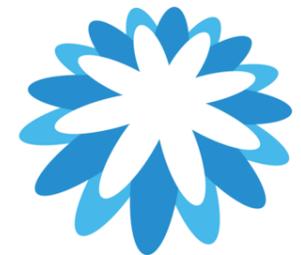


IMS Health & Quintiles are now



Legal Entity and Remit to details setup - instructions for supplier user admins

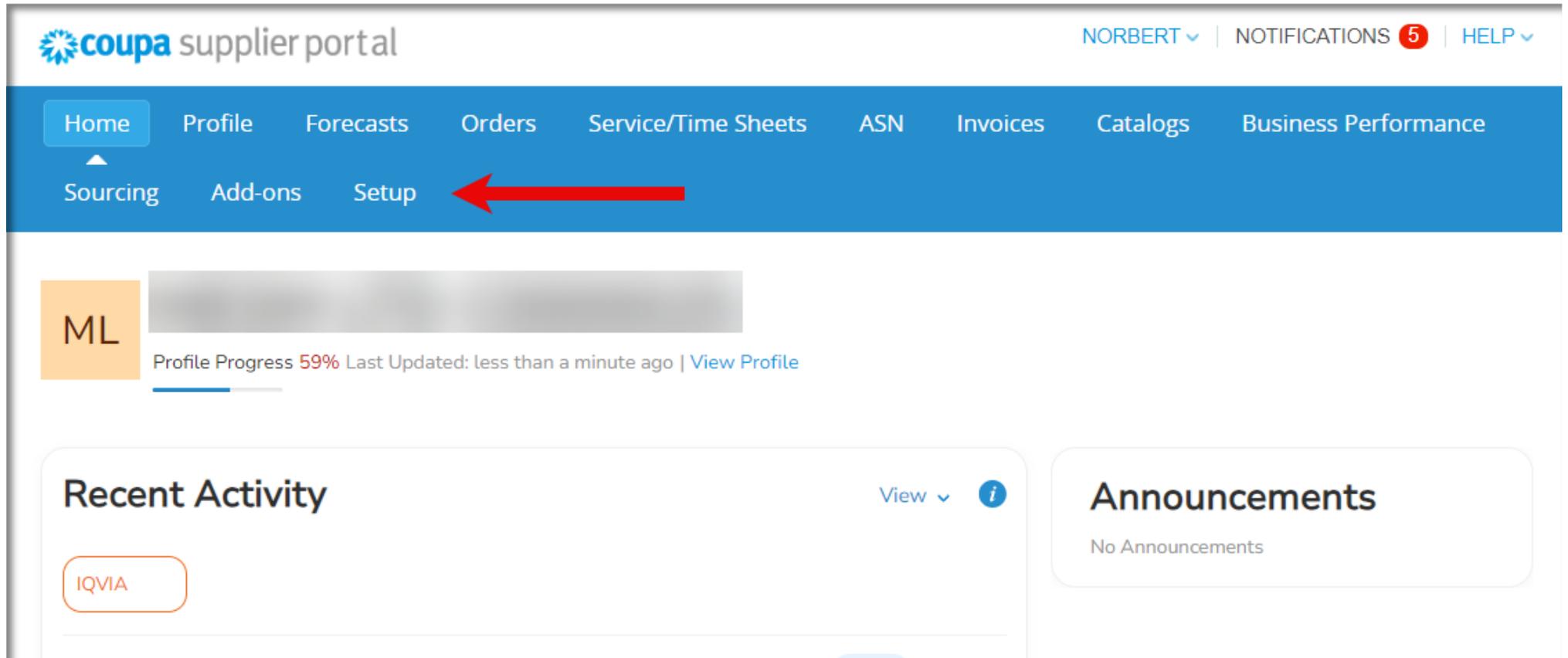
GFSS Procurement - March 2024



How to add your address (legal entity) and banking details (remit to data)

To login to your Coupa Supplier portal please click on <https://supplier.coupahost.com/>

The legal entity set up is in the **Setup** tab.



