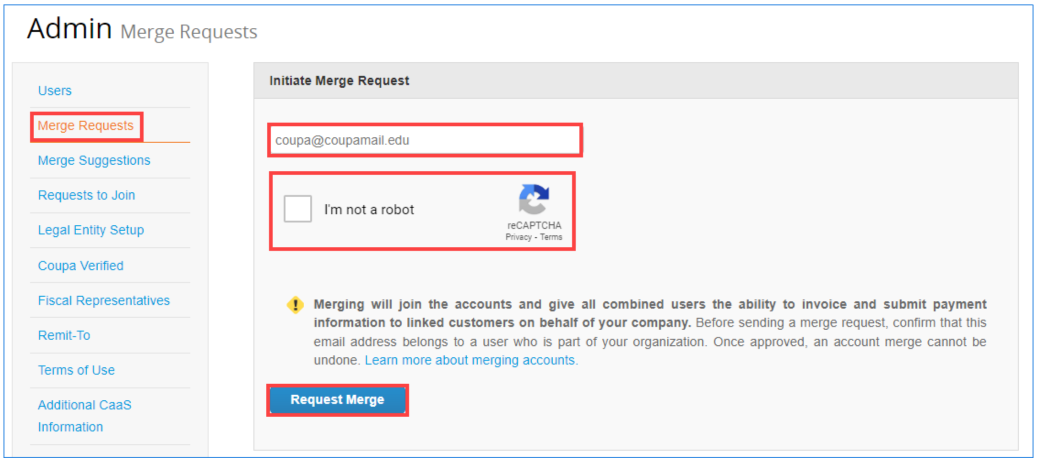
Request to Merge Accounts

Merge accounts is useful when several users, with different email addresses, from the same company, register to the Coupa Supplier Portal (CSP). Follow the instructions below to request to merge two or more accounts in CSP.

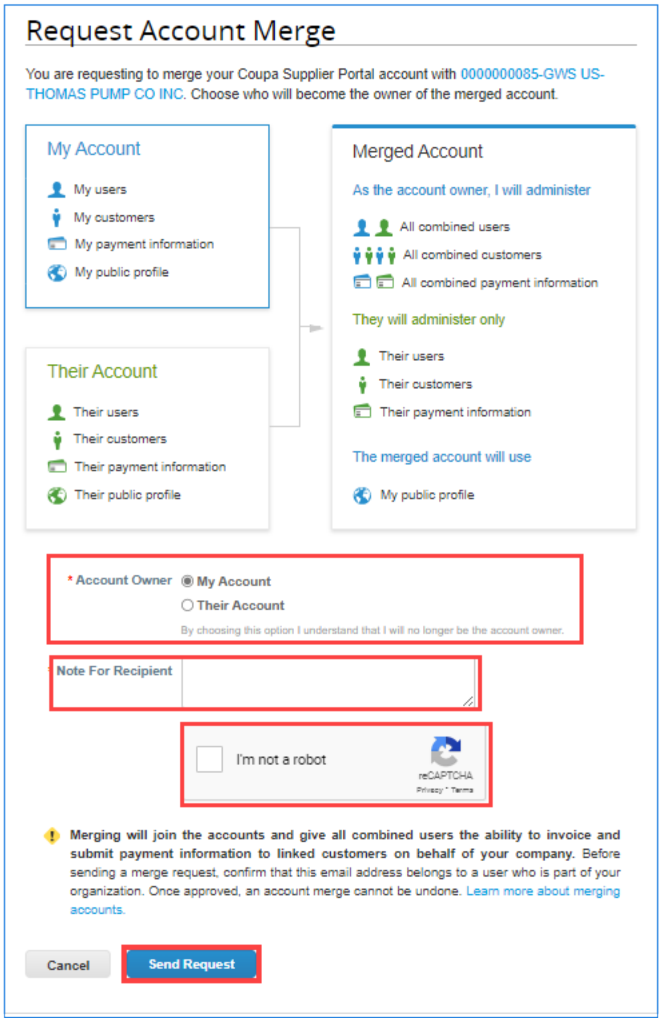
Note: An account merge cannot be reversed.

