



How to manage Users and Merge Requests in your Coupa Supplier Portal (CSP)

February 26

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Users and Merge Requests

This guide will help you manage Users and Merge Requests in your Coupa supplier portal (CSP). The Primary Contact or User with admin access is tasked with managing the Users on your organisations CSP account. Permissions grant access to users to corresponding menu items.

Mitie cannot add users to your Companies CSP account. The CSP belongs to your company and we at Mitie do not have access to it.

Supplier must manage their users. This can be found in Setup on your CSP homepage.

To add a user there are 2 options,

- If they do not have a CSP account registered to there Email – **Invite user**
- If they have a CSP account registered to there email – **Merge requests**

Administrators can manage user permissions and customer access

You may be asked to enter an MFA code to Invite user, change or merge request.

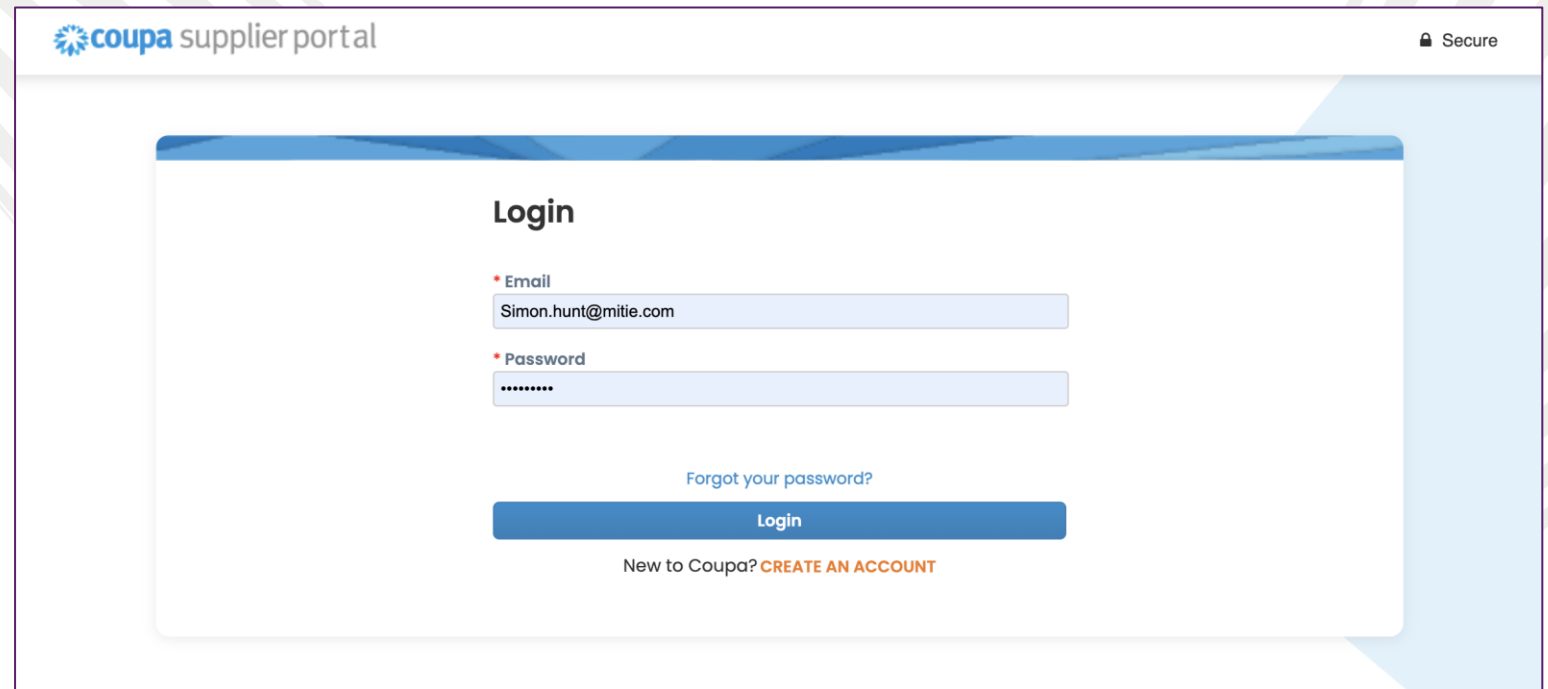
The screenshot displays the 'Admin Users' section of the Coupa Supplier Portal. A sidebar on the left lists navigation options such as 'Users', 'Worker Portal Access', 'Merge Requests', and 'Merge Suggestions'. The main content area features a table of users. The table has columns for 'User name', 'Email', 'Status', 'Permissions', 'Customer Access', 'Purpose', and 'Actions'. Two users are visible: Simon Hunt and Susana Viera. Both are marked as 'Active'. Simon Hunt's permissions include ASNs, Admin, Catalogues, Community, Early Payments, Forecast Planner, Inventory, Invoices, NAVI Access, Order Changes, Order Line Confirmation, Orders, Payment Method Admin, Payments, Profiles, Restricted Worker Access, Restricted Worker Assignment, Access, Service Sheets, Sourcing, and Supplier Dashboard. His customer access is 'Mitie Group Plc - STRAKER TECH UK LIMITED_0000642139'. Susana Viera has the same permissions and customer access: 'Mitie Group Plc - SRCL LTD_0000601291'. The page footer indicates 'Per page 5 | 10 | 15'.

