

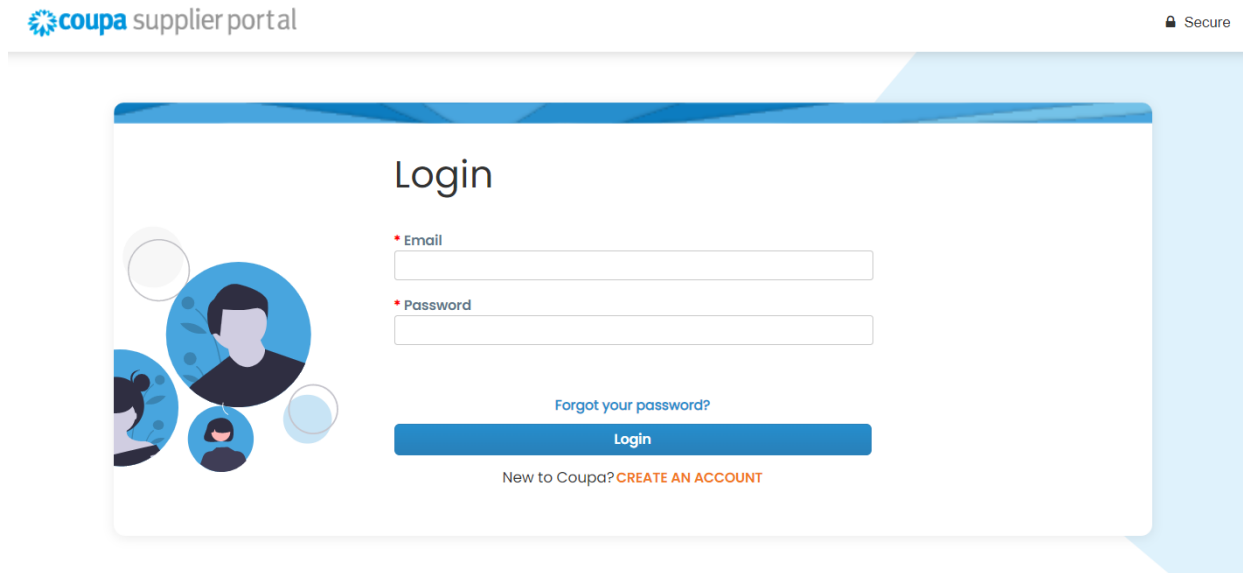


# Manage Your Admin Setups

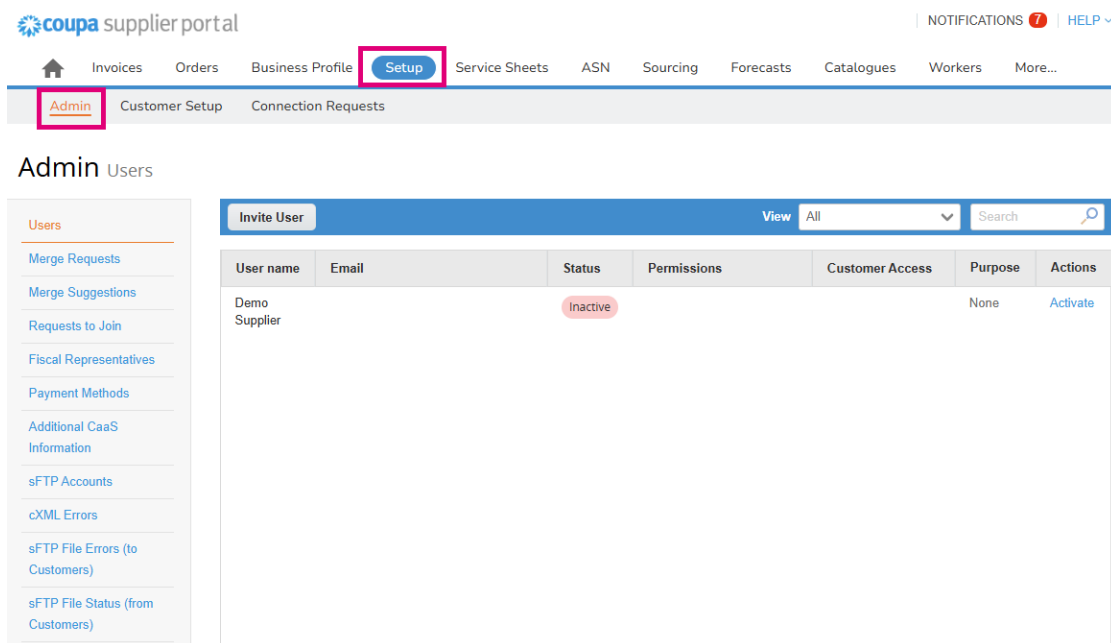
How To Guide

