

**03 – CSP Account
Configuration and
Administration**



**Bank of
Ireland
Group**



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03.a. How to Add More Users to a CSP Account (1/5)

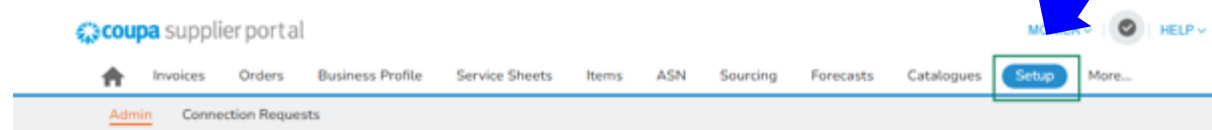


Log into your CSP account

Go to **Setup** -> **Users** -> **Invite User**

1

Setup



Users



Admin Users

Invite User

Name	Email	Status	Permissions	Customer Access	Purpose	Actions
M Miller	.com	Active	ASNs Admin Catalogues Community Contracts Early Payments Forecast Planner Hidden, Private and Public Inventory Invoices Order Changes Order Line Confirmation Orders Payment Method Admin Payments Profiles Service Sheets Sourcing Supplier Dashboard	Bank of Ireland	Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing	Edit

Per page 5 | 10 | 15

Invite User

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03.a. How to Add More Users to a CSP Account (2/5)



The Invite User window will open

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Required Fields

You only need to fill in the fields on the left-hand side and to tick the permissions you want to grant to the respective user, then click on **Send Invitation**.

Invite User

User Information

First Name

Last Name

* Email

Purpose

Select Some Options

Phone Number

Country/Region

Area Code

Number

Extension

Permissions

- All
- Admin
- Orders
 - All
 - Restricted Access to Orders
- Invoices
 - Catalogues
 - Profiles
 - A BNC
 - Service Sheets
 - All
 - Restricted Access to Service Sheets
- Payments
 - Order Changes
 - Early Payments
- Sourcing
 - Private and Public
 - Hidden, Private and Public
- Community
 - Order Line Confirmation
 - Forecast Planner
- Workers
 - View
 - Manage
- Worker Assignments
 - View
 - Manage
- Inventory
- Supplier Dashboard
- Contracts
 - View
 - Manage
- Payment Method Admin

Customers

- All
- Bank of Ireland

Cancel

4

Send Invitation

03.a. How to Add More Users to a CSP Account (3/5)



The invited user will be notified by email

They will click the **Join Coupa Supplier Portal** button on the invitation and will create a password to finalise the creation of their account:



Action Required – Join the Coupa Supplier Portal

Hi Jane Doe,

A coworker invited you to join their account on Coupa. Once you have registered, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions and much more.

Find out more using the links below, and use the button to register. Welcome!



Join

5



6

Password



8

Create Account



Create an account

Grow your Business on Coupa with a Free Account

* Business Name

GreenTech Innovations Ltd

Your legal business name (or legal personal name if an individual)

* Email

[Email field]

* First Name

Jane

* Last Name

Doe

Cannot contain special characters or symbols (like !, ?, *, &, <, >)

* Password

[Password field]

* Confirm Password

[Confirm Password field]

Use at least 8 characters and include a number and a letter.

I accept the [Privacy Policy](#) and [Terms of Use](#)



Accept Ts & Cs

7

Create an account

Already have an account? [Log In](#)

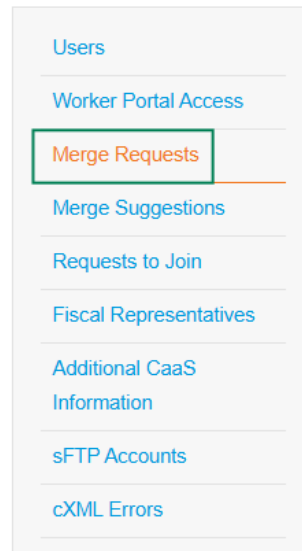
03.a. How to Add More Users to a CSP Account (4/5)



If the **invited user already has a CSP account**, you will receive an error notification when trying to send out the invitation, warning that this user is already on CSP.