Notification Preferences & Login to your CSP Account

This guide is split into 3 sections.

- Invite User
- Manage Users
- Merge Requests

Log into your CSP account



The screenshot shows the Coupa Supplier Portal login interface. At the top left, the logo reads "coupa supplier portal". At the top right, there is a "Secure" indicator with a lock icon. The main content area is titled "Login" and contains two input fields: "Email" with the value "Simon.hunt@mitie.com" and "Password" with masked characters. Below the password field is a link for "Forgot your password?". A blue "Login" button is positioned below the fields. At the bottom, there is a link for "New to Coupa? CREATE AN ACCOUNT".

Invite User

On the Coupa Homepage click on setup and the Admin users page opens

coupa supplier portal

SIMON | NOTIFICATIONS 6 | HELP

Home Invoices Orders Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogues **Setup** More...

Admin Connection Requests

Admin Users

Users

- Worker Portal Access
- Merge Requests
- Merge Suggestions
- Requests to Join
- Fiscal Representatives
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)

Invite User View All Search

User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Simon Hunt	simon.hunt@mitie.com	Active	ASNs Admin Catalogues Community Contracts Early Payments Forecast Planner Hidden, Private and Public Inventory Invoices NAVI Access Order Changes Order Line Confirmation Orders Payment Method Admin Payments Profiles Service Sheets Sourcing Supplier Dashboard	Mitie Group Plc	Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing	Edit
Simon Hunt	coupa.system.admin@mitie.com	Active	ASNs Admin Catalogues Community Contracts Early Payments Forecast Planner	Mitie Group Plc	None	Edit

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Invite User

To add a new user

Click



coupa supplier portal SIMON ▾ | NOTIFICATIONS 6 | HELP ▾

Home Invoices Orders Business Profile Service Sheets Items ASN Sourcing Forecasts Catalogues **Setup** More...

Admin Connection Requests

Admin Users

[Users](#)
[Worker Portal Access](#)
[Merge Requests](#)
[Merge Suggestions](#)
[Requests to Join](#)

Invite User View All ▾ Search 🔍

User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Simon Hunt	simon.hunt@mitie.com	Active	ASNs Admin Catalogues Community Contracts	Mitie Group Plc	Accounting, Diversity, Legal, Procurement, Risk, Sales,	Edit