1. Navigate to **Setup** from the home page. Click **Merge Requests.**



2. Enter the email address of the account you want to merge with. Click the security Captcha box **I'm not a robot**. Then, click **Request Merge**.
   Note: This change will not affect the primary contact email address, set in CBRE, where POs are dispatched to.

3. Click **My Account** to be the account owner. The other user's company account is removed. This will give you the ability to manage combined users, combined customers, and combined payment information. You can set the other user up as an administrator.
   Note: If you select **Their Account** as the account owner, the other user becomes the administrator, and their company account becomes the only company account. The administrator can choose to make you an administrator of the merged account.



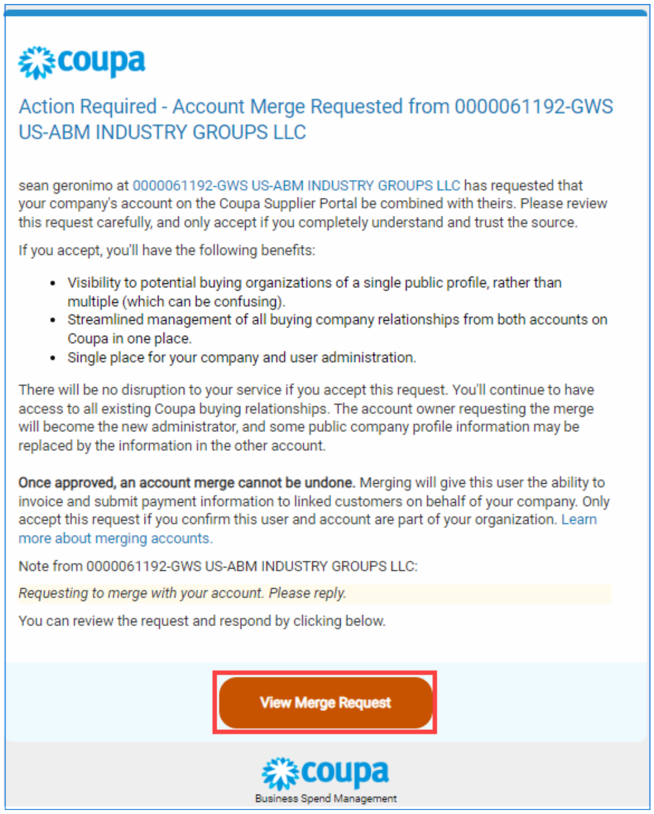
4. Add a note about the merge request in the **Note For Recipient** box. Select **I'm not a robot**. Then, click **Send Request**. An email notification will be sent to the email address of the account that you want to merge to.

Respond to a Merge Request

The following steps detail the required action of the account receiving the email notification for an account merge.

Note: Carefully read the instructions in the email notification before responding to a merge request.

1. Click **View Merge Request.**



Action Required - Account Merge Requested from 0000061192-GWS US-ABM INDUSTRY GROUPS LLC

sean geronimo at 0000061192-GWS US-ABM INDUSTRY GROUPS LLC has requested that your company's account on the Coupa Supplier Portal be combined with theirs. Please review this request carefully, and only accept if you completely understand and trust the source.

If you accept, you'll have the following benefits:

- Visibility to potential buying organizations of a single public profile, rather than multiple (which can be confusing).
- Streamlined management of all buying company relationships from both accounts on Coupa in one place.
- Single place for your company and user administration.

There will be no disruption to your service if you accept this request. You'll continue to have access to all existing Coupa buying relationships. The account owner requesting the merge will become the new administrator, and some public company profile information may be replaced by the information in the other account.

Once approved, an account merge cannot be undone. Merging will give this user the ability to invoice and submit payment information to linked customers on behalf of your company. Only accept this request if you confirm this user and account are part of your organization. Learn more about merging accounts.

