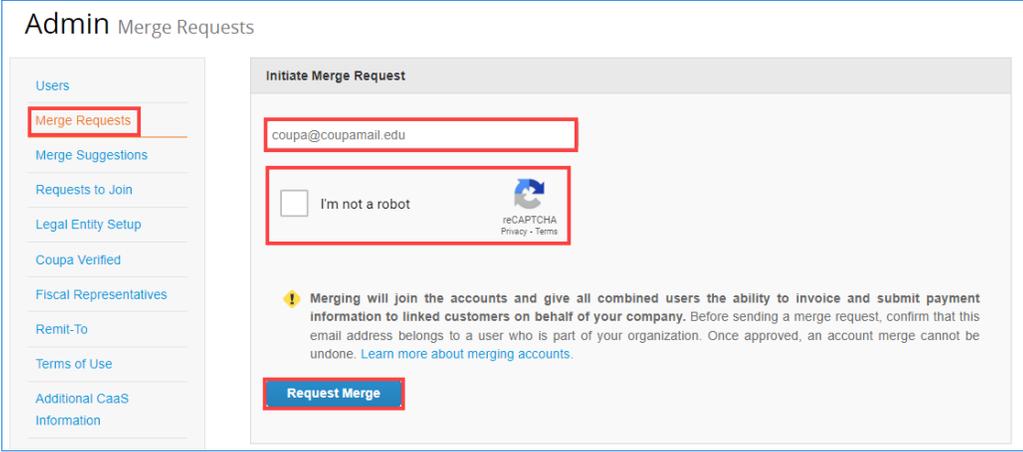


Request to Merge Accounts

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**.



Admin Merge Requests

Users

- Merge Requests
- Merge Suggestions
- Requests to Join
- Legal Entity Setup
- Coupa Verified
- Fiscal Representatives
- Remit-To
- Terms of Use
- Additional CaaS Information

Initiate Merge Request

coupa@coupamail.edu

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 organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Request Merge

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.**

Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with 0000000085-GWS US-THOMAS PUMP CO INC. Choose who will become the owner of the merged account.

My Account

- My users
- My customers
- My payment information
- My public profile

Merged Account

As the account owner, I will administer

- All combined users
- All combined customers
- All combined payment information

They will administer only

- Their users
- Their customers
- Their payment information

The merged account will use

- My public profile

* Account Owner My Account Their Account

By choosing this option I understand that I will no longer be the account owner.

Note For Recipient

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 organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Cancel
Send Request

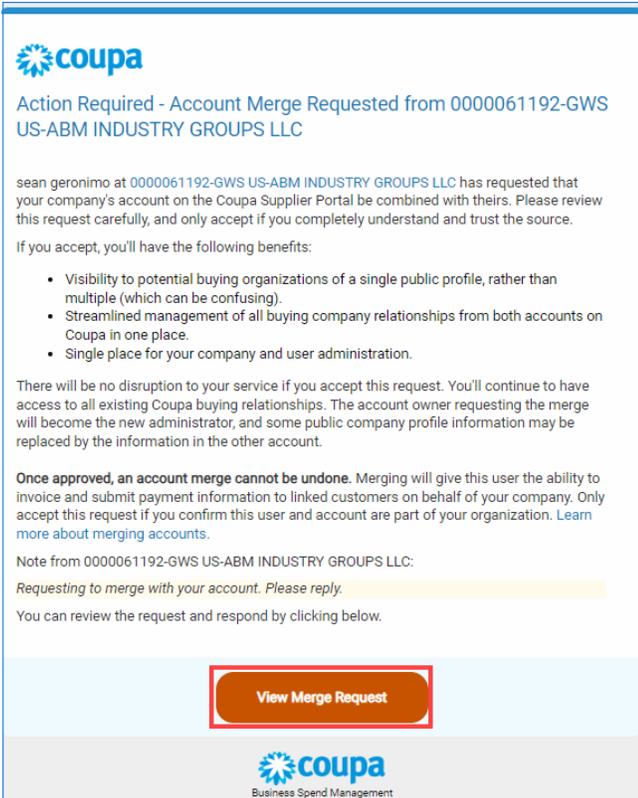
4. Add a note about the merge request in the **Note For Recipient** box. Select **I'm not a robot**. Then, click **Send Request**. An email notification will be sent to the email address of the account that you want to merge to.