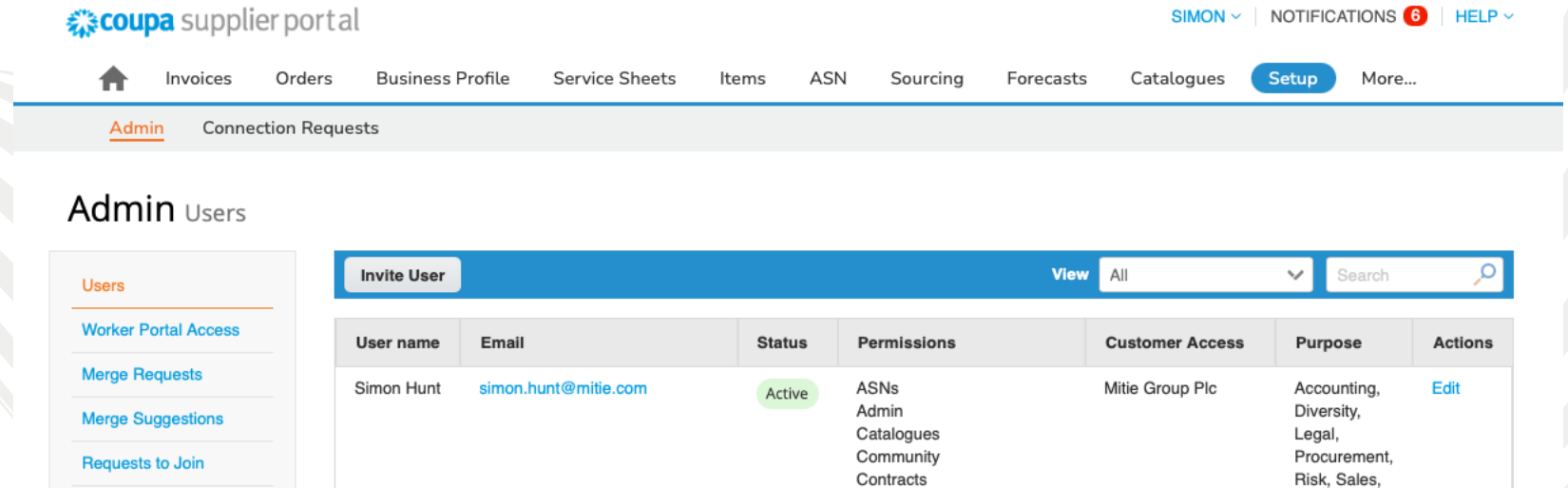
Invite User

To add a new user

Click



You may be asked to enter an MFA code to add new users



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and "supplier portal" text. On the right, there are links for "SIMON", "NOTIFICATIONS 6", and "HELP". Below this is a main navigation menu with items like "Invoices", "Orders", "Business Profile", "Service Sheets", "Items", "ASN", "Sourcing", "Forecasts", "Catalogues", "Setup", and "More...". A secondary menu shows "Admin" and "Connection Requests". The main content area is titled "Admin Users" and features a sidebar with links for "Users", "Worker Portal Access", "Merge Requests", "Merge Suggestions", and "Requests to Join". The main table has a header with "Invite User", "View", and a search box. The table contains one user entry: Simon Hunt, with email simon.hunt@mitie.com, status Active, and various permissions and customer access details.

User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Simon Hunt	simon.hunt@mitie.com	Active	ASNs Admin Catalogues Community Contracts	Mitie Group Plc	Accounting, Diversity, Legal, Procurement, Risk, Sales,	Edit

Invite User

Invite user popup opens.

- Add the mandatory information
- Review the Permissions
- Select Customers

Click Send

Send Invitation

You will get confirmation it has been sent, the new user will get an email to log into there new CSP account.

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Invite User

User Information

First Name

Last Name

*Email

Purpose

Phone Number

Country/Region

Area Code

Number

Extension

Permissions

- All
- Admin
- Orders
 - All
 - Restricted Access to Orders
- Invoices
- Catalogues
- Profiles
- ASNs
- Service Sheets
 - All
 - Restricted Access to Service Sheets
- Payments
- Order Changes
- Early Payments
- Sourcing
 - Private and Public
 - Hidden, Private and Public
- Community
- Order Line Confirmation
- Forecast Planner
- Workers
 - View
 - Manage
- Worker Assignments
 - View
 - Manage
- Inventory
- Supplier Dashboard
- Contracts
 - View
 - Manage
- Payment Method Admin
- NAVI Access

Customers

- All
- Mitie Group Plc

Cancel Send Invitation



Manage Users

Each user, you will have an actions column. If you wish to manage or deactivate the user.

click [Edit](#)

Admin Users

Users

[Worker Portal Access](#)

[Merge Requests](#)

[Merge Suggestions](#)

[Requests to Join](#)

[Fiscal Representatives](#)

[sFTP Accounts](#)

[cXML Errors](#)

[sFTP File Errors \(to Customers\)](#)

Invite User						
View All Search						
User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Simon Hunt	simon.hunt@mitie.com	Active	ASNs Admin Catalogues Community Contracts Early Payments Forecast Planner Hidden, Private and Public Inventory Invoices NAVI Access Order Changes Order Line Confirmation Orders Payment Method Admin Payments Profiles Service Sheets Sourcing Supplier Dashboard	Mitie Group Plc	Accounting, Diversity, Legal, Procurement, Risk, Sales, Sourcing	Edit

Edit User Access

Each user, you will have an actions column. If you wish to manage or deactivate the user.

Click 

Review the Permissions and Customers and amend as required.