In this case the only solution is to merge accounts by initiating a Merge Request: **Setup** -> **Merge Requests** -> **Request Merge**

Admin Merge Requests



Initiate Merge Request

← **Enter email address to merge with**

I'm not a robot  ← **Solve reCaptcha**

! 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 organisation. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

← **Request Merge**

03.a. How to Add More Users to a CSP Account (5/5)

The existing user will be notified of the merge requests and will be able to respond by accessing **Setup -> Merge Requests -> Open merge requests -> Respond**

The next window will explain the implications of merging account. Acknowledge the email address and click **'Accept'**.

Warning! 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 organization.

Admin Merge Requests

The screenshot shows the 'Initiate Merge Request' form. On the left is a navigation menu with 'Merge Requests' highlighted. The main form contains an email input field with 'coupa@coupamail.edu', a reCAPTCHA 'I'm not a robot' checkbox, and a 'Request Merge' button. Below this is a warning message: '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 organisation. Once approved, an account merge cannot be undone. Learn more about merging accounts.' At the bottom, there is a table of 'Open merge requests' with one entry for 'UAT Test Supplier' and a 'Respond' button.

Merge Request



UAT Test of UAT Test Supplier has requested to merge with your Coupa Supplier Portal account. By accepting this request, the administrator of UAT Test Supplier will become the new account owner.

This section compares the data of the current account and the merged account. 'My Account' lists: My users, My customers, My payment information, and My public profile. 'Their Account' lists: Their users, Their customers, Their payment information, and Their public profile. The 'Merged Account' section states: 'As the account owner, they will administer' and lists: All combined users, All combined customers, and All combined payment information. Below this, it says 'I will administer only' and lists: My users, My customers, and My payment information. At the bottom, it says 'The merged account will use' and lists: Their public profile.

Users with access to Supplier Name (.....-1@boi.com) merged account

Note from requester BOI Webinar

Add note for requester

I recognise the email address above as a colleague at my company, and I agree to merge

Warning! 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. Only accept this request if you confirm this user is part of your organisation. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Cancel Reject **Accept**

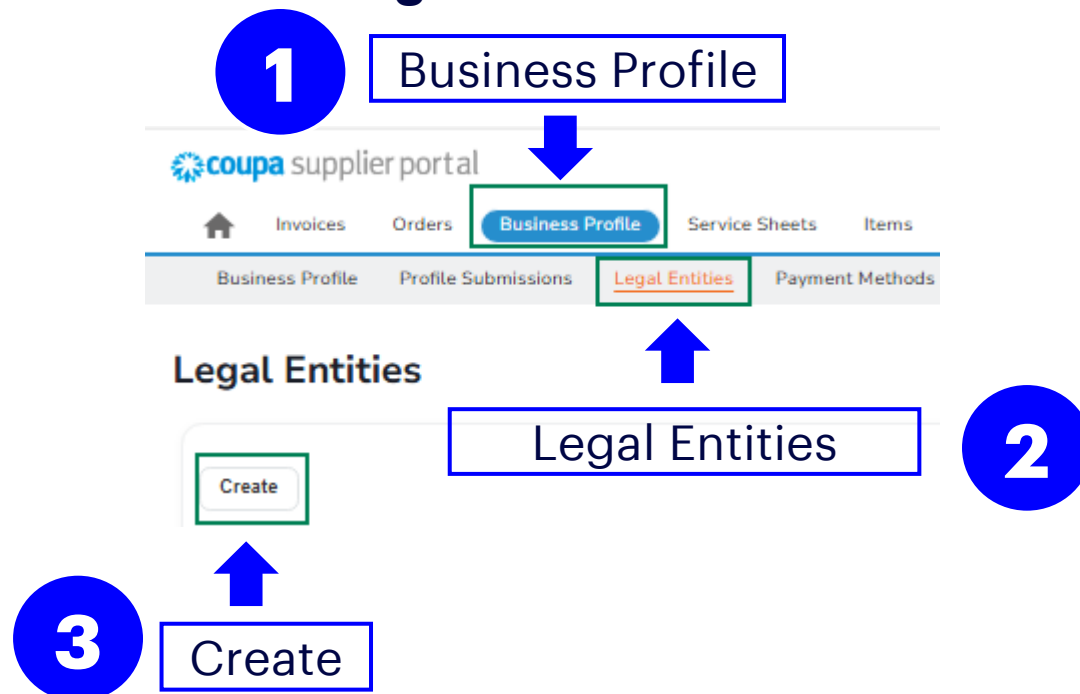
03.b. How to Add Multiple Legal Entities for Invoicing (1/3)



When you create your CSP account, you have the option to add details for a single legal entity

If you use the same email address in Coupa to manage several legal entities that provide services to BOI (e.g. offices in different countries), here is the process of adding additional legal entities once your CSP account creation is complete:

- Log into your CSP account (<https://supplier.coupahost.com/sessions/new>), go to **Business Profile > Legal Entities > Create:**



NOTE: The first time you go to the **Legal Entities** sub-tab you will be asked to enable Multifactor Authentication (MFA). You can find instructions about this procedure in section 03.d. of this guide.