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**.



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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.](#)

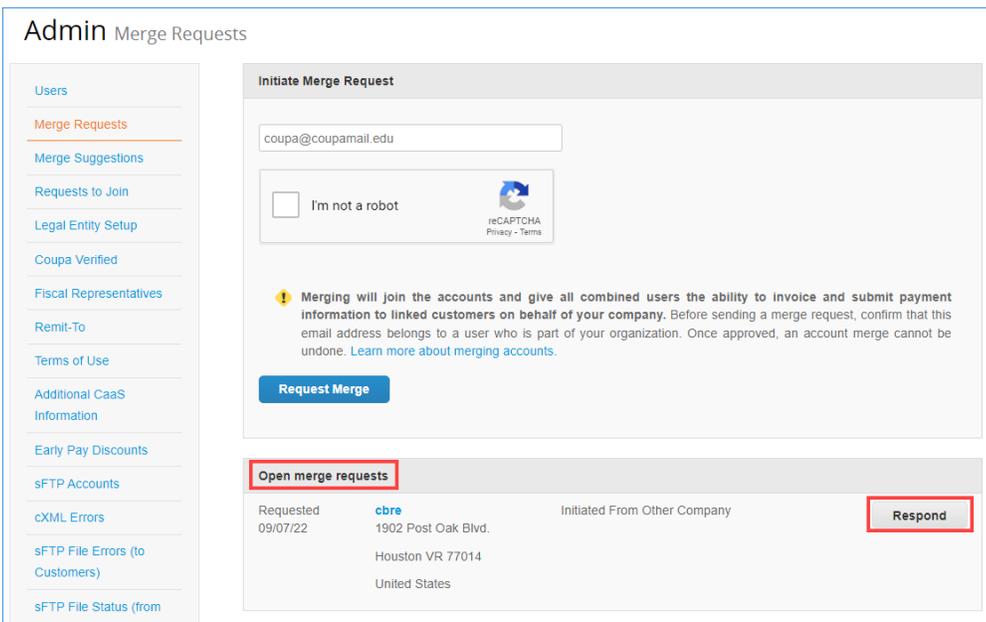
Note from 0000061192-GWS US-ABM INDUSTRY GROUPS LLC:
Requesting to merge with your account. Please reply.

You can review the request and respond by clicking below.

View Merge Request

coupa
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.



Admin Merge Requests

Users

Merge Requests

Merge Suggestions

Requests to Join

Legal Entity Setup

Coupa Verified

Fiscal Representatives

Remit-To

Terms of Use

Additional CaaS Information

Early Pay Discounts

sFTP Accounts

cXML Errors

sFTP File Errors (to Customers)

sFTP File Status (from

Initiate Merge Request

coupa@cupamail.edu

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 organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Request Merge

Open merge requests

Requested 09/07/22	cbre 1902 Post Oak Blvd. Houston VR 77014 United States	Initiated From Other Company	Respond
-----------------------	---	------------------------------	----------------

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**.

Merge Request ✕

Patricia Duffie of **cbre** has requested to merge with your Coupa Supplier Portal account. By accepting this request, the administrator of **cbre** will become the new account owner.

My Account

- 👤 My users
- 👥 My customers
- 💳 My payment information
- 🌐 My public profile

Merged Account

As the account owner, they will administer

- 👤👥 All combined users
- 👥👥 All combined customers
- 💳📄 All combined payment information

I will administer only

- 👤 My users
- 👥 My customers
- 💳 My payment information

The merged account will use

- 🌐 Their public profile

Their Account

- 👤 Their users
- 👥 Their customers
- 💳 Their payment information
- 🌐 Their public profile

Users with access to merged account

- sean geronimo ([redacted])
- Jennifer Janssen ([redacted])
- Jenn Janssen ([redacted])
- Prince July ([redacted])
- Test User ([redacted])
- JJTest Supplier ([redacted])
- Supplier TestJJ ([redacted])

Note from requester Account Merge request for new policy compliance and more efficient invoicing/order fulfillment.

