



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**.

The screenshot displays the CSP interface with a navigation menu at the top. The 'Setup' tab is highlighted, and the 'Admin' sub-tab is selected. Below the navigation, the 'Admin Users' section is visible, with the 'Users' sub-tab selected. The 'Invite User' button is highlighted with a red box and a circled '2'. A circled '1' is also present near the 'Setup' tab in the top navigation.

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.

The screenshot shows the 'Invite User' dialog box with the following elements:

- 1**: A red box highlights the input fields for 'First Name', 'Last Name', and '* Email'.
- 2**: A red box highlights the 'Permissions' sub-dialog, which lists various permissions with checkboxes and radio buttons. The permissions listed are:
 - 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
 - Early Payments
 - Business Performance
 - Sourcing
 - Order Line Confirmation
 - Forecast Planner
- 3**: A red box highlights the 'Send Invitation' button at the bottom right of the dialog.

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.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and the text 'supplier portal'. On the right side of the navigation bar, there are links for 'SEAN', 'NOTIFICATIONS', and 'HELP'. Below the navigation bar is a menu with options: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Add-ons. A red box labeled '1' highlights the 'Setup' and 'Admin' links in the menu. Below the menu is the 'Admin Users' section. On the left side of this section, there is a sidebar with various options: Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup, Fiscal Representatives, Remit-To, Additional CaaS, Information, sFTP Accounts, and cXML Errors. A red box labeled '2' highlights the 'Users' link in this sidebar. The main content area of the 'Admin Users' section shows a table of users. The table has columns for 'User Name', 'Email', 'Status', 'Permissions', 'Customer Access', and 'Actions'. The first row shows a user with 'User Name' 'J J', 'Email' 'jason.andrew+FTTEST@spendio.co.uk', 'Status' 'Active', 'Permissions' 'ASNs, Admin, Business Performance, Catalogs, Early Payments, Forecast Planner, Invoices, Order Changes, Order Line Confirmation, Orders, Payments, Profiles, Service/Time Sheets, Sourcing', 'Customer Access' 'FT TEST SYSTEM', and 'Actions' 'Edit'. A red box labeled '3' highlights the 'Edit' link in the 'Actions' column for this user. The second row shows a user with 'User Name' 'Sean', 'Email' 'sean.beckett@haritos.com', 'Status' 'Active', 'Permissions' 'ASNs', 'Customer Access' 'FT TEST SYSTEM', and 'Actions' 'Edit'.

User Name	Email	Status	Permissions	Customer Access	Actions
J J	jason.andrew+FTTEST@spendio.co.uk	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	FT TEST SYSTEM	Edit
Sean	sean.beckett@haritos.com	Active	ASNs	FT TEST SYSTEM	Edit

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.

Edit user access for JJ

User info

* First Name J

* Last Name J

* Email jason.andrew+FTTEST@spendio.co.uk

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

Early Payments

Business Performance

Sourcing

Order Line Confirmation

Forecast Planner

Customers

All

FT TEST SYSTEM

Cancel Deactivate User Save

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.

The screenshot shows the CSP Admin interface for Merge Requests. The top navigation bar includes Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Add-on. The left sidebar contains a 'Setup' menu with 'Admin' highlighted in red. Below 'Admin', 'Merge Requests' is highlighted in red. The main content area is titled 'Admin Merge Requests' and features an 'Initiate Merge Request' form. The form includes an email input field containing 'coupa@coupamail.edu', which is highlighted in red. Below the input field is a checkbox for 'I'm not a robot' and a reCAPTCHA logo. A warning message states: 'Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. Learn more about merging accounts.' Below the warning is a red 'Request Merge' button, also highlighted in red. At the bottom, there is a section for 'Open merge requests' which currently shows 'All clear! No open merge requests.'

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.

Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with [Other Supplier](#). Choose who will become the owner of the merged account.

My Account

- My users
- My customers
- My payment information
- My public profile

Their Account

- Their users
- Their customers
- Their payment information
- Their public profile

Merged Account

As the account owner, I will administer

- All combined users
- All combined customers
- All combined payment information

They will administer only

- Their users
- Their customers
- Their payment information

The merged account will use

- My public profile

Further help and support

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

- [FT Supplier Webpage](https://aboutus.ft.com/suppliers), 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