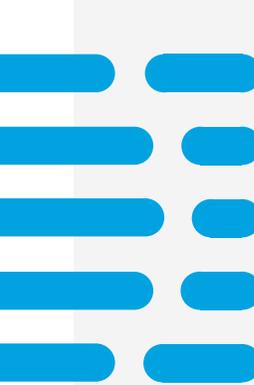




# **IQVIA : Supplier Registration Guide**

*Coupa Suppliers*



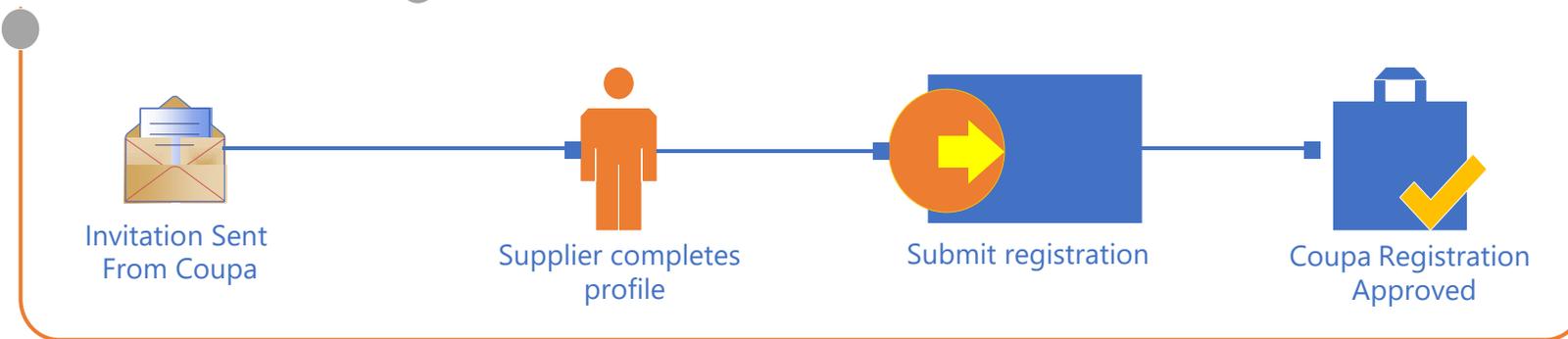
# Registration Process

- + Coupa is used to issue POs and as IQVIA's portal through which suppliers should submit electronic invoices.
- + Supplier Registration is a two-step process - Suppliers self-register using a link to an online form in Coupa then connect with IQVIA on the Coupa Supplier Portal ("CSP") to complete the onboarding process.
- + Suppliers will not receive Purchase Orders and they will not be able to submit invoices until registration is complete.
- + Supplier contacts must ensure to look for emails with registration links in spam/junk folders if not found in inbox.
- + Required information includes:
  - › Company name and address
  - › VAT/Tax registration information
  - › Primary contact information
  - › Banking and remittance information
- + CSP is available at <https://supplier.coupahost.com/>

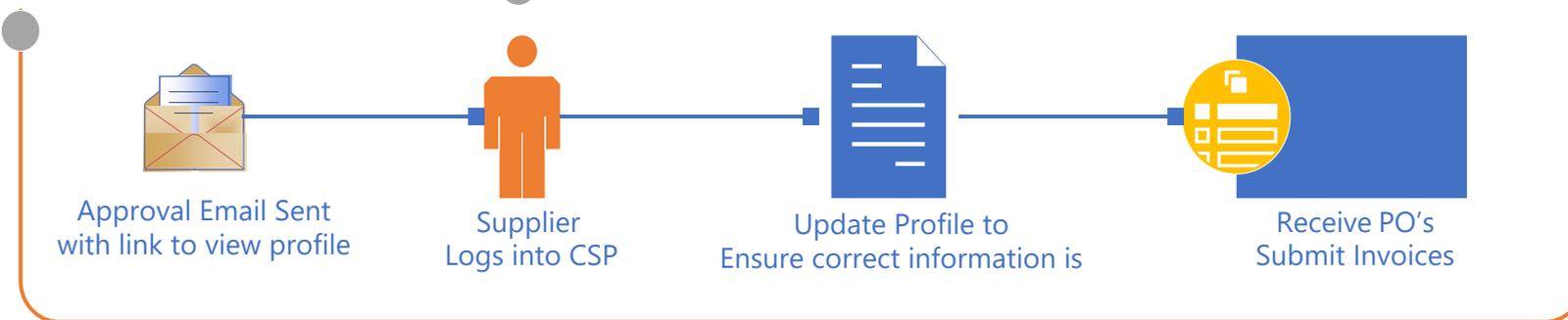
# Coupa Supplier Registration Process

## What you need to know

### Step 1- Register in Coupa



### Step 2- Connect with IQVIA via CSP



If the supplier does not register in Coupa, reminder emails will be sent to the supplier contact as per the following schedule.

