The Financial Times

Coupa Supplier Portal User Guide

Managing Users

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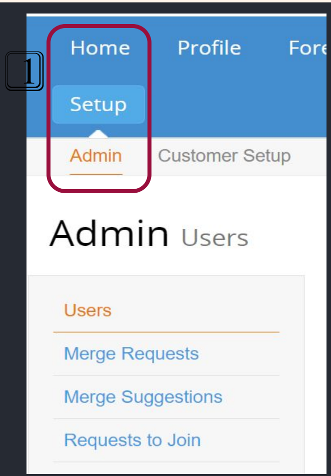
Inviting Additional Users to the CSP

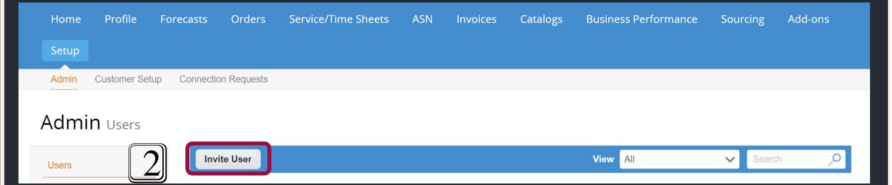
Inviting Additional Users to the CSP

Step 1:

1: To invite additional users to the CSP, from the **Home** page, select the **Setup** tab, then select the **Admin tab.**

2: Select **Users > Invite Users.**





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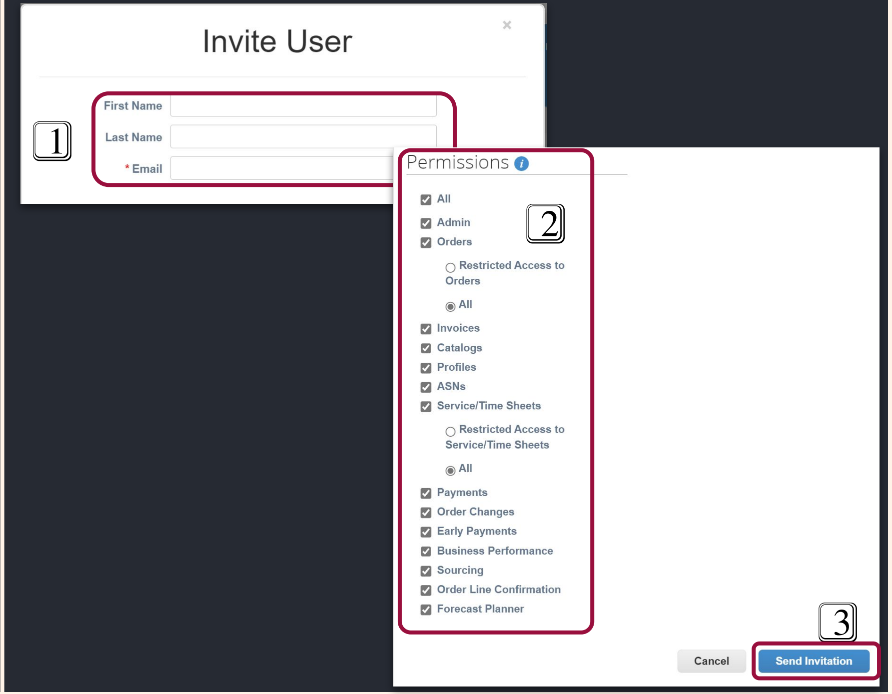
Inviting Additional Users to the CSP

Step 2:

1: Enter the first and last name and email address of the person you want to invite.

2: Select the new permissions you want them to have access to.

3: Select **Send Invitation** which will send an email to the user and they will be asked to set up a password. Once they have done this, they will have access to the CSP.