How to add your address (legal entity) and banking details (remit to data)

Select the **Legal Entity Setup** from the left menu bar and click on **Add Legal Entity**

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text 'supplier portal', and user information: 'NORBERT', 'NOTIFICATIONS 5', and 'HELP'. Below the header is a blue navigation bar with the following menu items: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Business Performance. A second row of navigation items includes Sourcing, Add-ons, and Setup. A red circle with the number '1' and a red arrow points to the 'Setup' button. Below this bar, the 'Admin' section is active, with 'Customer Setup' as a sub-option. The main content area is titled 'Admin Legal Entity Setup'. On the left, a sidebar menu lists: Users, Merge Requests, Merge Suggestions, Requests to Join, and Legal Entity Setup. A red circle with the number '2' and a red arrow points to the 'Legal Entity Setup' item. In the main content area, there is a grey bar labeled 'Legal Entity'. To the right of this bar, a red circle with the number '3' and a red arrow points to a button labeled 'Add Legal Entity'.

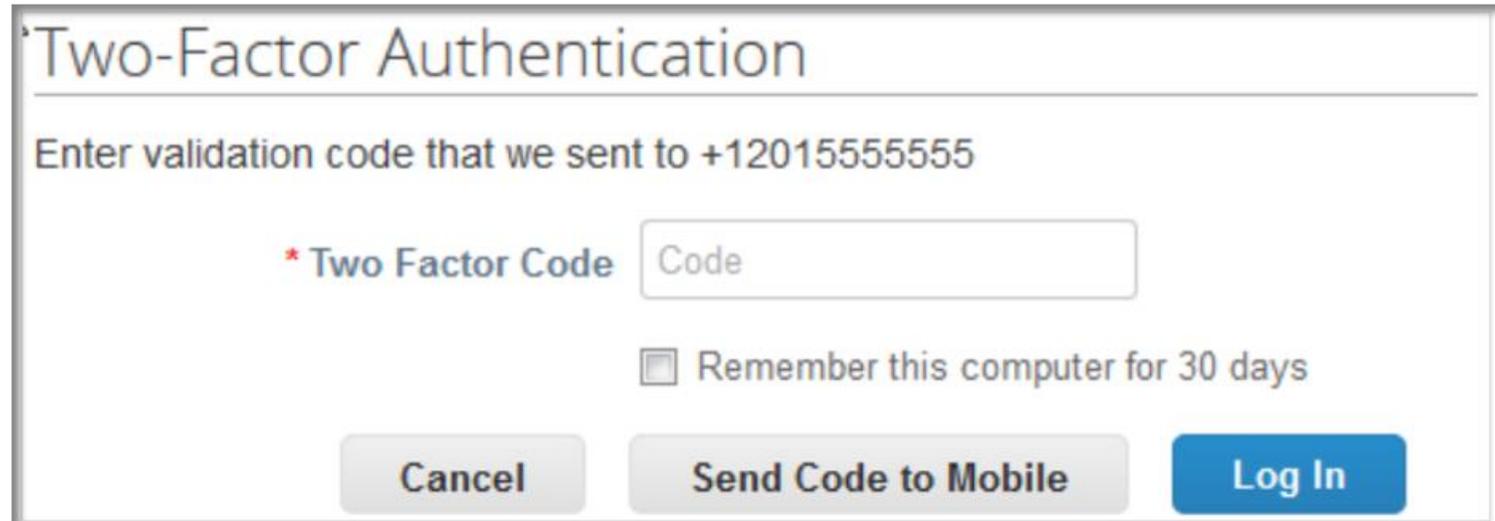
How to add your address (legal entity) and banking details (remit to data)

The Two-Factor Authentication prompt will appear when you click on the **Setup** tab.

- If you enabled the **Two-Factor Authenticator App**, open the **Google Authenticator** app on your device, select your **CSP account**, and retrieve the verification code.
- If you enabled **Two-Factor Authentication for SMS**, check your text messages for the verification code.

Enter the two-factor authentication code in the appropriate field.

Note: The code is valid for only 60 seconds. If you do not enter the code and click **Log In** within 60 seconds, you will need to generate a new code and try again.



The image shows a 'Two-Factor Authentication' dialog box. At the top, it says 'Two-Factor Authentication'. Below that, it asks to 'Enter validation code that we sent to +1201555555'. There is a text input field labeled '* Two Factor Code' with the placeholder text 'Code'. Below the input field is a checkbox labeled 'Remember this computer for 30 days'. At the bottom, there are three buttons: 'Cancel', 'Send Code to Mobile', and 'Log In'.