-  First reminder - after 2 days
-  Second reminder - after 5 days
-  Third reminder - after 10 days
-  Final (overdue) reminder - after 15 days
-  Cancelled (expired) reminder - after 30 days

*Your IQVIA contact will request for a new supplier to be created in Coupa. Once that request is approved, the email address provided as the primary supplier contact will receive an email from Coupa Supplier Portal.*

### If this supplier contact already has an account in Coupa Supplier Portal for another customer

You are Connected to IQVIA on Coupa

From: Coupa Supplier Portal (do\_not\_reply@supplier-test.coupahost.com)

To: [Redacted]

Date: Saturday, 13 August 2022 at 03:09 GMT+5:30



You are Connected to IQVIA on Coupa

Email subject line

Powered by Coupa

Hello Supplier,

IQVIA needs you to provide information about your company electronically in order to prevent lost documents and make sure you are paid on time. They manage this information with Coupa, their chosen platform for Spend Management. Within the next 48 hours, please respond below to provide this information.

Note: Not providing this information in a timely manner may impact your ability to do business and get paid. Let us know if you are unable to do so for any reason.

Welcome!

IQVIA

Login to Coupa

Click on this link to log into Coupa and complete the profile



Business Spend Management

To get immediate updates via SMS or change notification preferences, go [here and adjust your settings](#)

### If this supplier contact is new to Coupa Supplier Portal and they must sign up

IQVIA Profile Information Request - Action Required

Email subject line

Coupa Supplier Portal (do\_not\_reply@supplier-test.coupahost.com)

Powered by Coupa



IQVIA Profile Information Request - Action Required

Hello Supplier,

IQVIA needs you to provide information about your company electronically in order to prevent lost documents and make sure you are paid on time. They manage this information with Coupa, their chosen platform for Spend Management. Within the next 48 hours, please respond below to provide this information.

Note: Not providing this information in a timely manner may impact your ability to do business and get paid. Let us know if you are unable to do so for any reason.

Welcome!

IQVIA

Click on this link to sign up and complete the profile

Join and Respond

Respond Without Joining



Business Spend Management

# Landing page on Coupa Supplier Portal

The screenshot shows the Coupa Supplier Portal interface. A modal window is open in the center, featuring the Coupa logo and a message from IQVIA - Accenture Solutions Private Limited. The message states: "IQVIA - Accenture Solutions Private Limited is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with IQVIA - Accenture Solutions Private Limited so you're ready to do business together." Below the message is an orange "Continue" button. In the background, the portal header includes the user name "SHRUTI", a "NOTIFICATIONS 6" badge, and a "HELP" link. A red arrow points from a callout box to the notifications badge. Another callout box points to the "Continue" button.

coupa supplier portal

SHRUTI | NOTIFICATIONS 6 | HELP

Home Profile

New: Exclusive

Action needed: Co

Profile Progress

Profile Summ

1 Legal E View

Banking Info

Test Shruti 1

Continue

Alternatively, click on "notifications" tab and open the message titled "Update your profile for IQVIA"

Click on "Continue" to update the profile

Chat with Coupa Support

# Updating profile on Coupa Supplier Portal

## Supplier Information

\* Display Name

Doing Business As

Parent Company Name

Official company name, when different to Display Name

Payment Terms ZB90\_N90

\* PO Email



\* Remittance Email

## Guide For Tax Fields

[Guide\\_For\\_Tax\\_Fields.xlsx](#)

Please download and review this attachment for guidance per country on how to populate fields VAT Number, Tax Number 1, Tax Number 2 and Tax Number 3.

VAT Number

Tax Number 1 Type

Tax Number 1

Tax Number 2 Type

Tax Number 2

Tax Number 3 Type

Tax Number 3

All fields marked with an asterisk are mandatory

Not VAT Registered

If not claiming VAT or Service Tax, tick this box to confirm VAT or Service Tax is not applicable.

