



## Manage Your Admin Setups How To Guide





## How to Manage Your Admin Setups

1. Log in to the Coupa Supplier Portal with Email and Password

• Enall   • Password   Forgot your password?	Secur
Password  Forgot your password?	
Forgot your password?	
Lugin	
New to Coupa? CREATE AN ACCOUNT	

### 2. Select Setup and then Admin

<b>coupa</b> supplier po	ortal							NOTIFICATIO	ons 🚺   Help
nvoices Ord	ers Business I	Profile Setup	Service Sheets	ASN	Sourcing	Forecasts	Catalogues	Workers	More
Admin Customer Se	tup Connectio	n Requests							
Admin									
Admin Users									
Users	Invite User					View	All	✓ Sear	rch 🔎
Merge Requests	User name	Email		Status	Permission	5	Customer Acce	ess Purpo	ose Actions
Merge Suggestions	Demo			Inactive				None	Activate
Requests to Join	Supplier								
Fiscal Representatives									
Payment Methods									
Additional CaaS									
Information									
sFTP Accounts									
cXML Errors									
sFTP File Errors (to									
Customers)									
sFTP File Status (from									





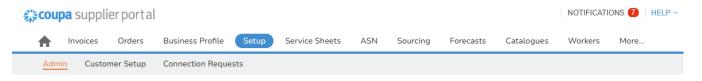
# - **Users** section - will show your permission and allow you to invite other users.

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Admin Customer Set	up Connection	n Requests							
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dmin Users		-							
Jsers	Invite User					View	All	✓ Search	, ,
lerge Requests	User name	Email		Status	Permissions	5	Customer Acce	ess Purpose	Actions
lerge Suggestions	Demo			Inactive			Organon -	None	Activate
equests to Join	Supplier						-		
iscal Representatives									
ayment Methods									
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nformation									
FTP Accounts									
XML Errors									
FTP File Errors (to									
Customers)									
FTP File Status (from									
Customers)									

 Merge Requests section will join the accounts and give 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







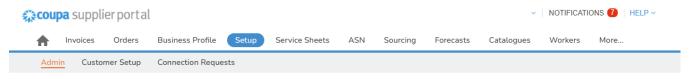
#### Admin Merge Requests

Users	Initiate Merge Request
Merge Requests	coupa@coupamail.edu
Merge Suggestions	
Requests to Join	l'm not a robot
Fiscal Representatives	reCAPTCHA Privacy - Terms
Payment Methods	
Additional CaaS Information	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 areal address belows to a user who is act of your company. One approved a second to be a second to be a second to be a second to be address belows to a user of your company.
sFTP Accounts	email address belongs to a user who is part of your organisation. Once approved, an account merge cannot be undone. Learn more about merging accounts.
cXML Errors	Request Merge
sFTP File Errors (to Customers)	
sFTP File Status (from	Open merge requests
Customers)	Request Merge

 Merge Suggestions where you can merge accounts with the same confirmed email domain and at least one common credential such as the Company Name, Address, Tax ID or DUNS Number. Please note that once approved, an account merge cannot be undone.







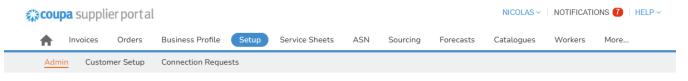
### Admin Merge Suggestions

ers	Merge Suggestions are accounts with the same confirmed email domain and at least one common credential such as the Company Name, Address, Tax ID or DUNS Number.
erge Requests	Before sending a merge request confirm that this email belongs to a user who is part of your organisation.
Merge Suggestions	Once approved, an account merge cannot be undone. Learn more about merging accounts.
Requests to Join	once approved, an account merge cannot be undone. Lean more about merging accounts.
Fiscal Representatives	Enable Merge Suggestions
Payment Methods	Open Merge Suggestions
Additional CaaS	All clear! No open merge suggestions.
nformation	
TP Accounts	
(ML Errors	
FTP File Errors (to	
ustomers)	
FTP File Status (from	
Customers)	

- **Requests to Join** where you can find new users requesting access to this account.