## How to Manage Your Admin Setups

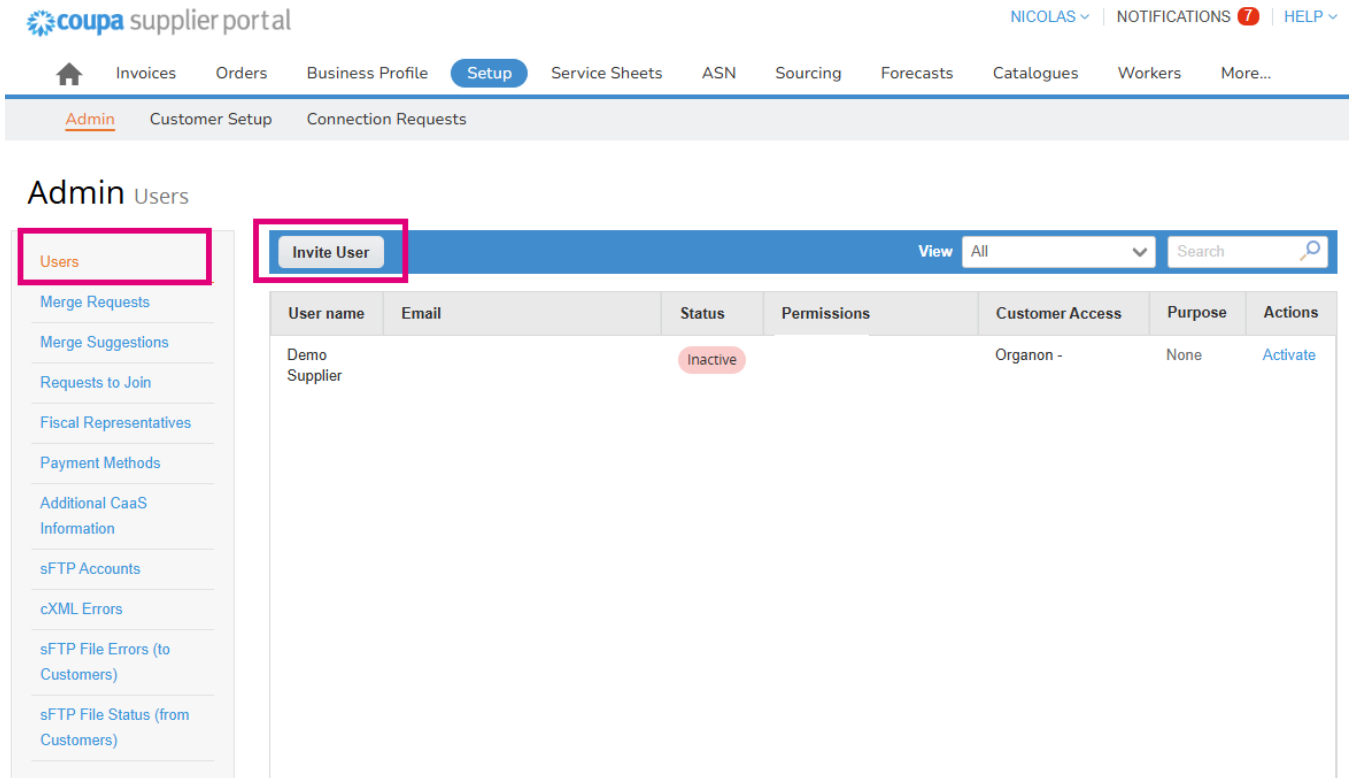
1. Log in to the Coupa Supplier Portal with **Email** and **Password**