How to add your address (legal entity) and banking details (remit to data)

All fields marked with the small red Asterix (*) are mandatory.

Fill out the **Legal Entity Name** and select your **Country/Region**, then select [Continue](#)

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](#)

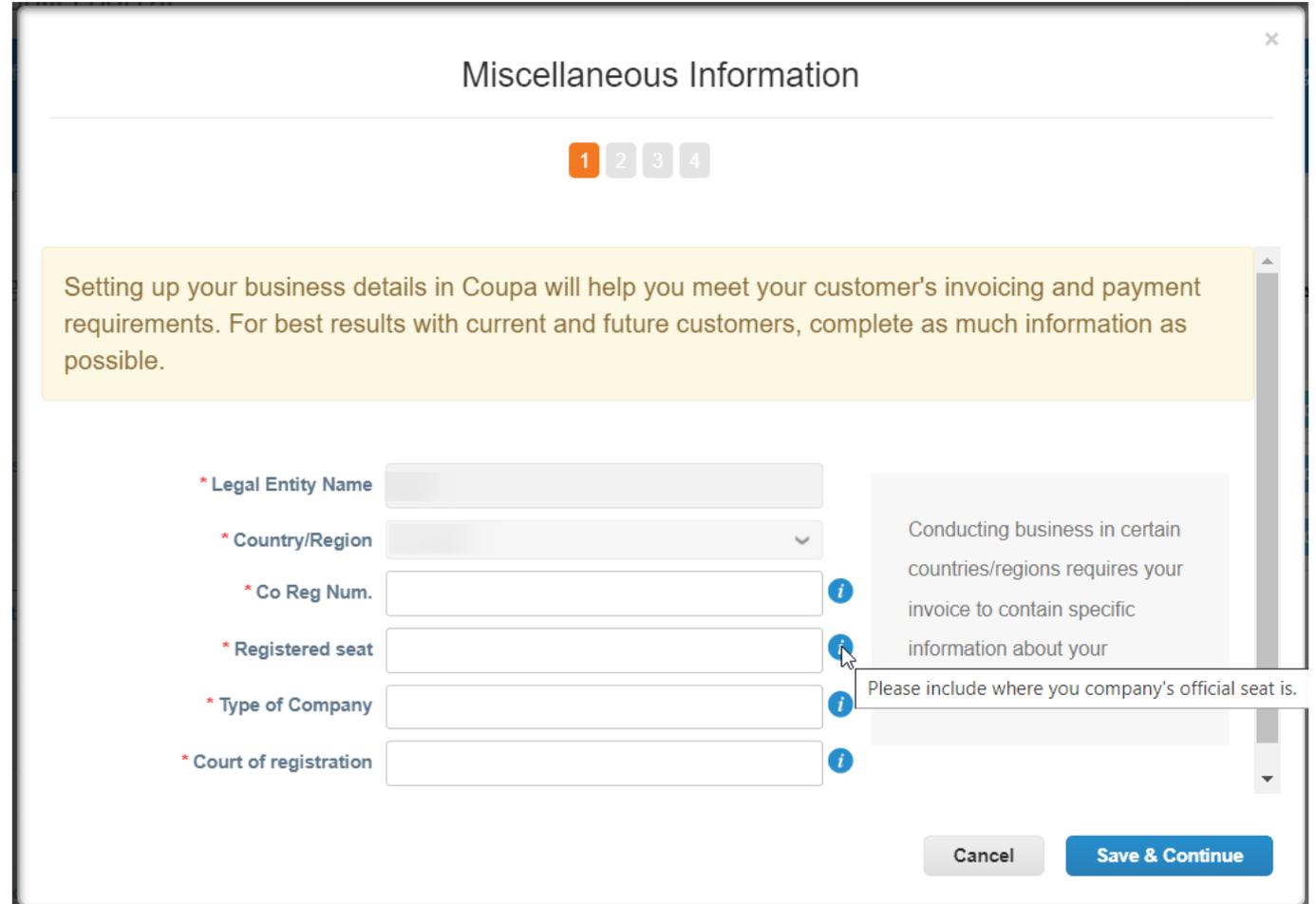
How to add your address (legal entity) and banking details (remit to data)

Miscellaneous Information

In this area, please fill out the company registration details.

