

## Managing Multiple Accounts in the Coupa Supplier Portal

Your company may have more than one account/profile in the CSP.

**Example:** If you provide services to multiple customers, such as IQVIA and another supplier, and want all accounts accessible under one login, you can use the Merge Request option.

### How to Merge Accounts

The screenshot shows the Coupa Supplier Portal interface. At the top, the logo 'coupa supplier portal' is on the left, and 'NORBERT' with a dropdown arrow, 'NOTIFICATIONS' with a red circle containing '1', and 'HELP' with a dropdown arrow are on the right. Below the logo is a navigation bar with 'Home', 'Invoices', 'Orders', 'Profile', 'Setup' (highlighted with a red circle '1'), 'Service/Time Sheets', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Add-ons', and 'More...'. Below this is a secondary navigation bar with 'Admin' (highlighted with a red circle '2'), 'Customer Setup', and 'Connection Requests'. The main content area is titled 'Admin Merge Requests'. On the left is a sidebar menu with 'Users', 'Merge Requests' (highlighted with a red circle '3'), 'Merge Suggestions', 'Requests to Join', 'Legal Entity Setup', 'Fiscal Representatives', 'Remit-To', 'Additional CaaS Information', 'sFTP Accounts', and 'cXML Errors'. The main content area is titled 'Initiate Merge Request' and contains a form with a text input field containing 'coupa@cupamail.edu' (highlighted with a red circle '4'), a checkbox labeled 'I'm not a robot' next to a reCAPTCHA logo (highlighted with a red circle '5'), a warning icon and text: '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.', and a blue 'Request Merge' button (highlighted with a red circle '6').

1. Log in to the Coupa Supplier Portal and go to **Setup**.
2. Select the **Admin** tab.
3. Click **Merge Request** in the left menu bar.
4. Enter the login email address of the account you want to merge.
5. Complete the “I’m not a robot” verification.
6. Click **Request Merge**.

**Note:** Account merges cannot be undone. Use caution when merging accounts and ensure that the account you are merging with belongs to your organization.

## After a Successful Merge

Once the merge is successful, all customers will appear under one login. You can access them via the **Orders** tab.

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Export to	View	All	Search	PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
					02/20/24	Issued	None		No	10,000.00 GBP		[Action icons]
					11/24/23	Issued	None		No	40,000.00 GBP		[Action icons]
					11/24/23	Issued	None		No	40,000.00 GBP		[Action icons]
					11/24/23	Issued	None		No	6,000.00 GBP		[Action icons]

1. Go to the **Orders** tab.
2. From the **Select Customer** drop-down menu, choose the account you need. The list of purchase orders (POs) for the selected account will appear.