

Merging accounts in the Coupa Supplier Portal(CSP)

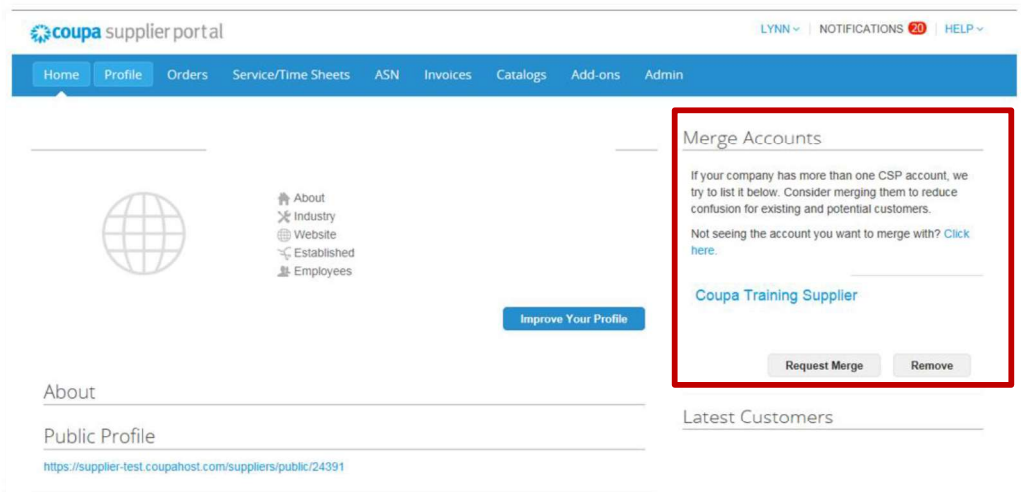


A Automatic account merge

When a new account is registered to the **Coupa Supplier Portal**, Coupa will automatically merge other existing accounts that have been registered with the same email address.

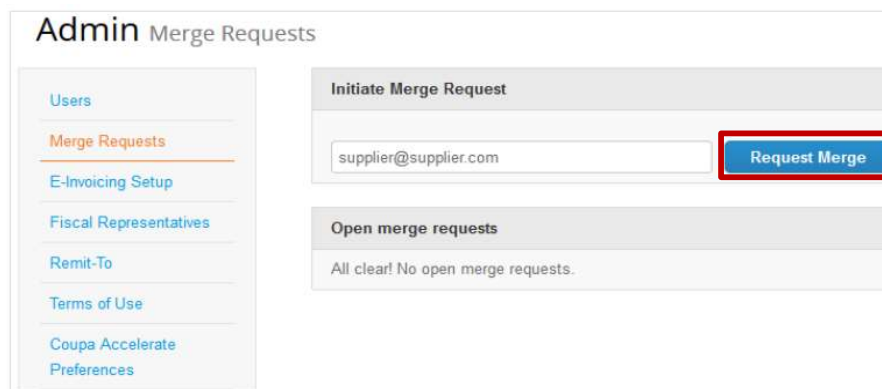
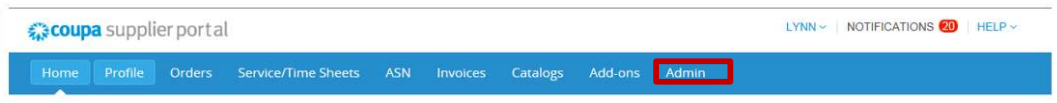
B Manual account merge: Option 1

- 1 Once the new account has been registered to the CSP, there will be the option to merge accounts on the home screen. The supplier can then click on the button **“Request merge”**.



C Manual account merge: Option 2

- 1 Once the new account has been registered to the CSP, there will be the option to merge accounts on the home screen. The supplier can then click on the button **“Request merge”**.



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D Automatic account merge




In both situations, you will be redirected to the same page.

- 1 Select the Account Owner of the record:
 - My Account means that you are retaining ownership and the merged user will be under your administration.
 - Their Account means that they are retaining ownership and the you will be under their administration.
- 2 Add a note about your request to help avoid any confusion.
- 3 Click Send Request.

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](#).

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

I'm not a robot 
reCAPTCHA
Privacy - Terms

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Once completed the registered accounts and their respective information, customers etc. will have been merged with each other.

