



HOW TO MERGE ACCOUNTS ON THE CSP





AUTOMATIC ACCOUNT MERGES



Course outline



Description

This course explains the process of automatically merging accounts on the CSP.

Objectives

After completing this course, you will be able to:

1. Merge multiple CSP customer accounts into one automatically

Merging accounts on the Coupa Supplier Portal (CSP)

If you are already on the CSP and your email address is the same for 2 companies Coupa will merge the accounts automatically :

Process Steps:

1 If you have an existing CSP account you will receive an email notifying you that Distell has added you as a supplier on the Coupa Supplier Portal

Click on the **'Login to Coupa'** button to access the CSP

2 The log in page will be displayed. Populate your existing credentials **'Email address and Password'** and log into the CSP.



You are Connected to Distell on Coupa

Powered by 

Hello Supplier,

Congratulations! Distell has added you as a supplier on the Coupa Supplier Portal. Click below to sign in so you can Configure your PO transmission preferences, Create an online catalogue, View purchase orders, Create electronic invoices.

Daisy Mogaila
Distell

1

Login to Coupa

Log In

Welcome back! Login or click here for [help](#).

2

* Email Address

* Password

Log In

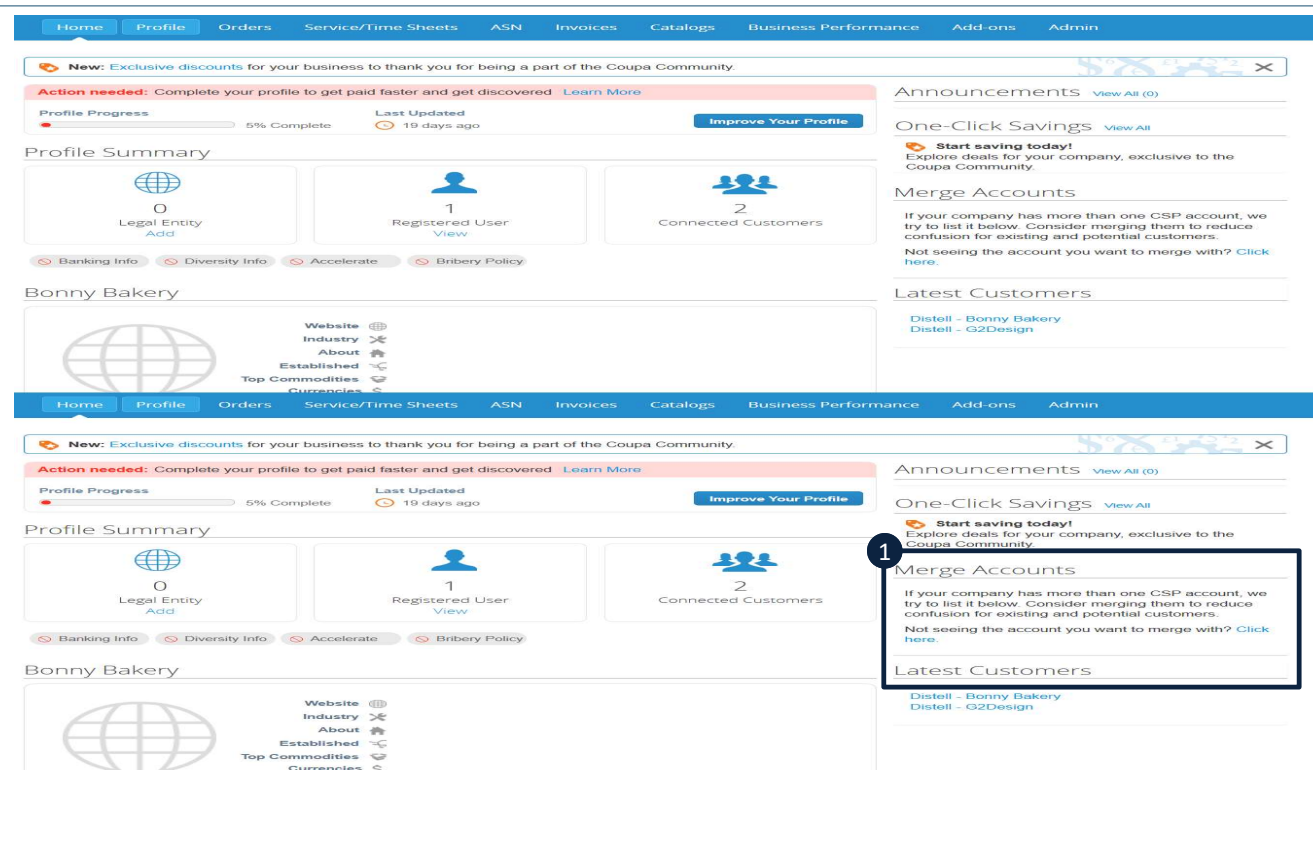
[Forgot Your Password?](#)

