



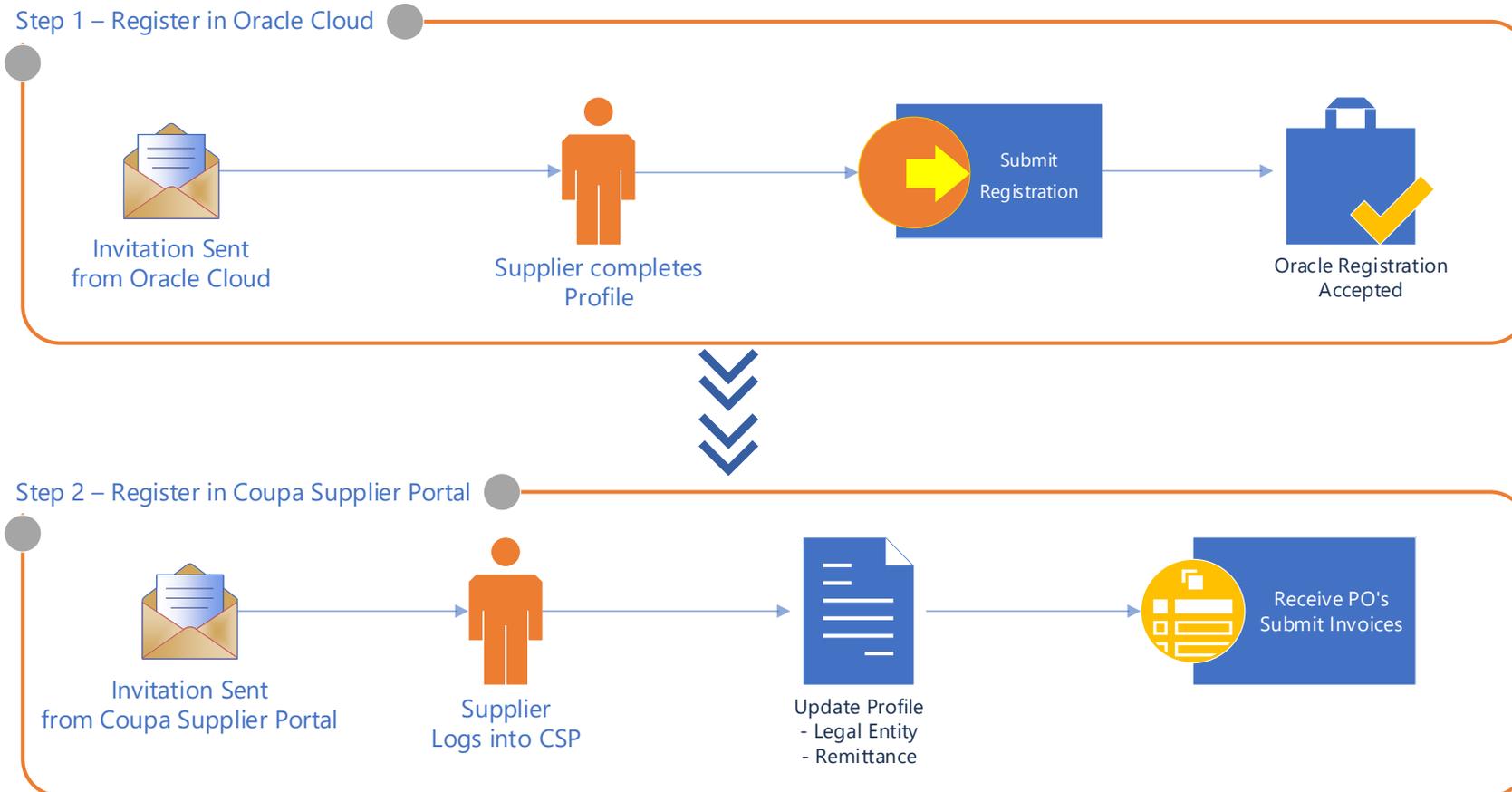
# **IQVIA: Supplier Registration in Oracle**

*Canadian Suppliers*

22 April 2020

# Registration Process: What you need to know

- Supplier Registration is a two step process: Register in Oracle Cloud and on the Coupa Supplier Portal
- You will not receive Purchase Orders or be able to submit invoices until registration in both is complete
- Your remittance information must remain in sync between the two systems



