QUICK REFERENCE GUIDE | FOR KIRKLAND & ELLIS SUPPLIERS

Manage Your Coupa Supplier Portal (CSP) Account

After you accept the invitation from Kirkland & Ellis to join the Coupa Supplier Portal (CSP) and set up your account, you can give colleagues at your company access to it. This guide explains how to add and edit users and how to merge your account with a coworker's existing CSP account.

IN THIS GUIDE

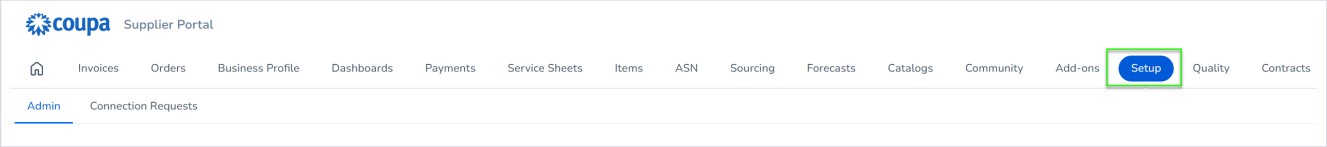
1 Add a User
Invite a colleague to your account

2 Edit or Deactivate a User
Change permissions or remove access

3 Merge Accounts
Combine two CSP accounts into one

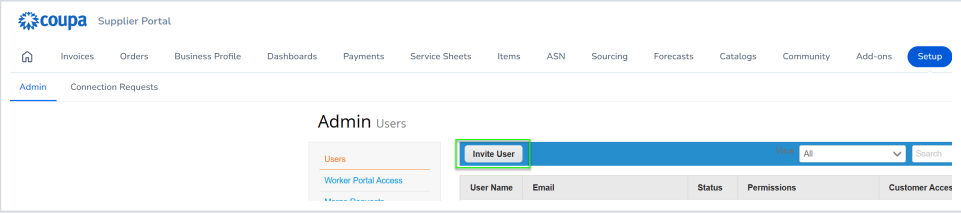
Before You Begin

Every task in this guide starts on the **Setup** tab. In the CSP top navigation bar, click **Setup**, then click **Admin**. You must have administrator access to your company's CSP account to add, edit or deactivate users.



1 Add a User

1. On the **Setup** tab, go to **Admin > Users** and click **Invite User**. The **Invite User** window opens.

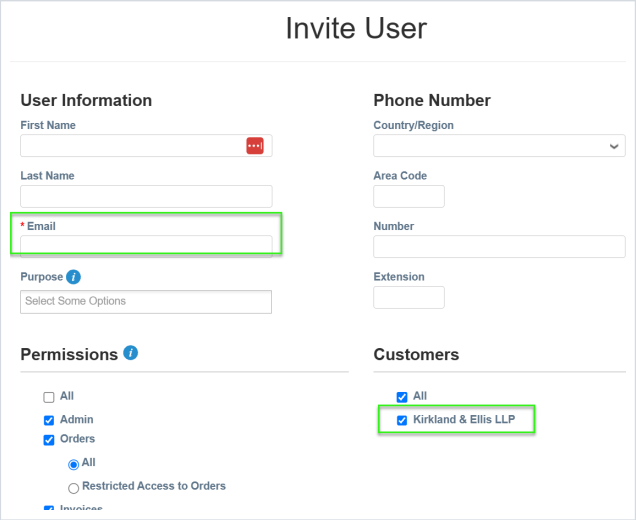


1 ADD A USER (CONTINUED)

2. In the **User Information** section, enter the employee's email address. This is the only required field.

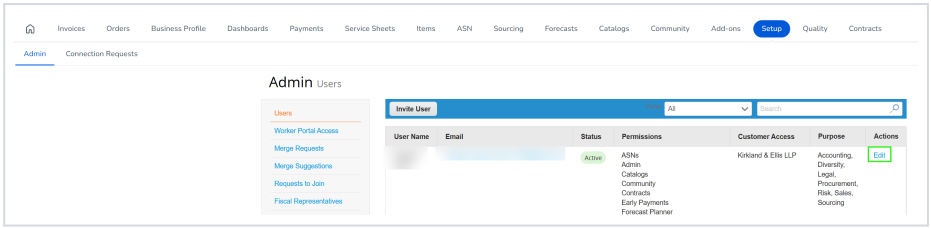
3. In the **Customers** section, select the check box for each customer the employee can access. Clear a check box to restrict access to that customer.

4. Click **Send Invitation**. The employee receives an email invitation to join your company's CSP account.



2 Edit or Deactivate a User

1. On the **Setup** tab, go to **Admin > Users**. Find the user and click **Edit** in the **Actions** column.



2. Update the user's permissions or customer access, then click **Save**.

> **Need to remove someone's access?**
> Click **Deactivate User** in the same window. Administrators can deactivate any existing user.

3 Merge Accounts

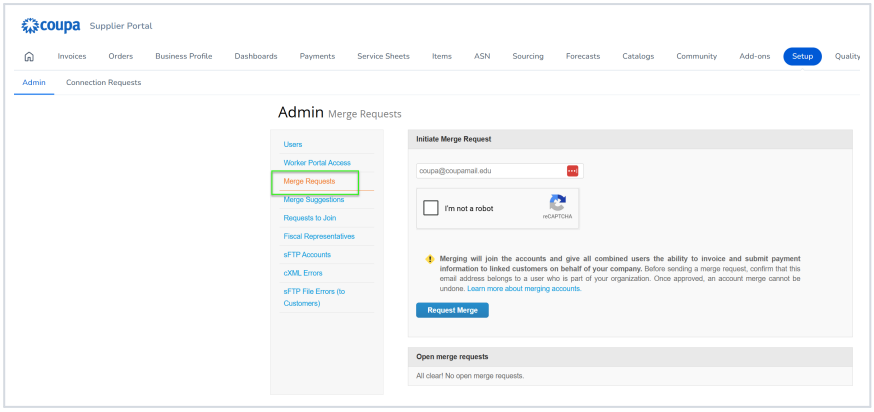
If a coworker already has a CSP account, you can merge your two accounts. Your team then manages one company profile together instead of maintaining separate accounts.

> **Important: A merge cannot be undone**
> After a merge, every user on the combined account can invoice and submit payment information to linked customers on behalf of your company. Before you send a request, confirm that the email address belongs to a coworker at your organization.

3 MERGE ACCOUNTS (CONTINUED)

TO REQUEST A MERGE

1. On the **Setup** tab, go to **Admin** and click **Merge Requests**. The **Initiate Merge Request** form appears.



2. Enter the email address of the coworker whose account you want to merge with yours.

3. Click **Request Merge**, then choose whether your account or your coworker's account will be the account owner.

4. Click **Send Request**.

TO ACCEPT A MERGE (COMPLETED BY YOUR COWORKER)

1. Open the merge request email and click **View Merge Request**, or go to **Setup > Admin > Merge Requests**.

2. Review the list of users who will have access to the merged account. Add a note for the requester if needed.

3. Select the check box confirming that the listed users are coworkers, then click **Accept**.