The small information icons () will provide more information about the requested item

After completing, select 



Miscellaneous Information

1 2 3 4

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

* Co Reg Num. 

* Registered seat 

* Type of Company 

* Court of registration 

Conducting business in certain countries/regions requires your invoice to contain specific information about your

Please include where your company's official seat is.

Cancel Save & Continue

How to add your address (legal entity) and banking details (remit to data)

Tell your customers about your organization

- Check IQVIA as your customer
- Fill out your company address
- Select Use this address for Remit-To if you want to receive payments via check to your address (mostly used in USA)
- Uncheck the Use this for Ship From address if you ship your goods from a different location (a warehouse in different city / country)
- If you are VAT registered, select the registration country a fill out your VAT ID
- Check the I don't have a VAT/GST Number if you don't have a VAT ID.



Tell your customers about your organization

1 2 3 4

Which customers do you want to see this?

All
 IQVIA

What address do you invoice from?

* Address Line 1 +

* City

State

* Postal Code

Country/Region Slovakia

Use this address for Remit-To *i*

Use this for Ship From address *i*

What is your Tax ID? *i*

Country/Region x

* VAT ID

I don't have a VAT/GST Number

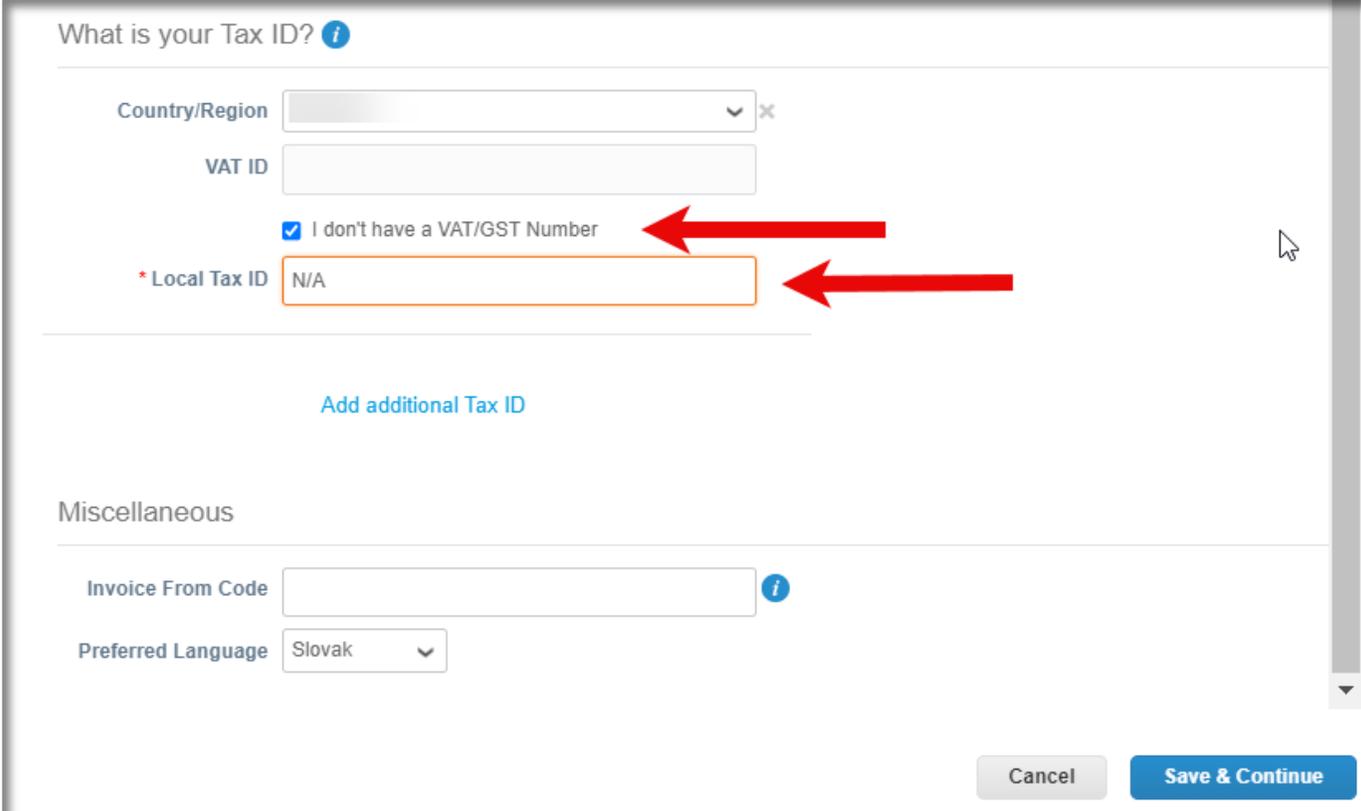
REQUIRED FOR INVOICING

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

How to add your address (legal entity) and banking details (remit to data)

