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# Coupa for Suppliers

Coupa Supplier Portal (CSP) – Set up E-invoicing

## 3. Set up E-invoicing

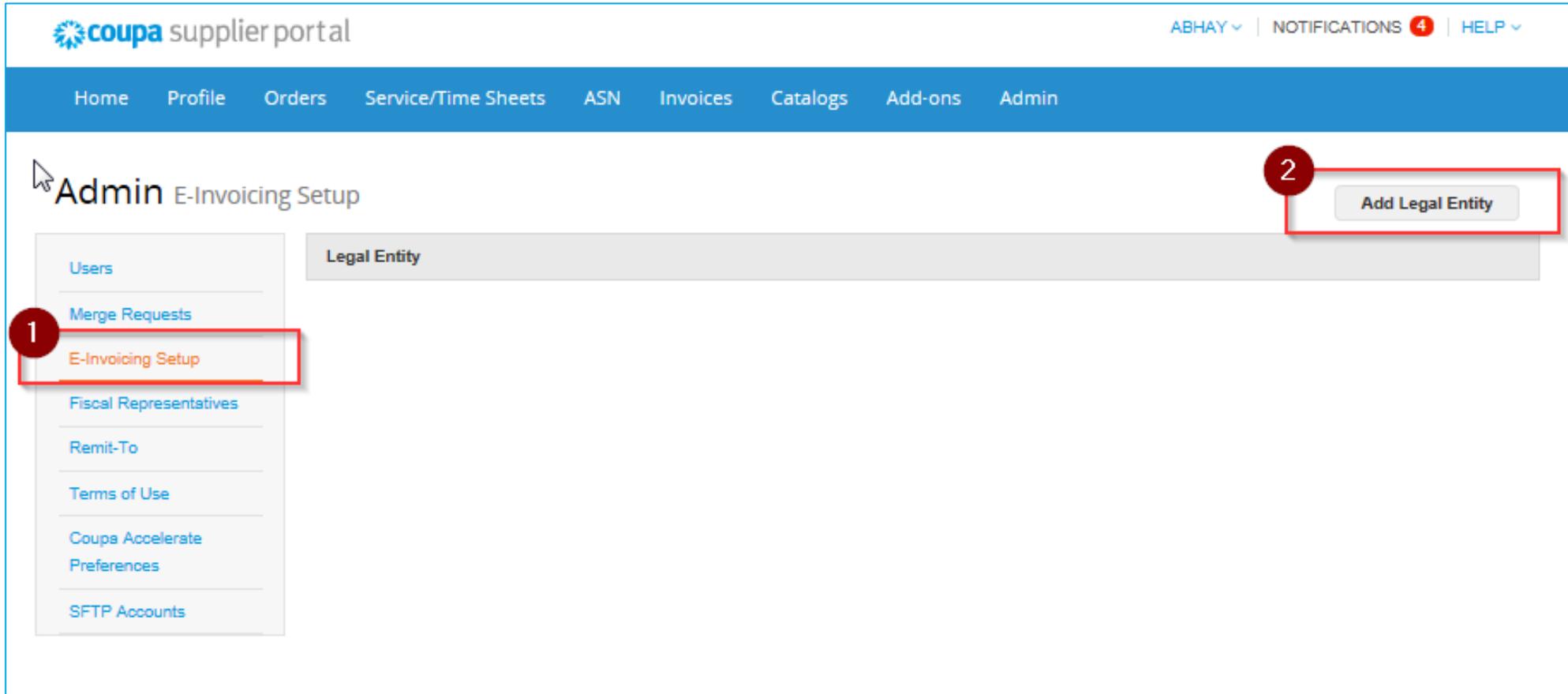
# Set up your account to create electronic invoices

- click on **Admin** tab on the main menu

The screenshot shows the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the right side of the top bar, there are links for "FIRST\_NAME", "NOTIFICATIONS" (with a red circle containing the number 0), and "HELP". Below this is a blue navigation bar with tabs for "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin". The "Admin" tab is highlighted with a red rectangular box. Below the navigation bar, the main content area is divided into two columns. The left column is titled "TestSupplier" and features a globe icon, a list of links: "About", "Industry", "Website", "Established", and "Employees", and a blue button labeled "Improve Your Profile". Below this, there are sections for "About" and "Public Profile" with a URL: "https://supplier-test.coupahost.com/suppliers/public/21849". The right column contains a "Merge Accounts" section with text explaining the purpose of merging accounts and a link "Click here.", followed by a "Latest Customers" section listing "IQVIA".