Add note for requester

I recognize the email addresses above as coworkers at my company, and I agree to merge

⚠️ This request is from a user who has a different email domain. Only accept this request if you confirm this user is part of your organization. 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. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Cancel
Reject
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.

coupa supplier portal CBRE v | NOTIFICATIONS 99 | HELP v

[Home](#)
[Invoices](#)
[Orders](#)
[Profile](#)
[Setup](#)
[Service/Time Sheets](#)
[ASN](#)
[Sourcing](#)
[Forecasts](#)
[Catalogs](#)
[Add-ons](#)
[More...](#)

[Admin](#)
[Customer Setup](#)
[Connection Requests](#)

Users

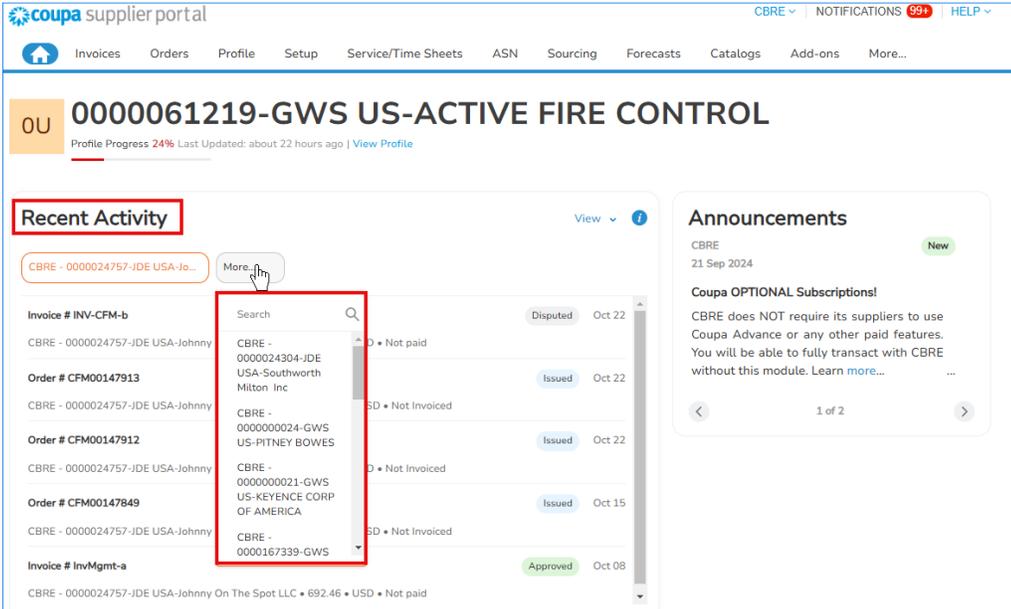
- Merge Requests
- Merge Suggestions
- Requests to Join
- Legal Entity Setup
- Coupa Verified
- Fiscal Representatives
- Ramó-To
- Terms of Use
- Additional CaaS Information
- Early Pay Discounts
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

Users	Permissions	Customer Access
Jenn Janssen jennifer.janssen@cbre.com Status: Inactive Activate	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	CBRE - 000000023-GWS US-EXS INC CBRE - 000001162-GWS US-ABM INDUSTRY GROUPS LLC CBRE - 000120074-CORP US-ABM INDUSTRIES INC CBRE - 000040043-CBRE CHL-COMERCIAL M Y F LIMITADA CBRE - 0000025893-JOE CAN-AMAZON SPRINGS WATER CO LTD CBRE - 0000070766-CBRE PER-TERMO SISTEMAS S.A.C CBRE - 0000064791-GWS US-1000 BULBS COM CBRE - 0000104877-CAN-INTERIOR CARE LIMITED
Jennifer Janssen jjans007@gmail.com Status: Inactive Activate	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	CBRE - 000000023-GWS US-EXS INC CBRE - 000001162-GWS US-ABM INDUSTRY GROUPS LLC CBRE - 000120074-CORP US-ABM INDUSTRIES INC CBRE - 000040043-CBRE CHL-COMERCIAL M Y F LIMITADA CBRE - 0000025893-JOE CAN-AMAZON SPRINGS WATER CO LTD CBRE - 0000070766-CBRE PER-TERMO SISTEMAS S.A.C CBRE - 0000064791-GWS US-1000 BULBS COM CBRE - 0000104877-CAN-INTERIOR CARE LIMITED
JJTest Supplier JJTestSupplier@gmail.com Status: Active Edit	ASNs Admin Business Performance Catalogs Early Payments Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	CBRE - 0000060253-CORP US-TRICENTIS USA CORP

