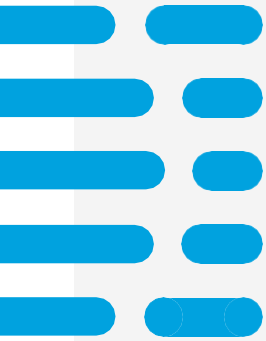




# **IQVIA: Supplier Registration in Coupa**

*English*

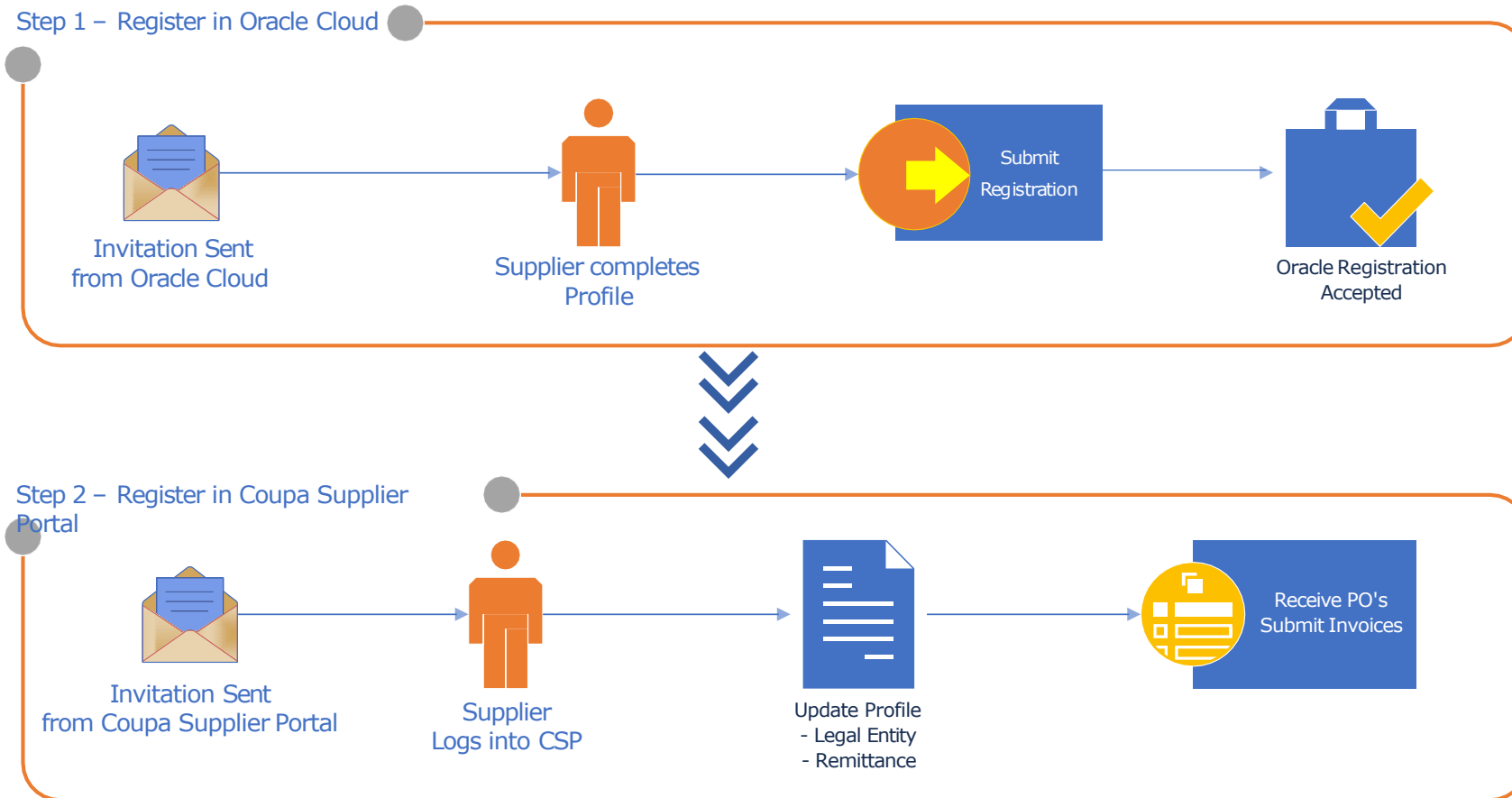
23<sup>rd</sup> February 2021



- +High level process
- +Coupa registration
- +Invoicing In Coupa
- +Who to contact for help