Once updated Click 

Edit user access for Simon Hunt

User Information

- First Name: Simon
- Last Name: Hunt
- Email: simon.hunt@mitie.com

Phone Number

- Country/Region: [Dropdown]
- Area Code: [Text]
- Number: [Text]
- Extension: [Text]

Purpose

- Accounting [x] Diversity [x]
- Legal [x] Procurement [x] Risk [x]
- Sales [x] Sourcing [x]

Primary Contact

- Current primary contact: Simon Hunt

Permissions

- All
- Admin
- Orders
 - All
 - Restricted Access to Orders
- Invoices
- Catalogues
- Profiles
- ASNs
- Service Sheets
 - All
 - Restricted Access to Service Sheets
- Payments
- Order Changes
- Early Payments
- Sourcing
 - Private and Public
 - Hidden, Private and Public
- Community
- Order Line Confirmation
- Forecast Planner
- Workers
 - View
 - Manage
- Worker Assignments
 - View
 - Manage
- Inventory
- Supplier Dashboard
- Contracts
 - View
 - Manage
- Payment Method Admin
- NAVI Access

Customers

- All
- Mitie Group Plc

Buttons: Cancel, Deactivate User, Save

Merge Requests

This is for any person you are trying to add to your CSP account already has a CSP account linked to their email.

From the setup menu go to Merge Requests

Change the email address from `coupa@coupamail.edu` to the email address of the user you want to merge with.

Complete the reCAPTCHA (I'm not a robot)

Click

Request Merge

The screenshot shows the 'Admin Merge Requests' page in the Coupa Supplier Portal. The page has a navigation bar at the top with 'Admin' and 'Connection Requests' highlighted. A sidebar on the left lists various admin functions, with 'Merge Requests' selected. The main content area is titled 'Initiate Merge Request' and contains a form with an email input field (containing 'coupa@coupamail.edu'), a reCAPTCHA 'I'm not a robot' checkbox, and a 'Request Merge' button. A warning message below the form states: '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 organisation. Once approved, an account merge cannot be undone. Learn more about merging accounts.' Below this is a section for 'Open merge requests' which shows 'All clear! No open merge requests.'

Request Account Merge

Account Owner: select one of the options.

Add Note for Recipient

Complete the reCAPTCHA (I'm not a robot)

Click

Send Request

Request Account Merge

You are requesting to merge your Coupa Supplier Portal account with [HSS Hire Service Group Ltd \(506323\)](#). 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

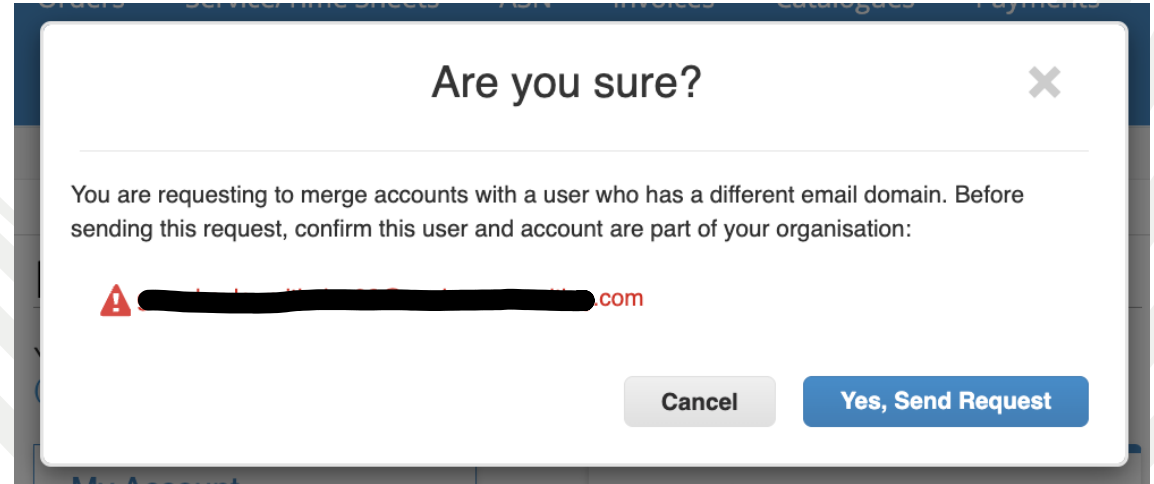
! Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organisation. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Are you sure

Click

Yes, Send Request

The Merge request has now been sent to the user.



Initiate Merge Requests

You will be able to see your open Merge Requests

You have the option to cancel however the user will have received a notification in there CSP account.

The user you are merging with will need go to Merge requests, they will be able to accept the merge request which they will see in open merge requests. Only once they have accepted the merge request, they will be merged with the account.

Always check your legal entity after any merge requests as it will merge them if they have one set up.

