

**Coupa Quick  
Reference Guide for  
Suppliers |  
First steps &  
settings in the CSP**





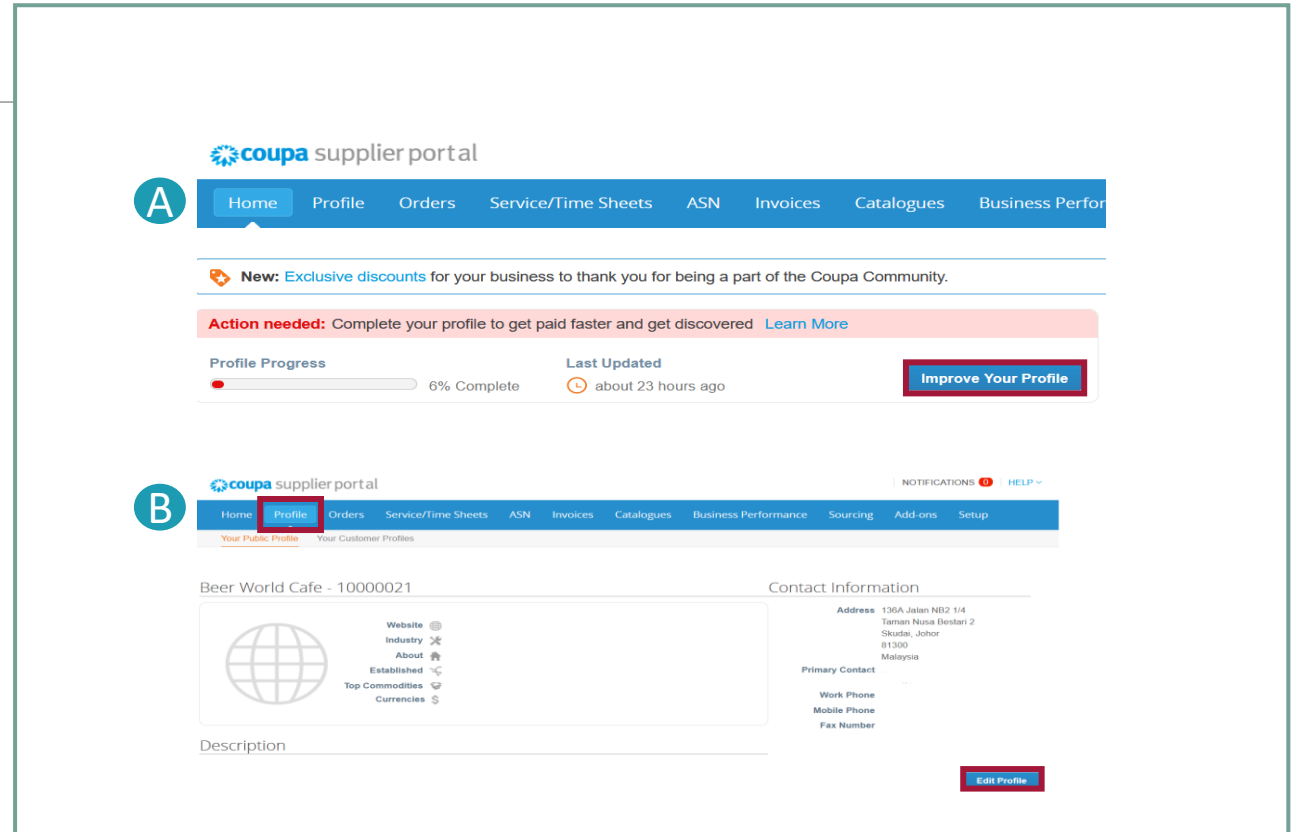




## Enriching your company profile on the Coupa Supplier Portal (1/2)

**A** Step 1 (Option A):  
Starting at the CSP landing page, click on the button *'Improve Your Profile'* to change or update your company information.