# 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 Oracle Cloud and the Coupa Supplier Portal
- If your remittance information changes in future, then please make the updates in both Oracle Cloud and Coupa Supplier Portal before using the new remittance information on the invoice

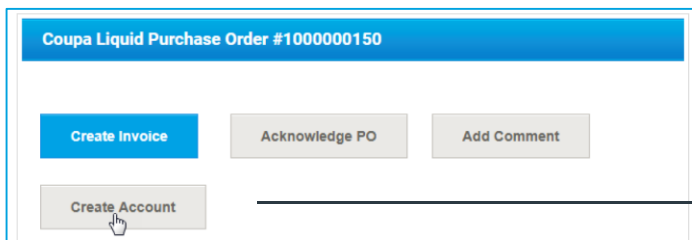


# Coupa Registration



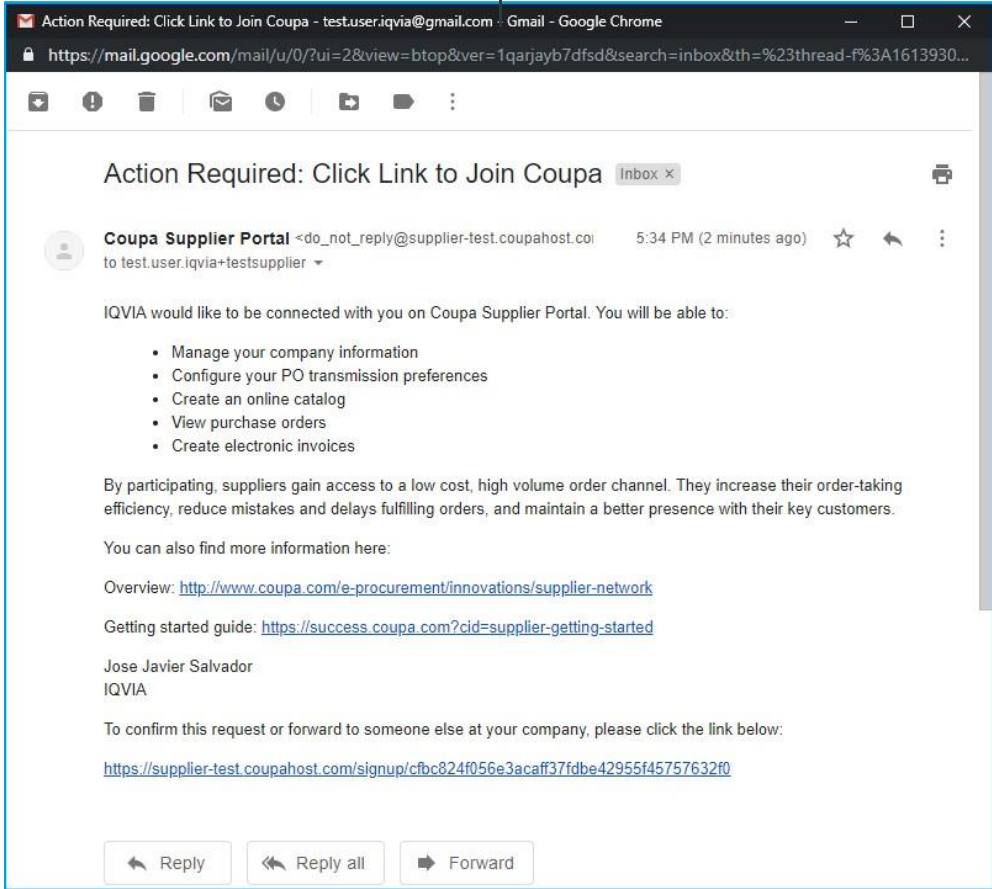
# Coupa Supplier Portal (CSP)

- ❖ CSP is an online portal that provides an easy way to manage information, view purchase orders, create & manage invoices, and catalogues.
- ❖ An email invitation to join CSP will be sent by IQVIA (to the email address you have previously supplied us).
- ❖ This email will contain a Coupa Overview, a Coupa Getting Started Guide, and a link for you to create your password. Click the link to begin.
- ❖ If you transact with your customers through PO methods other than the CSP and you are not linked to the CSP, you can see the Create Account button in your PO notification email.