# Add Legal Entity

1. click on the **E-Invoicing Setup** link on the left of the **Admin** page. The **Legal Entity** page appears. You can add new legal entities or manage or deactivate existing ones.



2. To add a legal entity, click on the **Add Legal Entity** button in the top right corner

- On the appearing page **Where's your business located?** enter the **official name of your business** that is registered with the local government
  - select the **country** where it is located
- (Depending on the country, another window(2) may appears with additional location information)

Supplier portal ABHAY NOTIFICATIONS

### 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

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

Cancel Continue

Supplier portal CHRIS NOTIFICATIONS

### 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

\* Type of Company

Board of Directors

Conducting business in certain countries requires your invoice to contain specific information about your company.

Cancel Save & Continue

- Click **Save & Continue**

In the appearing **Tell your customers about your organization** window, fill in at least the mandatory fields, that is, the fields marked with a red asterisk (\*), and click **Done**

Supplier portal

CHRIS | NOTIFICATION

### 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

Address Line 2

\* City

State

\* Postal Code

Country United Kingdom

Use this address for Remit-To

Use this for Ship From address

**REQUIRED FOR INVOICING**

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

#### 1. Which customers do you want to see this?

Select all or the specific customer(s) that you want to see your legal entity information.

#### 2. What address do you invoice from?

Required for invoicing. Registered address of your legal entity.

Do not forget to tick:

- **Use this address for Remit-To:** Selected by default. Deselect it if your remit-to address is different from your invoice-from address or you have more than one remit-to locations.
- **Use this for Ship From address:** Selected by default. Deselect it if your ship-from address is different from your invoice-from address or you have more than one location.

Banking information ⓘ

Bank Account Country: United Kingdom

Bank Account Currency: [dropdown]

Bank Name: [text box]

Beneficiary Name: [text box]

Routing (Bank Code) Number: Sort Code [dropdown] [text box]

Account Number: [text box] ⓘ

Account Number Confirm: [text box]

IBAN: [text box] ⓘ

SWIFT/BIC Code: [text box] ⓘ

Bank Account Type: Business

Bank address

Address Line 1: [text box]

Address Line 2: [text box]

City: [text box]

State: [text box]

Postal Code: [text box]

What is your Tax ID? ⓘ

Country: United Kingdom

\* VAT ID: [text box]

I don't have a VAT/GST Number

Add additional Tax ID

Miscellaneous

Invoice From Code: [text box] ⓘ

Preferred Language: English (UK)

Cancel Save & Continue

### 3. Banking information (mandatory\*)

Banking information for the remit-to address. You can use both domestic and international (global) banking information.

### 4. What is your Tax ID?

Select your **tax country** from the drop-down list. Enter the **tax/VAT ID**, including the prefix to the number, for example, **GB1234567890**. Please note that you can add more tax IDs by clicking on the Add additional Tax ID.

In case you do not have VAT number, please tick

- **“I do not have a VAT/GST Number”**

And enter your Local Tax ID.

I don't have a VAT/GST Number

\* Local Tax ID: [text box]

Add additional Tax ID

### 5. Click **Save & Continue**

- In the appearing **Where do you want to receive payment** window, verify the information on this screen and if everything looks ok, click **Next**.

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	Banking information	Status	
1510 Valley Center Parkway Bethlehem PA 18017 United States	Wells Fargo LHB LLC *****9123 123456789	Active	Manage

Deactivate Legal Entity Cancel Next

- you can deactivate your existing address by clicking on **Deactivate Remit-To**. Column Status – “Active” will change on “Deactivated”.