Managing Existing Users in the CSP

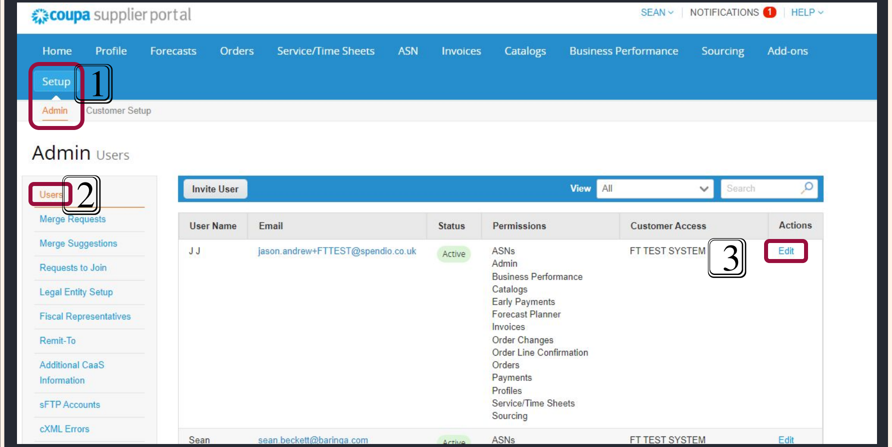
Managing Existing Users in the CSP

Step 1:

1: Navigate to **Setup > Admin.**

2: Navigate to **Users** in the sidebar.

3: Select **Edit,** under the User profile you want to manage.



Managing Existing Users in the CSP

Step 2:

The Edit user access page opens. This is where you can change access against Permissions and select or deselect Customers.

Verify and amend the name of the User as required.

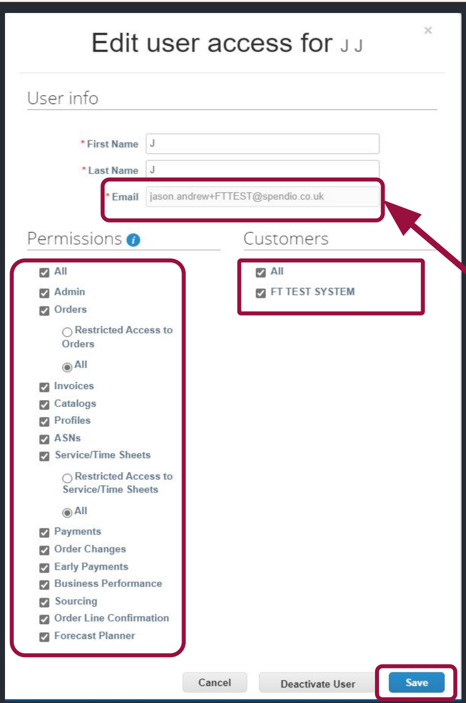
Select the appropriate Permissions and requirement of activities on CSP.

Allocate the Customers, the User needs to manage on the CSP.

Please ensure the Financial Times is ticked. Select ‘**Save**’.

Your user account should be setup and ready to use.

Note: As as the admin, you can also Deactivate or Reactivate Users, eg. Leavers or an employee returning from a maternity break.



Note: You are unable to amend the ‘Email’ field.

Merge Requests in the CSP

Merge Requests in the CSP

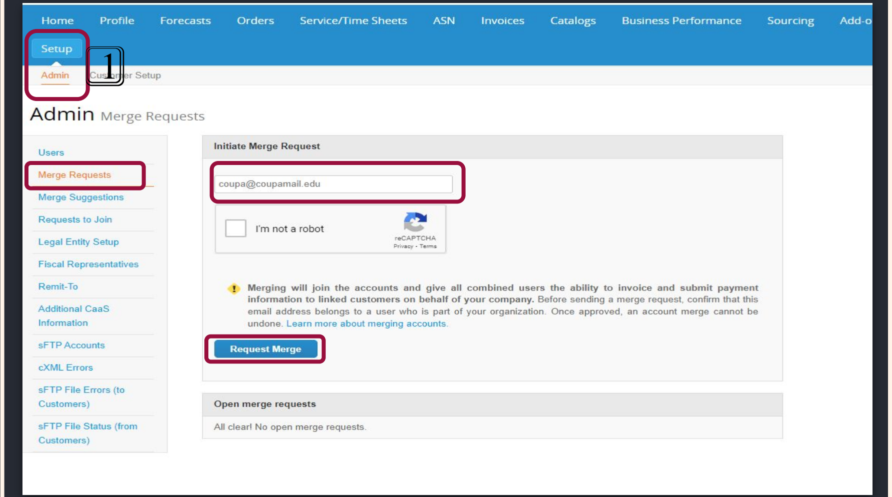
Your company may have more than one account/profile in the CSP. This can happen when several users from the same company register or are invited to the CSP through different email addresses.

In order to combine these users into one main account go to:

1: Navigate to **Setup > Admin**

2: Select **Merge Requests** in the sidebar

3: Select the **Request Merge** button, select an account to be the parent account, and add a note.