Note: If you are already linked to the CSP, you can see the **Login** button instead of **Create Account**.

Note: If you do not receive your invitation email, check your spam folder..



# Coupa Supplier Portal

- ❖ Coupa will default the contact information for you
- ❖ In the “Password” field, enter a password that you will use to log into the CSP (Password should be at least 8 characters long)
- ❖ Re-enter the desired password in the “Password confirmation” field
- ❖ To create a CSP account, you must also accept the Privacy Policy. Please read the Privacy Policy and Terms of Use documents and select the checkbox to Accept

Note by default, this account is the admin account for your company. Once set up, you can add users and assign them roles, including account administration.

Join the Coupa Supplier Portal

Validate the information below and create the password for your account. [Click here for help.](#)

\* First Name

\* Last Name

\* Company

\* Email

\* Password   
Use at least 8 characters and include a number and a letter.

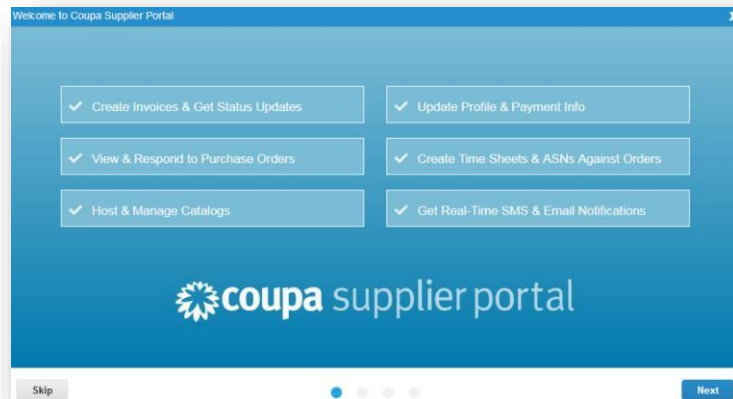
\* Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

# Coupa Supplier Portal

## Getting started with CSP

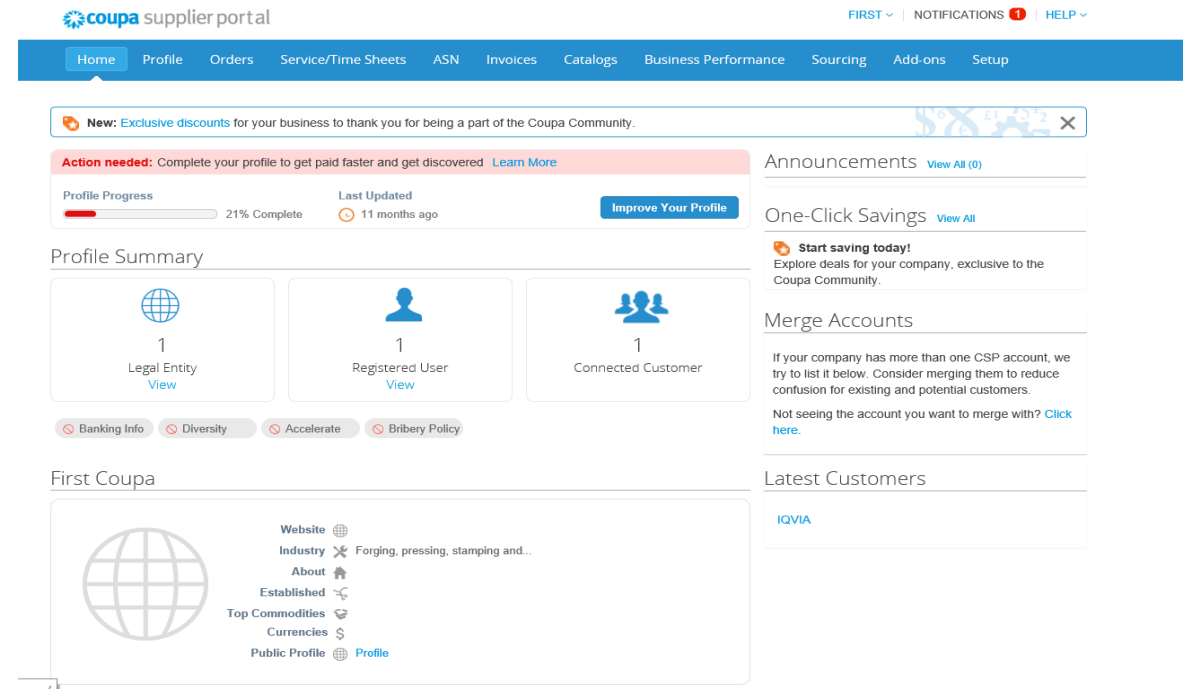
- ❖ On your first log in, Coupa takes you on a welcome tour.



