

Setting up a Coupa Delegate

Delegates are individuals who are authorized to work on your behalf. They may submit requests and reports, and some delegates may even approve on your behalf.

To add a delegate to submit a request or report, follow these steps:

1. Click on your user icon in the upper right corner
2. Go to settings
3. Click on delegates
4. Under Delegate Expense Creation sections, enter the name of your chosen delegate
5. Select the correct individual from the list that populates
6. Click Save Delegates

Settings

General **Delegates** Billing Accounts Reports Notifications

Delegates

☐ Turn off my own notifications during delegation period.
☒ Notify me whenever a delegate approves something for me.

Create Search

Delegate	Approval Delegate	Receiving Delegate	Start Date	End Date	Reason	Actions
No rows.						

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Delegate Expense Creation

Allow these users to create Expense Reports on your behalf.

Select Save Delegates

To add a delegate to approve on your behalf, follow these steps:

1. Click on your user icon in the upper right corner
2. Go to settings
3. Click on Delegates
4. Under Delegates, click Create
5. Complete the required fields
 - a. Check the box for Approval
 - b. Enter the delegate's name and select it from the list
 - c. Enter a start date for the delegate permissions

- d. Enter an end date for the delegate permissions
- e. Enter a reason for assigning a delegate
6. Click Save
7. Manage existing approval delegates from the Delegates tab of your User Settings

Settings

[General](#) [Delegates](#) [Billing Accounts](#) [Reports](#) [Notifications](#)

Delegates

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