Merging accounts on the Coupa Supplier Portal (CSP)

Once you have accessed the home page in the CSP the additional company will be added under latest customers :

Process Steps:

- Both companies will be displayed under Latest Customers.



The screenshot displays the Coupa Supplier Portal (CSP) home page. The page features a navigation bar at the top with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Add-ons, and Admin. Below the navigation bar, there is a 'New' banner for exclusive discounts. A 'Profile Summary' section shows progress (5% Complete) and a 'Last Updated' date (19 days ago). The 'Profile Summary' includes sections for Legal Entity (0), Registered User (1), and Connected Customers (2). Below this, there are links for Banking Info, Diversity Info, Accelerate, and Bribery Policy. The 'Bonny Bakery' section is visible. On the right side, there are sections for Announcements, One-Click Savings, Merge Accounts, and Latest Customers. The 'Merge Accounts' section is highlighted with a red box and a red circle containing the number 1, indicating the step where both companies will be displayed under Latest Customers.



MERGING ACCOUNTS MANUALLY

Course outline

Description

This course explains the process of manually merging accounts on the CSP

Objectives

After completing this course, you will be able to:

1. Merge accounts manually

Merging accounts on the Coupa Supplier Portal (CSP)

Follow the below step to merge account manually :

Process Steps:

- 1 Populate your log in credentials email address and password.
- 2 Click on the 'Login to Coupa' button to access the CSP.

Log In

Welcome back! Login or click here for [help](#).

1

* Email Address

* Password

2

Log In

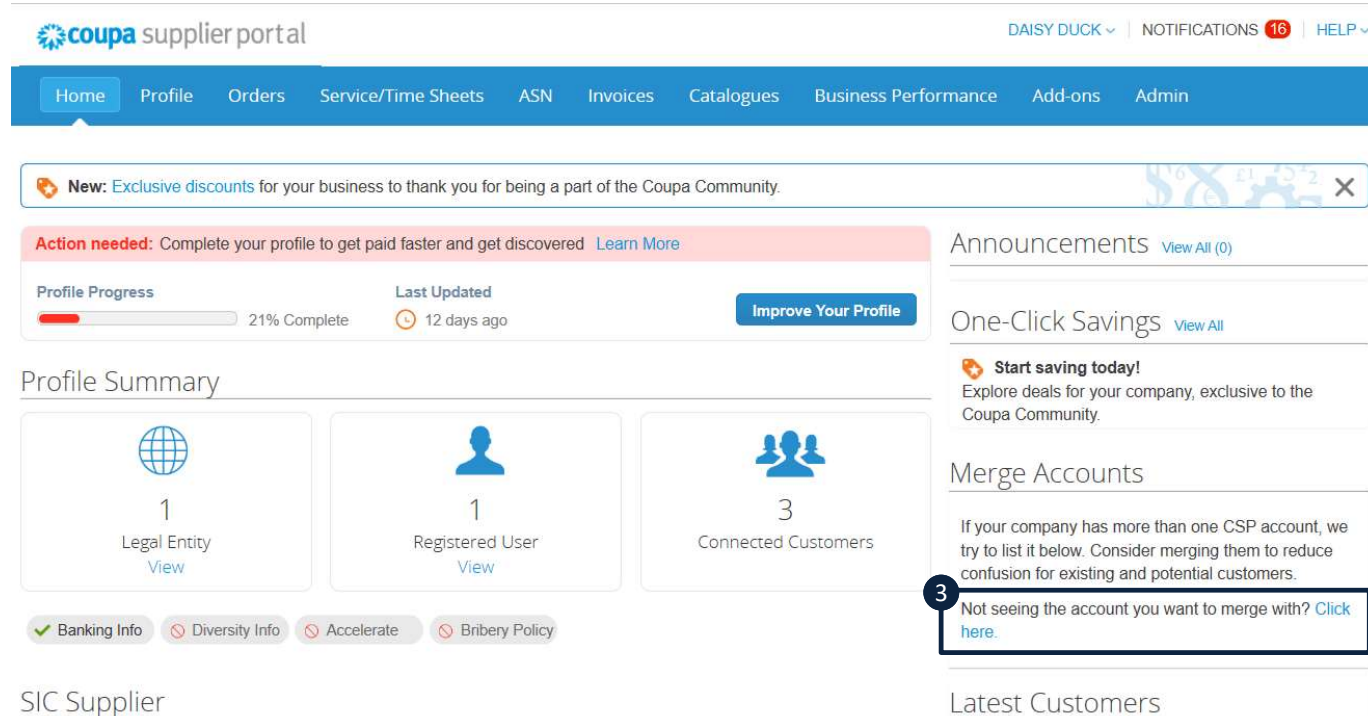
[Forgot Your Password?](#)