### Admin Requests to Join

Users Merge Requests	Requests to Join are from new users requesting access to this account. Before responding, confirm that this email address belongs to a user who is part of your organisation. Either invite the user to join this account (and set appropriate permissions) or reject their request to join.							
Merge Suggestions	Users	Requested	Response					
Requests to Join	All clear! No open us	er join requests.						
Fiscal Representatives								
Payment Methods								
Additional CaaS Information								
sFTP Accounts								
cXML Errors								
sFTP File Errors (to Customers)								
sFTP File Status (from Customers)								

Fiscal Representatives allows you to assign a fiscal representative





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Admin Customer Se	etup Connection Requests						

Admin Fiscal Representatives

	None				
Users	Name	Country/Region	Tax ID	Associated Tax Registrations	
Merge Requests					
Merge Suggestions					
Requests to Join					
Fiscal Representatives					
Payment Methods					
Additional CaaS					
Information					
sFTP Accounts					
cXML Errors					
sFTP File Errors (to					
Customers)					
sFTP File Status (from					
Customers)					

 Payment Methods. This section allows you to add a remit-to address or perform actions such as editing and disabling existing entries.



Add Fiscal Representative



nvoices Or	ders Business Profile	Setup Service She	eets ASN	Sourcing F	Forecasts Catalogues	Workers Mo	ore
Admin Customer S	Setup Connection Requests						
dmin Remit-To							
Commence To							
Users	Add Remit-To				View All	✓ Search	<b>Q</b>
Merge Requests							
	Payment Method Name	Remit-To Address	Payment Type	Legal Entity	Customer Sharing Statu	s	Actions
Merge Suggestions	None		Address	Test Account		Active	ø 💿
Requests to Join						Active	
Fiscal Representatives							
Payment Methods						Active	
Additional CaaS						Active	
Information						Active	
sFTP Accounts					See	e all 46 customers	
XML Errors	None		Address			Active	<i>ø</i> 💿
SFTP File Errors (to							
Customers)						Active	
						Active	

 Additional CaaS Information (Additional Compliance as a Service Information), section is for integrating with Coupa's Compliance as a Service, particularly for e-invoicing. This integration ensures that your electronic invoices meet local regulatory requirements.





A Invoices Ord	ers Business F	Profile Setup	Service Sheets	ASN	Sourcing	Forecasts	Catalogues	Workers	More
11									
Admin Customer Se	etup Connectio	n Requests							
dmin Users									
Users	Invite User					View /	All	✓ Se	arch 🔎
Merge Requests	User name	Email		Status	Permissions		Customer Acce	ss Purp	oose Actions
Merge Suggestions	Demo			Inactive			Organon	None	e Activate
Requests to Join	Supplier			macure					
Fiscal Representatives									
Payment Methods									
Additional CaaS									
Information					1				
sFTP Accounts									
cXML Errors									
sFTP File Errors (to									
Customers)									
sFTP File Status (from									
Customers)									

 SFTP Accounts, CXML Errors, SFTP File Errors, SFTP File Status. SFTP and CXML accounts allow you to share invoicing, catalogs, and POs digitally with your customers and check for errors.

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f Invoices Or	ders Business F	Profile Setup	Service Sheets	ASN	Sourcing	Forecasts	Catalogues	Workers	More
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Admin Users									
Users	Invite User					View	All	✓ Sear	h 🔎
Merge Requests	User name	Email		Status	Permissions		Customer Acces	is Purpo	se Actions
Merge Suggestions	Demo			Inactive			Organon	None	Activate
Requests to Join	Supplier			mactive					
Fiscal Representatives									
Payment Methods									
Additional CaaS									
Information					:				
sFTP Accounts									
cXML Errors									
sFTP File Errors (to									
Customers)									
sFTP File Status (from									
Customers)									

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