# Oracle Registration

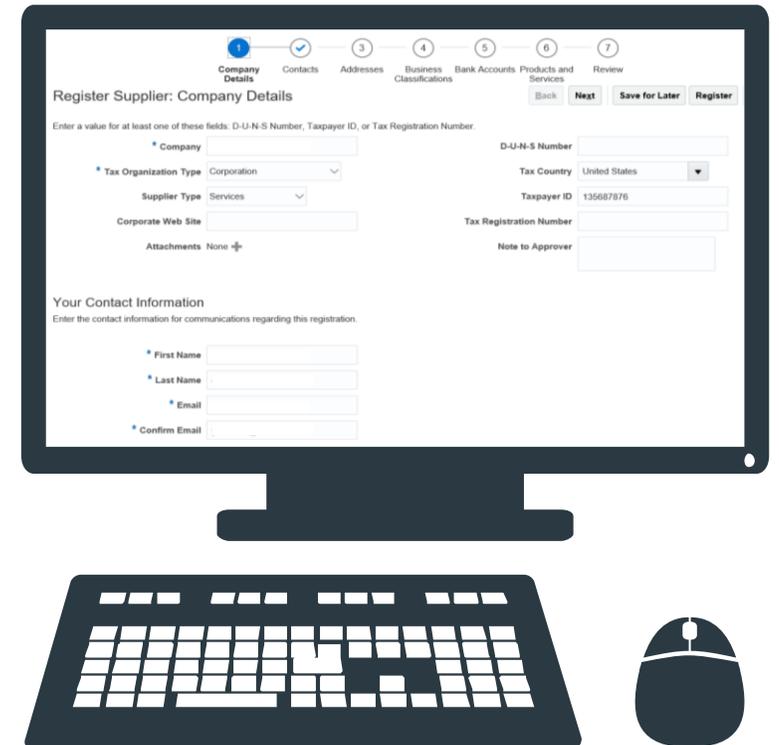
# IQVIA Finance ERP Supplier Portal

The Supplier Portal is an online portal for suppliers to view and manage information. The portal is used to:

<https://elcj.fa.us2.oraclecloud.com/fscmUI/faces/PrcPosRegisterSupplier?prcBuld=300000001992547>

- Manage supplier contact information and user accounts for supplier portal access
- Onboard suppliers through self-service registration with approval workflow

## [Portal Link](#)



# External Supplier Registration

## Supplier Registration

SIGN IN  
ORACLE APPLICATIONS CLOUD

User ID

Password

Forgot Password

Sign In

English

ORACLE

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Enter **User ID** and **Password** and then click **Sign In**.

1. Log in to the Supplier Portal by using your login credentials. A link will be available to suppliers to reach the Supplier Portal

# External Supplier Registration (Cont.)

## Enter Company Details

The **Register Supplier** screen is displayed with different sections.

The screenshot shows the 'Register Supplier: Company Details' screen. At the top, there is a progress bar with seven steps: 1. Company Details (highlighted with a blue circle), 2. Contacts, 3. Addresses, 4. Business Classifications, 5. Bank Accounts, 6. Products and Services, and 7. Review. Below the progress bar, there are buttons for 'Back', 'Next' (highlighted with a red box), 'Save for Later', and 'Register'. The main form area is divided into two sections: 'Company Details' and 'Your Contact Information'. The 'Company Details' section includes fields for 'Company' (Deloitte LLC), 'Tax Organization Type' (Corporation), 'Supplier Type' (Services), 'Corporate Web Site', 'Attachments' (None), 'D-U-N-S Number', 'Tax Country' (United States), 'Taxpayer ID' (135687876), and 'Note to Approver'. The 'Your Contact Information' section includes fields for 'First Name', 'Last Name', 'Email', and 'Confirm Email'. Annotations are present: a yellow callout 'a. Enter Company and select Tax Organization Type.' points to the 'Company' and 'Tax Organization Type' fields; a yellow callout 'b. Enter First Name, Last Name, Email and Confirm Email.' points to the contact information fields; and a yellow callout 'c. Click Next.' points to the 'Next' button.

2. The first section that is displayed is **Company Details**. The supplier must enter the mandatory fields for **Company Details** and **Contact Information**.

Enter **Company** and select **Tax Organization Type** under **Company Details**.

Under **Contact Information**, enter **First Name**, **Last Name**, **Email** and **Confirm Email**. Then, click **Next** to open the **Contacts** section.

# External Supplier Registration (Cont.)

## Enter Contacts Details

3. In the second section for **Contacts**, click the **Create** icon to enter the relevant fields and create **Supplier Contact(s)**.

The screenshot shows the 'Register Supplier: Contacts' page. At the top, a progress bar has seven steps: 1 (checked), 2 (highlighted in blue), 3, 4, 5, 6, and 7. Below the progress bar are labels for each step: Company Details, **Contacts**, Addresses, Business Classifications, Bank Accounts, Products and Services, and Review. On the right side, there are buttons for 'Back', 'Next' (highlighted with a red box), 'Save for Later', and 'Register'. Below the progress bar, the text 'Enter at least one contact.' is displayed. A toolbar contains 'Actions', 'View', 'Format', '+ Create' (highlighted with a red box), 'Edit', 'Delete', 'Freeze', 'Detach', and 'Wrap'. Below the toolbar is a table with the following columns: Name, Job Title, Email, Administrative Contact, Request User Account, and Edit. The first row of the table is highlighted with a red border and contains a blue bar with a checkmark in the 'Administrative Contact' and 'Request User Account' columns, and an edit icon in the 'Edit' column. A yellow callout box points to the 'Create' icon with the text 'a. Click the Create icon.' Another yellow callout box points to the 'Next' button with the text 'c. Click Next.' A third yellow callout box points to the first row of the table with the text 'b. Enter Name and Email ID.' At the bottom left, it says 'Columns Hidden 7'.