Please note that there needs to be always at least one Remit-To address active for using this legal entity.

Where do you want to receive payment?

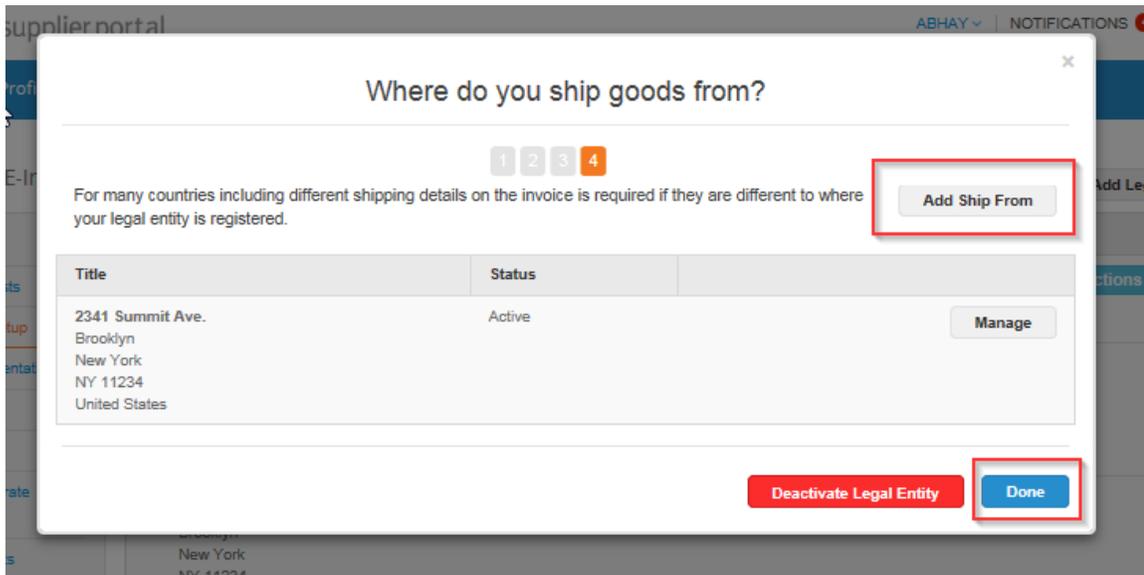
1 2 3 4

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	Banking information	Status	
1510 Valley Center Parkway Bethlehem PA 18017 United States	Wells Fargo LHB LLC *****9123 123456789	Active	Manage

Deactivate Legal Entity Cancel Next



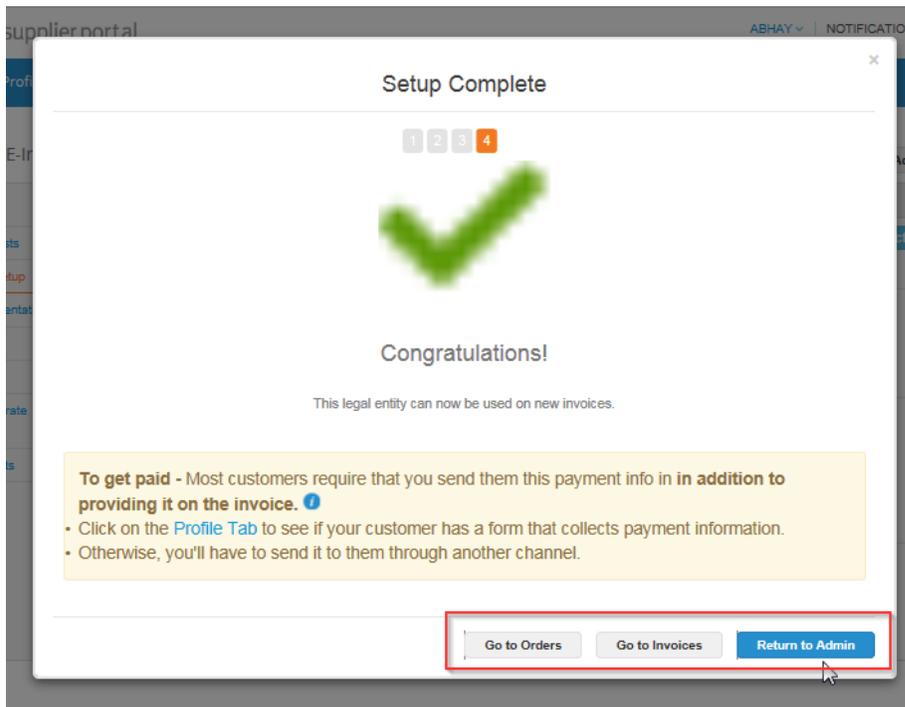
In the appearing **Where do you ship goods from?** window, manage or add another ship from address and after click **Done**.

