phone Number

Country/Region:

Area/City:

Local:

Extension:

#### Permissions

- All
- Admin
- Orders
  - All
  - Restricted Access to Orders
- Invoices
- Catalogs
- Profiles
- ASNs
- Service Sheets
  - All
  - Restricted Access to Service Sheets
- Payments
  - Order Changes
  - Early Payments
  - Business Performance
  - Sourcing
    - Private and Public
    - Hidden, Private, and Public
- Order Line Confirmation
- Forecast Planner
- Workers
  - View
  - Manage
- Worker Assignments
  - View
  - Manage

#### Customers

- All
- CBRE - 000000116-CAN-ACKLANDS GRAINGER
- CBRE - 0000024757-JDE USA-Johnny On The Spot LLC
- CBRE - 0000000021-GWS US-KEYENCE CORP OF AMERICA
- CBRE - 0000024304-JDE USA-Southworth Milton Inc
- CBRE - 0000000024-GWS US-PITNEY BOWES
- CBRE - 0000061219-GWS US-ACTIVE FIRE CONTROL
- CBRE - 0000167339-GWS 50500 GBR-Carrickbracken Ltd
- CBRE - 0000000736-GWS US-RAMPART PEST CONTROL
- CBRE - 0000127785-GWS 95009 IRL-Johnson Controls IRELAND LIMITED
- CBRE - 0000070709-CBRE PAN-Sistemas Electronicos de Seguridad
- CBRE - 0000068605-GWS MEX-WEST UNIFIED COMMUNICATIONS SERVICES MEX
- CBRE - 0000264096-CBRE CRI-3 102 894202 SRL
- CBRE - 0000264100-CBRE CRI-CPE MIL NOVECIENTOS OCHENTA Y NUEVE LIMI

3. Confirm user's deactivation status.

**NOTE: You can permanently Delete the user from the Actions column. To delete a user is to remove the user from the Users data table, but information (i.e. customers, invoices, etc.) relative to the account remains as part of the account.**

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
CBRE Test	cbretes2024@gmail.com	Active	ASNs Admin	CBRE - 0000061219-GWS US-ACTIVE	None	Edit
John Smith	jvendor443@gmail.com	Deactivated	ASNs Admin Business Performance	CBRE - 000000116-CAN-ACKLANDS GRAINGER	None	Activate

For additional support, please reach out to your Procurement Buyer Support Team.

Region & Line of Business	Support Email Contact
ADV & GWS APAC	<a href="mailto:APAC_ProcurementBuyerSupport@cbre.com">APAC_ProcurementBuyerSupport@cbre.com</a>
Corporate & US	<a href="mailto:usprocurement@cbre.com">usprocurement@cbre.com</a>
GWS U.S. & Canada	<a href="mailto:GWSNAM_ProcurementBuyerSupport@cbre.com">GWSNAM_ProcurementBuyerSupport@cbre.com</a>
GWS Latin America	<a href="mailto:LATAM_ProcurementBuyerSupport@cbre.com">LATAM_ProcurementBuyerSupport@cbre.com</a> Chile, Panama, Peru, Costa Rica, Uruguay, Dominican Republic, Columbia, Argentina, Mexico
EMEA, Canada ACML	<a href="#">All CBRE Entities</a>