# External Supplier Registration (Cont.)

## Enter Addresses Details

4. Now we come to the third section to enter supplier address details. Click the **Create** icon in the **Addresses** section. The **Create Address** window opens. Enter the mandatory fields and then click **OK**.

Register Supplier: Addresses

Enter at least one address.

Actions View Format **+ Create** Edit Delete

Address Name	Address
New York	Rockefeller Plaza 41st Floor, NEW YORK

Columns Hidden 3

a. Click the **Create** icon.

3

Company Details Contacts **Addresses**

Create Address

\* Address Name New York

\* Country United States

Address Line 1 0 Rockefeller Plaza 41st Floor

Address Line 2

City New York

State NY

Postal Code 1012

\* Address  Ordering

Purpose  Remit to

RFQ or Bidding

Phone 1

Fax 1

Email

b. Enter **Address Name, Address, and Country.**

Address Contacts

Select the contacts that are associated with this address.

Actions View Format X Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact
No data to display.			

Columns Hidden 4

Create Another **OK** Cancel

c. Click **OK**.

# External Supplier Registration (Cont.)

## Enter Business Classifications Details

5. Next section that displays is **Business Classifications**. Specify **Supplier Classification** by clicking the **Add (+)** icon or click the checkbox '**None of the classifications are applicable**' if required. Then, click **Next**.

The screenshot shows the 'Register Supplier: Business Classifications' form. At the top, a progress bar indicates the current step is 4, 'Business Classifications'. The form includes a checkbox for 'None of the classifications are applicable', a table for adding classifications, and a 'Next' button. Annotations provide instructions: 'a. Click the Add (+) icon.', 'b. Select the Classification.', and 'c. Click Next.'

Register Supplier: Business Classifications

Click the checkbox 'None of the classifications are applicable' if required.

None of the classifications are applicable

a. Click the **Add (+)** icon.

c. Click **Next**.

Classification	Subclassification	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes
Veteran Owned		Other	test		m/d/yy	m/d/yy	None +	

b. Select the **Classification**.

# External Supplier Registration (Cont.)

## Enter Bank Accounts Details

6. The fifth section is for creating **Bank Accounts**. Click the **Create** icon to create the bank account. In the **Create Bank Account** pop-up, enter the mandatory fields, click **OK**, and then **Next**.

Register Supplier: Bank Accounts

Company Details Contacts Addresses Business Classifications **Bank Accounts** Products and Services Review

Back Next Save for Later Register Cancel

Account Number  
XXXXXX9934  
Columns Hidden 8

+ Create Edit

**Create Bank Account**

\* Country United States IBAN  
Bank Bank of America Currency  
Branch  
\* Account Number 1345679934

Additional Information

Account Name BoA Agency Location Code  
Alternate Account Name Account Type  
Account Suffix Description  
Check Digits

Comments

Note to Approver My bank is not available in the list of values, please add Wells Fargo bank and bank branch

Create Another OK Cancel

Edit Delete

a. Click the **Create** icon.

b. Enter **Country** and **Account Number**.

c. Click **OK**.

d. Click **Next**.

# External Supplier Registration (Cont.)

## Enter Products and Services Details

7. We will now see how a supplier can add products and services. Click the **Create** icon in the **Products and Services** section. The **Select and Add: Product and Services** pop-up opens. Select the relevant **Category Name**, click **OK**, and then click **Next**.

The screenshot displays the 'Register Supplier: Products and Services' interface. At the top, a progress bar shows steps 1 through 7, with step 6, 'Products and Services', highlighted. Below the progress bar, the main interface has a 'Select and Add' button highlighted with a red box and a callout 'a. Click Select and Add.'. The 'Select and Add: Product and Services' pop-up is open, showing a search bar and a table of categories. The 'Professional Fees & Support Services' category is selected, indicated by a checkmark in the first column. A callout 'b. Select Category Name.' points to this row. At the bottom of the pop-up, the 'OK' button is highlighted with a red box and a callout 'c. Click OK.'. In the main interface, the 'Next' button is highlighted with a red box and a callout 'd. Click Next.'.