What is your Tax ID

- If you don't have a **VAT ID** the system will require your **Local Tax ID** (not applicable in all countries). **If you don't have Local Tax ID add NONE or Not Applicable or N/A to this field**
- In Miscellaneous you can name this legal entity in case you will have multiple for easier selection in the invoice form. If you have only one legal entity, you can leave this field blank.
- Select your preferred language
- Select 



What is your Tax ID? 

Country/Region x

VAT ID

I don't have a VAT/GST Number

* Local Tax ID

[Add additional Tax ID](#)

Miscellaneous

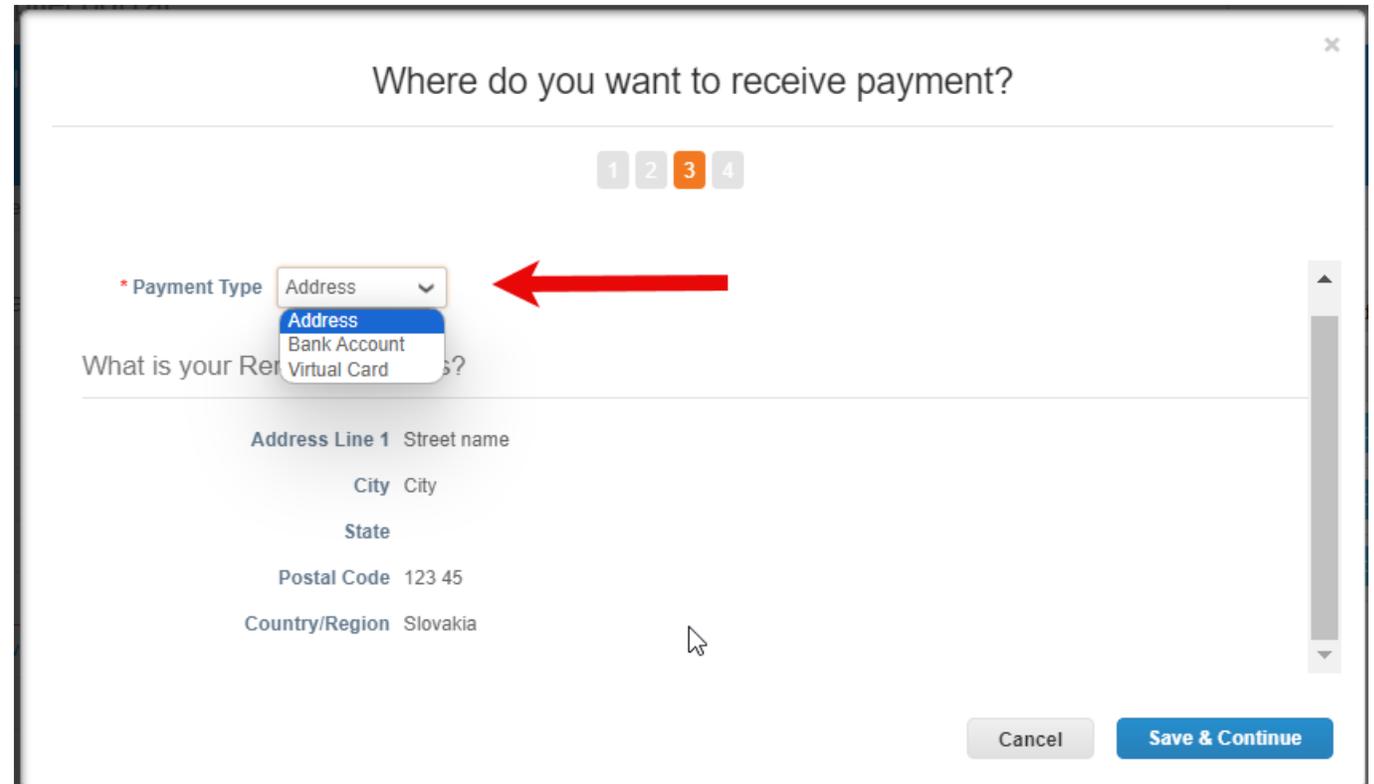
Invoice From Code 

Preferred Language

How to add your address (legal entity) and banking details (remit to data)

Where do you want to receive payment ?