03.b. How to Add Multiple Legal Entities for Invoicing (2/3)



Fill in the mandatory fields and click on 'Save':

4

1 - 8

Mandatory (*)

Create Legal Entity

1 → Legal Entity Name * (GreenTech Innovations UK) ← 2 Country/Region * (United Kingdom)

3 → Tax Registrations Country/Region * (United Kingdom) ← 4 VAT ID * (GB123456789) I don't have a Tax ID Number

[Add Tax Registration](#)

Additional Company Information

Type of Company * (Ltd) ← 5 Board of Directors

Invoice From Address

Please enter the address that you invoice from or the address where you receive posted and in-person payments.

Country/Region * (United Kingdom) ← 6 Address Line 1 * (123 Baker Street) Address Line 2 (Address Line 2) ⊕

City * (London) ← 7 State () Postcode * (W1U 6RY) ← 8

Invoice-From Code () Preferred Language (English (UK))

Ship-From Address

Please enter the physical address that your goods are shipped from. This can be a warehouse address.

Same as Invoice-From Address

Remit-To Address

Please enter the address to which you receive in-person payments.

Same as Invoice-From Address

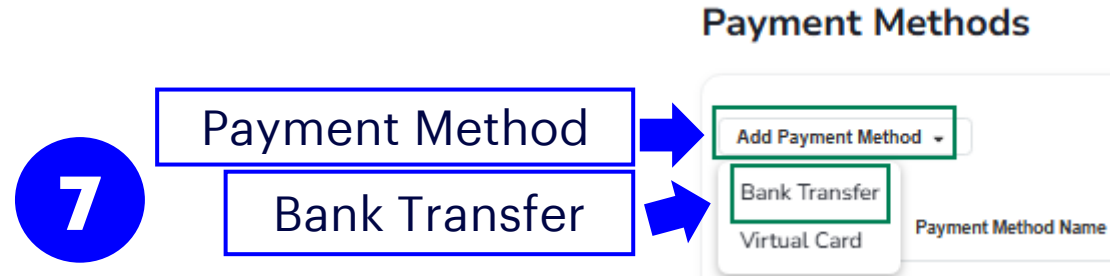
5 Save → Cancel Save

03.b. How to Add Multiple Legal Entities for Invoicing (3/3)



You will then be prompted to associate a bank account with your newly created Legal Entity. Click on 'Continue' and then follow the steps described in the 'How to Add Multiple Bank Accounts for Invoicing' section (coming up next) to add a new bank account:

- ✓ Business Legal Entity successfully created. Next, you must add payment info or a Remit-to address required for invoicing. Go to Payment Methods and click 'Add Payment Method' to complete this.



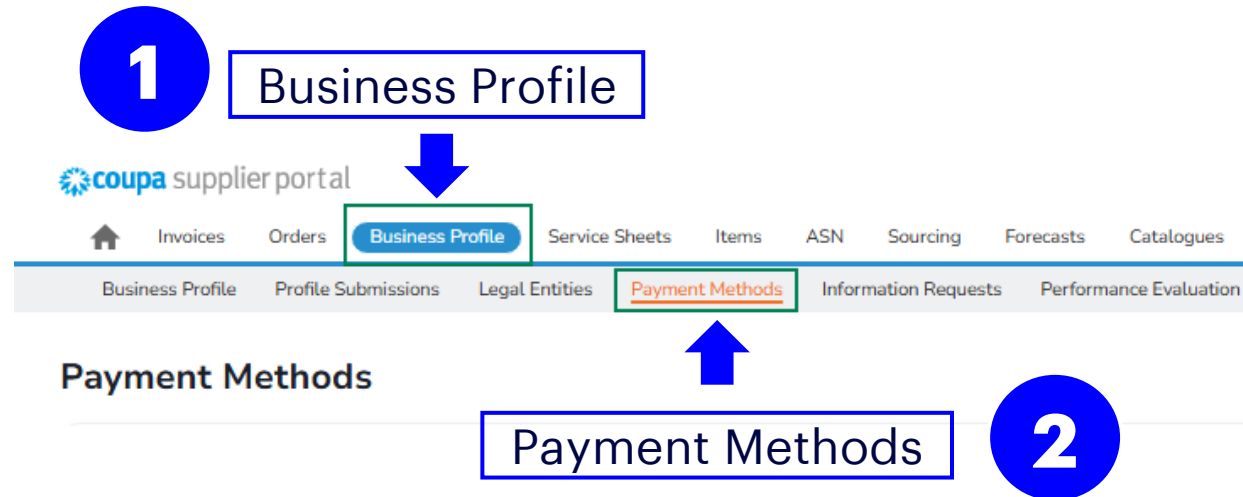
03.c. How to Add Multiple Bank Accounts for Invoicing (1/4)



