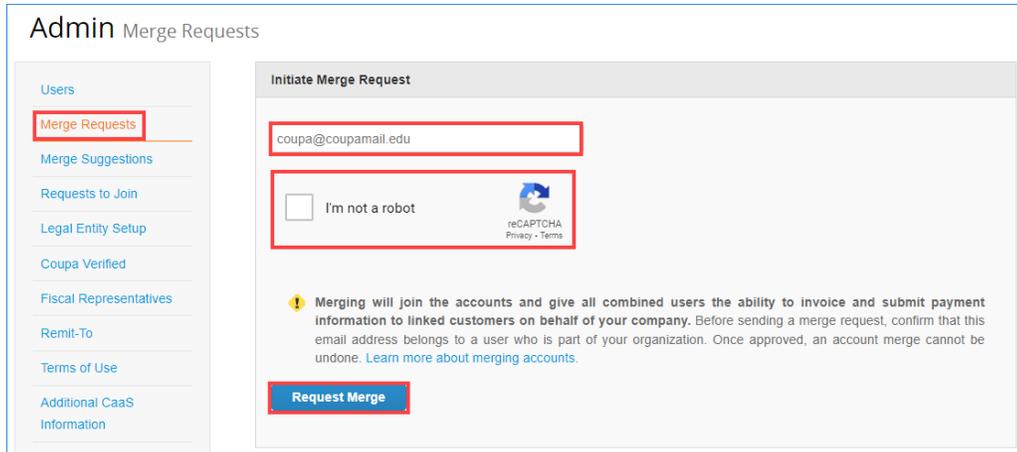


## Request to Merge Accounts

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**.



The screenshot shows the 'Admin Merge Requests' interface. On the left is a sidebar with navigation links: Users, Merge Requests (highlighted), Merge Suggestions, Requests to Join, Legal Entity Setup, Coupa Verified, Fiscal Representatives, Remit-To, Terms of Use, and Additional CaaS Information. The main content area is titled 'Initiate Merge Request' and contains a form with an email address field (coupa@coupamail.edu), a reCAPTCHA box, and a 'Request Merge' button. A warning message is displayed below the form: '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.'

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

#### Their Account

- Their users
- Their customers
- Their payment information
- Their 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.](#)

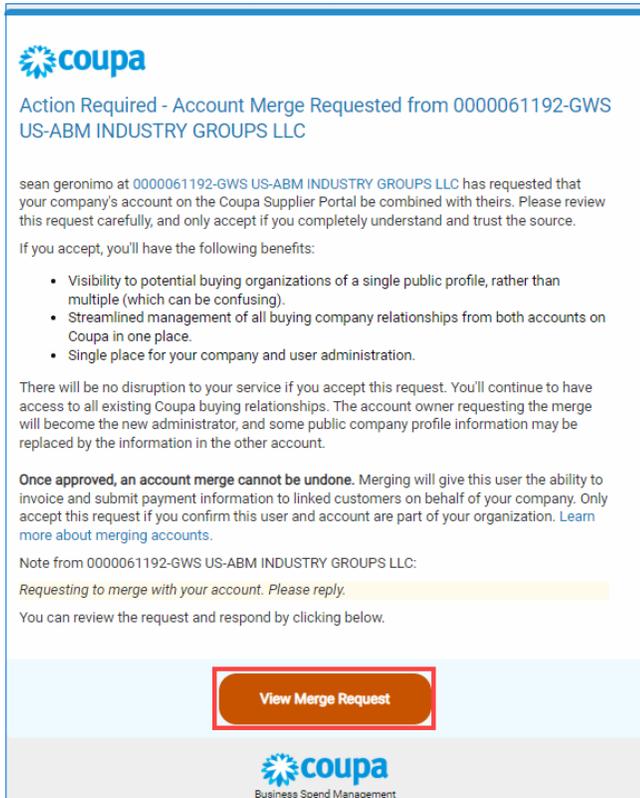
4. Add a note about the merge request in the **Note For Recipient** box. Select **I'm not a robot**. Then, click **Send Request**. An email notification will be sent to the email address of the account that you want to merge to.

## 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**.



The screenshot shows an email notification from Coupa. At the top left is the Coupa logo. Below it, the subject line reads "Action Required - Account Merge Requested from 0000061192-GWS US-ABM INDUSTRY GROUPS LLC". The main body of the email contains the following text:

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.