Note from 0000061192-GWS US-ABM INDUSTRY GROUPS LLC:

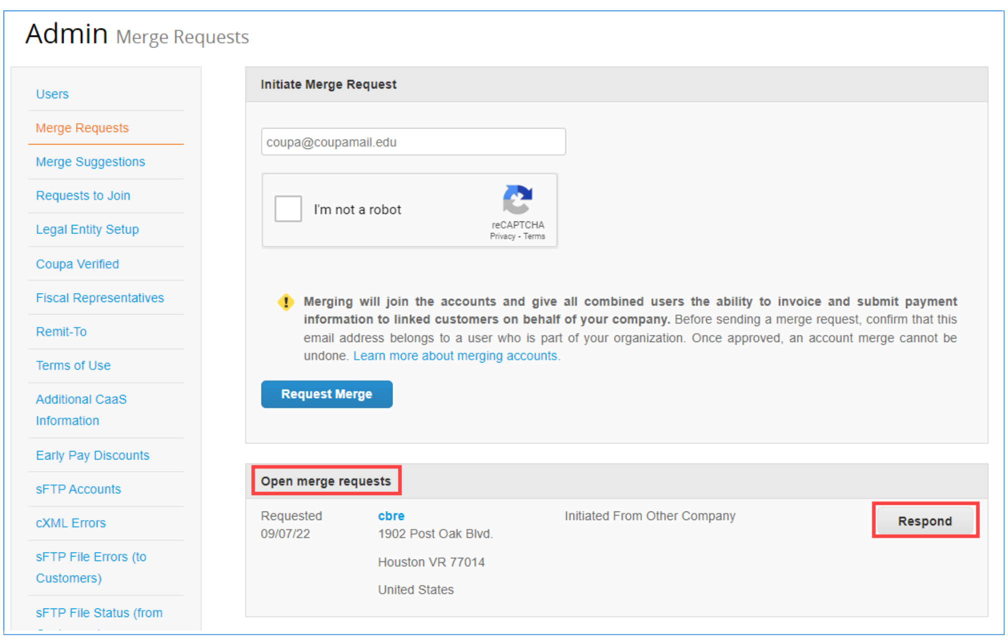
Requesting to merge with your account. Please reply.

You can review the request and respond by clicking below.