2. Select **Setup** and then **Admin**



- **Users** section - will show your permission and allow you to invite other users.



coupa supplier portal

NICOLAS ▾ | NOTIFICATIONS 7 | HELP ▾

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

Admin Customer Setup Connection Requests

### Admin Users

Users

Merge Requests

Merge Suggestions

Requests to Join

Fiscal Representatives

Payment Methods

Additional CaaS Information

sFTP Accounts

cXML Errors

sFTP File Errors (to Customers)

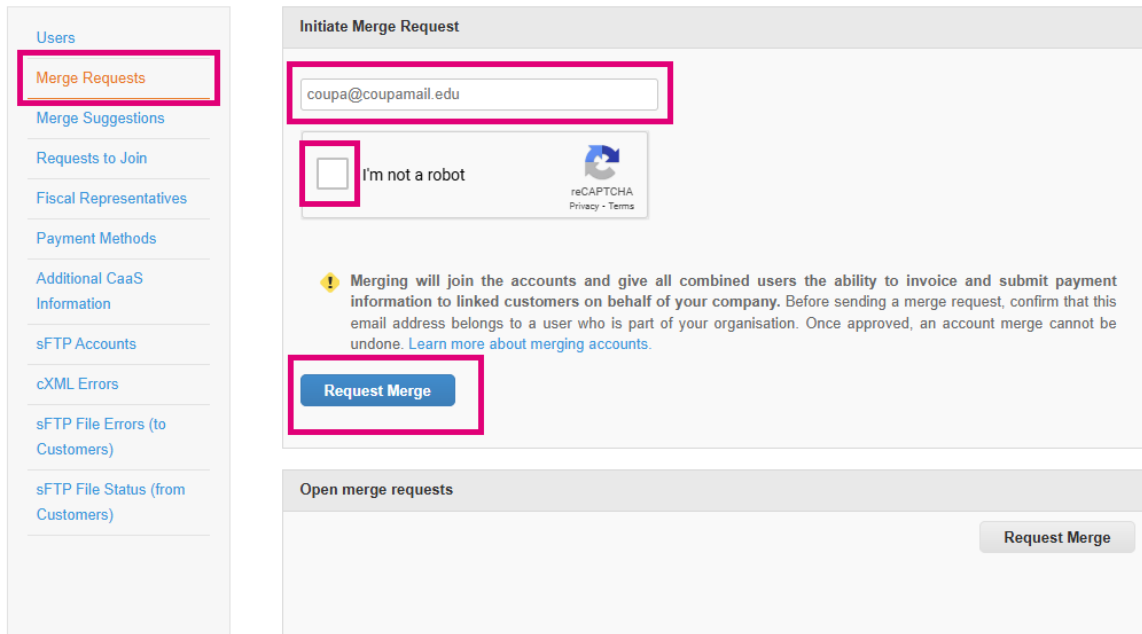
sFTP File Status (from Customers)

Invite User View All Search

User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Demo Supplier		Inactive		Organon -	None	Activate

- **Merge Requests** section will join the accounts and give 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


## Admin Merge Requests



**Users**

- Merge Requests**
- Merge Suggestions
- Requests to Join
- Fiscal Representatives
- Payment Methods
- Additional CaaS Information
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

### Initiate Merge Request

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.](#)

**Request Merge**

### Open merge requests

**Request Merge**

- **Merge Suggestions** where you can merge accounts with the same confirmed email domain and at least one common credential such as the Company Name, Address, Tax ID or DUNS Number. Please note that once approved, an account merge cannot be undone.

## Admin Merge Suggestions

- Users
- Merge Requests
- Merge Suggestions**
- Requests to Join
- Fiscal Representatives
- Payment Methods
- Additional CaaS Information
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

Merge Suggestions are accounts with the same confirmed email domain and at least one common credential such as the Company Name, Address, Tax ID or DUNS Number.