**B** Step 1 (Option B):  
Click on *'Profile'* tab, then click on *'Edit Profile'*.



## Enriching your company profile on the Coupa Supplier Portal (2/2)

### Step 2:

A new window will open where you can edit your information.

Click the 'Save' button from the bottom right corner of the page when you have filled in the required information.

The screenshot shows the 'Edit Profile' form in the Coupa Supplier Portal. The form is organized into four main sections:

- General Information:** Includes fields for Name (Konstantin GmbH - Gmail based), Logo (with a 'Select' button), Profile Background (with a 'Select' button), Industry (dropdown menu), Year Established, Short Description, Full Description, Registered Users (schaefflercoupatest+supplierguide1@gmail.com, with an 'Add New' button), Web Site, LinkedIn Profile, Facebook Profile, and Twitter Profile.
- Address:** Includes Address Line 1, Address Line 2, City, State, Postal Code, and Country/Region (United Kingdom).
- Primary Contact:** Includes First Name, Last Name, Email, Work Phone, Mobile Phone, Fax Number, and PO Delivery Email.
- Financial & Legal Information:** Includes Accelerate (Enabled, Edit Preferences), Currencies (dropdown menu), DUNS Number, and an 'Add Legal Entity' button. A note states: 'Most customers require Legal Entity information for invoicing'.

At the bottom right of the form, there are 'Cancel' and 'Save' buttons.



### Note:

- Mandatory fields are marked with a red asterisk (\*).
- Please keep your information regarding **address** (mandatory fields: address line 1, city, state, postal code, and country) and **contact information** (mandatory fields: first name, last name, and email address) always up to date.

## Merge Accounts (1/2)

Your company may have more than one account/profile in the CSP. This can happen when several users from the same company register or are invited to the CSP through different email addresses. In this case we recommend to merge accounts by following the instructions (Option 1 or Option 2) listed below.

- Option 1:**  
The CSP lists all CSP accounts (based on email domains), which can be merged in the right-hand column on the **home** tab. If you want to merge an account, click on the *'Request Merge'* button and select an account to be the parent account.

The screenshot shows the Coupa Supplier Portal Home page. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. A red banner at the top indicates an action needed to complete the profile. The main content area features a Profile Progress bar (6% Complete), a Last Updated timestamp (about 3 hours ago), and an Improve Your Profile button. Below this is a Profile Summary section with three cards: Legal Entity (0), Registered User (1), and Connected Customer (1). At the bottom of the summary are tags for Banking Info, Diversity, Accelerate, and Bribery Policy. On the right side, there are sections for Announcements, One-Click Savings, and a Start saving today! promotion. The Merge Accounts section is highlighted with a red box and contains the following text: "If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers. Not seeing the account you want to merge with? Click here." Below this text are two entries: SupplierA (supplierA@supplier.com) and SupplierB (supplierB@supplier.com), each with a Request Merge button and a Remove button.



### Note:

In case you are aware that an email address is invalid, click on the Remove button and the email address will not show up in the Merge Accounts section again.



## Merge Accounts (2/2)

### Option 2:

- 1 Click on the tab “Setup” in the main menu bar.
- 2 Click on “Merge Requests” and include the mail address you would like to request the merge for.  
Option 2 is recommended to use if the list of suggested accounts is too long and you wish to merge a specific address directly.