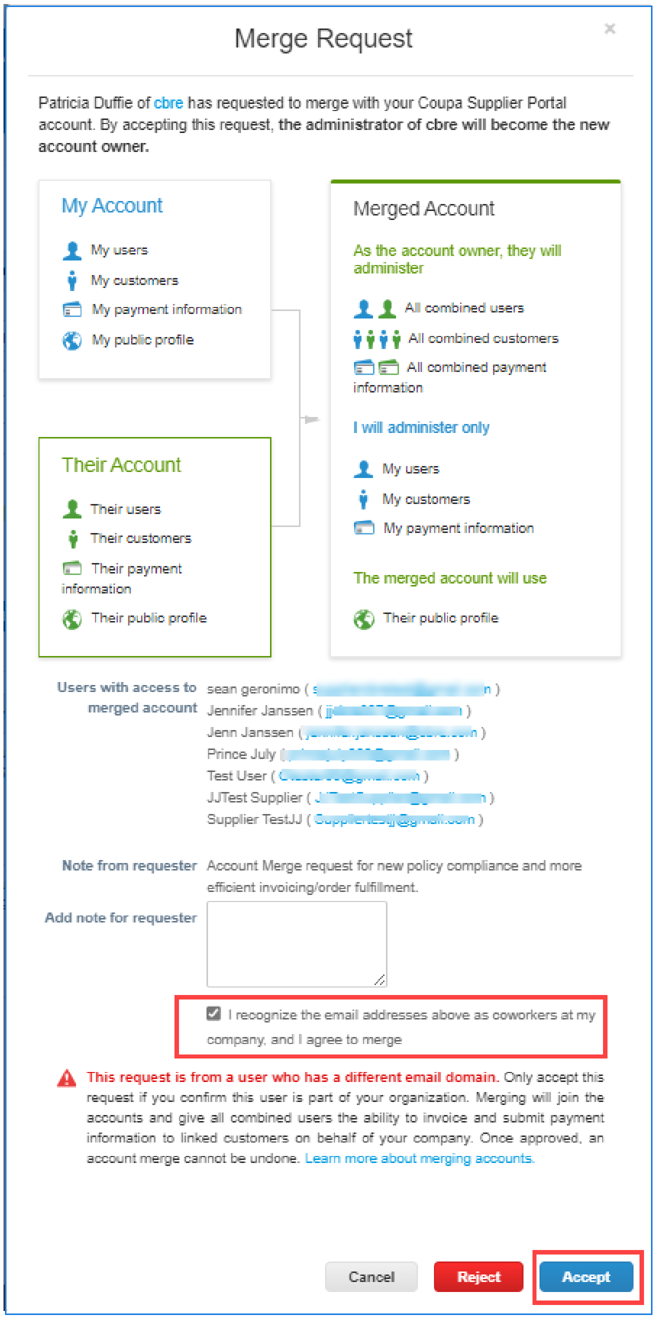
View Merge Request

Business Spend Management

2. Click **Respond** next to the account that you want to merge with. **Open Merge Request** may show multiple requests to merge.



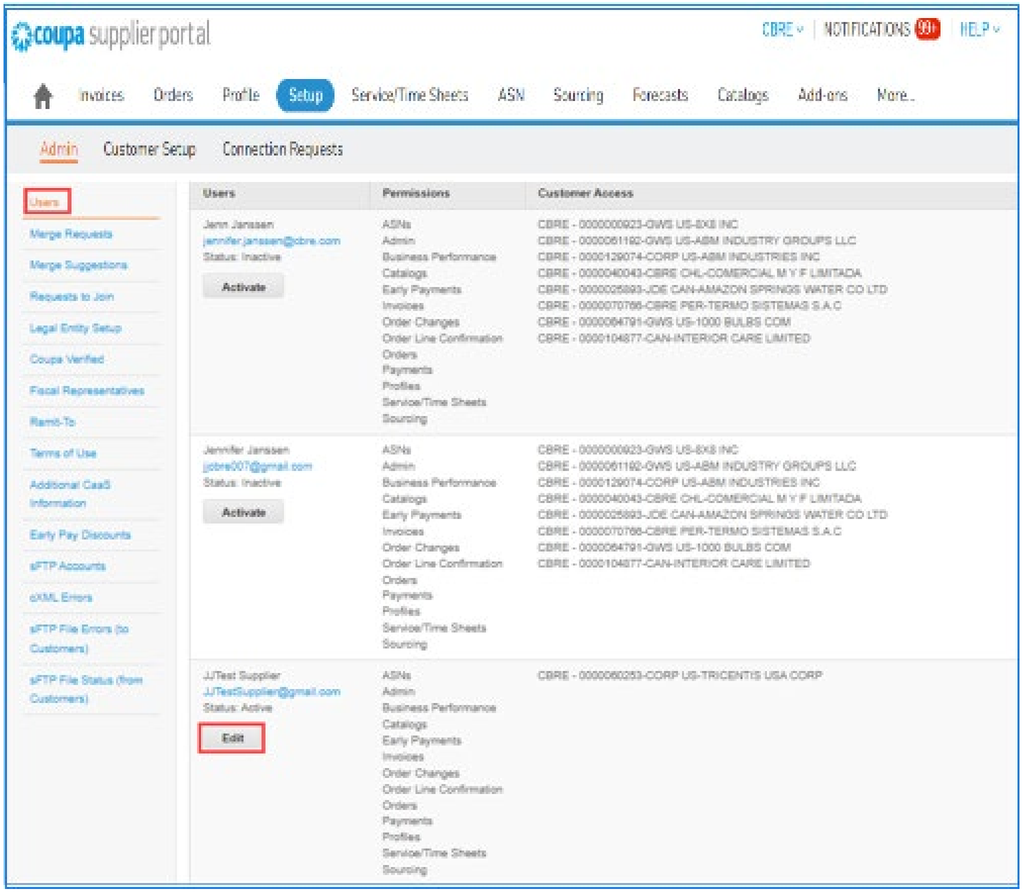
3. Click the box next to **I recognize the email address above as a coworker at my company, and I agree to merge.** Then, click **Accept.**



Edit a User on a Merged Account

Users of a merged account will have access to the same customers. Each user can edit their Permissions settings. A user with Admin Permission settings may also edit the settings of other users. The following steps detail how to edit a user.

