Coupa Supplier Portal- CSP

How to Merge Supplier Accounts

Jan 2024

Background

This guide will provide you with an overview of the steps to be performed to merge Supplier accounts in the CSP.

Outline

Single Supplier can have multiple accounts/profiles in CSP if several users from the same company register or are invited to the CSP portal using different email addresses. In this case the accounts can be merged into a single account.

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).

Warning – Account merges cannot be undone. Please use caution when merging accounts and ensure to verify that the account you are merging with is part of your organisation

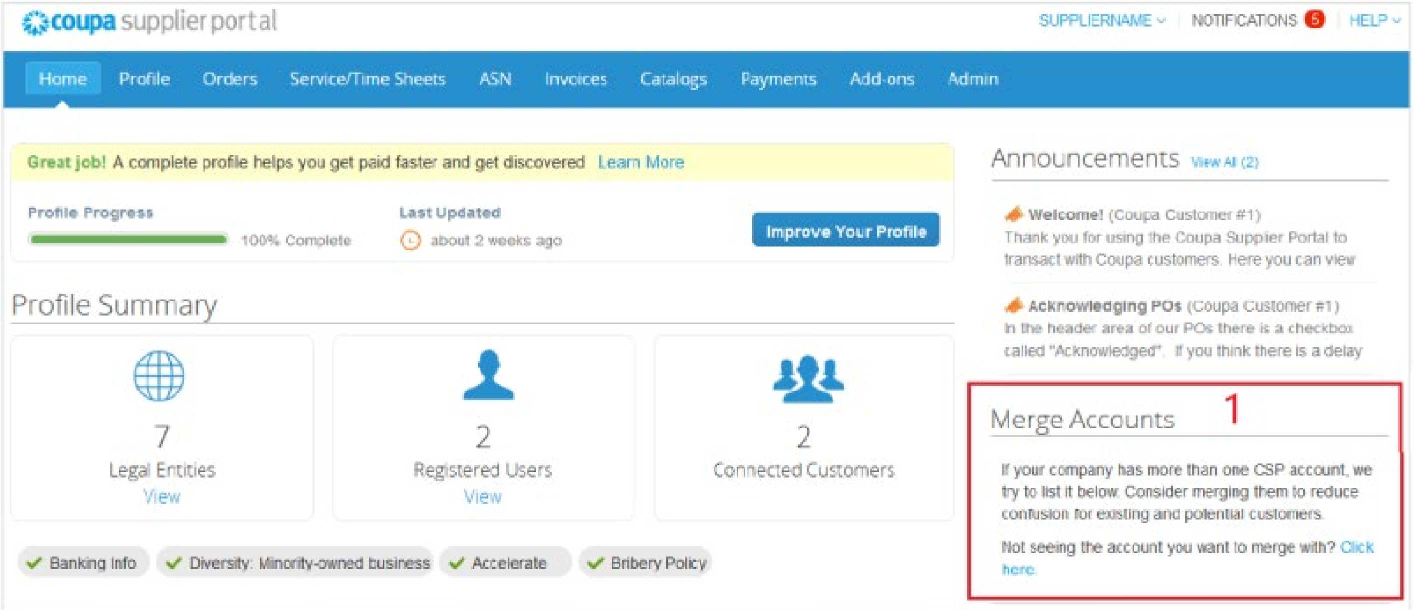
Request Merge by Supplier – Step 1 (Navigate to the location)

Below are the steps to be followed to merge accounts in the CSP:

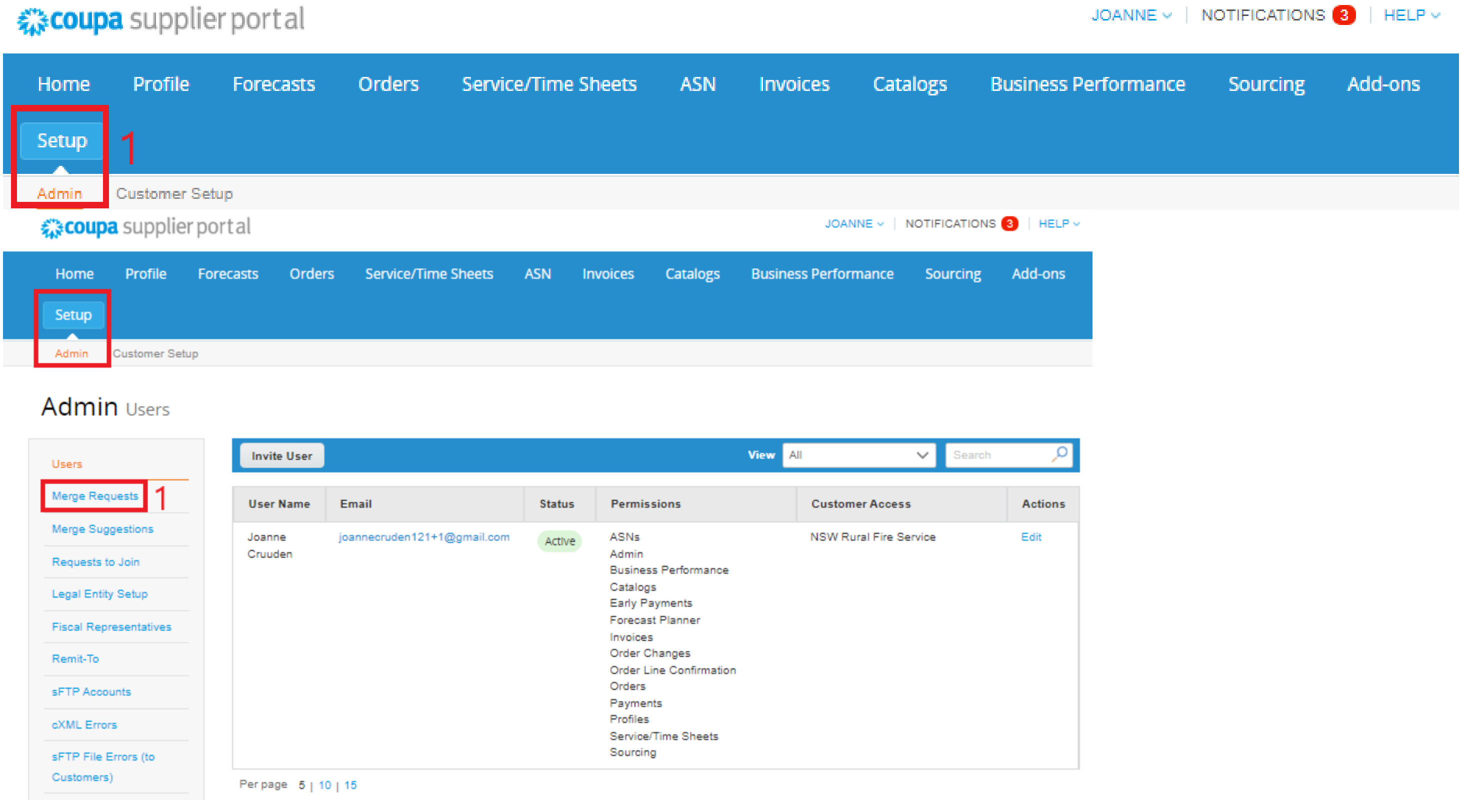
Supplier Company may have more than one account/profile in the CSP. This can happen when several users from the same company register or are invited to the CSP through different email addresses.

1. On the CSP homepage you may have a notification on the right hand of the screen noting **Merge Accounts** if this doesn't appear then click on **Profile** tab then **Setup** button on the main menu bar. From the left nav click **Merge Requests.**

Homepage



Admin/Setup tab



Request Merge by Supplier – Step 2/3 (Request Merge from homepage)

There are 2 ways a merge can be done :-

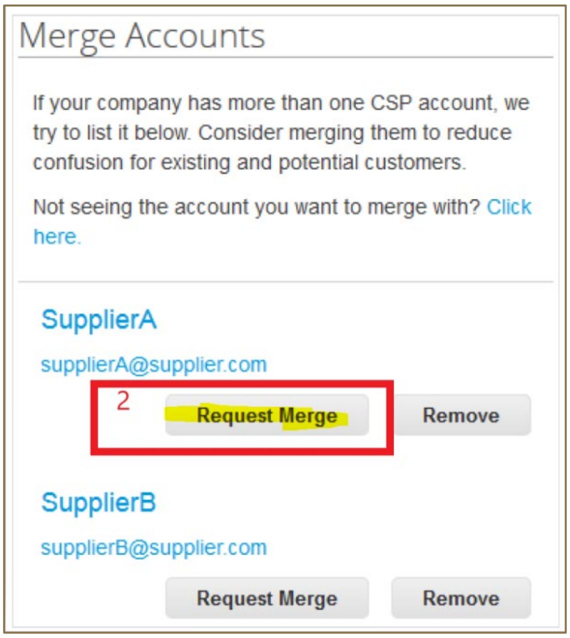
2. Click the **Request Merge** button to initiate the merge request via the suggestion on homepage