- ❖ Warning: After logging in to the CSP as a non-admin user, you can see a banner listing your existing permissions and the permissions you can request from your admins. CSP admins that manage users are also notified through a banner to check their users' permissions.


Note: You can close the banner for the current session, but the message is displayed again after logging into a new session and clicking Submit.

- ❖ When you are finished, you will be taken to your CSP homepage



# Set Up Legal Entities

- ❖ You must set up your account to create electronic invoices. From the Setup / Legal Entity Setup page add, manage, or deactivate legal entities, or manage remit-to accounts.
- ❖ You can provide more remit-to accounts and add this information to your legal entities so that your customers can use different payment methods when working with you.

 FIRST ▾ | NOTIFICATIONS 1 | HELP ▾

[Home](#) [Profile](#) [Orders](#) [Service/Time Sheets](#) [ASN](#) [Invoices](#) [Catalogs](#) [Business Performance](#) [Sourcing](#) [Add-ons](#) [Setup](#)

[Admin](#) [Customer Setup](#)

## Admin Legal Entity Setup Add Legal Entity

- [Users](#)
- [Merge Requests](#)
- [Legal Entity Setup](#)
- [Fiscal Representatives](#)
- [Remit-To](#)
- [Terms of Use](#)
- [Payment Preferences ▾](#)
- [Static Discounting](#)
- [SFTP Accounts](#)
- [cXML Errors](#)
- [SFTP Errors](#)

Legal Entity			
<span style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 4px;">Actions ▾</span>			
Invoice From	Remit-To Accounts	Locations	Customers
jkdjgj adfd fdfd Algeria		jkdjgj adfd fdfd Algeria	IQVIA



# Set Up Legal Entities

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.

**1** \* 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.

**2**

1. Add your Company Name and Country
2. Click Continue

1. For Canadian Suppliers, populate the QST Registration Number field with QST or PST tax registration of the Supplier. Click 'Save & Continue'.

Note: Leave this field blank if you only have HST or GST registered.

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

QST Registration Number

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

Which customers do you want to see this? **1**

- All
- IQVIA - C0001242
- IQVIA - CR053 Test Supplier

What address do you invoice from? **2**

\* Address Line 1

Address Line 2

\* City

State

\* Postal Code

Country United States

**REQUIRED FOR INVOICING**

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

Use this address for Remit-To **i**

Use this for Ship From address **i**

What is your Tax ID? **i** **3**

Country  **x**

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous **4**

Invoice From Code  **i**

Preferred Language

Cancel

Save & Continue

## Set Up Legal Entities

1. You may have other customers that use Coupa. You can either restrict this address to IQVIA or you can make it available for you to assign to all your customers.

2. Enter your business address. Keep in mind, your remittance address MUST match what you entered in Oracle Cloud

3. If applicable, enter your Tax ID. If you are not registered, leave the field blank.

If you click the I don't have the VAT/GST Number field, it will ask for a Local Number, so don't check the box if this not something your country has.