At the bottom of the email content area, there is a prominent orange button with the text "View Merge Request". Below the email content is the footer, which includes the Coupa logo and the text "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

  
 I'm not a robot   

**!** 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	<b>cbre</b> 1902 Post Oak Blvd. Houston VR 77014 United States	Initiated From Other Company	<b>Respond</b>
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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

#### Their Account

- Their users
- Their customers
- Their payment information
- Their 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

Users with access to merged account

- sean geronimo ( [sean.geronimo@cbre.com](#) )
- Jennifer Janssen ( [jjanssen@cbre.com](#) )
- Jenn Janssen ( [jenn.janssen@cbre.com](#) )
- Prince July ( [prince.july@cbre.com](#) )
- Test User ( [testuser@gmail.com](#) )
- JJTest Supplier ( [JJTestSupplier@gmail.com](#) )
- Supplier TestJJ ( [SupplierTestJJ@gmail.com](#) )

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

Add note for requester

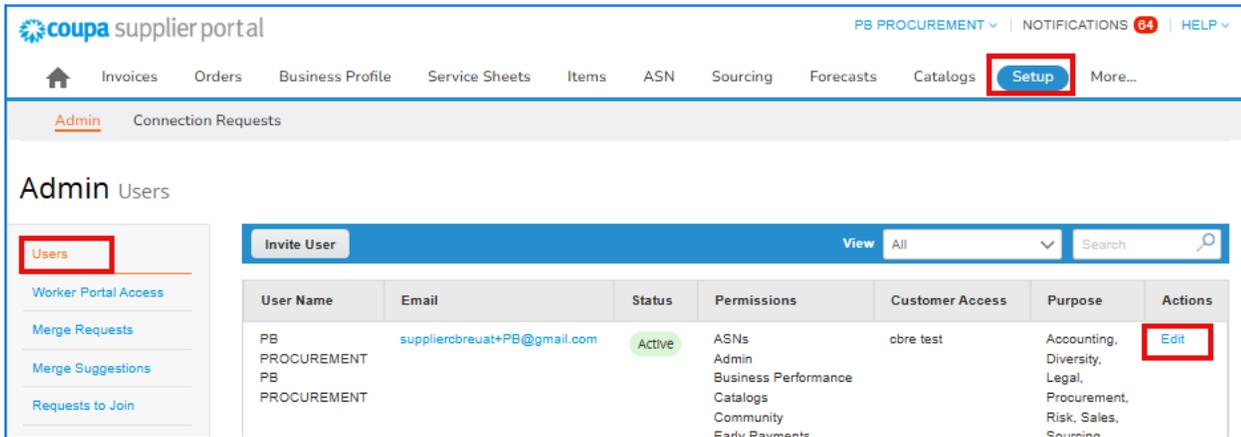
I recognize the email addresses above as coworkers at my company, and I agree to merge

**⚠ 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.](#)

## 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.



The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'PB PROCUREMENT', 'NOTIFICATIONS 64', and 'HELP'. The main navigation menu has 'Setup' highlighted with a red box. Below the navigation, the 'Admin' tab is selected, showing 'Connection Requests' and 'Admin Users'. On the left sidebar, 'Users' is highlighted with a red box. The main content area shows a table of users with columns: User Name, Email, Status, Permissions, Customer Access, Purpose, and Actions. The 'Edit' link in the Actions column for the user 'PB PROCUREMENT PB PROCUREMENT' is highlighted with a red box.

User Name	Email	Status	Permissions	Customer Access	Purpose	Actions
PB PROCUREMENT PB PROCUREMENT	suppliercbreuat+PB@gmail.com	Active	ASNs Admin Business Performance Catalogs Community Early Payments	cbre test	Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing	<a href="#">Edit</a>

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

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

Region & Line of Business	Support Email Contact
ADV & GWS APAC	<a href="mailto:APAC_ProcurementBuyerSupport@cbre.com">APAC_ProcurementBuyerSupport@cbre.com</a>
Corporate & US	<a href="mailto:usprocurement@cbre.com">usprocurement@cbre.com</a>
GWS U.S. & Canada	<a href="mailto:GWSNAM_ProcurementBuyerSupport@cbre.com">GWSNAM_ProcurementBuyerSupport@cbre.com</a>
GWS Latin America	<a href="mailto:LATAM_ProcurementBuyerSupport@cbre.com">LATAM_ProcurementBuyerSupport@cbre.com</a> Chile, Panama, Peru, Costa Rica, Uruguay, Dominican Republic, Columbia, Argentina, Mexico
EMEA, Canada ACML	<a href="#">All CBRE Entities</a>