



.sanofi



# 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).

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Business Performance', 'Sourcing', 'Add on...', and 'Setup'. A red box highlights the 'Setup' tab with a '1' callout. Below the navigation bar, the 'Admin' section is active, with a red box around the 'Admin' link and a '2' callout. The 'Merge Requests' link in the left sidebar is highlighted with a red box and a '3' callout. The 'Initiate Merge Request' form contains the email address 'coupa@coupamail.edu' in a red box with a '4' callout, an unchecked 'I'm not a robot' checkbox, and a CAPTCHA image. A red box around the 'Request Merge' button has a '5' callout. A warning message states: '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.'

# CSP Supplier Merge 2/3

- 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.
- Add a note about your request to help avoid any confusion and then
- 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.

### Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with **WAVE-K401-0010262769-0010262769**. Choose who will become the owner of the merged account.

**My Account**

- My users
- My customers
- My payment information
- My public profile

**Their Account**

- Their users
- Their customers
- Their payment information
- Their public profile

**Merged Account**

As the account owner, I will administer

- All combined users
- All combined customers
- All combined payment information

They will administer only


- Their users
- Their customers
- Their payment information

The merged account will use

- My public profile

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

**7** Note For Recipient

I'm not a robot 

**8**

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

# CSP Supplier Merge 3/3

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

Merge request submitted successfully. [LEHIGH VALLEY SAFETY SUPPLY CO (US-PA-ALLEN-01)-89], or the account owner, will only be notified if they have an active account. X

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

The screenshot shows the Coupa Supplier Portal interface. At the top right, there are links for 'TEST', 'NOTIFICATIONS' (with a red badge), and 'HELP'. The main navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup' (highlighted with a red box and callout 1). Below this, a secondary navigation bar shows 'Admin' (highlighted with a red box and callout 2) and 'Customer Setup'. The main content area is titled 'Admin Users'. On the left, a sidebar menu lists various actions: 'Users' (highlighted with a red box and callout 3), 'Merge Requests', 'Merge Suggestions', 'Requests to Join', 'Legal Entity Setup', 'Fiscal Representatives', 'Remit-To', 'Terms of Use', and 'Additional CaaS Information'. In the main content area, there is a table with columns 'Users', 'Permissions', and 'Customer Access'. The first row shows a user named 'Test June' with email 'testcoupa2023@gmail.com' and status 'Active'. An 'Edit' button (highlighted with a red box and callout 4) is located next to the user's name. To the right of the table, an 'Invite User' button (highlighted with a red box and callout 5) is visible.

Users	Permissions	Customer Access
Test June testcoupa2023@gmail.com Status: Active	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	eBuy DEV

# 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**.

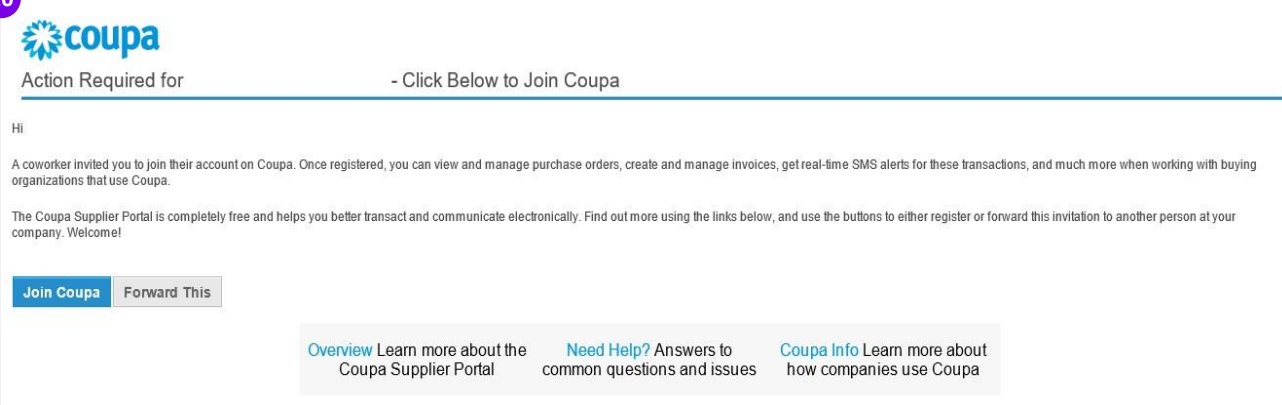
The screenshot shows the 'Invite User' form with the following elements:

- 6** A red box highlights the user information fields: 'First Name', 'Last Name', and '\* Email'.
- 7** A red box highlights the 'Permissions' section, which includes a list of permissions with checkboxes: All, Admin, Orders, Restricted Access to Orders, All, Invoices, Catalogs, Profiles, ASNs, Service/Time Sheets, Restricted Access to Service/Time Sheets, All, Payments, Order Changes, Early Payments, Business Performance, Sourcing, and Order Line Confirmation.
- 8** A red box highlights the 'Customers' section, which includes a list of customers with checkboxes: All and eBuy DEV.
- 9** A red box highlights the 'Send Invitation' button at the bottom right of the form.


# 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.

10



The screenshot shows an email invitation from Coupa. At the top left is the Coupa logo. Below it, the text reads "Action Required for" followed by a horizontal line and "- Click Below to Join Coupa". The main body of the email starts with "Hi" and a paragraph explaining that a coworker invited the recipient to join their account on Coupa. It lists benefits such as viewing and managing purchase orders, creating and managing invoices, and receiving real-time SMS alerts. Below this is another paragraph stating that the Coupa Supplier Portal is free and helps with electronic transactions, with a "Welcome!" message. At the bottom left, there are two buttons: "Join Coupa" (highlighted in blue) and "Forward This". At the bottom right, there are three links: "Overview Learn more about the Coupa Supplier Portal", "Need Help? Answers to common questions and issues", and "Coupa Info Learn more about how companies use Coupa".

 Action Required for - Click Below to Join Coupa

---

Hi

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

The Coupa Supplier Portal is completely free and helps you better transact and communicate electronically. Find out more using the links below, and use the buttons to either register or forward this invitation to another person at your company. Welcome!

[Join Coupa](#) [Forward This](#)

[Overview](#) Learn more about the Coupa Supplier Portal   [Need Help?](#) Answers to common questions and issues   [Coupa Info](#) Learn more about how companies use Coupa

•  
Thank you  
•

sanofi