4. Populate the 'Invoice From Code' field to have an RTA identifier associated with the new legal entity that is being setup.

This is useful if the supplier has multiple RTA's and can be used to differentiate between them. The supplier can populate this field with a code of their choice.

Once you fill in your company's information, click **SAVE & CONTINUE**

## Where do you want to receive payment?

1 2 3 4

\* Payment Type Bank Account ▾

Address  
Bank Account  
Virtual Card

1

Banking informa

Bank Account Country: United States ▾

Bank Account Currency: ▾

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number: Routing Numt ▾

Account Number:  *i*

Confirm Account Number:

IBAN:  *i*

SWIFT/BIC Code:  *i*

Bank Account Type: Business ▾

2

### RECOMMENDED

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't have it already - please use their payment info change process (which may be outside of Coupa for some buying organizations). *i*

Bank address

Address Line 1:

Address Line 2:

City:

State: Select an Option ▾

Postal Code:

3

## Set Up Remittance Information with Banking

1. From the dropdown, select **BANK ACCOUNT** to display the banking fields
2. Please enter the applicable banking fields on this screen. The bank country and Routing field will default from the country you chose on the first screen of the Remit-To screen.
3. We do not require the address of the bank.
4. Once you fill in your company's banking information, click **SAVE & CONTINUE**

What is your Remit-To Address?

Address Line 1 123 Some Street

Address Line 2

City Anytown

## 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 My Bank *****4321 123456789	123 Some Street Anytown TX 78613 United States	Active	Manage

1

Deactivate Legal Entity

Cancel

Next

## Account Verification

1. Verify the Remittance information displayed on the screen. If everything is correct, click **NEXT**.

If you need to edit the information, click **MANAGE** to return to the data entry screens.

## Where do you ship goods from?

1 2 3 4

For many countries 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	
123 Some Street Anytown TX 78613 United States	Active	Manage

1

Deactivate Legal Entity

Done

1. Verify the Shipping information displayed on the screen. If everything is correct, click **DONE**.

If you need to edit the information, click **MANAGE** to return to the data entry screens.

## Setup Complete



Congratulations!

This legal entity can now be used on new invoices.

**To get paid** - Most customers require that you send them this payment info in **in addition to providing it on the invoice.** 

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

[Go to Orders](#)

[Go to Invoices](#)

[Return to Admin](#)

[Done](#)

# Invoicing in Coupa




# How to Invoice Using Coupa







Log into the Coupa Supplier Portal: <https://supplier.coupahost.com/sessions/new>

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the Coupa logo and 'supplier portal' text. On the right, there are links for 'FIRST', 'NOTIFICATIONS 1', and 'HELP'. Below this is a main navigation menu with tabs for 'Home', 'Profile', 'Orders' (highlighted in green), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Under the 'Orders' tab, there are sub-tabs for 'Orders', 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', and 'Shipments'. A 'Select Customer' dropdown menu is set to 'IQVIA', with a 'Configure PO Delivery' button next to it. Below this is a section titled 'Purchase Orders' with 'Instructions From Customer' and a paragraph of text. A callout box says 'Click the [gold coin icon] Action to Accept the Purchase Order and Create an Invoice using its data'. At the bottom, there is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The first row (PO 1935) has a red box around the gold coin icon in the Actions column, with a red circle containing the number '2' next to it. The second row (PO 1932) also has a gold coin icon in the Actions column.

**Instructions From Customer**

Please make sure to "Acknowledge" your Purchase Order prior to creating an Invoice against the PO. Failure to acknowledge your PO, and/or failure to request an update to the PO by contacting the Requester, may result in delays to invoice processing & payment if the quantity, amount or price you are invoicing is higher than the Purchase Order.

