



# Users and Merge Requests

## How to Manage Users and Merge Requests in your CSP

This guide will help you manage Users and Merge Requests in your Coupa supplier portal (CSP).

Admin Users

User name	Email	Status	Permissions	Customer Access	Actions
Asha Lewis	asha.lewis@mbie.com	Deactivated	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Mitie Group Plc - Vodafone PLC Test Site	Activate
Rachael Mauler	rachael.mauler@mbie.com	Inactive	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Mitie Group Plc - Vodafone PLC Test Site	Activate
Simon Hurt	simon.hurt@mbie.com	Active	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Mitie Group Plc - SRCL LTD, 0000001021 Mitie Group Plc - Vodafone PLC Test Site Mitie Group Plc - Filimax Ltd Mitie Group Plc - Test Supplier SH	Edit

The Primary Contact or User with admin access is tasked with managing the Users on your organisations CSP account. This Guide will detail how Suppliers can manage Users in their CSP Account.

**Note:** for auditing purposes, Coupa does not allow users to be deleted, so you cannot delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.

If you are the primary contact or have Admin Access, you will need to check the permissions assigned to users.

Permissions grant access to users to corresponding menus items. As an admin user, you have all the permissions by default.

Administrators can manage user permissions and customer access by,

- Assigning Certain users to only certain customers.
- Limiting the types of documents they can access.
- What functions they can perform.

If you need to add a new user and they already have a CSP account assigned to their email address you will have to perform a Merge Request.

This guide is split into 3 sections.

- Add New User (Section 1)
- Manage Users (Section 3)
- Merge Requests

Users and Merge Requests can be found under Setup, Admin.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Payments', and 'Business Performance'. Below this, there are tabs for 'Sourcing', 'Add-ons', and 'Setup'. Under 'Setup', there are sub-tabs for 'Admin' and 'Customer Setup'. The main content area is titled 'Admin Users' and features a table of users. The table has columns for 'User name', 'Email', 'Status', 'Permissions', 'Customer Access', and 'Actions'. Two users are listed: Aisha Lewis (Deactivated) and Rachael Mauler (Inactive). The 'Permissions' column lists various system functions like ASNs, Admin, Business Performance, Catalogues, etc. The 'Customer Access' column shows 'Mille Group Plc - Vodafone PLC' and 'Test Site'. The 'Actions' column has an 'Activate' link for each user.

User name	Email	Status	Permissions	Customer Access	Actions
Aisha Lewis	aisha.lewis@mitie.com	Deactivated	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Mille Group Plc - Vodafone PLC Test Site	Activate
Rachael Mauler	rachael.mauler@mitie.com	Inactive	ASNs Admin	Mille Group Plc - Vodafone PLC Test Site	Activate

1.

## Add New User

To add a new user

Click Invite User button.

The screenshot shows the 'Admin Users' page in the Coupa Supplier Portal. The navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogues', 'Payments', and 'Business Performance'. The 'Setup' menu is active, with 'Admin' and 'Customer Setup' sub-items. The 'Admin Users' section has a sidebar with options like 'Merge Requests', 'Merge Suggestions', 'Requests to Join', and 'Legal Entity Setup'. The main area shows a table of users with columns for 'User name', 'Email', 'Status', 'Permissions', 'Customer Access', and 'Actions'. A user named 'Aisha Lewis' with email 'aisha.lewis@mitie.com' is shown with a 'Deactivated' status and an 'Activate' button.

User name	Email	Status	Permissions	Customer Access	Actions
Aisha Lewis	aisha.lewis@mitie.com	Deactivated	ASNs Admin Business Performance Catalogues	Mitie Group Plc - Vodafone PLC Test Site	Activate

2.

## 'Invite User'

Invite user popup opens.

Add

- First Name
- Last Name
- Email address.

Review the Permissions and Customers and amend as required.

Click Send Invitation

The 'Invite User' popup form includes input fields for 'First Name', 'Last Name', and 'Email'. It features two main sections: 'Permissions' and 'Customers'. The 'Permissions' section has checkboxes for 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'Invoices', 'Catalogues', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Timesheets', 'All', 'Payments', 'Order Changes', 'Early Payments', 'Business Performance', 'Sourcing', 'Order Line Confirmation', and 'Forecast Planner'. The 'Customers' section has checkboxes for 'All', 'Mitie Group Plc - Vodafone PLC Test Site', 'Mitie Group Plc - Filmtex Ltd', 'Mitie Group Plc - Test Supplier SH', and 'Mitie Group Plc - SRCL LTD\_0000601291'. At the bottom, there are 'Cancel' and 'Send Invitation' buttons.

