

Overview

This document provides an overview and instructions for a supplier to merge accounts from different sites together.

- Prior to the 2024 release, Unified Supplier Database, suppliers were required to register on each agency's site with a unique username and access each site individually to review and respond to bids.
- With the 2024 release, Unified Supplier Database, suppliers have the ability to merge their existing accounts together. **This allows the supplier to log in with one username and password and access all agencies they have registered with in the Agency section.**
- Suppliers are required to register with each agency to review and respond to bids. However, they can now use the **Find New Agency** option to find and register with other agencies and automatically merge them.
- Log in to any Ion Wave agency to see the **Self Merge** button. Only supplier users with the Administrative role will have access to the Self Merge option in the Quick Links section of the Home page.



Figure 1 Select Self Merge in Quick Links box.

Note: It is important to choose which account (agency site) will be the Primary Account. The information in that account must be accurate and what you want your information to show for all accounts. You must ALWAYS start from the account with that agency to begin all merge actions.

How to Merge Accounts

Click the **Self Merge** button. A pop-up box will appear to allow you to choose an agency to log into so you can merge your accounts. You must know your login information for the agency you choose.

Supplier: Merge Existing Accounts

Click in the search field and start typing the agency name, or scroll to find the agency name.

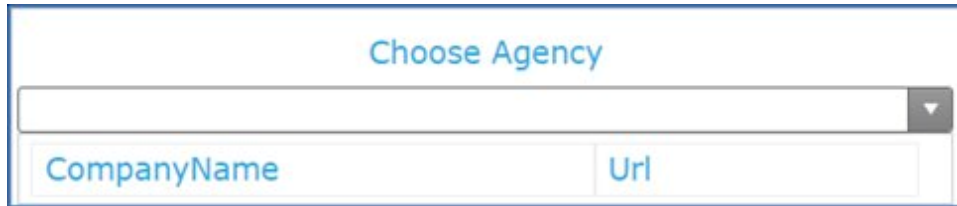


Figure 2 Use drop-down menu to select agency.

Once you find the agency, click on the name to see a login screen. Enter your Username and Password for that agency and click the **Verify Account** button.



Figure 3 Enter user login information and verify account.

You will be brought to a screen called Supplier Compare.

If Account Information Does Not Match

If you receive a screen with error messages in red font, you will be directed to contact IWT Support. Email documentation showing your correct information to **support.ionwave@eunasolutions.com**. In this example, you would need to provide information showing the correct Tax ID number, Tax ID Type, and Organization Type.



Figure 4 Non-matching company information will appear.

Note: If you would like to change your Primary Account designation, click the **Change Agency** button on the top left-hand side of the screen.

Supplier: Merge Existing Accounts

If Account Information Matches

If your account information matches, you will see the following screen with all information in green font.

The screenshot shows a 'Supplier Compare' interface. At the top, there are instructions: 1. Make sure the information you want to keep is listed under 'Primary Account'. Please compare the information listed in each account. If any information does not match, please note the 'Primary Account' information will be used once the merge is complete. 2. All activity for both accounts will be preserved and will be found in the Primary Account once the merge is complete. 3. Bid invitations, responses, & awards associated with both accounts will be found in the Primary Account once the merge is complete. 4. You will be able to verify all changes before completing the merge. Below the instructions, there are two main sections: 'Primary Account' and 'Account to be Merged'. Each section contains fields for 'Agencies Reg. With', 'Name', 'Legal Name', 'Org Type', 'Website', 'Formation Date', 'Recovery Email', 'Tax ID', 'Tax ID Type', 'SAM ID', 'DUNS', 'Formation State/Province', 'Addresses', 'General/Corporate', 'Address 1', 'Address 2', 'City', 'State/Province, Country', 'Zip', 'Contact', 'Email', 'Phone', 'Toll Free', and 'Fax'. In the 'Primary Account' section, the information for 'Sherman, D.D., TX' is shown. In the 'Account to be Merged' section, the information for 'City of Plano, TX' is shown. Green highlights are used to indicate matching information between the two accounts.

