Supplier Training

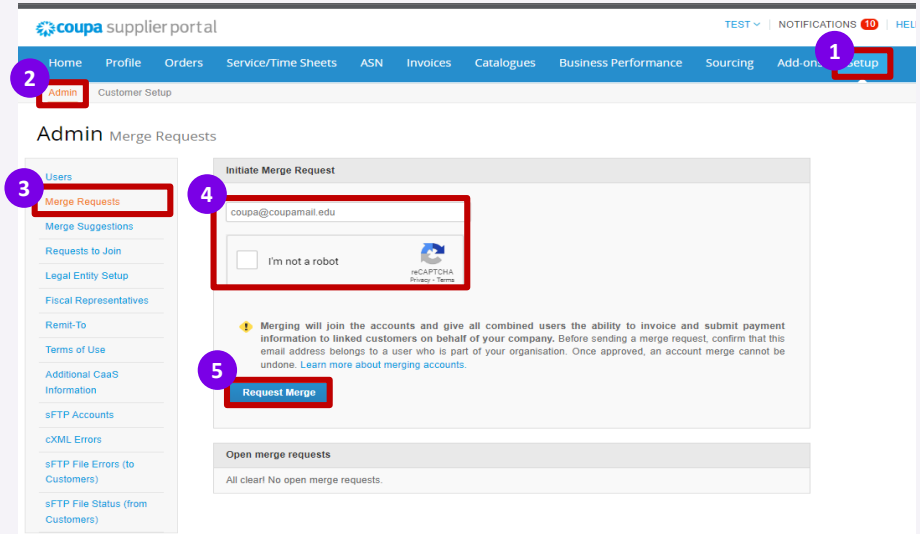
Coupa Supplier Portal – managing user

CSP Supplier Merge 1/3

Your 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.

Follow the step to merge your different account:

1. Click first on **Setup** tab
2. Then on **Admin**
3. Click on Merge Request
4. Add the email address of the recipient and Tick the CAPTCHA box
5. Click on the<**Request Merge**>button

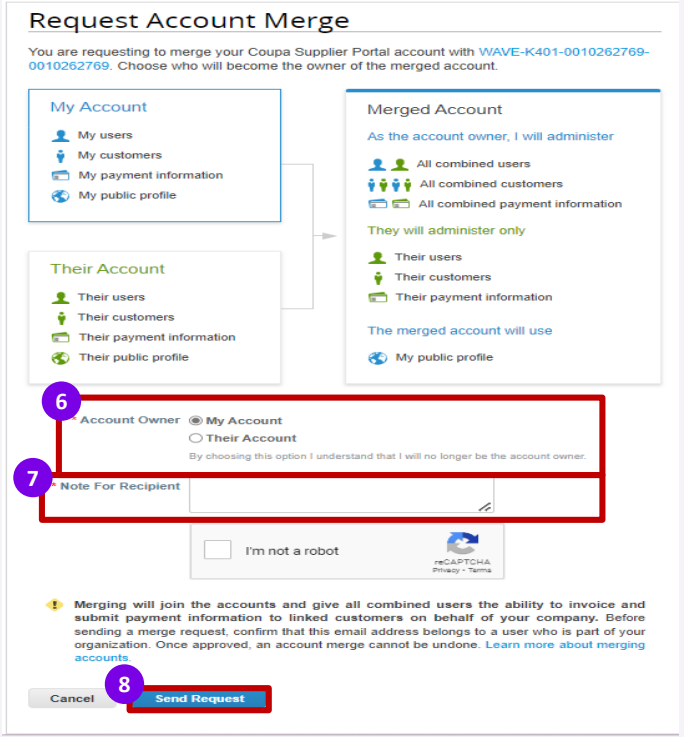


Note: Accounts with the same email address are merged automatically (regardless of which invite message you use to create your account, since both invites are sent to the same email address).

CSP Supplier Merge 2/3

6. After clicking on <**Request Merge**>, 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 you will be under their administration.
7. Add a note about your request to help avoid any confusion and then
8. Click on <**Send Request**> button.

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. Once approved, an account merge cannot be undone.



CSP Supplier Merge 3/3

9 Once the request is sent you will receive a confirmation.

The person requested to Merge will receive a notification on their CSP account to accept or reject the merger request.

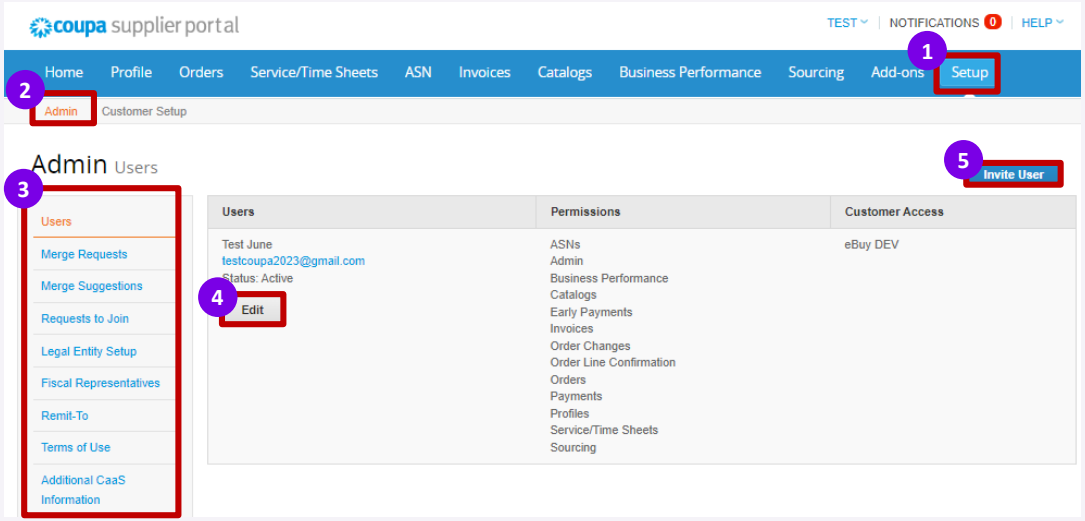
Once accepted the merge will be complete.