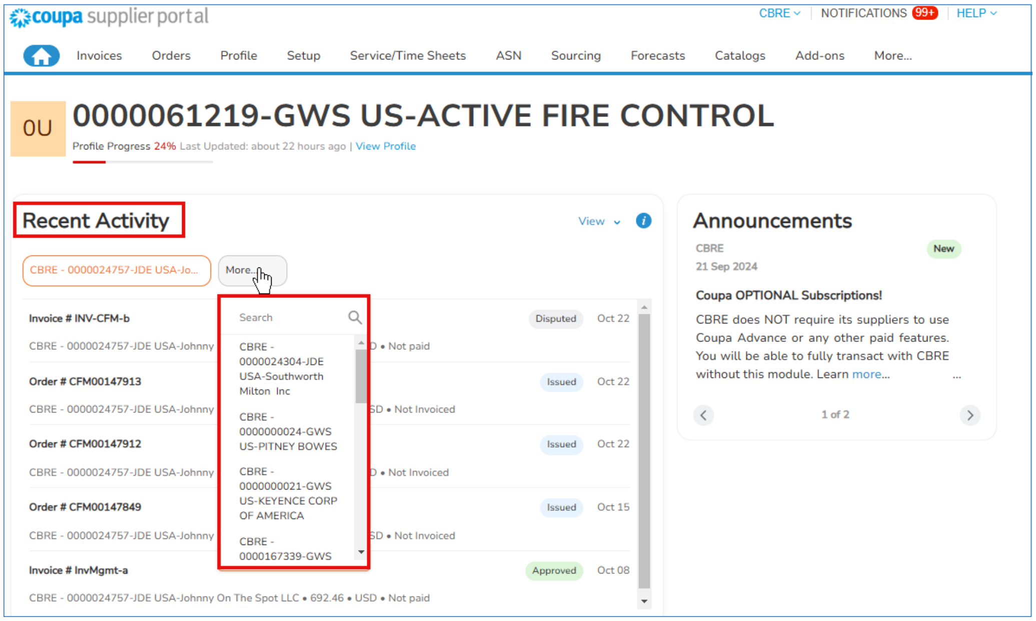
1. Select **User** from the Admin tab. Click **Edit** to make changes to the user's permissions.



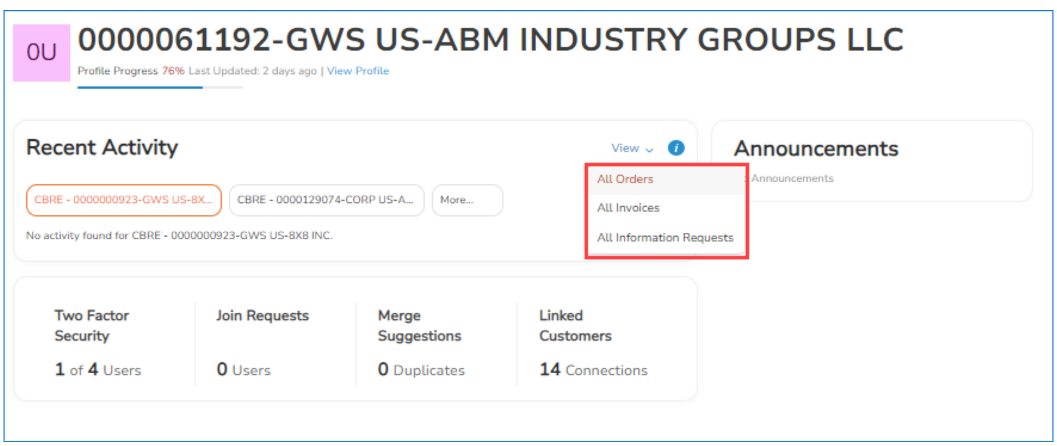
2. Click **Save** when you have completed your edits to the user's permissions.