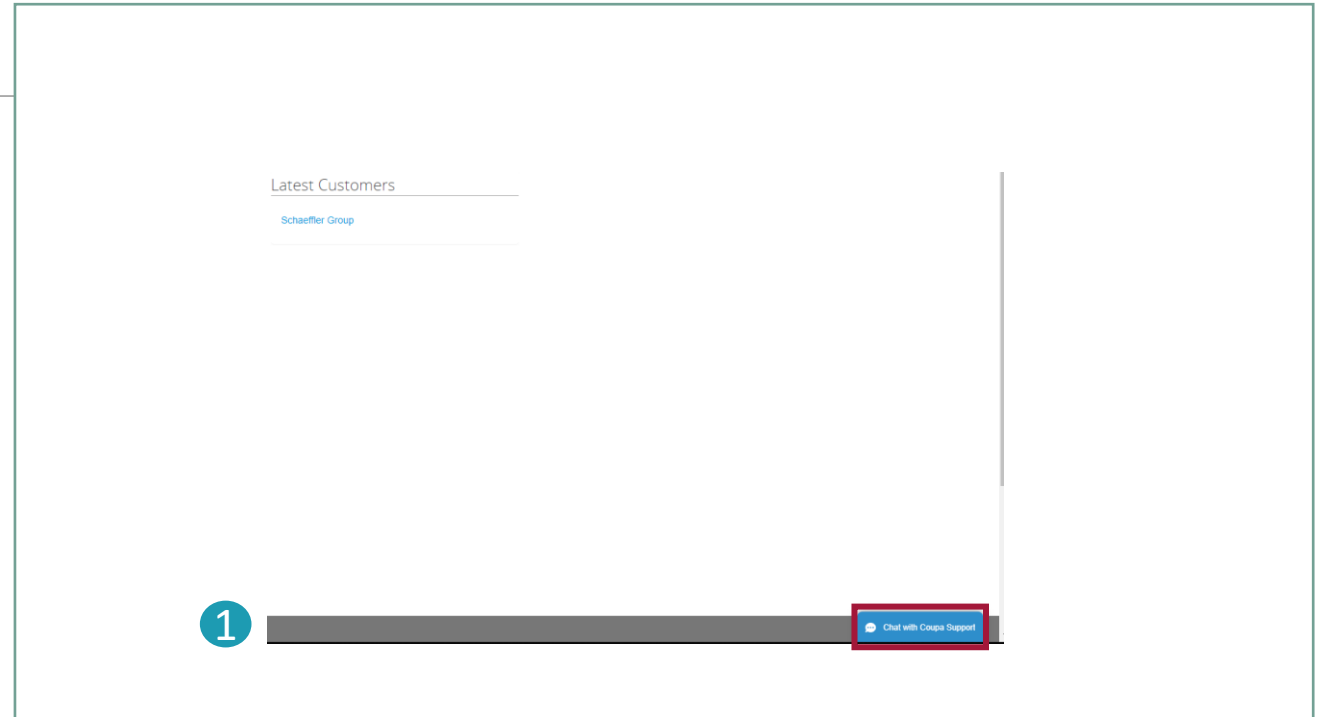
The screenshot displays the Coupa Supplier Portal interface. At the top, the 'coupa supplier portal' logo is on the left, and 'TESTS | NOTIFICATIONS 1 | HELP' is on the right. A blue navigation bar contains the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogues, Business Performance, Sourcing, Add-ons, and Setup. The 'Setup' item is highlighted with a red box and a circled '1'. Below this bar, the 'Admin' section is active, showing 'Customer Setup' and a list of options: Users, Merge Requests (highlighted with a red box and a circled '2'), Legal Entity Setup, Fiscal Representatives, Remit-To, Terms of Use, Payment Preferences, Static Discounting, and SFTP Accounts. The 'Merge Requests' page is titled 'Admin Merge Requests' and features an 'Initiate Merge Request' form. The form includes an email input field with 'supplier@supplier.com', a 'Request Merge' button, a reCAPTCHA widget (highlighted with a red box), and a confirmation statement: 'By submitting the merge request, I confirm that the user whose email address I am providing belongs to my organisation.' Below the form, there is a section for 'Open merge requests' which currently shows 'All clear! No open merge requests.'

## Coupa Supplier Help Desk



If you face any technical issues with the Coupa Supplier Portal you can request live support by Coupa.

- 1 Navigate to the bottom right of your screen and click on the button *'Chat with Coupa Support'*.



**Note:**

For any Schaeffler related questions, please reach out to your contact at Schaeffler Purchasing.