



## How to Merge CSP Accounts

April 2024

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# 01

## Course Outline

### Description

This course explains how to merge your client CSP accounts .

### Objectives

**After completing this course, you will be able to:**

1. Merge supplier CSP accounts

02

## How to Merge CSP Accounts

# How to Merge CSP Accounts

To merge a Coupa Supplier Portal Account to check which suppliers are linked on the CSP, login to CSP and navigate to the Home tab.

## Process Steps:

- 1 Populate your log in credentials "Email Address" and "Password".
- 2 Click on the "Login" button to access the CSP.

The screenshot shows the Coupa Supplier Portal login interface. At the top, the header reads "coupa supplier portal" with a lock icon and the word "Secure" on the right. The main heading is "Login". Below this is a form with two input fields: "Email" and "Password", both marked with a red asterisk. A blue circle with the number "1" points to the Email field. Below the password field is a link that says "Forgot your password?". At the bottom of the form is a large blue "Login" button, with a blue circle and the number "2" pointing to it. Below the button is a link that says "New to Coupa? CREATE AN ACCOUNT".



# How to Merge CSP Accounts

To merge a Coupa Supplier Portal Account to check which suppliers are linked on the CSP, login to CSP and navigate to the Home tab.

## Process Steps:

- 1 Once logged in to the CSP and navigate to find the "Setup".
- 2 Once you have accessed "Setup" click "Merge Request" to populate the merge details

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, 'supplier portal', and user information for 'DELOITTE' with a notifications count of 29 and a help link. Below the header is a navigation bar with tabs: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, and Sourcing. An 'Add-ons' dropdown menu is open, showing 'Setup' as the selected option, marked with a blue circle and the number 1. Below the navigation bar, the user's profile for 'Deloitte Consulting' is shown, with a profile progress of 82% and a 'View Profile' link. The main content area is titled 'Admin Users' and contains a sidebar with links: Users, Merge Requests (highlighted with a blue circle and the number 2), Merge Suggestions, Requests to Join, and Legal Entity Setup. The main content area also features an 'Invite User' button, a 'View' dropdown set to 'All', and a search bar. Below these is a table with columns: User name, Email, Status, Permissions, Customer Access, and Actions. The table contains one row for 'Carol Smith' with email 'edfcoupatesting+carol@gmail.com', status 'Deactivated', and permissions for ASNs, Admin, Business, and Performance. The customer access is 'EDF Renewables (Pty) Ltd' and the action is 'Activate'.

User name	Email	Status	Permissions	Customer Access	Actions
Carol Smith	edfcoupatesting+carol@gmail.com	Deactivated	ASNs Admin Business Performance	EDF Renewables (Pty) Ltd	Activate

# How to Merge CSP Accounts

Once you have accessed the CSP follow the below steps:

## Process Steps:

- 1 Populate the email address of the admin account user you want to merge with.
- 2 Check the "I'm not a robot" to proceed
- 3 To send the merge request click on 'Request Merge'.

**Note :** Users on the other account will receive a notification and can accept or decline your merge request

## Admin Merge Requests

[Users](#)

**Merge Requests**

[Merge Suggestions](#)

[Requests to Join](#)

[Legal Entity Setup](#)

[Fiscal Representatives](#)

[Remit-To](#)

[sFTP Accounts](#)

[cXML Errors](#)

[sFTP File Errors \(to Customers\)](#)

### Initiate Merge Request



I'm not a robot



reCAPTCHA  
Privacy - Terms

**!** 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.](#)

**Request Merge**

### Open merge requests

All clear! No open merge requests.



Thank You!