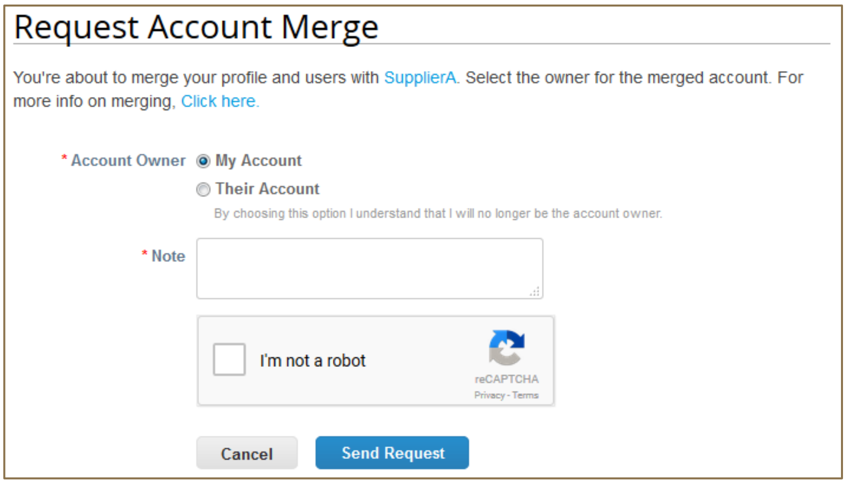
or

2. Click the **Merge Requests** link on the left navigation under **admin tab,** provide the email address of the account you want to merge in the email field, and then click the **Request Merge.**
3. A message about the submission of merge request will display on the homepage for Supplier A and Supplier B will also receive the merge message. Click the **View Merge** button to view the merge request. Supplier B can either accept or reject.

The suggestions to merge accounts are based on email domain a notifcation may appear on the homepage right hand side to merge accounts as per below.

