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HOW TO MERGE ACCOUNTS

COUPA SUPPLIER PORTAL (CSP) USER GUIDE

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HOW TO MERGE ACCOUNTS

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.

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 suggestions to merge accounts are based on email domain. For example, all the users with the @example.com domain get suggestions to merge. Merge suggestions appear in the right-hand column on the Home page.

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

Not seeing the account you want to merge with? [Click here.](#)

SupplierA
supplierA@supplier.com

SupplierB
supplierB@supplier.com

If you know that a suggestion is invalid, click on the Remove button and you will not see the request again.

If you want to merge an account, click on the Request Merge button and select an account to be the parent account and add a note.

Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with [SIT Test Supplier 9](#). Choose who will become the owner of the merged account.



* Account Owner My Account
 Their Account

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

* Note For Recipient

Ich bin kein Roboter. 
reCAPTCHA
Datenschutzerklärung * Nutzungsbedingungen

! 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.](#)

The account you are about to merge with has an sFTP account set up for automatic invoice download for customers using CaaS. Please add a new sFTP account if you wish to continue receiving these downloads.

Cancel

Send Request

Selection	Description
Account Owner / My Account	<p>This causes the other account to be merged into your company account. The other user's company account is removed.</p> <p>You continue to be the administrator for the merged company account, and the previous administrator becomes a regular user in the merged account. You can make them an administrator if you want. For more information.</p>
*Account Owner / Their Account	<p>Your company account is removed. The other user's company account becomes the only company account.</p> <p>You can no longer be the account administrator, but the administrator of the existing account can choose to make you an administrator of the merged account.</p>
*Note for Recipient	<p>Add a note about the merge request, for example, the reason for the account merge.</p>

Merged accounts use the following rules:

Element	Merge Behaviour
Connected customers and customer profiles	<p>Any connected customers are retained in the new account. The existing email address remains the contact email for the customer. If the customer is connected to both accounts, the parent account connection is retained and the merged account connection is removed.</p>
Remit-to address	<p>Remit-to information is transferred only for addresses that are available to all customers.</p>

You can also search for a specific account to merge, for example, if the account is not listed or the list is too long to search for the specific account that you want. Clicking on the [Click here](#) link takes you to the Admin Merge Requests page. You can access this page also by clicking on the Admin tab on the main menu and on the Merge Requests link on the left.


Provide the email address of the account you want to merge, and click Request Merge.

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

Admin Merge Requests

- Users
- Merge Requests**
- Legal Entity Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Payment Preferences ▾
- Static Discounting
- SFTP Accounts
- cXML Errors
- SFTP Errors

Initiate Merge Request

I'm not a robot 

By submitting the merge request I confirm that the user whose email address I am providing belongs to my organization.

Open merge requests

All clear! No open merge requests.

https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal

IMPRINT

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