3.

### 'Manage Users'

Under Users against each user, you will have an actions column

If you wish to manage or deactivate the user, click edit

#### Admin Users

The screenshot shows the 'Admin Users' interface. On the left is a sidebar with the following options: Users (selected), Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup, Fiscal Representatives, Remit-To, Early Pay Discounts, sFTP Accounts, cXML Errors, and sFTP File Errors (to Customers). The main area displays a table of users. At the top, there is a search bar with 'simon' entered and a 'View' dropdown set to 'All'. Below the search bar, it says 'Showing results for simon'. The table has columns for User name, Email, Status, Permissions, Customer Access, and Actions. One user is listed: Simon Hunt, with email simon.hunt@mitie.com, status Active, and a list of permissions and customer access. An 'Edit' link is visible in the Actions column.

User name	Email	Status	Permissions	Customer Access	Actions
Simon Hunt	simon.hunt@mitie.com	Active	ASNs Admin Business Performance Catalogues Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	Mitie Group Plc - SRCL LTD_0000601291 Mitie Group Plc - Vodafone PLC Test Site Mitie Group Plc - Filmtek Ltd Mitie Group Plc - Test Supplier SH	Edit

Per page 5 | 10 | 15

4.

### 'Edit user access'

Review the Permissions and Customers and amend as required.

Once updated Click Save

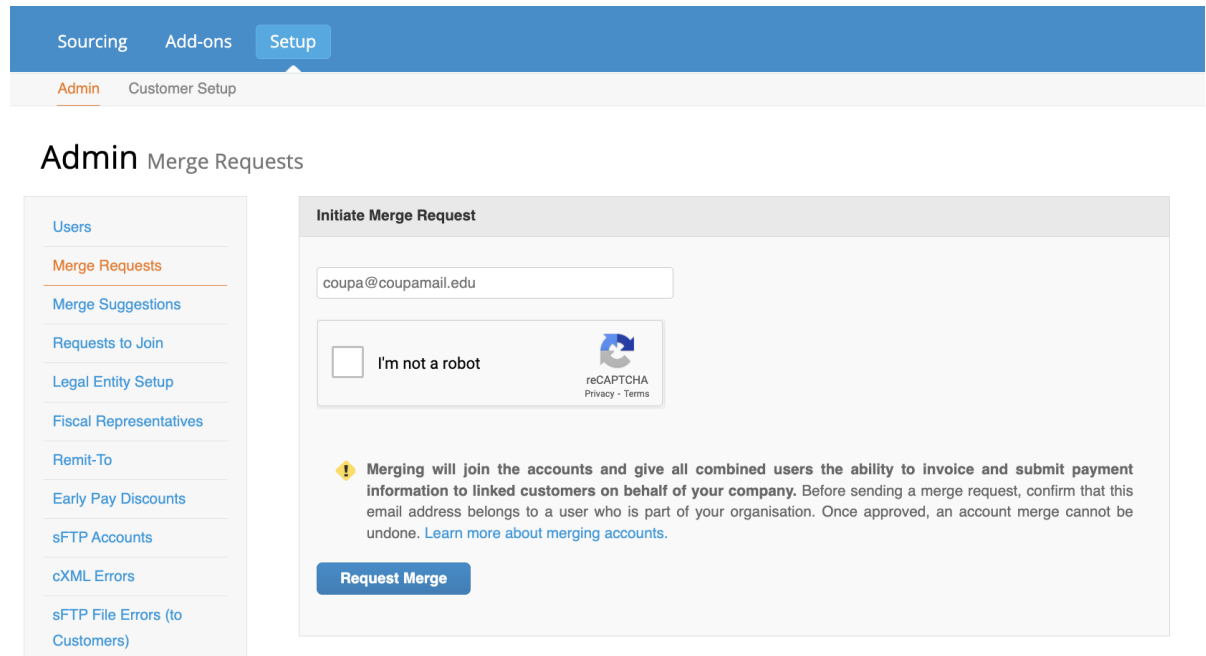
The screenshot shows a dialog box titled 'Edit user access for Simon Hunt'. It has a close button (X) in the top right corner. The dialog is divided into three sections: 'User info', 'Permissions', and 'Customers'. The 'User info' section has fields for First Name (Simon), Last Name (Hunt), and Email (simon.hunt@mitie.com). The 'Permissions' section has a list of permissions with checkboxes: All (checked), Admin (unchecked), Orders (checked), Restricted Access to Orders (radio button), Invoices (checked), Catalogues (checked), Profiles (checked), ASNs (checked), Service/Time Sheets (checked), Restricted Access to Service/Time Sheets (radio button), Payments (checked), Order Changes (checked), Early Payments (checked), Business Performance (checked), Sourcing (checked), Order Line Confirmation (checked), and Forecast Planner (checked). The 'Customers' section has a list of customers with checkboxes: All (checked), Mitie Group Plc - Vodafone PLC Test Site (checked), Mitie Group Plc - Filmtek Ltd (checked), Mitie Group Plc - Test Supplier SH (checked), and Mitie Group Plc - SRCL LTD\_0000601291 (checked). At the bottom, there are three buttons: Cancel, Deactivate User, and Save.