# Updating profile on Coupa Supplier Portal – contd.

\* Preferred Currency

\* Preferred Language

DUNS Number

Italy Date of Birth  

Required for Independent contractors in Italy

Italy City of Birth

Required for Independent contractors in Italy

France Supplier Classification

France DAS 2 Reporting

Diversity   
Hubzone  
Lesbian / Gay / Bisexual / Transgender Owned Business Enterprise  
Minority Business Enterprise

US Supplier Diversity Programme

Company Type  Individual  
 S Corporation  
 C Corporation  
 Other Corporation  
 Partnership  
 LLP / LLC  
 Proprietorship  
 Other

Move your cursor over this icon for details/instructions related to the information requested



# Updating profile on Coupa Supplier Portal – contd.

## Primary Contact

Supplier Contact Information

First Name

Supplier Contact Information

Last Name

Supplier Contact Information

Email address  ⓘ

Supplier Contact Information

Mobile Phone  US/Canada

650-555-1212

Supplier Contact Information

Work Phone  US/Canada

650-555-1212

Supplier Contact Information

This contact will be set up as the primary supplier contact on the supplier record in our system

## Primary Address

Country/Region

Address Name

Street Address

Street Address 2

City

State Region

Postal Code

Location Code

PO Box

PO Box Postal Code

Please add the company's legal address here, this is the address that your company is registered under

# Updating profile on Coupa Supplier Portal – contd.

- \* **Supplier Country**
- India
  - US
  - China
  - Taiwan
  - Indonesia
  - Philippines
  - Singapore
  - Malaysia
  - Thailand
  - Korea
  - Mexico
  - Israel
  - Egypt
  - Other

Select the Supplier Country - Required Supplier Documents section will enable based on country selected

Selecting the country will list down the mandatory documents that must be attached to the form

## Suppliers Supporting Documents

\* **Federal Tax Form**  No file chosen

W9 – for US suppliers | W8 – for non-US suppliers getting paid from IQVIA Business Unit in US

**Link for W8**  <https://apps.irs.gov/app/picklist/list/formsI...>

**Link for W9**  <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

**Other Documents**  No file chosen

Enter the Document Name below

**Document Name**

Here you can attach any other supporting document

# Updating profile on Coupa Supplier Portal – contd.

## Adding a Remit to Address

Step – 1

Step - 2

### Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

Click here to add a new remit to address

\* Supplier Country

- India
- US
- China
- Taiwan
- Indonesia
- Philippines
- Singapore
- Malaysia
- Thailand
- Korea
- Mexico
- Israel
- Egypt
- Other

Select the Supplier Country - Required Supplier Documents section will enable based on country selected

Suppliers Supporting Documents

### Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

Cancel

Continue

# Updating profile on Coupa Supplier Portal – contd.

## Adding a Remit to Address

Step – 1

Step - 2

### Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

Click here to add a new remit to address

\* Supplier Country

- India
- US
- China
- Taiwan
- Indonesia
- Philippines
- Singapore
- Malaysia
- Thailand
- Korea
- Mexico
- Israel
- Egypt
- Other

Select the Supplier Country - Required Supplier Documents section will enable based on country selected

Suppliers Supporting Documents

### Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

\* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

Update the company name, country and hit "Continue"

Cancel

Continue

# Updating profile on Coupa Supplier Portal – contd.

## Adding a Remit to Address – cont.

What address do you invoice from?

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country/Region

Use this address for Remit-To *i*

Use this for Ship From address *i*

**REQUIRED FOR INVOICING**

Enter the registered address of your legal entity. This is the same location where you receive government

What is your Tax ID? *i*

Country/Region

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code  *i*

Preferred Language

Click on these icons for help on requested information, complete all fields and hit "Save & Continue"

# Updating profile on Coupa Supplier Portal – contd.

## *Adding a Remit to Address – cont.*

Where do you want to receive payment? ×

1 2 3 4

\* Payment Type  ▼

What is your Remit to Address? ?

- Address
- Bank Account
- Virtual Card

Address Line 1 Test

Address Line 2

City Test

State

Postal Code 123456

Country/Region United States

Cancel **Save & Continue**

Select the preferred payment method. If you choose **“Address”**, payment method will be set up as **“Check”**. If you would like to receive payment through bank transfer, please select **“Bank Account”** and provide bank information on the fields that will be populated when that selection is made. Hit **“Save & Continue”**.