Merging accounts on the Coupa Supplier Portal (CSP)

Once you have accessed the CSP home page follow the below steps:

Process Steps:

- 3 To Merge your account with another navigate to the merge account option on the home page and click on 'Click Here'.



coupa supplier portal

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Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Add-ons Admin

New: Exclusive discounts for your business to thank you for being a part of the Coupa Community.

Action needed: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress 21% Complete **Last Updated** 12 days ago [Improve Your Profile](#)

Profile Summary

- 1 Legal Entity [View](#)
- 1 Registered User [View](#)
- 3 Connected Customers

✓ Banking Info ✗ Diversity Info ✗ Accelerate ✗ Bribery Policy

Announcements [View All \(0\)](#)

One-Click Savings [View All](#)

Start saving today!
Explore deals for your company, exclusive to the Coupa Community.

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.

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

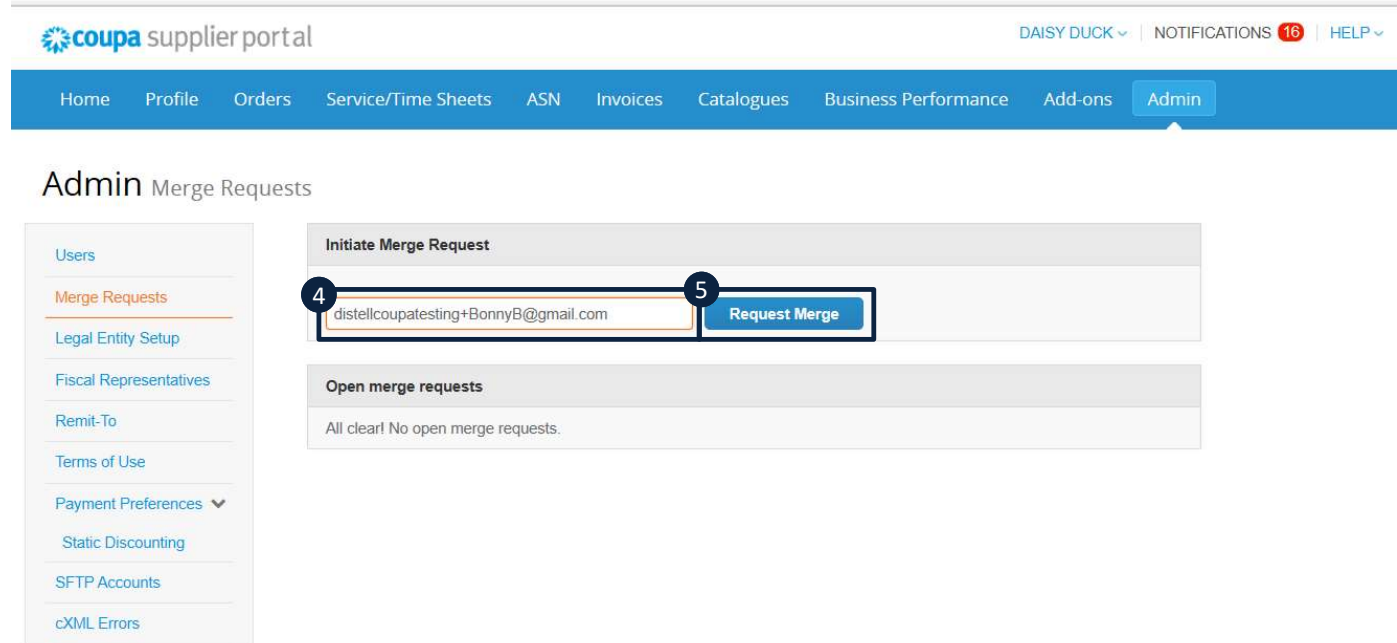
Latest Customers

Merging accounts on the Coupa Supplier Portal (CSP)

Once you have accessed the CSP home page follow the below steps:

Process Steps:

- 4 Populate the email address of the account you want to merge.
- 5 To send the merge click on 'Request Merge'.