5.

### 'Merge Requests'

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

From the setup menu go to Merge Requests



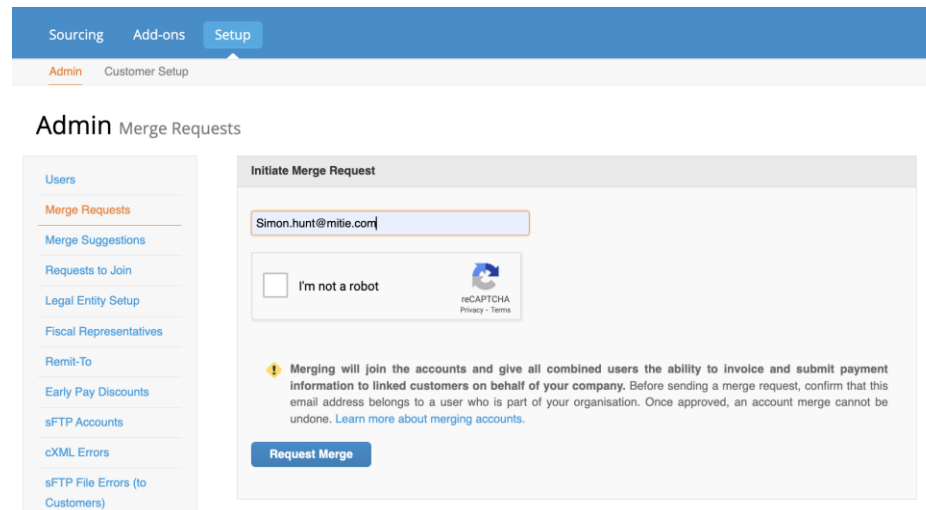
6.

### 'Initiate Merge Requests'

Change the email address from [coupa@coupamail.edu](mailto: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



7.

### '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

**Warning:** 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.](#)

8.

### 'Are You Sure'

Click yes, Send Request

The Merge request has now been sent to the user.

**Are you sure?**

You are requesting to merge accounts with a user who has a different email domain. Before sending this request, confirm this user and account are part of your organisation:

[Redacted]

9.

## 'Open Merge Requests'

### You will be able to see your active Merge Requests

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

If they go to Merge requests the will be able to accept the merge request.

The screenshot displays the 'Admin Merge Requests' page in the Coupa system. At the top, there is a navigation bar with 'Sourcing', 'Add-ons', and 'Setup' tabs, and a sub-menu with 'Admin' and 'Customer Setup'. The main heading is 'Admin Merge Requests'. On the left, a sidebar menu lists various setup options: Users, Merge Requests (highlighted), Merge Suggestions, Requests to Join, Legal Entity Setup, Fiscal Representatives, Remit-To, Early Pay Discounts, sFTP Accounts, cXML Errors, and sFTP File Errors (to Customers). The main content area is divided into two sections. The top section, 'Initiate Merge Request', features a text input field with 'coupa@coupamail.edu', a reCAPTCHA widget with the text 'I'm not a robot', and a blue '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.](#)'. The bottom section, 'Open merge requests', shows a table with one entry:

Requested	Company Name	Initiated From	Action
20/05/2024	<a href="#">HSS Hire Service Group Ltd (506323)</a> Oakland House Talbot Road Manchester M16 0PQ United Kingdom	Initiated From My Company	Cancel

For all Coupa supplier help and guides Click [here](#) for Mitie Suppliers website.