Before sending a merge request confirm that this email belongs to a user who is part of your organisation.

Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Enable Merge Suggestions

### Open Merge Suggestions

All clear! No open merge suggestions.

- **Requests to Join** where you can find new users requesting access to this account.

## Admin Requests to Join

<a href="#">Users</a>
<a href="#">Merge Requests</a>
<a href="#">Merge Suggestions</a>
<b><a href="#">Requests to Join</a></b>
<a href="#">Fiscal Representatives</a>
<a href="#">Payment Methods</a>
<a href="#">Additional CaaS Information</a>
<a href="#">sFTP Accounts</a>
<a href="#">cXML Errors</a>
<a href="#">sFTP File Errors (to Customers)</a>
<a href="#">sFTP File Status (from Customers)</a>

Requests to Join are from new users requesting access to this account.

Before responding, confirm that this email address belongs to a user who is part of your organisation. Either invite the user to join this account (and set appropriate permissions) or reject their request to join.

Users	Requested	Response
All clear! No open user join requests.		

- **Fiscal Representatives** allows you to assign a fiscal representative

## Admin Fiscal Representatives

[Add Fiscal Representative](#)

- Users
- Merge Requests
- Merge Suggestions
- Requests to Join
- Fiscal Representatives**
- Payment Methods
- Additional CaaS Information
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

None

Name	Country/Region	Tax ID	Associated Tax Registrations	
------	----------------	--------	------------------------------	--

- **Payment Methods.** This section allows you to add a **remit-to address** or perform actions such as editing and disabling existing entries.

coupa supplier portal NICOLAS | NOTIFICATIONS 6 | HELP

[Home](#)
[Invoices](#)
[Orders](#)
[Business Profile](#)
[Setup](#)
[Service Sheets](#)
[ASN](#)
[Sourcing](#)
[Forecasts](#)
[Catalogues](#)
[Workers](#)
[More...](#)

[Admin](#)
[Customer Setup](#)
[Connection Requests](#)

### Admin Remit-To

- Users
- Merge Requests
- Merge Suggestions
- Requests to Join
- Fiscal Representatives
- Payment Methods
- Additional CaaS Information
- sFTP Accounts
- cXML Errors
- sFTP File Errors (to Customers)
- sFTP File Status (from Customers)

Add Remit-To
View All

Payment Method Name	Remit-To Address	Payment Type	Legal Entity	Customer Sharing Status	Actions
None		Address	Test Account	Active	
				Active	
				Active	
				Active	
				Active	
<a href="#">See all 46 customers</a>					
None		Address		Active	
				Active	
				Active	
None		Address		Active	

- **Additional CaaS Information (Additional Compliance as a Service Information)**, section is for integrating with Coupa's Compliance as a Service, particularly for e-invoicing. This integration ensures that your electronic invoices meet local regulatory requirements.



### Admin Users

**Users**

- [Merge Requests](#)
- [Merge Suggestions](#)
- [Requests to Join](#)
- [Fiscal Representatives](#)
- [Payment Methods](#)
- [Additional CaaS Information](#)
- [sFTP Accounts](#)
- [cXML Errors](#)
- [sFTP File Errors \(to Customers\)](#)
- [sFTP File Status \(from Customers\)](#)

Invite User
View: All

User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Demo Supplier		Inactive		Organon	None	<a href="#">Activate</a>

- **SFTP Accounts, CXML Errors, SFTP File Errors, SFTP File Status.** SFTP and CXML accounts allow you to share invoicing, catalogs, and POs digitally with your customers and check for errors.

### Admin Users

**Users**

- [Merge Requests](#)
- [Merge Suggestions](#)
- [Requests to Join](#)
- [Fiscal Representatives](#)
- [Payment Methods](#)
- [Additional CaaS Information](#)
- [sFTP Accounts](#)
- [cXML Errors](#)
- [sFTP File Errors \(to Customers\)](#)
- [sFTP File Status \(from Customers\)](#)

Invite User
View: All

User name	Email	Status	Permissions	Customer Access	Purpose	Actions
Demo Supplier		Inactive		Organon	None	<a href="#">Activate</a>