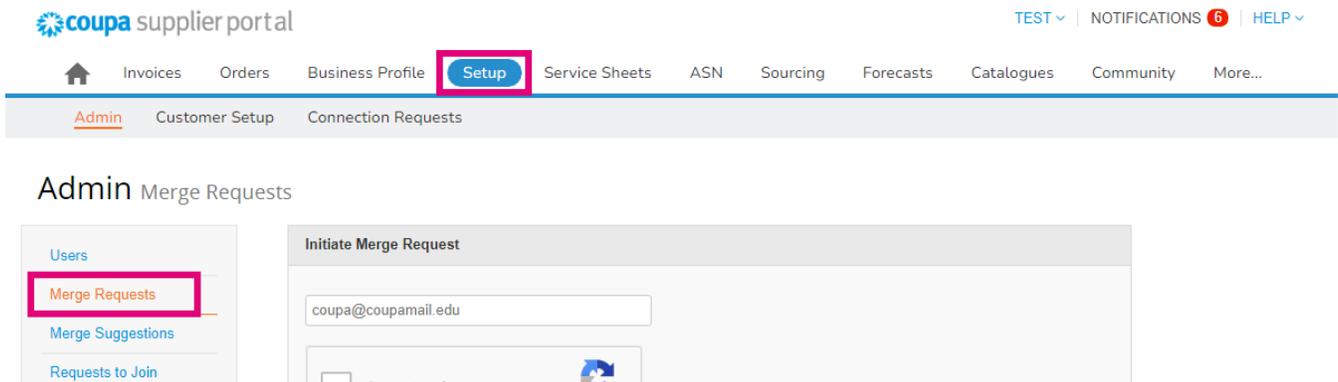




HOW TO SEND MERGE REQUEST

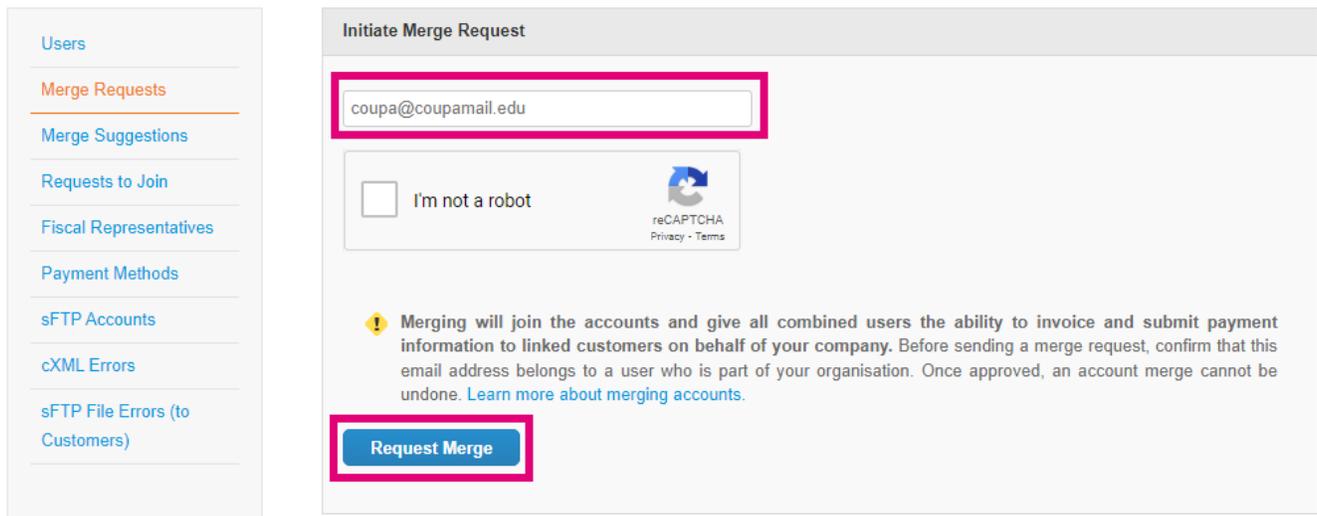
How to send Merge request in Coupa

1. Click on the **Setup** tab → select **Merge Request**

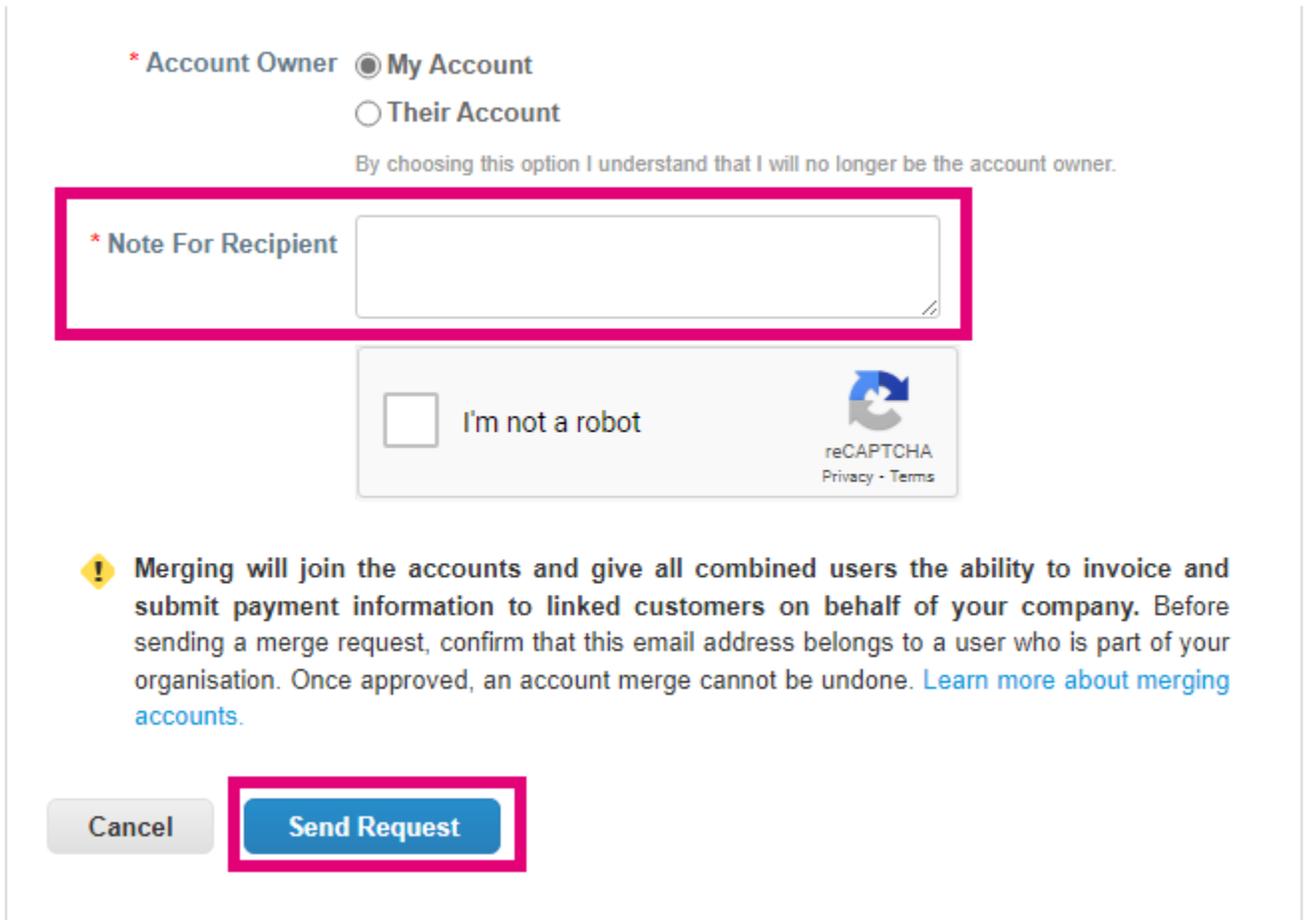


2. In the **Email address field**, type the email address for the recipient you would like to send the marga request to then click **Request Merge**

Admin Merge Requests



3. Type the note for recipient (ex. Please accept the request) in field **Note For Recipient** then click **Sent Request**.



The screenshot shows a web form for sending a merge request. At the top, there is a section for "Account Owner" with two radio buttons: "My Account" (selected) and "Their Account". Below this is a disclaimer: "By choosing this option I understand that I will no longer be the account owner." The main part of the form is a large text input field labeled "* Note For Recipient", which is highlighted with a red border. Below the text field is a reCAPTCHA widget with the text "I'm not a robot" and a "reCAPTCHA Privacy - Terms" link. At the bottom of the form, there are two buttons: a grey "Cancel" button and a blue "Send Request" button, which is also highlighted with a red border. A warning icon (yellow triangle with an exclamation mark) is positioned above the "Send Request" button, followed by a paragraph of text explaining the consequences of merging accounts.

* 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.](#)

4. The recipient will be notified to accept the request, in order to accept the merge request, the recipient should login to Coupa, Click on the **Setup** tab → select **Merge Request**

Admin Merge Requests

Users

Merge Requests

Merge Suggestions

Requests to Join

Initiate Merge Request

5. The merge request will be listed in **Open merge requests**, click on **Respond**

Open merge requests			
Requested 28/01/2025	TEST COUPA LTD London, UK London England 1234 United Kingdom	Initiated From Other Company	Respond

6. Type the note for requester (ex. accept) in field **Note For Requester** then click **Accept**.

Users with access to merged account C D (vendoronboardingtest01@gmail.com)

Note from requester please accept

Add note for requester

I recognise the email address above as a colleague at my company, and I agree to merge

 **This request is from a user who has a different email domain.** Only accept this request if you confirm this user is part of your organisation. 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. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

Cancel

Reject

Accept