Select	Category Name	Description
<input type="checkbox"/>	Direct Material	Direct Material
<input type="checkbox"/>	I.T. Hardware and Software	I.T. Hardware and Software
<input type="checkbox"/>	Marketing Materials	Marketing Materials
<input type="checkbox"/>	Office Supplies	Office Supplies
<input type="checkbox"/>	Operating Supplies & Expense	Operating Supplies & Expense
<input checked="" type="checkbox"/>	Professional Fees & Support Services	Professional Fees & Support Services
<input type="checkbox"/>	Repair & Maintenance	Repair & Maintenance
<input type="checkbox"/>	Safety Supplies	Safety Supplies
<input type="checkbox"/>	Undefined	Undefined Browsing Category
<input type="checkbox"/>	Utilities	Utilities

# External Supplier Registration (Cont.)

## Enter Products and Services Details

Select and Add: Products and Services

Search

Category Name  Description

Search Reset

View Format Freeze Detach Wrap

Select	Category Name	Description
<input type="checkbox"/>	▶ Direct Material	Direct Material
<input type="checkbox"/>	▶ I.T. Hardware and Software	I.T. Hardware and Software
<input type="checkbox"/>	▶ Marketing Materials	Marketing Materials
<input type="checkbox"/>	▶ Office Supplies	Office Supplies
<input type="checkbox"/>	▶ Operating Supplies & Expense	Operating Supplies & Expense
<input checked="" type="checkbox"/>	▶ Professional Fees & Support Services	Professional Fees & Support Services
<input type="checkbox"/>	▶ Repair & Maintenance	Repair & Maintenance
<input type="checkbox"/>	▶ Safety Supplies	Safety Supplies
<input type="checkbox"/>	▶ Undefined	Undefined Browsing Category
<input type="checkbox"/>	▶ Utilities	Utilities

Columns Hidden 1

Apply OK Cancel

The Products and Services Categories are shown here.

# External Supplier Registration (Cont.)

## Review Details

8. Review registration components and click **Register**.

Review Supplier Registration: Deloitte LLC

Company Details

Company	Deloitte LLC	D-U-N-S Number	
Tax Organization Type	Corporation	Tax Country	United States
Supplier Type	Services	Taxpayer ID	135687876
Corporate Web Site		Tax Registration Number	
		Note to Approver	

Attachments

Type	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.					

Contacts

Name	Job Title	Email	Administrative Contact	Request User Account	Details
elshaeir, yana		yelshaeir@deloitte.com	✓	✓	

b. Click Register.

a. Review registration components

Confirmation

Your registration request was submitted. You will receive an e-mail after your registration request is reviewed.

c. Click OK.

# External Supplier Registration (Cont.)

## Approval Process

Access this task in the [Workspace Application](#) or take direct action using the links in this email:

**Actions:** [Approve](#) | [Reject](#) | [Request More Info](#)

Supplier Registration Request 4001

Select the Action you wish to perform.

### Details

<b>Assignee</b>		<b>Registration Request</b>	4001	<b>Approval Status</b>	Pending Approval
<b>Assigned Date</b>	8/4/19	<b>Requested By</b>		<b>Business Relationship</b>	Prospective
<b>Task Number</b>	201712	<b>Request Date</b>	8/4/19	<b>Source</b>	External
		<b>Inviting Procurement BU</b>	Lookahead US BU	<b>Note to Approver</b>	

### Company Details

<b>Company</b>		<b>D-U-N-S Number</b>		
<b>Tax Organization Type</b>		<b>Tax Country</b>	United States	I
<b>Supplier Type</b>		<b>Taxpayer ID</b>	135687876	
<b>Corporate Web Site</b>		<b>Tax Registration Number</b>		

### Attachments

Type	Category	*File Name or URL	Title	Description	Attached By
No data to display.					

9. Once the Registration is submitted, the Approver receives an email.

# External Supplier Registration (Cont.)

## Approval Process

10. Once the request is approved, the supplier gets a notification in an email and a separate email for resetting their password.

Your registration request to be a supplier for Setup Enterprise (Lookahead US BU) was approved.

### Registration Request Details

<b>Registration Request</b>	4001
<b>Request Date</b>	08/04/2019
<b>Requested By</b>	
<b>Company</b>	Deloitte LLC

**From:** [eiv-dev3.fa.sender@workflow.mail.us6.oraclecloud.com](mailto:eiv-dev3.fa.sender@workflow.mail.us6.oraclecloud.com)  
**Date:**  
**To:**  
**Subject: Oracle Fusion Applications-Welcome E-Mail**

Dear

Congratulations! Your Oracle Fusion Applications account has been successfully created.

Please follow the link below to reset your password.

<https://eiv-dev3.fa.us6.oraclecloud.com:443/hcmUI/faces/ResetPassword?ase.gid=55c9fe8f302e461996a8b3049911b957>

For any issues, contact your system administrator.

Thank You,  
Oracle Fusion Applications