The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Add-ons, and Admin. The Admin section is currently active. The main content area is titled 'Admin Merge Requests'. On the left, there is a sidebar with various administrative options: Users, Merge Requests (highlighted), Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences, Static Discounting, SFTP Accounts, and cXML Errors. The 'Initiate Merge Request' form contains a text input field with the email address 'distellcoupatesting+BonnyB@gmail.com' and a 'Request Merge' button. The 'Open merge requests' section below it shows the message 'All clear! No open merge requests.'

Merging accounts on the Coupa Supplier Portal (CSP)

Once you have accessed the CSP home page follow the below steps:

- Process Steps:**
- 6 Select the account owner, your account or the account of the person you are requesting a merge with.
 - 7 Populate a note in the 'Request Note' box .
 - 8 Check the 'I am not a robot' box .
 - 9 Click on 'Send Request' to send the merge request.

 **coupa** supplier portal

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Home Profile Orders Service/Time Sheets ASN Invoices Catalogues Business Performance Add-ons Admin

Request Account Merge

You're about to merge your profile and users with [Bonny Bakery](#). Select the owner for the merged account. For more info on merging, [Click here](#).

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

7

8 ☐ I'm not a robot 
reCAPTCHA Privacy - Terms

9

Merging accounts on the Coupa Supplier Portal (CSP)

To Complete the merge, log in to the account you sent the request merge:

Process Steps:

- 10
- Click on 'View merge' to access the merge request

HomeProfileOrdersService/Time SheetsASNInvoicesCatalogsBusiness PerformanceAdd-onsAdmin

New: Exclusive discounts for your business to thank you for being a part of the Coupa Community.

Action needed: Complete your profile to get paid faster and get discovered [Learn More](#)

Profile Progress

5% Complete

Last Updated

19 days ago

Improve Your Profile

Profile Summary

0

Legal Entity

Add

1

Registered User

View

2

Connected Customers


Banking Info

Diversity Info

Accelerate

Bribery Policy

Bonny Bakery



Website

Industry

Announcements [View All \(0\)](#)

One-Click Savings [View All](#)

Start saving today!

Explore deals for your company, exclusive to the Coupa Community.

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.](#)

SIC Supplier is requesting to merge with you

[distellcoupatesting+SIC@gmail.com](#)

10

View Merge

12

Merging accounts on the Coupa Supplier Portal (CSP)

Log in to the account you sent the request merge :

Process Steps:

- 11 Populate a **note for the requester**. This can be a note informing them of that the request is being granted or that just a note to say the request is received and will be actioned.
- 12 Check the box if you recognise the email address that requested the merge.
- 13 Click 'Accept Merge' to merge the 2 accounts.

Company Account Merge

Supplier Portal account.

If you accept this request **the administrator of SIC Supplier will become the account owner** for the merged company profile and all current users will retain access to their customer accounts. The following users will have access to the merged account:

- Bonny B ([distellcoupatesting+BonnyB@gmail.com](#))

Note From Requester: Request merging

11

Provide note for the Requester

12

☐ I recognize the email address above as a coworker at my company, and I agree to merge

Cancel

Reject

Accept

Company Account Merge

Supplier Portal account.

If you accept this request **the administrator of SIC Supplier will become the account owner** for the merged company profile and all current users will retain access to their customer accounts. The following users will have access to the merged account:

- Bonny B ([distellcoupatesting+BonnyB@gmail.com](#))

Note From Requester: Request merging

Provide note for the Requester

My co worker requesting a merge

☒ I recognize the email address above as a coworker at my company, and I agree to merge.