- In **Payment Type** select:
 - **Address** if you wish to receive payments via check (mostly used in USA)
 - **Bank Account** if you wish to receive payments via bank transfer
- Select 



Where do you want to receive payment?

1 2 3 4

* Payment Type Address

Address
Bank Account
Virtual Card

What is your Remit to data?

Address Line 1 Street name

City City

State

Postal Code 123 45

Country/Region Slovakia

Cancel Save & Continue

How to add your address (legal entity) and banking details (remit to data)

- If you selected **Bank Account**, fill out your bank account number and SWIFT/BIC code
- Either you can add your bank account number in your local format or the international IBAN format
- In both cases you must confirm the number again in the field below.
- Bank Account region and currency should be populated automatically based on your location – please doublecheck
- Bank name, Branch code, type and supporting documents are not mandatory
- Select 

Where do you want to receive payment?

1 2 3 4

* Payment Type

What are your Bank Account Details? [i](#)

Bank Account

Country/Region:

Bank Account Currency:

Beneficiary Name:

Bank Name:

Account Number: [i](#)

Confirm Account Number:

IBAN: [i](#)

Confirm IBAN:

SWIFT/BIC Code: [i](#)

My bank does not have a BIC code

Branch Code:

Bank Account Type:

Supporting Documents No file chosen [i](#)

How to add your address (legal entity) and banking details (remit to data)

- Doublecheck and if all data is correct select **Next**
- NOTE: the bank account number in this page and on your legal entity page will show the last 4 digits for better visibility in case you have multiple

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.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Bank Account *****3003 *****SK6X	Street name City 123 45	Active	Manage

Deactivate Legal Entity Cancel **Next**

How to add your address (legal entity) and banking details (remit to data)

- Doublecheck and if all data is correct select **Done**

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
Street name City 123 45	Active