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
1935	2020-04-17	Issued	2020-04-29	1 Each of ASSET MULTI 1 Each of ASSET MULTI 1 Each of ASSET MULTI 1 Each of ASSET MULTI	No	6,000.00 USD	  
1932	2020-04-17	Issued	None	1 Each of ASSET MULTI 1 Each of ASSET MULTI 1 Each of ASSET MULTI 1 Each of ASSET MULTI	No	6,000.00 USD	  

1. Navigate to the 'Orders' tab and select customer
2. Click gold coin icon under the Actions column for the relevant PO

# Selecting Entity, Remittance and Shipping addresses

Choose Invoicing Details

1 \* Legal Entity First Time Set Up + Add New

Invoice From GST Identifiant RTA  
16720 Trans-Canada Highway  
Kirkland, Quebec H9H 5M3  
Canada  
Canada (123456789)

2 \* Remit-To Select + Add New

\* Ship From Address Select + Add New

3

Cancel

Please note that you will need to select the remit-to address only if you have several different bank accounts set in Coupa. Otherwise, this will be automatically populated.

1. Select the Legal Entity
2. Select the Remit-To
3. Select the Ship From Address

You can confirm you have selected the correct legal entity by checking the RTA Identifier (*this will only be visible if it was entered during setup*) on the Invoice from field.



# Creating the Invoice

coupa supplier portal

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons Setup

Select Customer IQVIA

Create Invoice Create

General Info

1 \* Invoice #

\* Invoice Date 2020-04-29

\* Payment Term ZB45\_N45

Date of Supply 2020-04-29

\* Currency USD

Delivery Number

Status Draft

Image Scan Choose File No file chosen

Supplier Note

Attachments Add File | URL | Text

From

\* Supplier NOT IN EBX Upside Learning Solutions Pvt. Ltd. C0001242OLD

\* Supplier GST/HST ID 123456789 2

\* Invoice From Address First Time Set Up GST Identifiant RTA 16720 Trans-Canada Highway Kirkland, Quebec H9H 5M3 Canada 123456789

\* Remit To Address First Time Set Up GST Identifiant RTA 16720 Trans-Canada Highway Kirkland, Quebec H9H 5M3 Canada

Bank Name: Name of Bank

Bank Account Number: \*\*\*\*\*4321

Routing Number: 123456789

\* Ship From Address First Time Set Up GST Identifiant RTA 16720 Trans-Canada Highway Kirkland, Quebec H9H 5M3 Canada

1. Populate the Invoice # field with your invoice number
2. Select the Invoice Date – it should not exceed more than 2 months
3. Add the original invoice as attachment

4. Only for Canadian Suppliers:  
If multiple GST/HST numbers were adding during RTA creation, then you can select the GST/HST number to use from the drop down menu

If QST/PST populated during supplier RTA creation then this will appear under the 'Invoice From Address' section

# Adding Taxes to the Invoice **only!!!!!!** for Canadian Suppliers

At Invoice line level, select the tax type and the tax rate intended for the invoice.

Lines

Type	Description	Qty	UOM	Price
	ASSET MULTI	1	Each	1,500.00

PO Line 1932-1 Contract Supplier Part Number

Billing A-US26300057-US265X999999--1023040000-N/A-DUMMY\_ASSET--15700000

Taxes

Tax Type	Tax Rate	Tax Amount	Tax Reference
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00	

1 2

GST  
HST  
PST  
QST  
Add Tag

Lines

Type	Description	Qty	UOM	Price
	ASSET MULTI	1	Each	1,500.00

PO Line 1932-1 Contract Supplier Part Number

Billing A-US26300057-US265X999999--1023040000-N/A-DUMMY\_ASSET--15700000

Taxes

Tax Type	Tax Rate	Tax Amount	Tax Reference
GST	5.0%	75.00	
HST	15.0%	225.00	

1

Add Tag

If multiple taxes need to be assigned click the **green +** icon and populate the taxes accordingly.

# Calculating the Invoice Total

- 1. Click 'Calculate' to ensure the tax is included on your invoice
- 2. Click 'Submit' to send the invoice to IQVIA

**Totals & Taxes**

Lines Net Total	6,000.00
Lines Tax Totals	300.00

---

Shipping

Tax   0.000

+ Tax Reference

---

Misc

Tax   0.000

+ Tax Reference

---

Total Tax	300.00
Net Total	6,000.00
<b>Gross Total</b>	<b>6,300.00</b>

1 2

Delete Cancel Save as Draft **Calculate** **Submit**

A popup box will appear confirming you are ready to send, click the 'Send Invoice' button.

