



# RFS

# Coupa Supplier Portal- CSP

## How to Merge Supplier Accounts

Jan 2024

### Background

This guide will provide you with an overview of the steps to be performed to merge Supplier accounts in the CSP.

### Outline

Single Supplier can have multiple accounts/profiles in CSP if several users from the same company register or are invited to the CSP portal using different email addresses. In this case the accounts can be merged into a single account.

**Note – Accounts with the same email address are merged automatically (regardless of which invite message you use to create your account, since both invites are sent to the same email address).**

**Warning – Account merges cannot be undone. Please use caution when merging accounts and ensure to verify that the account you are merging with is part of your organisation**

## Request Merge by Supplier – Step 1 (Navigate to the location)

Below are the steps to be followed to merge accounts in the CSP:

Supplier 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.

1. On the CSP homepage you may have a notification on the right hand of the screen noting **Merge Accounts** if this doesn't appear then click on **Profile** tab then **Setup** button on the main menu bar. From the left nav click **Merge Requests**.

### Homepage

The screenshot shows the Coupa Supplier Portal homepage. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Add-ons', and 'Admin'. A 'Profile Progress' section indicates '100% Complete' and 'Last Updated about 2 weeks ago'. A 'Merge Accounts' notification is highlighted in a red box on the right side of the page, stating: 'Merge Accounts 1. If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers. Not seeing the account you want to merge with? Click here.'

### Admin/Setup tab

The screenshot shows the Coupa Supplier Portal Admin/Setup tab. The navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Setup' button is highlighted in a red box with a '1' next to it. Below the navigation bar, the 'Admin' tab is selected, and the 'Customer Setup' section is visible.

### Admin Users

The screenshot shows the Coupa Supplier Portal Admin Users page. The navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Setup' button is highlighted in a red box with a '1' next to it. Below the navigation bar, the 'Admin' tab is selected, and the 'Customer Setup' section is visible. The 'Merge Requests' link is highlighted in a red box with a '1' next to it. The main content area shows a table of users with columns for 'User Name', 'Email', 'Status', 'Permissions', 'Customer Access', and 'Actions'. The table contains one user: Joanne Cruuden, joannecruuden121+1@gmail.com, Active, with various permissions and customer access.

User Name	Email	Status	Permissions	Customer Access	Actions
Joanne Cruuden	joannecruuden121+1@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	NSW Rural Fire Service	Edit

## **Request Merge by Supplier – Step 2/3 (Request Merge from homepage)**

There are 2 ways a merge can be done :-

2. Click the **Request Merge** button to initiate the merge request via the suggestion on homepage or
2. Click the **Merge Requests** link on the left navigation under **admin tab**, provide the email address of the account you want to merge in the email field, and then click the **Request Merge**.
3. A message about the submission of merge request will display on the homepage for Supplier A and Supplier B will also receive the merge message. Click the **View Merge** button to view the merge request. Supplier B can either accept or reject.

The suggestions to merge accounts are based on email domain a notification may appear on the homepage right hand side to merge accounts as per below.

If you know that a suggestion is invalid, click on the **Remove** Button and you will not see the request again

### Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here](#).

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**SupplierA**  
supplierA@supplier.com

2 **Request Merge** Remove

**SupplierB**  
supplierB@supplier.com

Request Merge Remove

### Request Account Merge

You're about to merge your profile and users with **SupplierA**. Select the owner for the merged account. For more info on merging, [Click here](#).

\* Account Owner  My Account  
 Their Account  
By choosing this option I understand that I will no longer be the account owner.

\* Note

I'm not a robot   
reCAPTCHA  
Privacy - Terms

Cancel **Send Request**

If the account is not listed or the list is too long to search for the specific account that you want. Clicking on the **Click here** link takes you to the **Admin Merge requests** page

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.
*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.

## Request Merge by Supplier – Step 2 (Merge Request from Admin/Setup tab)

The screenshot shows the 'Admin Users' page in the Coupa system. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Payments', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Setup' tab is highlighted with a red box and a red '1'. Below the navigation bar, the 'Admin Users' section is visible. The 'Users' sub-tab is highlighted with a red box and a red '2'. The main content area shows a table of users with columns for 'Users', 'Permissions', and 'Customer Access'. A table with one user, Jane Doe, is shown. The 'Permissions' column lists various system permissions. The 'Customer Access' column shows 'Customer 1'. There is an 'Edit' button next to the user name and an 'Invite User' button in the top right corner.

The screenshot shows the 'Admin Merge Requests' page. The left sidebar contains a list of navigation items: 'Users', 'Merge Requests', 'Legal Entity Setup', 'Fiscal Representatives', 'Remit-To', 'Terms of Use', 'Payment Preferences', 'Static Discounting', 'SFTP Accounts', 'cXML Errors', and 'SFTP Errors'. The 'Merge Requests' sub-tab is highlighted with a red box and a red '2'. The main content area is titled 'Initiate Merge Request'. It features a text input field containing 'jdosupplier@awesomesupplier.com' and a blue 'Request Merge' button. Below the input field is a reCAPTCHA widget with the text 'I'm not a robot' and a checkbox. A confirmation message reads: 'By submitting the merge request I confirm that the user whose email address I am providing belongs to my organization.' Below this is a section titled 'Open merge requests' which states 'All clear! No open merge requests.'

## Merged accounts use the following rules:

Element	Merge Behavior
Connected customers and customer profiles	Any connected customers are retained in the new account. The existing email address remains the contact email for the customer. If the customer is connected to both accounts, the parent account connection is retained and the merged account connection is removed.
Remit-to addresses	Remit-to information is transferred only for addresses that are available to all customers.

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For further information – go to the [Coupa Supplier Portal](#) or contact Coupa via email [sourcing.support@coupa.com](mailto:sourcing.support@coupa.com)