Manage

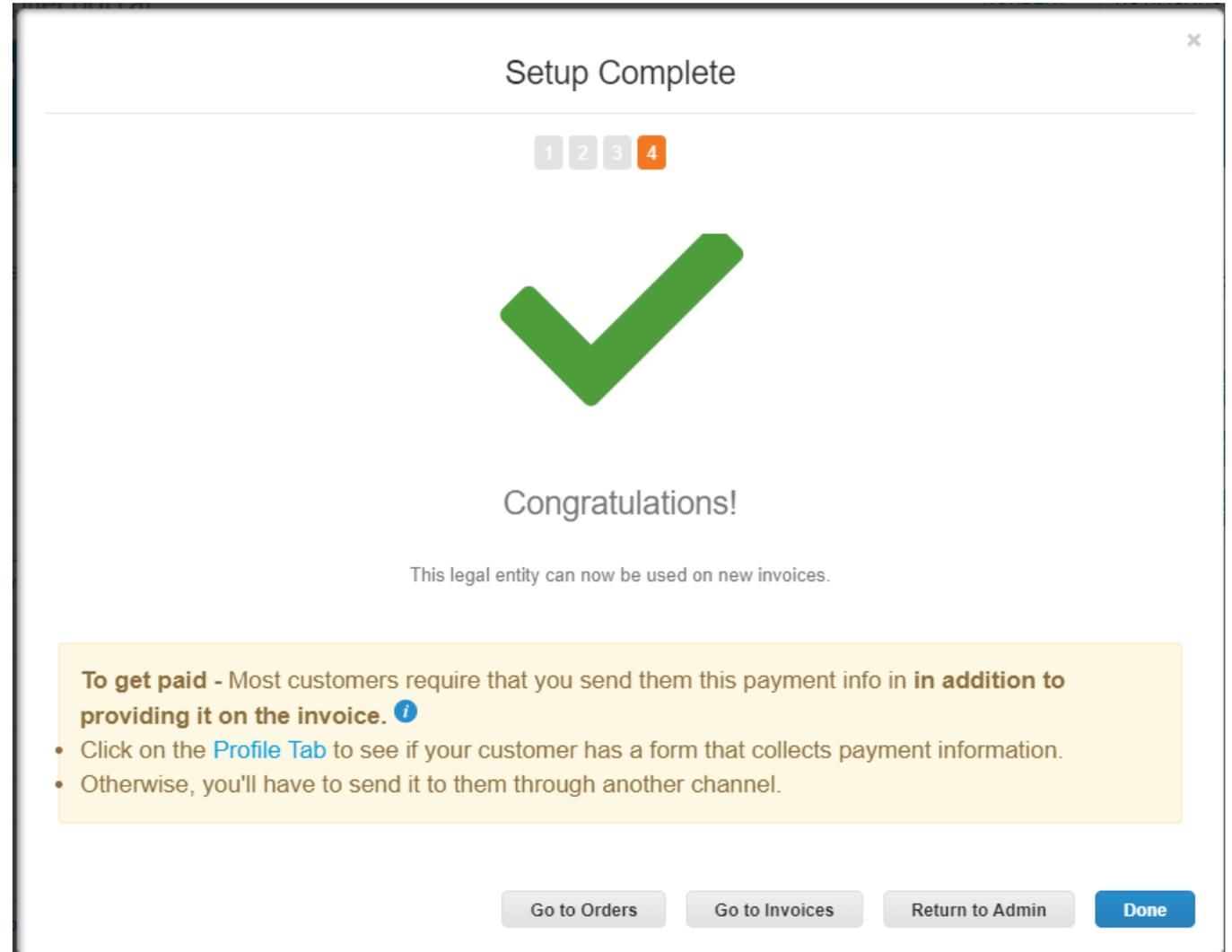
Deactivate Legal Entity **Done**

How to add your address (legal entity) and banking details (remit to data)

Setup Complete

- Select [Done](#)

Please note: The payment information you provided during the initial setup of your supplier account has already been received. There is no need to resubmit this information, as it will be displayed on your first online invoice. Our Accounts Payable team will verify it against the data in our records. If the information matches, your invoices for this legal entity will be processed automatically.



The screenshot shows a 'Setup Complete' confirmation window. At the top, it says 'Setup Complete' with a close button (X). Below this is a progress indicator with four steps: 1, 2, 3, and 4. Step 4 is highlighted in orange. A large green checkmark is centered on the screen. Below the checkmark, it says 'Congratulations!' and 'This legal entity can now be used on new invoices.' A yellow callout box contains the following text: 'To get paid - Most customers require that you send them this payment info in addition to providing it on the invoice.' followed by an information icon (i) and two bullet points: 'Click on the Profile Tab to see if your customer has a form that collects payment information.' and 'Otherwise, you'll have to send it to them through another channel.' At the bottom of the window, there are four buttons: 'Go to Orders', 'Go to Invoices', 'Return to Admin', and 'Done'.

How to add your address (legal entity) and banking details (remit to data)

- Your legal entity will now appear in your SETUP tab.

Please Note: You can longer make changes to this legal entity. If the data changes, use the **Actions** function to deactivate it and create a new legal entity based on the updated information.

Your legal entity remit to setup is now complete.

The screenshot shows the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text 'supplier portal', and user information: 'NORBERT' with a dropdown arrow, 'NOTIFICATIONS 5' with a red badge, and 'HELP' with a dropdown arrow. Below the header is a navigation bar with tabs: Home, Profile, Forecasts, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, and Add-ons. A 'Setup' button is highlighted in the navigation bar. Below the navigation bar, the breadcrumb trail shows 'Admin' and 'Customer Setup'. The main content area is titled 'Admin Legal Entity Setup' and features a table with one row for a legal entity named 'test'. To the right of the 'test' row is an 'Actions' button. In the top right corner of the main content area, there is an 'Add Legal Entity' button. On the left side, there is a sidebar menu with the following items: Users, Merge Requests, Merge Suggestions, Requests to Join, Legal Entity Setup (highlighted with an orange underline), Fiscal Representatives, Remit-To, Additional CaaS Information, and sFTP Accounts. A mouse cursor is visible at the bottom right of the page.