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

View Customer Activity

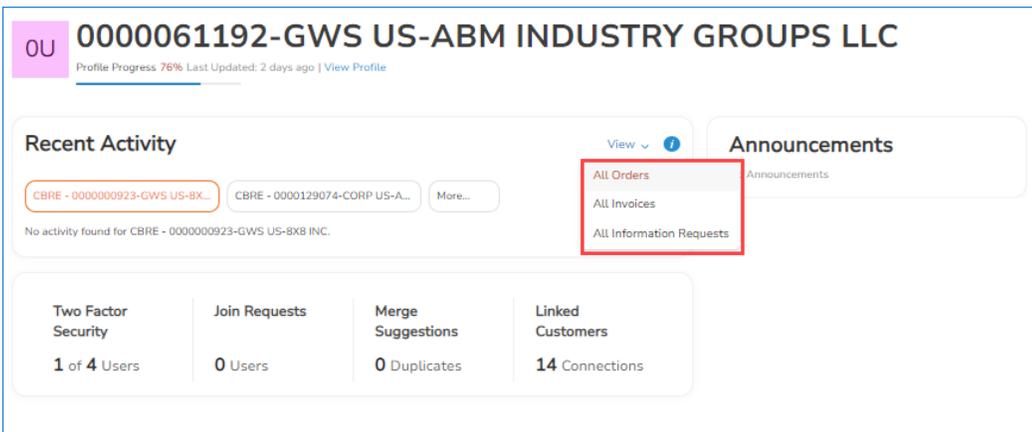
1. You can view **Recent Activity** by customer. Select **More** to choose from a list of additional customers.



The screenshot shows the 'Recent Activity' section for customer '0000061219-GWS US-ACTIVE FIRE CONTROL'. A 'More...' button is highlighted with a red box, and a dropdown menu is open, showing a search bar and a list of customer IDs. The list includes:

- CBRE - 0000024757-JDE USA-Johnny
- CBRE - 0000024304-JDE USA-Southworth Milton Inc
- CBRE - 000000024-GWS US-PITNEY BOWES
- CBRE - 000000021-GWS US-KEYENCE CORP OF AMERICA
- CBRE - 0000167339-GWS

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



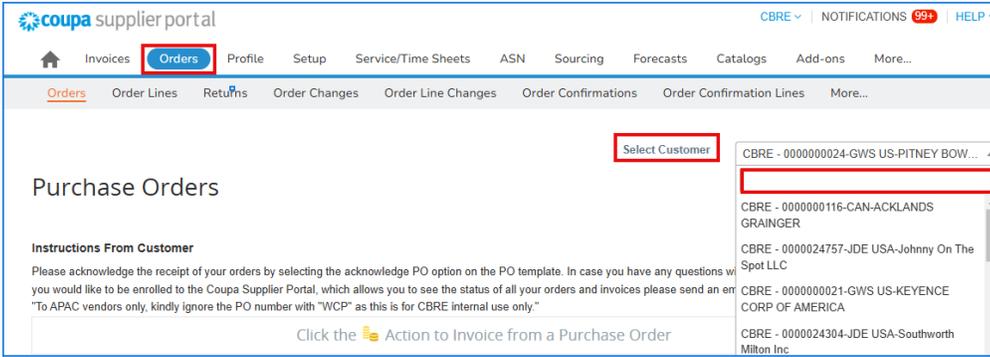
The screenshot shows the 'Recent Activity' section for customer '0000061192-GWS US-ABM INDUSTRY GROUPS LLC'. A 'View' button is highlighted with a red box, and a dropdown menu is open, showing 'All Orders', 'All Invoices', and 'All Information Requests'. Below the activity section, there are four cards:

- Two Factor Security:** 1 of 4 Users
- Join Requests:** 0 Users
- Merge Suggestions:** 0 Duplicates
- Linked Customers:** 14 Connections

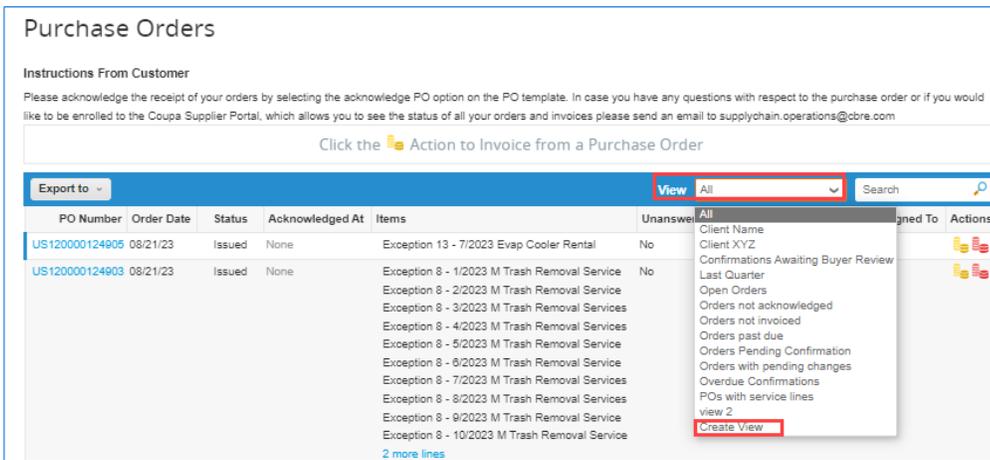
Create a View by Customer

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.

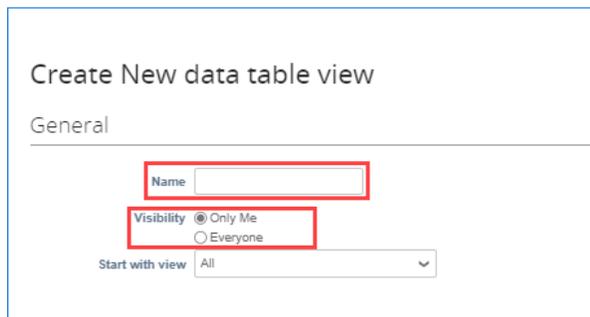
1. Select the **Orders** tab from the home page. Choose your customer from **Select Customer** dropdown list.



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.

Conditions

Match Conditions: Match all conditions from at least one group Add group of conditions

Filter By: PO Number Filter Clause: contains Filter Text: ABM + x

OR

Filter By: Order Date Filter Clause: this month + x

and Filter By: Item Filter Clause: is Filter Text: paper towels + x

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**.

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order. You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns	Selected Columns
Client Name	PO Number
CMMS PR #	Order Date
Comments	Status
Payment Agreements	Acknowledged At
PO ID	Items
Work Order #	Unanswered Comments
	Total
	Assigned To
	Actions

Default Sort Order

Sort by in ascending order.

Cancel Save

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

Region & Line of Business	Support Email Contact
GWS APAC	APAC_ProcurementBuyerSupport@cbre.com
GWS EMEA	GWSEMEAsupplychainbuyer@cbre.com
GWS Latin America	LATAM_ProcurementBuyerSupport@cbre.com
GWS US & Canada	GWSNAM_ProcurementBuyerSupport@cbre.com
Corporate/Advisory APAC	APACSupplyChainBuyers@cbre.com
Corporate/Advisory EMEA	ADVEMEA_ProcurementBuyerSupport@cbre.com
Corporate U.S.	USProcurement@cbre.com