View Customer Activity

1. You can view **Recent Activity** by customer. Select **More** to choose from a list of additional customers.



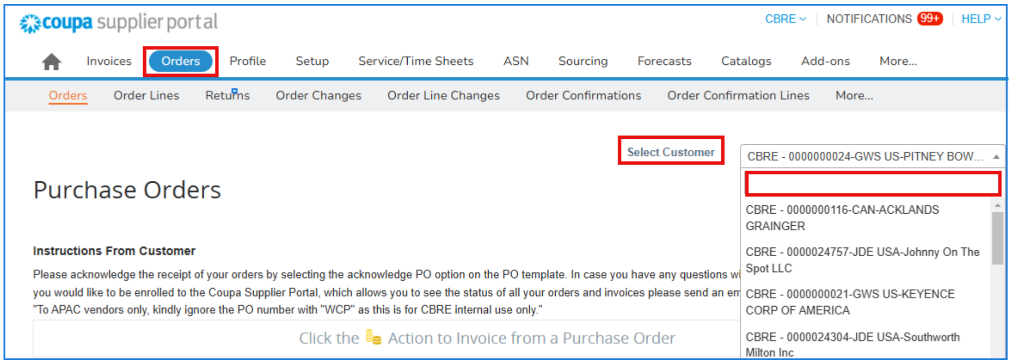
2. Select **View** for quick links to the selected customer's orders, invoices, and information requests.



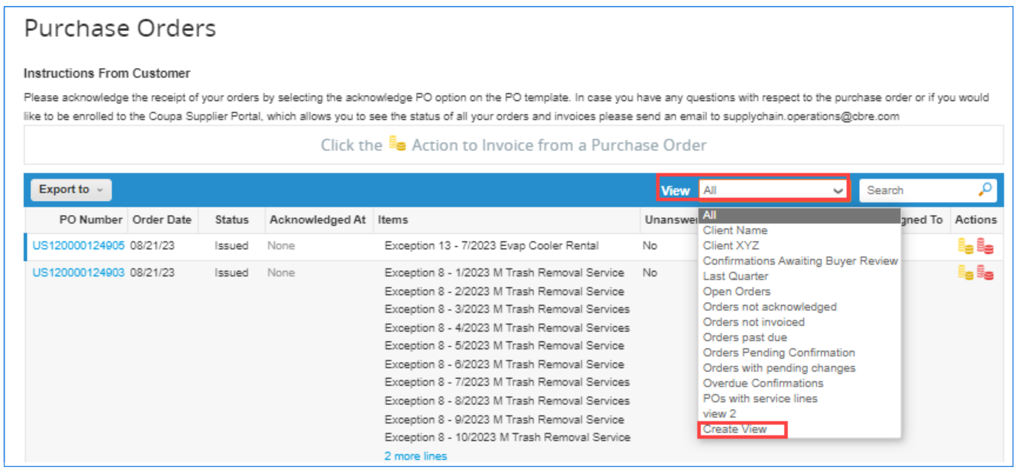
Create a View by Customer

Create a custom view by customer on Orders, Service/Time Sheets, ASNs, Invoices, and Catalogs. The following steps detail how to create a view by customer for purchase order information.

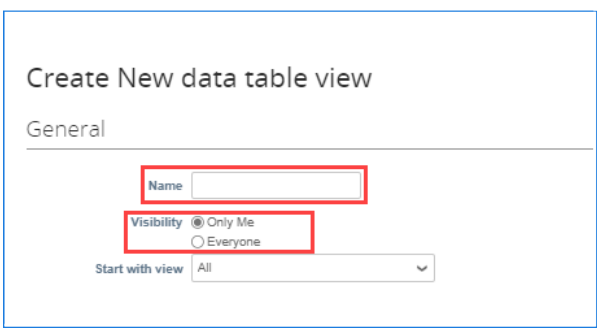
1. Select the **Orders** tab from the home page. Choose your customer from **Select Customer** drop-down list.