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The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'SIMON', 'NOTIFICATIONS 6', and 'HELP' are on the right. A navigation bar includes 'Invoices', 'Orders', 'Business Profile', 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', 'Catalogues', 'Setup', and 'More...'. Below this, the 'Admin' section is active, showing 'Connection Requests'.

The main content area is titled 'Admin Merge Requests'. On the left is a sidebar menu with items: 'Users', 'Worker Portal Access', 'Merge Requests' (highlighted), 'Merge Suggestions', 'Requests to Join', 'Fiscal Representatives', 'sFTP Accounts', 'cXML Errors', and 'sFTP File Errors (to Customers)'. The main area contains two sections:

- Initiate Merge Request:** A form with an email input field containing 'coupa@coupamail.edu', a reCAPTCHA 'I'm not a robot' checkbox, and a 'Request Merge' button. A warning icon and text state: '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 organisation. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)'
- Open merge requests:** A table with one entry:

Requested	Company	Initiated From	Action
20/05/2024	HSS Hire Service Group Ltd (506323) Oakland House Talbot Road Manchester M16 0PQ United Kingdom	Initiated From My Company	Cancel

Our Dedicated Supplier Website

Mitie has a dedicated supplier website [Mitie Suppliers](#)
You will find lots of How to Guides.

Each section in this document will have reference to How to Guides

Click  **How to Guides** to expand

Introduction to the Coupa Supplier Portal (CSP)

What is the CSP?

The CSP is an easy to setup, free tool for suppliers to manage business with all customers who use Coupa, under one roof. The Coupa platform will provide you with full visibility of the status of your invoice and will enable a quicker process. No installation of hardware or software is required, and the service incurs no fee for you to pay.

How do I login to the portal?

Click on the image below to login to the CSP.

- Bookmark the link/add it to your favourites tab
- The email address used to login should be the same as the primary contact held on Mitie's Vendor Master
- If you already use Coupa with other customers, please provide an email address for your current CSP administrator.



Who can I contact for support?

Please email askmitieprocurement@mitie.com for any support using the CSP, our friendly team are happy to help guide you through the process.

You can also find help and information on the Coupa website, please [click here to visit](#).



How to manage / setup your CSP



Click for How to Guides

- How to register the CSP
- How to register and activate your CSP
- How to setup your legal entity
- How to set-up Two-factor Authentication
- How to update your details on the CSP
- How to manage user or merge requests in your CSP
- How to update Notification settings
- How to manage your preferred language in your CSP

Supplier Maintenance (SMT)

Mitie uses Coupa to manage and onboard new suppliers and undertakes validation checks to ensure our suppliers meet our minimum standards. Existing suppliers can also use Coupa to update, amend and maintain details such as their banking information and remit to address.



- New Suppliers
- Existing Suppliers
- Managing your company information with Mitie

How to Invoice Mitie

Depending on the volume and frequency of transactions there are multiple ways you can invoice via Coupa, you can either choose:

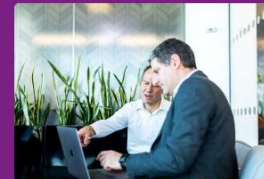
1. The Coupa Supplier Portal
2. Supplier Actionable Notifications (please refer to the how-to-guide below)

Before you invoice Mitie, please ensure that you have read the Tax guides that are listed in the menu below for your country.

Please note that the above guides are changed frequently, so please make sure that you download the most up-to-date version

You must have a Legal entity set up in your CSP to invoice Mitie Group PLC.

If you need further support regarding your invoices e.g. payment status or pending approval. Please email accountspayable@mitie.com



Click for How to Guides

- UK, CIS and VAT Guide
- Cyprus Tax Guide
- Germany VAT Guide
- Gibraltar VAT Guide
- Belgium VAT Guide
- France VAT Guide
- Netherlands VAT Guide
- How to setup your legal entity
- How to setup your business sites in the CSP
- How to submit an invoice by the CSP
- How to submit a credit note by the CSP
- How to Create and Submit an invoice via SAN
- How to manage Disputed Invoices

Contract Lifecycle Management (CLM)

Review Contracts

Coupa Contract Lifecycle Management (CLM) module enables suppliers to review and manage contracts online.



How to Guides

Source to Contract (S2C)

Participate in eAuctions

Coupa eSourcing and eAuctions tools enable Suppliers to interact online with Mitie during the Sourcing and eAuction process.



How to Guides

If you cannot find the help you need, please email askmitieprocurement@mitie.com

Website address: <https://mitiesuppliers.com/mitie-supplier-faq/using-coupa-2/>

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