Cancel

Reject

13

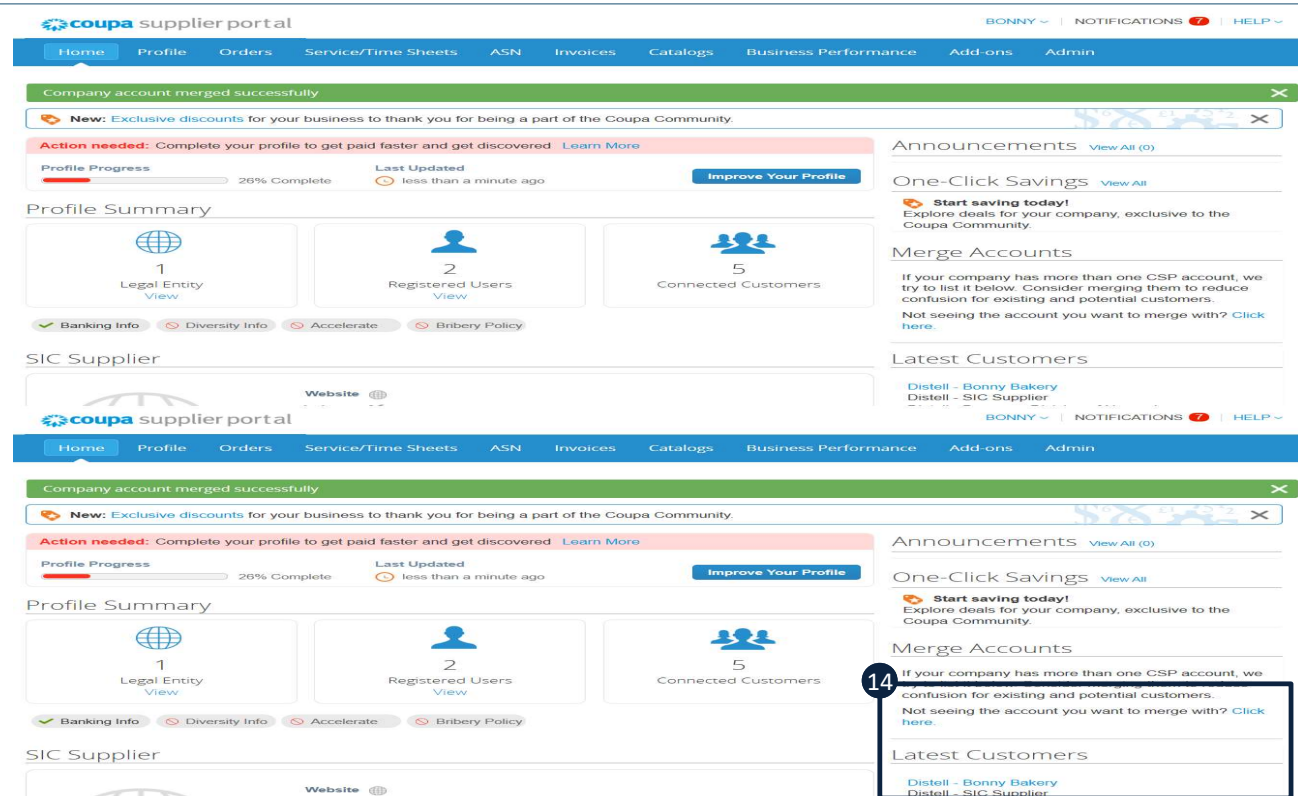
Accept

Merging accounts on the Coupa Supplier Portal (CSP)

You will receive a pop up that the merge was successful :

Process Steps:

14 The 2 accounts will be displayed under Latest Customers.



The screenshot displays the Coupa Supplier Portal interface. At the top, a green notification bar states "Company account merged successfully". Below this, a red banner indicates "Action needed: Complete your profile to get paid faster and get discovered". The "Profile Summary" section shows 1 Legal Entity, 2 Registered Users, and 5 Connected Customers. The "SIC Supplier" section is visible below. On the right, the "Latest Customers" section lists "Distell - Bonny Bakery" and "Distell - SIC Supplier". A callout box labeled "14" points to the "Distell - SIC Supplier" entry in the "Latest Customers" list.



HOW TO NAVIGATE BETWEEN 2 MERGED ACCOUNTS






Navigating Merged accounts (CSP)

Once accounts have been merged follow the bellow steps to navigate between accounts

Process Steps:

- 1
- Access any of the tabs e.g. profile and customer profile. There will be a drop down to select the company you want to view.

 supplier portal

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HomeProfileOrdersService/Time SheetsASNInvoicesCataloguesBusiness PerformanceAdd-onsAdmin

Your Public ProfileYour Customer Profiles

Distell - G2Design

Profile

1

- Distell - SIC Supplier
- Distell - Bevcana Division of Nampak
- Distell - Bonny Bakery
- Distell - Bevcana Division of Nampak
- Distell - G2Design