

Coupa Supplier Account Merge Request

How to merge existing Coupa Supplier Accounts

19 March, 2019

Coupa Supplier Portal (CSP) Supplier Merge

Start by logging into your CSP Account [HERE](#)

The screenshot displays the Coupa Supplier Portal interface. At the top left is the 'coupa supplier portal' logo. On the right, there are user-specific links: 'LYNN', 'NOTIFICATIONS 20', and 'HELP'. A blue navigation bar contains the following menu items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is divided into two columns. The left column features a globe icon and a list of links: About, Industry, Website, Established, and Employees. Below this list is a blue button labeled 'Improve Your Profile'. Underneath the button are sections for 'About' and 'Public Profile', with the latter including a URL: <https://supplier-test.coupahost.com/suppliers/public/24391>. The right column is titled 'Merge Accounts' and contains a paragraph explaining that users with multiple CSP accounts should consider merging them to reduce confusion. It also includes a link: 'Not seeing the account you want to merge with? [Click here.](#)'. Below this is a section for 'Coupa Training Supplier' with two buttons: 'Request Merge' and 'Remove'. At the bottom right, there is a section for 'Latest Customers'.

Coupa Supplier Portal (CSP) Supplier Merge

- Click the **Merge Request** link in the Admin tab on the left of the screen or the **Click Here** link in the Merge Accounts section at the right of the screen.

Admin Merge Requests

Users

Merge Requests

E-Invoicing Setup

Initiate Merge Request

coupa@cupamail.edu

Request Merge

- Enter the e-mail address of the account to be merged.

Initiate Merge Request

JohnDoe@irco.com

Request Merge

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.](#)

Coupa Supplier Portal (CSP) Supplier 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 the you will be under their administration.
- Add a note about your request to help avoid any confusion.
- Click Send

Request Account Merge

You're about to merge your profile and users with [LEHIGH VALLEY SAFETY SUPPLY CO \(US-PA-ALLEN-01\)-89](#). Select the owner for the merged account. For more info on merging, [Click here](#).

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

* Note

I'm not a robot  reCAPTCHA
Privacy - Terms

Cancel Send Request

- 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.