2. Click the next to **View** and select **Create View**.

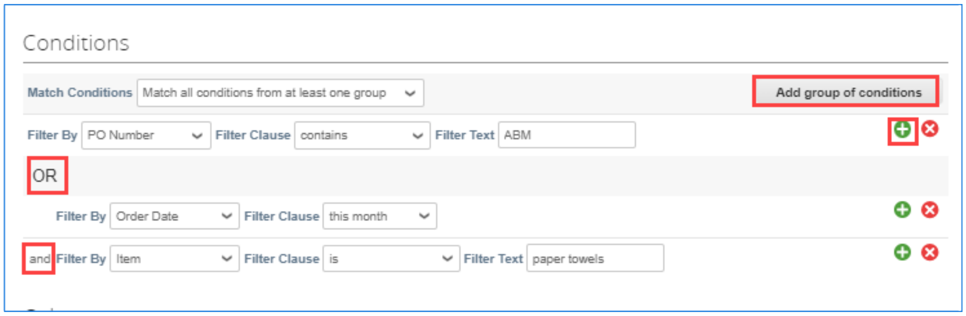


3. Enter a **Name** for your view on the Create New data table view page. Select **Only Me** to be the only one who can access the view that you are creating.

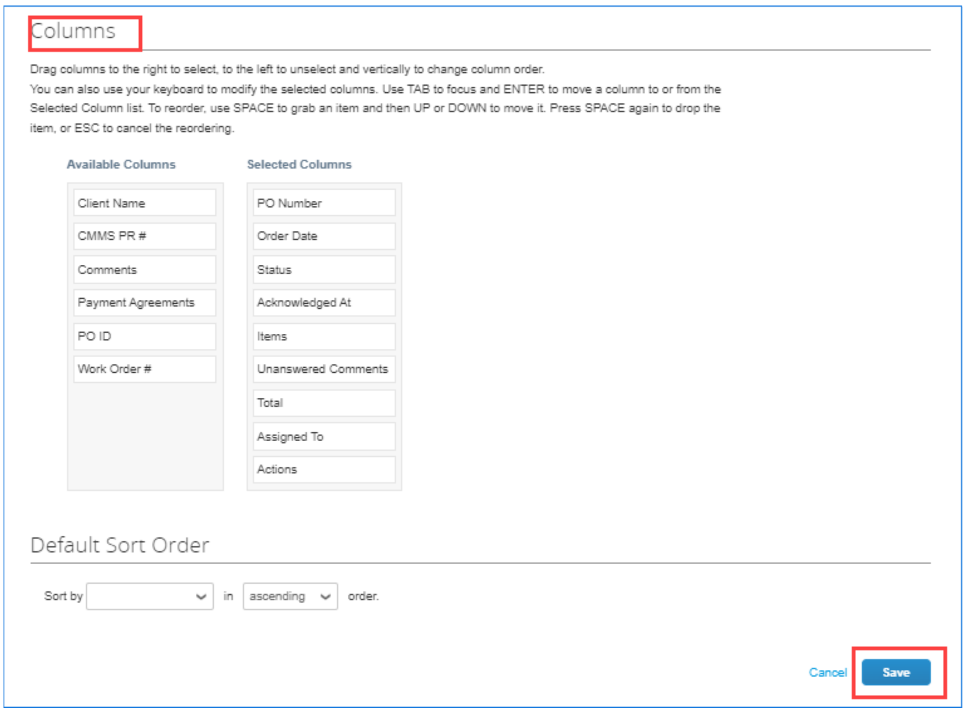


4. Select from the **Match Conditions** drop-down. **Match all conditions** will result in a display of information that is an exact match to the filter you define. **Match at least one condition** will result in a display of one or more objects matching the filter that you define.
5. Create **Filter By** conditions. Add additional filters by clicking or **Add group of conditions**.

   Note: allows you to define multiple filters but will display information matching only one filter. For example, if searching for POs beginning with ABM or created this month, the display will display POs beginning with ABM or created this month. **Add group of conditions** will display POs beginning with ABM *or* an order date of this month *and* with paper towels as the item.



6. Select columns to include in your View. You can add, remove, and re-order the columns by clicking on and dragging them. Select **Save**.



For additional support, please contact our Procurement Buyer Support Team.

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GWS US & Canada	GWSNAM_ProcurementBuyerSupport@cbre.com
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