- You can see purchase orders and create invoices for both supplier records after selecting a customer from the Select Customer drop-down.

Managing Users in CSP 1/3

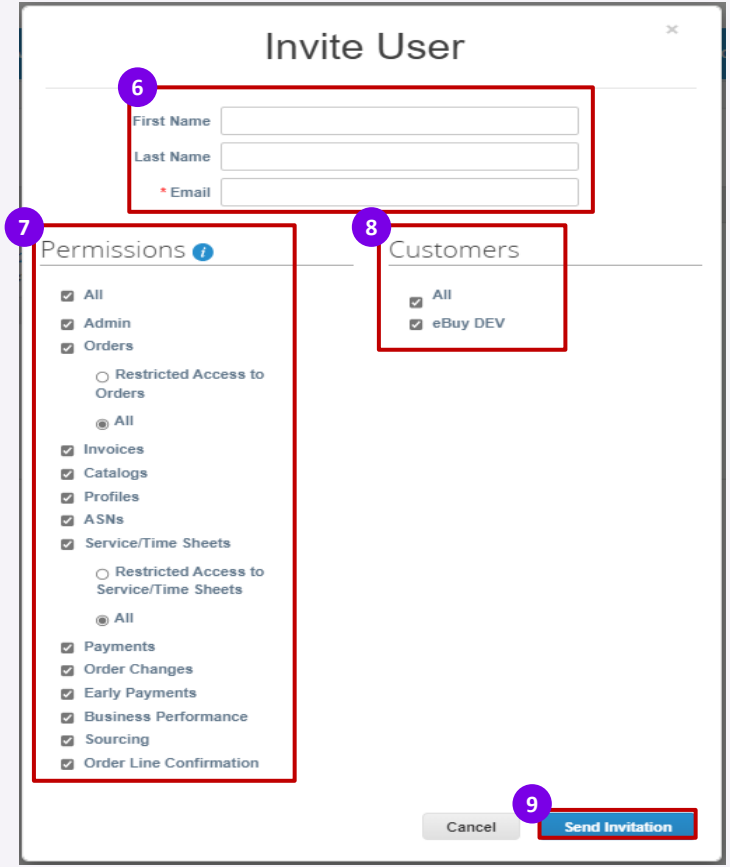
Using the supplier portal, you can invite additional users in your company to access the CSP.

1. Click first on **Setup** tab
2. Then on **Admin** tab at the top of the home page
3. On the left, you will see a list of actions you can perform:
4. Click on **Edit** button if you would like to edit the existing user
5. Click on **Invite User** button to add a new user



Managing Users in CSP 3/3

6. Enter the user's information.
7. Select the user's **permissions**
8. Select which **customer(s)** the user can access.
9. Click on **Send Invitation**.



Managing Users in CSP 3/3

10 After you have sent the invitation, the employee will receive an email notification, with a link to register.

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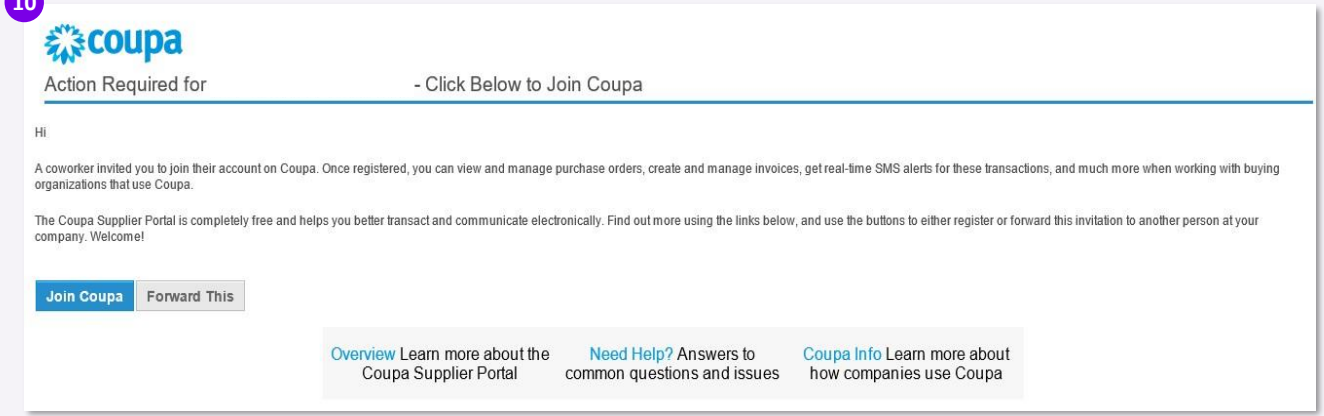

Thank you

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