When you create your CSP account, you have the option to add bank details for a single bank account

If your company uses several bank accounts (e.g. in different currencies) in relation to the services provided to BOI, here is the process of adding additional bank accounts once your CSP account creation is complete:

- ❑ Log into your CSP account (<https://supplier.coupahost.com/sessions/new>), go to **Business Profile > Payment Methods**:



NOTE: The first time you go to the **Payment Methods** sub-tab you will be asked to enable Multifactor Authentication (MFA). You can find instructions about this procedure in section 03.d. of this guide.

03.c. How to Add Multiple Bank Accounts for Invoicing (2/4)



Click on **Add Payment Method** and select **Bank Transfer**:

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'coupa supplier portal', user 'MONICA', and 'HELP'. The main navigation menu has 'Business Profile' selected. Below it, a sub-menu shows 'Payment Methods' highlighted. The 'Payment Methods' section features an 'Add Payment Method' button, a search bar, and a table of existing methods.

Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Ireland	EUR	GreenTech Innovations Ltd	Bank of Ireland	Active	

Payment Method



Bank Transfer



3

03.c. How to Add Multiple Bank Accounts for Invoicing (3/4)



Fill in at least the fields highlighted below and click on **Save**:

4

Highlighted Fields



Add Payment Method

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

Account Nickname * BOI GBP Account	Beneficiary Legal Name * GreenTech Innovations Ltd.
Bank Branch Country / Region * Ireland	Bank Account Currency * GBP
Bank Name * Bank of Ireland	Account Number 31926819
IBAN IE79 BOFI 9311 5212 3456 78	Transit Code Type Transit Code
SWIFT / BIC Code BOFIIE2D	Branch Code

Additional Information

Bank Branch Address

Address Line 1
Address Line 2
+ Address Line 3

Townland/District
Post Town/City
County/Province
+ Subdivision ISO Code
Eircode

Save

5



03.c. How to Add Multiple Bank Accounts for Invoicing (4/4)



You will then be asked to select the customers with whom you want to share this account.

You must tick **Bank of Ireland** and click on **Save**.

Both accounts will now be displayed in the **Payment Methods** section, and you will be able to select the appropriate one when creating each invoice:

Great News! The payment information has been successfully saved.

Select customers with whom you want to share GBP Account and click Save.

Customer

Select All

Bank of Ireland

Per page: 5 | 10 | 20

Cancel Save

BOI

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Payment Methods

GBP Account has been linked with your customer(s).

Add Payment Method

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	GBP Account	Ireland	GBP	GreenTech Innovations Ltd	Bank of Ireland	Active	
Bank Transfer	EUR Account	Ireland	EUR	GreenTech Innovations Ltd	Bank of Ireland	Active	

Save

7

NOTE: If the account you are adding has not been used previously in relation to the Bank of Ireland Group (is not recorded in BOI SAP), you should also update the **Supplier Onboarding External Form** with these details. Instructions for this process can be found in section 02 of the Training Pack.

