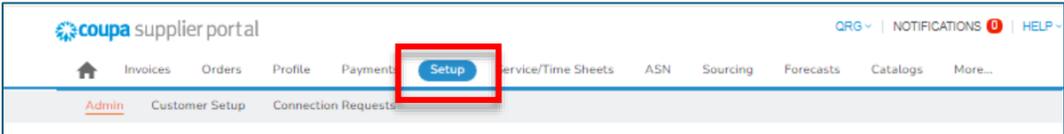


Manage Your Coupa Supplier Portal (CSP) Account

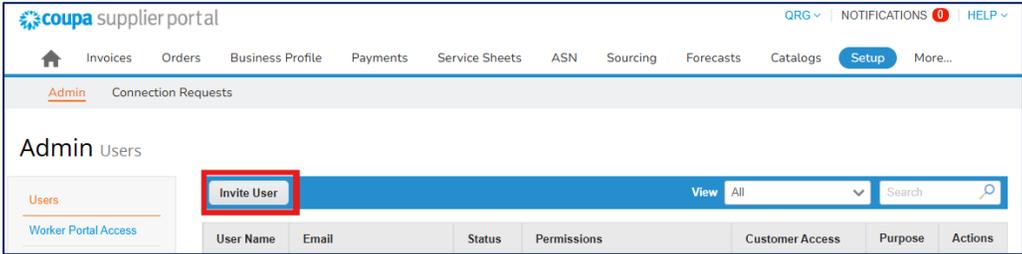
Once you receive the invitation from Kirkland to join the Coupa Supplier Portal, you will be able to setup your account if you don't have one already. This document provides guidance on how to share account access with others from your company.

To update Admin Settings, click the **Setup** tab in the CSP



Adding a User

- 1. Click **Invite User**. The **Invite User** popup window appears.

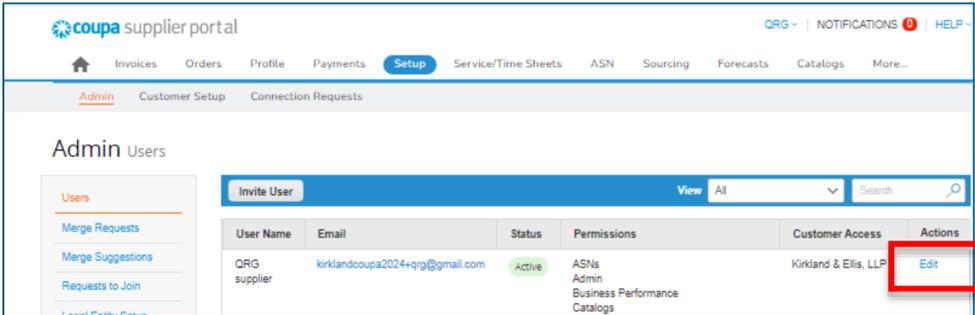


- 2. Click **Send Invitation**.

Note: Enter the Employee's email address (required). Supplier Administrators can restrict access to specific customers by checking or unchecking customer name boxes in their user table.

Editing Existing Users

- 1. Click **Edit**.



2. Make changes to the user's permissions/customer access and click **Save**.

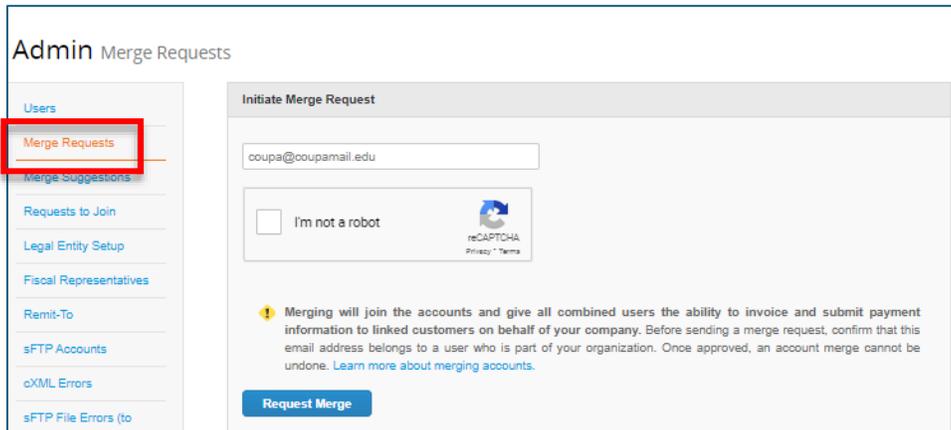
Note: Supplier Admins also can deactivate any existing user by clicking **Deactivate User**.

Requesting an Account Merge

After connecting with Kirkland on the CSP, you may discover that another person at your company already has a Coupa account. In this case, you will have the option to merge your accounts so you can operate your company's CSP account together rather than separately. Merging accounts can help centralize management of your company's Coupa profile.

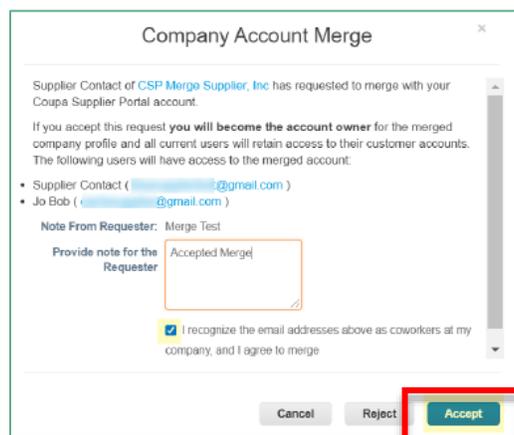
To Request a Merge:

1. Click **Merge Requests**. The **Request Account Merge** screen appears.



The screenshot shows the 'Admin Merge Requests' interface. On the left, a sidebar menu has 'Merge Requests' highlighted with a red box. The main area is titled 'Initiate Merge Request' and contains an email input field with 'coupa@coupamail.edu', a reCAPTCHA widget, and a blue 'Request Merge' button. A warning icon and text below the form 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 organization. Once approved, an account merge cannot be undone. Learn more about merging accounts.'

2. Enter the **email address** of the user you are looking to merge accounts with.
3. Click on **Request Merge** and confirm if your account or their account will be the owner. Once finalized, click on **Send Request**.
4. The other account holder will receive the merge request and can click **View Merge Request** on the email or navigate manually to the **Merge Requests** page and click **Accept**.



The screenshot shows a 'Company Account Merge' dialog box. It contains the following text: 'Supplier Contact of CSP Merge Supplier, Inc. has requested to merge with your Coupa Supplier Portal account. If you accept this request you will become the account owner for the merged company profile and all current users will retain access to their customer accounts. The following users will have access to the merged account: • Supplier Contact ([email]@gmail.com) • Jo Bob ([email]@gmail.com)'. Below this, it says 'Note From Requester: Merge Test' and 'Provide note for the Requester' with a text area containing 'Accepted Merge'. At the bottom, there is a checked checkbox: 'I recognize the email addresses above as coworkers at my company, and I agree to merge'. Three buttons are at the bottom: 'Cancel', 'Reject', and 'Accept', with 'Accept' highlighted by a red box.