**Are You Ready to Send?** ✕

Coupa is about to create an invoice on your behalf. Please make sure you are not attaching another invoice to this transaction as the Coupa generated PDF is your and your customers legal invoice.

1

Continue Editing **Send Invoice**

# Viewing Invoices

Select Customer IQVIA

### Instructions From Customer

Please make sure to "Acknowledge" your Purchase Order prior to creating an Invoice against the PO. Failure to acknowledge your PO, and/or failure to request an update to the PO by contacting the Requester, may result in delays to invoice processing & payment if the quantity, amount or price you are invoicing is higher than the Purchase Order.

### Create Invoices

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
CR_Canada Demo	12/16/19	Pending Approval	1355	-1,563,312.00 PKR	No	
Canada_Demo1	12/16/19	Disputed	1343	10,005.00 IDR	Yes	
CR_12345	12/05/19	Pending Approval	1413	-1,500.00 USD	No	
TEST123_INV	12/05/19	Pending Approval	1414	1,500.00 USD	No	
123test	12/04/19	Disputed	1414	1,500.00 GBP	Yes	
INV_1234567	11/27/19	Pending Approval	1413	4,500.00 USD	No	
CN_Test	11/25/19	Approved	1366	-10,000.00 USD	No	
CR_PO1299	11/25/19	Approved	1299	-1,000.00 USD	No	
INV_GermanProjects	11/07/19	Approved	1395	5,000.00 USD	No	
INV_1338	11/05/19	Voided	1338	20,000.00 INR	Yes	
INV_1366	11/05/19	Approved	1366	62,000.00 USD	No	
INV_1354	11/04/19	Disputed	1354	1,563,312,000.00 PKR	Yes	
None	11/04/19	Draft	1355	1,563,312.00 PKR	No	
INV_1353	11/04/19	Disputed	1353	360,000.00 SGD	Yes	

From the invoices tab, you can see the status of your invoices, view invoices by status and see the reason an invoice was disputed.

Create Invoices

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View Disputed Search

Invoice #	Invoice Date	PO #	Total	Disputed Date	Commented	Dispute Reason	Actions
Canada_Demo1	12/16/19	1343	10,005.00 IDR	12/16/19	12/16/19	This is an invoice for countries (Paper Invoice is required)	
123test	12/04/19	1414	1,500.00 GBP	12/04/19	12/04/19	Invoice currency does not match PO currency	
INV_1354	11/04/19	1354	1,563,312,000.00 PKR	11/04/19	11/04/19	This is an invoice for countries (Paper Invoice is required)	
INV_1353	11/04/19	1353	360,000.00 SGD	11/04/19	11/04/19	This is an invoice for countries (Paper Invoice is required)	

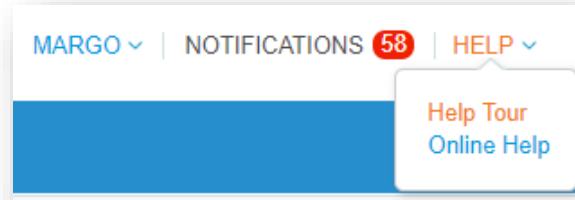
- All
- Abandoned
- Approved
- Credit Notes
- Disputed**
- Disputes with a supplier response
- Disputes without supplier response
- Draft
- Payment Information
- Pending Approval
- Processing
- Test
- Voided
- Create View

# Who to Contact for Help



# Navigate and Get Help

- ❖ When you log in for the first time, you are greeted by the **Help Tour** ([welcome tour](#)) on the **Home** screen.
- ❖ You can click on CSP Online **Help** – in the top right corner of the page to access the Online Help or to view the Help Tour any time.



- ❖ [Coupa Success Portal for Suppliers](#)
- ❖ For further inquiries, you may contact IQVIA Procurement Team at [procurement@iqvia.com](mailto:procurement@iqvia.com)