# Updating profile on Coupa Supplier Portal – contd.

## Adding a Remit to Address – cont.

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

On next screen you can opt to add additional remit to addresses by clicking here

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	Test Test 123456 United States	Active	Manage

Deactivate Legal Entity Cancel Next

# Updating profile on Coupa Supplier Portal – contd.

## *Adding a Remit to Address – cont.*

Where do you want to receive payment?

1 2 3 4

On next screen you can opt to add additional remit to addresses by clicking here

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	Test Test 123456 United States	Active	Manage

Deactivate Legal Entity Cancel Next

# Updating profile on Coupa Supplier Portal – contd.

## *Adding a Remit to Address – cont.*

×

### Where do you ship goods from?

---

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.

Add Ship From

Title	Status	
Test Test 123456 United States	Active	<span>Manage</span>

Add alternate Ship From address or click on **“Done”** to finish adding the remit to address.

Deactivate Legal Entity Done

# Updating profile on Coupa Supplier Portal – contd.

## Adding a Remit to Address – cont.

Setup Complete

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Click on **“Add Now”** and the remit to address will be added to the form.

Add Later Add Now

Link for W9 <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

Other Documents  No file chosen  
Enter the Document Name below

Document Name

Decline Save **Submit for Approval**

Click on **“Submit For Approval”** as the final step. You can also choose to “save” and complete the profile later.

# Things you need to know

- Once the profile has been submitted, Vendor Maintenance team at IQVIA will be notified. Supplier contact will also receive a confirmation email with subject line - **Profile Info Recently Updated for IQVIA on Coupa**
- Team will review the form and approve if all required information/documents have been provided.
- If there is information missing or incorrect, the team will reject the profile and primary supplier contact will be sent an email requesting to make corrections or provide more information.
- Once the profile is approved, IQVIA Vendor Maintenance team will wait for details to integrate into their MDM tool and finalize the supplier setup. The supplier contact will receive an email confirmation with subject line - **Profile Info submitted to IQVIA was Approved**
- **IMPORTANT** - If you wish to make any changes to your supplier record in our system, please reach out to your IQVIA contact who will need to raise a ticket. There is no integration between Coupa and the Coupa Supplier Portal so changes made to your profile on the portal will not be directly integrated into our systems.
- Refer to the last slide for list of mandatory supporting documents country-wise. If your country is not listed, please attach any supporting tax registration document, letters from the bank etc.

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❖ **Please make sure that you check for emails/reminders from IQVIA or Coupa Supplier Portal regularly for a quick turnaround time. Also, these email may end up in your spam/junk folders.**

# Mandatory Documents for Supplier Creation/Update

Country	Mandatory Documents	Comments
India	<ul style="list-style-type: none"> <li>• PAN card</li> <li>• Cancelled check</li> <li>• Signed copy of GST declaration</li> </ul>	Mandatory
China	<ul style="list-style-type: none"> <li>• Business License</li> </ul>	Mandatory for all payees except hospital
Taiwan	<ul style="list-style-type: none"> <li>• Cover Page of supplier's bank book</li> <li>• Company Tax ID certificate</li> </ul>	Mandatory
Indonesia	<ul style="list-style-type: none"> <li>• Tax ID Number</li> <li>• Cover Page of supplier's bank book</li> </ul>	Mandatory
Philippines	<ul style="list-style-type: none"> <li>• Form 2303 - Certificate of Registration</li> </ul>	Mandatory
	<ul style="list-style-type: none"> <li>• By law certificate or Incorporation certificate</li> </ul>	Not mandatory for Site Payees, mandatory for new suppliers
Singapore	<ul style="list-style-type: none"> <li>• Certificate of Business Registration</li> <li>• VAT/ GST certificate</li> </ul>	Mandatory
Malaysia	<ul style="list-style-type: none"> <li>• Certificate of Incorporation (SSM) or SSM company profile</li> </ul>	Mandatory
Thailand	<ul style="list-style-type: none"> <li>• Business Operation Form or Certificate of registration</li> <li>• VAT certificate</li> </ul>	Mandatory
Korea	<ul style="list-style-type: none"> <li>• Certificate of registration</li> <li>• Copy of bank account</li> </ul>	Mandatory
US	<ul style="list-style-type: none"> <li>• Federal Tax Form – <a href="#">W9</a> or <a href="#">W8</a></li> </ul>	W9 – for US suppliers   W8 – for non-US suppliers getting paid from IQVIA Business Unit in US