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

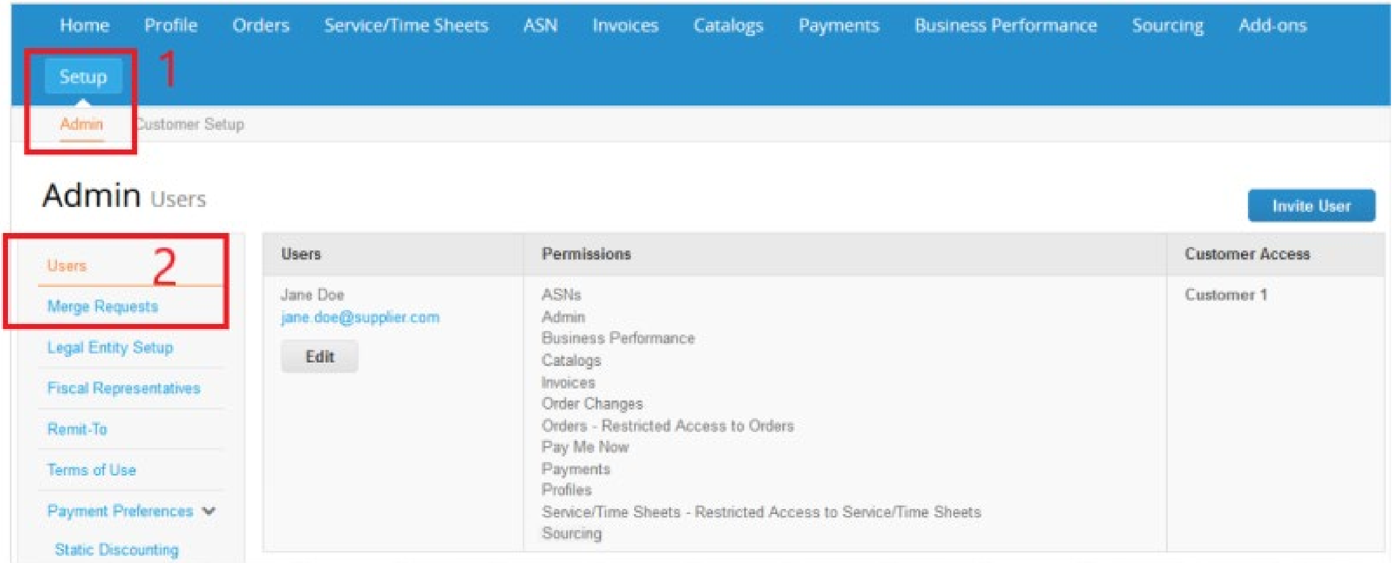


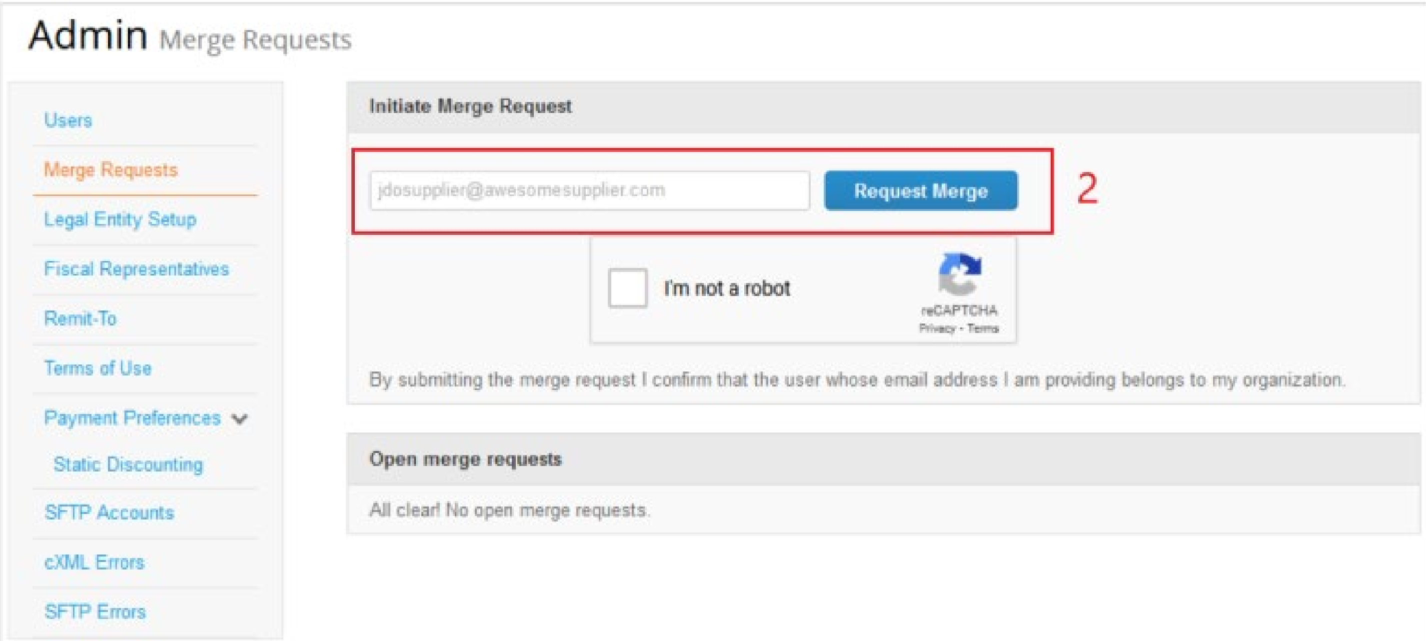


If the account is not listed or the list is too long to search for the specific account that you want. Clicking on the **Click here** link takes you to the **Admin Merge requests** page

Selection	Description
*Account Owner / My Account	This causes the other account to be merged into your company account. The other user's company account is removed. 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.
*Account Owner / Their Account	Your company account is removed. The other user's company account becomes the only company account. 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.
*Note	Add a note about the merge request, for example, the reason for the account merge.

Request Merge by Supplier – Step 2 (Merge Request from Admin/Setup tab)





Merged accounts use the following rules:

Element	Merge Behavior
Connected customers and customer profiles	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.
Remit-to addresses	Remit-to information is transferred only for addresses that are available to all customers.

For further information – go to the Coupa Supplier Portal or contact Coupa via **email** sourcing.support@coupa.com