Figure 5 Green highlights show matching company information.

Read ALL instructions listed on the screen before continuing. Once you have read and understand, click the Continue button.

Some highlights are below:

- If any information in the Account to be Merged is different from the Primary Account, it will be overridden.
- All Bid Responses will still be accessible on all accounts.
- You will be able to access all agency information when you log in with your Primary Account information, including new and previous Bid information.

Map Users

Read ALL instructions listed on the screen before continuing.

The Primary Account side will list ALL existing users on that site, whether Active or Inactive. There will also be an option to add a New User. Each column lists users in alphabetical order by name.

The screenshot shows a 'Primary Account - Existing Users' section on the left and an 'Account to be Merged' section on the right. The 'Primary Account - Existing Users' section lists two users: 'Abby Baxter' and 'Kristin Baxter'. The 'Account to be Merged' section lists two users: 'Kristin Baxter' and 'Ryan Baxter'. Each user entry includes fields for 'Username', 'Title', 'Email', and 'Status'. The 'Primary Account - Existing Users' section is highlighted with a red box.

Figure 6 Primary account user information on left.

Supplier: Merge Existing Accounts

The Accounts to be Merged side will list ALL existing users on that site, whether Active or Inactive.

Primary Account - Existing Users	Account to be Merged
Abby Baxter Username: abby-sherman Title: [blank] Email: abaxter@d.ionwave.net Status: ACTIVE	Kristin Baxter Username: kristin-plano Title: [blank] Email: kbaxter@d.ionwave.net Status: ACTIVE
Kristin Baxter Username: kristin-sherman Title: [blank] Email: kbaxter@d.ionwave.net Status: ACTIVE	Ryan Baxter Username: baxter-plano Title: [blank] Email: baxter@d.ionwave.net Status: ACTIVE
Primary Account - New Users [blank slot]	

Figure 7 Existing user profiles listed on right.

To merge users, hover over the name of the user in the **Account to be Merged** column, then click to drag and drop the user into the appropriate **Primary Account** slot.

If the same person is in both columns (for example, if Kristin has the same email address), drag the Kristin Baxter user from the Account to be Merged column and drop it into the Kristin Baxter user in the Primary Account column.

If there is no matching user in the Primary Account Existing Users column, drag the user from the Account to be Merged column and drop it into the **New User** blank field. The system will not allow you to continue until all users from the Account to be Merged column have been moved.

Primary Account - Existing Users	Account to be Merged
Abby Baxter Username: abby-sherman Title: [blank] Email: abaxter@d.ionwave.net Status: ACTIVE	
Kristin Baxter Username: kristin-sherman Title: [blank] Email: kbaxter@d.ionwave.net Status: ACTIVE	
Primary Account - New Users [blank slot]	

Figure 8 Sample profile appearance.

Completing the Merge

Click the **Continue** button to verify the information is correct on the Primary Account Information Verification screen. If you need to make changes, click the **Previous** button. If the information is correct, click the **Merge** button.

Once you click the Merge button, you will receive the following confirmation message. Click **OK** and you will be taken to the login page of the original agency you had logged in to.

Supplier: Merge Existing Accounts

Primary Account - Existing Users		Account to be Merged
Abby Baxter Username: abby-sherman Title: Email: abaxter@d.ionwave.net Status: ACTIVE		
Kristin Baxter Username: kristin-sherman Title: Email: kbaxter@d.ionwave.net Status: ACTIVE	Kristin Baxter Username: kristin-plano Title: Email: kbaxter@d.ionwave.net Status: ACTIVE	
Primary Account - New Users		
Ryan Baxter Username: baxter-plano Title: Email: baxter@d.ionwave.net Status: ACTIVE		

Figure 9 Select OK to return to login.

Note: Once you merge an account, the Primary Account (the account you logged into and clicked the Self Merge button) becomes the username and password for the Account to be Merged.