

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:

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

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 have an existing CSP account, please see the job aid titled *How to Invite Additional Users to the Coupa Supplier Portal*.

Process – Merging with Existing Users within the Coupa Supplier Portal

1. Login to your Coupa Supplier Portal (<https://supplier.coupahost.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”

The screenshot illustrates the steps to initiate a merge request in the Coupa Supplier Portal. It shows the 'Setup' tab selected in the top navigation, the 'Admin' menu item selected in the left-hand navigation, and the 'Merge Requests' sub-item highlighted. The 'Initiate Merge Request' form is shown with the email address 'coupa@coupamail.edu' entered, the 'Request Merge' button highlighted, and the 'Open merge requests' section highlighted, which currently displays 'All clear! No open merge requests.'

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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 **Kenny's Kleaning**. 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

* Account Owner My Account 5

Their Account

By choosing this option I understand that I will no longer be the account owner.

* Note For Recipient

I'm not a robot

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.](#)

Cancel
Send Request
6

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.

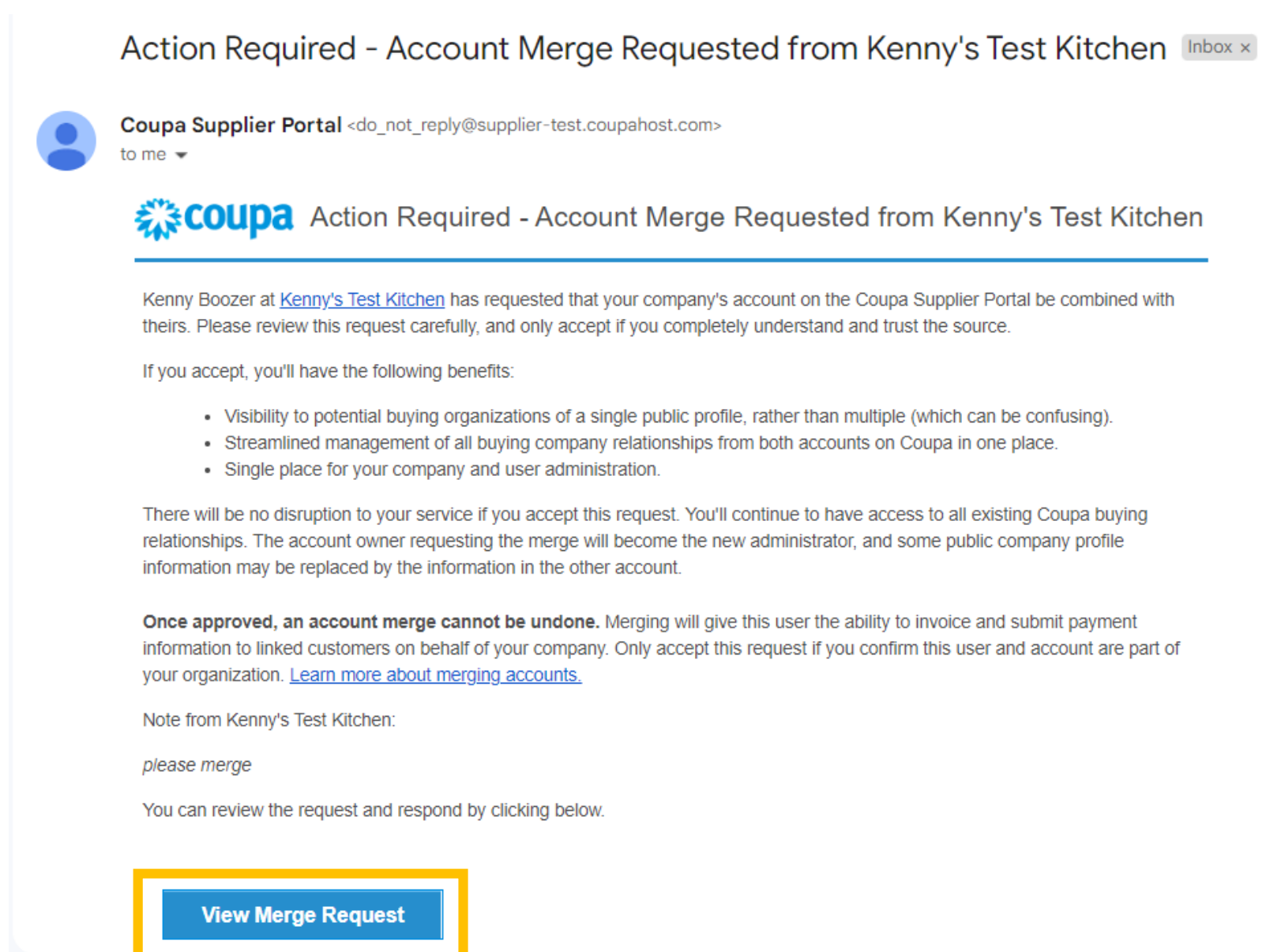
NOTE: All connected customer information is retained upon merging accounts. User login information should also remain the same. Account changes will be made at the discretion of the designated administrative user.

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Process – How to Accept a Merge Request within the Coupa Supplier Portal

1. Once a user initiates a Merge Request within the Coupa Supplier Portal, the invited user will receive an actionable email. Upon receipt of the email, please select “View Merge Request”.



2. After selecting “View Merge Request”, the user will be prompted to login to their CSP account. Once logged in, the user will be auto-navigated to the “Merge Requests” section of the CSP. Here, the user can take action by selecting “Respond” on the open merge request.

Open merge requests		
02/08/23	Kenny's Test Kitchen 123 Spooner St Irvine CA 92887 United States	Respond

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- After selecting “Respond”, the following window will appear. This window will outline important details around the merge request and will allow users to either “Accept” or “Reject” the merge request.

× Merge Request

Kenny Boozer of [Kenny's Test Kitchen](#) has requested to merge with your Coupa Supplier Portal account. By accepting this request, the administrator of Kenny's Test Kitchen will become the new account owner.

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, they will administer

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

I will administer only

- My users
- My customers
- My payment information

The merged account will use

- Their public profile

Users with access to merged account: Davita Supplier (coupatest216@gmail.com)
 Coupa Test (coupatest226@gmail.com)

Note from requester: please merge

Add note for requester:

I recognize the email addresses above as coworkers at my company, and I agree to merge

! 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. Only accept this request if you confirm this user is part of your organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Cancel Reject Accept