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Merge Requests in the CSP

The table explains what happens to each of the accounts when a merge is requested, to help choose the parent account.

Selection	Description
*Account Owner / My Account	This causes the other account to be merged into your company account. The other user's company account is removed. You continue to be the administrator for the merged company account, and the previous administrator becomes a regular user in the merged account. You can make them an administrator if you want. For more information, see Manage Users.
*Account Owner / Their Account	Your company account is removed. The other user's company account becomes the only company account. You can no longer be the account administrator, but the administrator of the existing account can choose to make you an administrator of the merged account.
*Note	Add a note about the merge request, for example, the reason for the account merge.

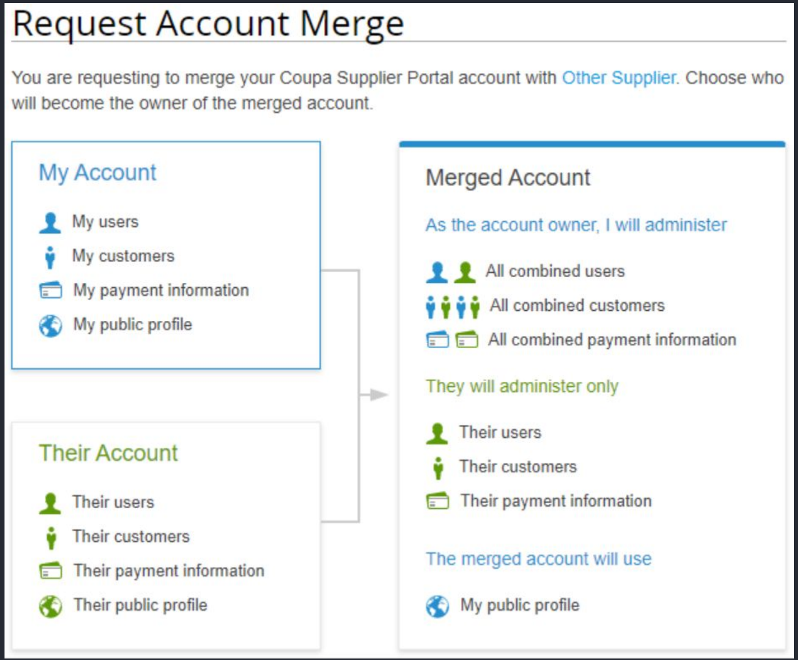
Merge Requests in the CSP

When you select either your account or the other account to be the account owner, the CSP shows you a visual representation of who controls relevant data after the merge.

When you merge accounts, you select the account that becomes the account owner.

After the accounts merge, in most cases, the new account owner can administer data from both their account and the merged account, while the owner of the merged account can only administer data that originally existed in the merged account.

Please note: Account merges cannot be undone. Use caution when merging accounts and be sure to verify that the account you are merging with is part of your organisation.



Further help and support

If you are unable to find answers to your questions within these guides you can refer to:

- FT Supplier Webpage, which includes FAQs and other supporting information: aboutus.ft.com/suppliers
- You can contact our Procure-to-Pay Operations team at p2p@ft.com

Or if you require technical assistance with Coupa you can refer to:

- Coupa Supplier Help Centre
- Coupa Compass - Provides generic user guides for Suppliers including videos, courses and resources to help with technical issues.
- View the 'Getting started with the CSP' guide from Coupa
- From the CSP homepage you can click the bubble in the bottom right of the screen, to chat live with a Coupa specialist

Glossary of Terms

CSP	Coupa Supplier Portal
Admin	The person with Administration rights for the Coupa Supplier Portal for your account
Financial Times business contact	The Financial Times employee you have been discussing supply of goods and/or services
PO	Purchase Order
Users	Your employees who have access to the Coupa Supplier Portal
Invitation	There are two types of invitation you could receive from the Financial Times, both will be sent by email. Suppliers already working with the FT will receive an invitation when we launch the CSP on <insert date>. After this date, any new Suppliers that start working with the FT will receive an invitation initiated by their Financial Time business contact.
Coupa Compass	This is Coupa's own support webpage that includes user guides for suppliers including videos, courses and resources to help with any issues you may have using the CSP, including technical help
Supplier Information Form	This is the form that will be sent by the Financial Times business contact. It is a Supplier Information form that allows The FT to collect basic company information from our Suppliers and is the first step in connecting with the Financial Times for business through the CSP