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

After completing the e-invoicing setup by clicking **Done**, that is, after adding a legal entity, you can use it on new invoices.

From the **Setup Complete** page you can choose to

- **Go to Orders,**
- **Go to Invoices,** or
- **Return to Admin** page.



# Deactivate Legal Entity

If you click on **Actions** button and select **deactivate legal entity**, all information will disappear. After you can add legal entity from beginning with correct information.

The screenshot shows the 'Admin E-Invoicing Setup' page in the Coupa Supplier Portal. The 'Admin' menu item in the top navigation bar is highlighted with a red box and a circled '1'. On the left sidebar, 'E-Invoicing Setup' is highlighted with a red box and a circled '2'. In the main content area, the 'Legal Entity' section for 'ABCD' is visible, showing details like address and Tax ID. An 'Actions' button is highlighted with a red box and a circled '3', and its dropdown menu is open, showing 'Manage' and 'Deactivate Legal Entity' options.

The screenshot shows the 'Admin E-Invoicing Setup' page after the legal entity has been deactivated. The 'Legal Entity' section is now empty, and the 'Add Legal Entity' button is visible. A red arrow points from the 'Deactivate Legal Entity' option in the previous screenshot to this one, indicating the transition.

# How to set up multiple Remit to addresses

- **What is your Remit-To Address?**

- Address containing bank details where you want to receive payment. (If you receive payments to a different location than where your business is registered, you will need a new Remit to address for each location).
- Includes mandatory address-specific fields: Address Line 1, Address Line 2, City, State, Postal Code, and Country/Region

- 1. Log in to the CSP

- 2. Click on **Setup**



- 3. On the left of the **Admin page**, click on the **Legal Entity Setup** then on **Actions** and select **Managed Remit-To Accounts**



- 4. In new pop-up window, click on **Add Remit –To**

## Add a new Remit-To account

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.



Remit-To Account	Remit-To Address	Status	
Address	12 Clover Field London JY1 891 United Kingdom	Active	Manage

- 5. Select **Payment Type Address** and fill in all mandatory fields mark with \*
- 6. Open the **Integration Code** and write based on instruction in the table below.
- \*Note: This Integration Code helps you to select correct Remit to once you will create invoices.



<b>Integration Code?</b>	<p>Code to tie your CSP remit-to address to the corresponding address in your ERP.</p> <p><b>IMPORTANT:</b></p> <p>Write <b>European in EUR</b> for all European POs with currency EUR</p> <p>Write <b>European in GBP</b> for all European POs with currency GBP</p> <p>Write <b>US in USD</b> for all US and Canada POs with currency USD</p> <p>Etc.</p>
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- 7. Click on **Save & Continue**

## Add a new Remit-To account

- 8. Remit to address has been created

- 9. If you have multiple Remit to Addresses, you will have to select the appropriate one with each new invoice when creating the invoice.

- 10. To manage your remit-to accounts, go to Setup > Admin > Remit-To. For more information, see View and Manage Remit-to Information.

Payment Type: Address

What is your Remit-To Address?

Address Line 1

Address Line 2

City

State: Select an Option

Postal Code

Country/Region

What is your Remit-To Integration Code? (optional) ⓘ

Code

Cancel Save & Continue