Managing Users in the Coupa Supplier Portal(CSP)

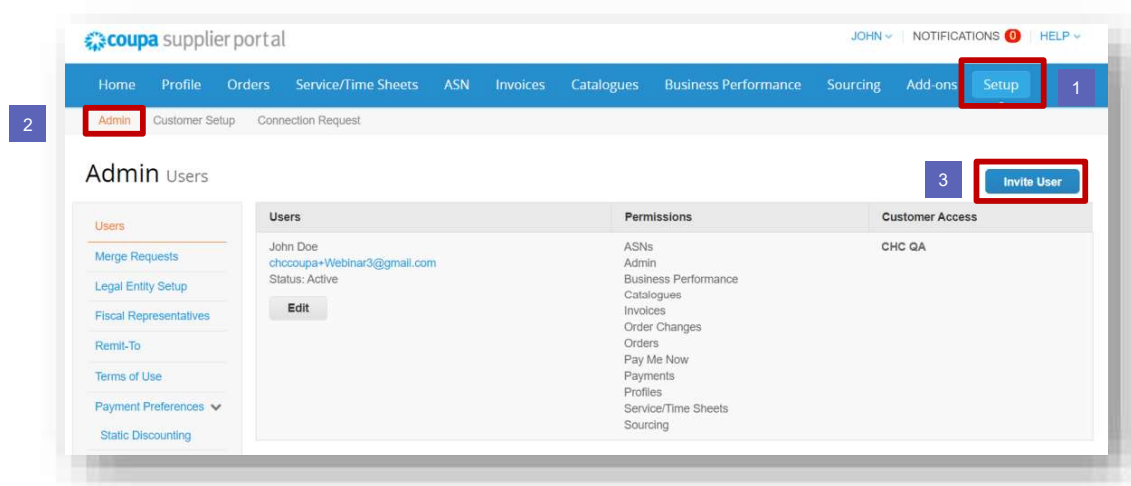


A Sending the invitation



When you want another user to be connected to the **Coupa Supplier Portal**, an invitation will need to be sent.

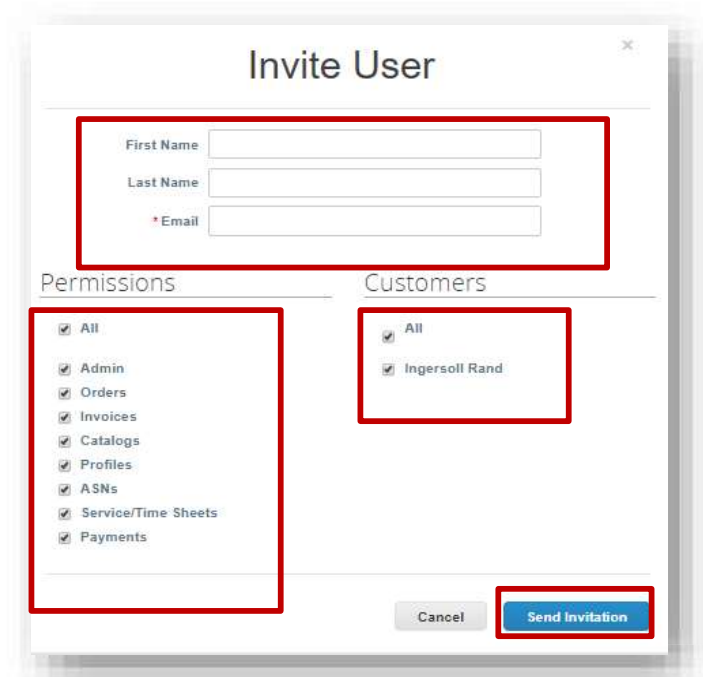
- 1 Go to the setup page.
- 2 Go to the Admin tab.
- 3 Click on the **“Invite User”** button.



B Necessary information

After clicking the **“Request merge”** button, the following information is required.

- The contact & personal information regarding the invited user.
- The permission the new user will have in the **Coupa Supplier Platform**.
- The customers to which the new user will have access to.



Once completed the new user will have access to the selected customers and will have the selected permissions to act upon within the **Coupa Supplier Platform**.