03.d. Multifactor Authentication (MFA) Activation and Use (1/4)

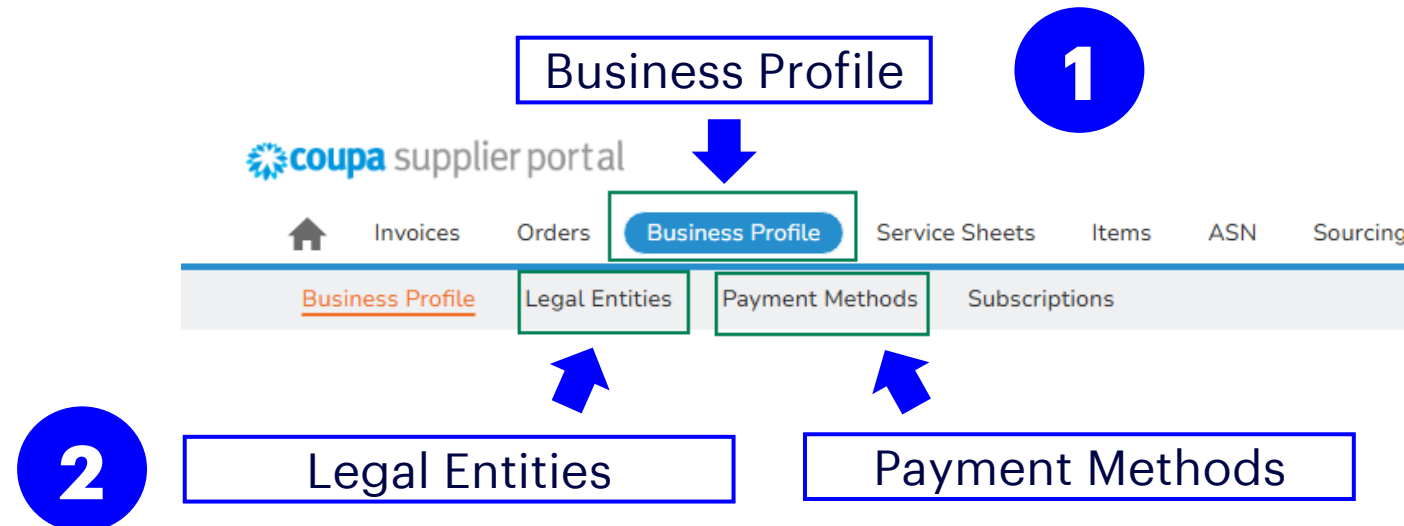


In the Coupa Supplier Portal (CSP), **MFA (Multi-Factor Authentication)** is a security feature that enhances account protection by requiring users to verify their identity using more than just a password.

It will be **required each time you access the *Legal Entities* or *Payment Methods*** sub-tab in the **Business Profile** tab, to make payment information-related changes.

How to enable MFA

- ❑ Go to the **Business Profile** tab and click on **Legal Entities** or **Payment Methods**.



03.d. Multifactor Authentication (MFA) Activation and Use (2/4)



- ❑ You will be asked to enable Multi-Factor Authentication. This is a mandatory step. Click on “**Enable**”:
- ❑ Scan the QR code with your Multi-Factor Authentication app (e.g. Google Authenticator, Microsoft Authenticator etc.)
- ❑ Enter the 6-digit verification code received on your mobile device from the MFA app and click **Enable**.
- ❑ If you don't have an MFA app, download it on your mobile device from Play Store/App Store.

Authentication Required
Multi Factor Authentication needs to be enabled before you can access this feature.

3 Enable

Multi Factor Authentication via App

1 Scan this QR code using your mobile device.

- Open your preferred authentication app on your mobile device. [Learn more](#)
- For most apps, select “Add” or “+” to scan the QR code or copy and paste the security key.

4 QR code

Coupa Supplier Portal

XYMQEG2ERFKSYH6IHHQ3LTF6
S25TYZR5
Click to copy Security Key

5 6-digit code

2 Enter the 6-digit verification code from your device.

278714

Cancel **6 Enable**

03.d. Multifactor Authentication (MFA) Activation and Use (3/4)



The system will then provide some emergency recovery codes which:

- ❑ You can use to **restore access to the CSP** in the cases indicated in the screenshot.
- ❑ You should **keep safe** in case you need them and once you save them, close this window.

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03.d. Multifactor Authentication (MFA) Activation and Use (4/4)



You now have access to the **Legal Entities** and **Payment Methods** sub-tabs

Upon every subsequent login to your account and attempt to access the **Legal Entities** or **Payment Methods**, the system will require you to enter the MFA code from your Authenticator app:

8

Multi Factor Authentication

Enter the 6-digit verification code from your authenticator app.

* Multi Factor Authentication Code

Cancel OK

MFA code