

Job Aid – How to Initiate a Merge Request within the CSP– Coupa Tool

How to Initiate a Merge Request within the Coupa Supplier Portal (CSP)

In this job aid:

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This guide demonstrates how to merge with existing Coupa Supplier Portal users.

Merge Request Overview

- It is extremely common for companies to have multiple Coupa Supplier Portal users/accounts.
 - This often occurs when multiple users from the same company register on separate occasions OR receive customer invitations via different email addresses.
- Since invitations can only be sent to email addresses not currently linked to a CSP account, a merge request must take place in the event that two or more users would like to combine CSP account data for their company.

NOTE: Merge Requests only work for EXISTING CSP users – meaning the user in which you are merging with MUST already be associated with an existing CSP account. If you are needing to invite a user within your company who DOES NOT already exist within the Coupa Supplier Portal (SP) 4.6 (7) 4 (c) 1 (o) 1.3 (u) (n) 6.1 (t) 2.6 (.) -, (c) 1

1. Login to your Coupa Supplier Portal (<https://supplier.couphost.com/sessions/new>) account and navigate to the 'Setup' tab on the righthand side of the homepage.
2. Ensure 'Admin' is selected, then select 'Merge Requests' in the menu on the left-hand side.
3. Fill in the email address of the user in which you would like to merge with. Then select "Request Merge"

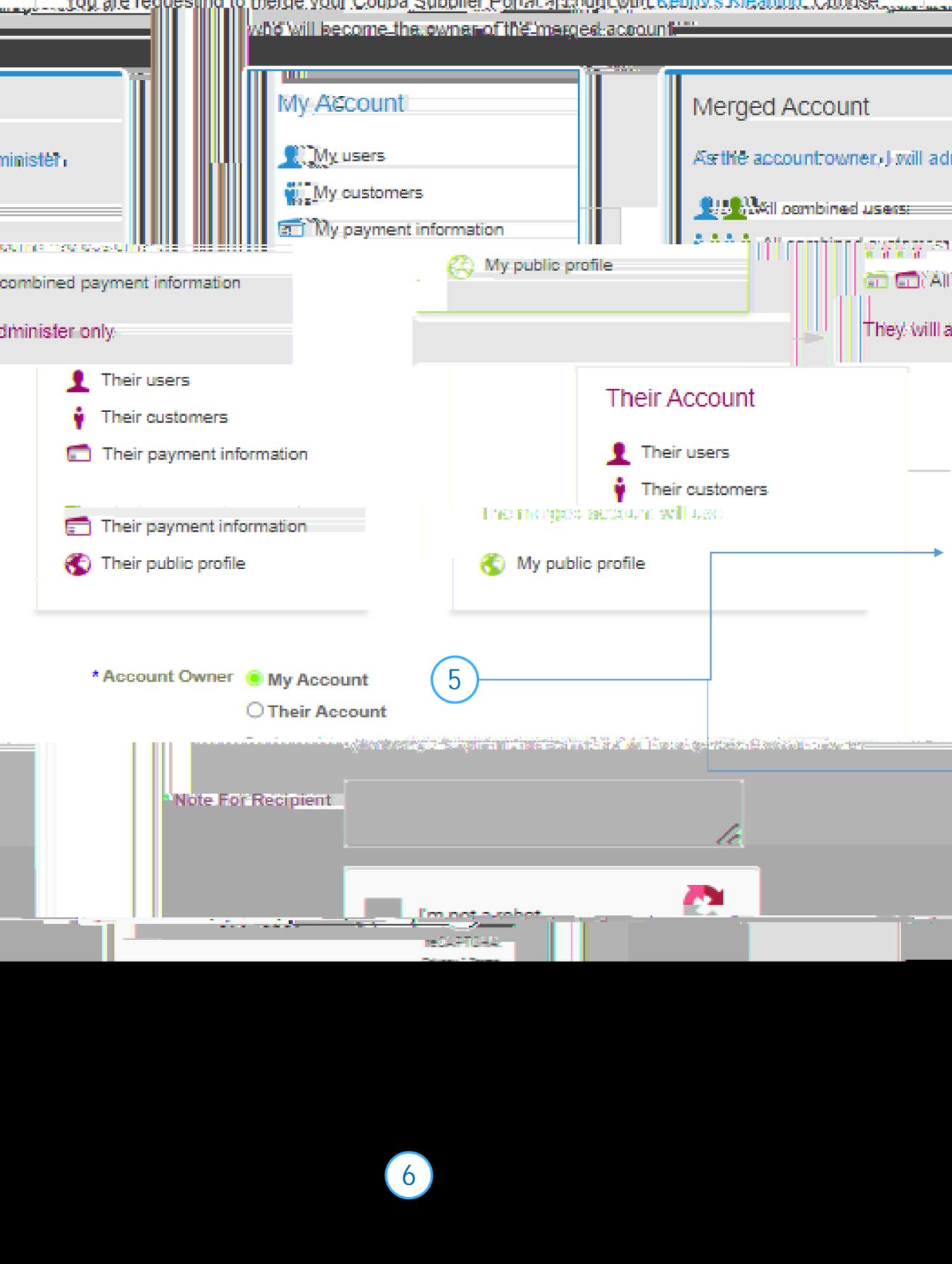
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4. After selecting “Request Merge”, the following page will appear.
5. You are required to select who between the two accounts will be the designated account owner and maintain administrator status upon the successful merge of accounts. (Please read the below section carefully when attempting to merge accounts as account merges cannot be undone).
6. Once an account owner is selected and a “Note For Recipient” is provided, please select “Send Request”.

Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with **Keony's Kleaning**. Choose who will become the owner of the merged account.



Should you select **My Account**, you will continue to maintain administrator status and the merged user will default to regular user status.

Should you select **Their Account**, the other user will maintain administrator status while you default to regular user status.

NOTE: All connected customer information is retained upon merging accounts. User login information should also remain the same. Account changes will be made at the discretion of the designated administrative user.

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