



IMS Health & Quintiles are now



COUPA for Suppliers

Coupa Supplier Portal (CSP) – Set up form

Covered topics

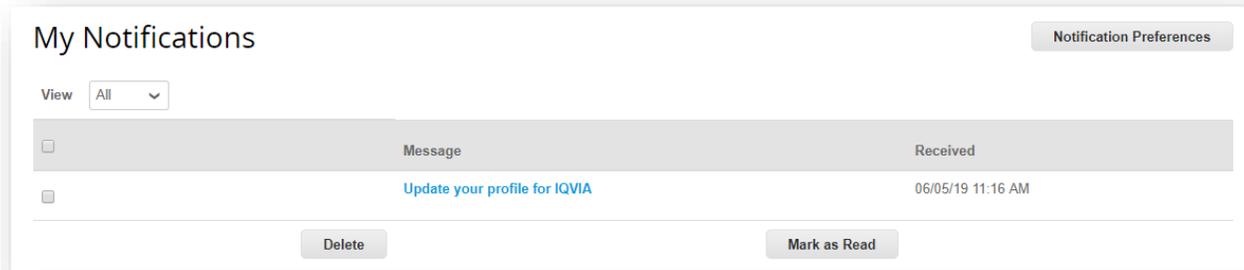
- + [Update IQVIA profile](#)
- + [Add a Remit-To Address](#)



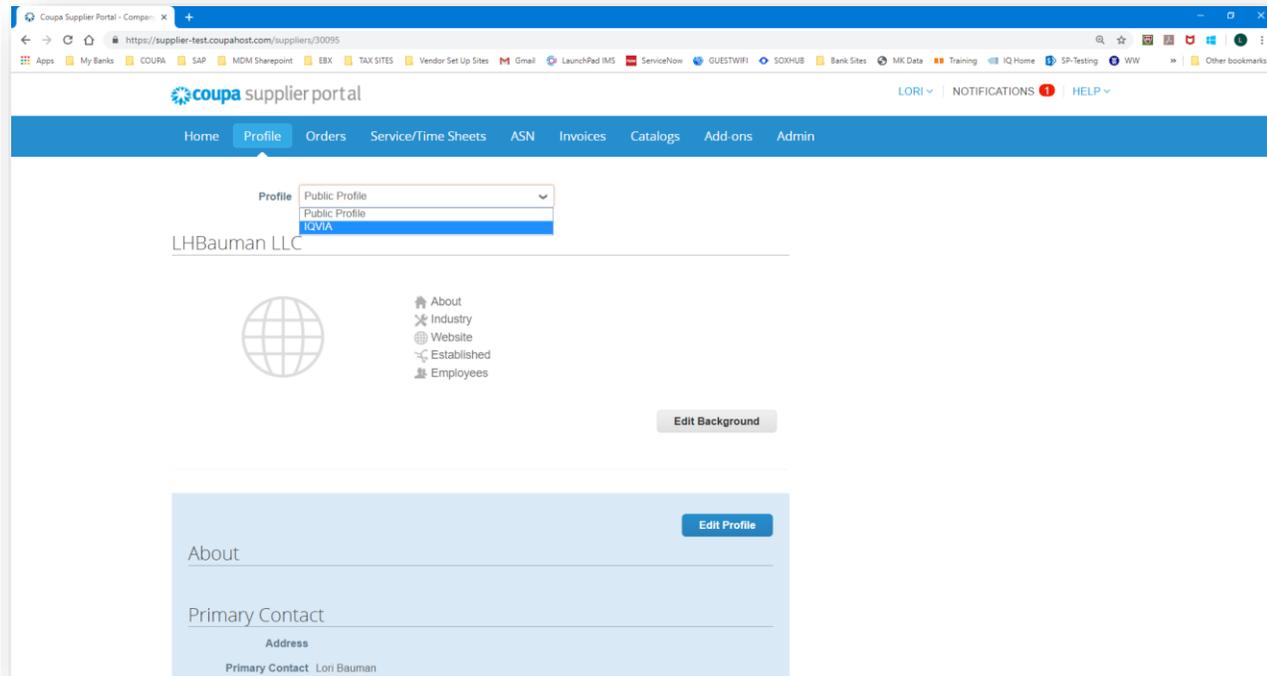
Update IQVIA profile

• There are two ways to update your IQVIA profile:

1. Navigate to **Notifications** and click on the **Update your profile for IQVIA** link



2. Go to Profiles and select **IQVIA** from the Drop-Down box:



- If you already submitted the Form for Approval, you will need to **Withdraw** the form by scrolling to the bottom of the screen and clicking Withdraw:



The screenshot shows a web interface for a Coupa form. At the top right, there is a grey button labeled "Withdraw" which is highlighted with a red rectangular border. Below this, there is a "Comments" section with a speech bubble icon and a dropdown arrow. Underneath the comments section is a large empty text input field. At the bottom right of the input field is a grey button labeled "Add Comment". The footer of the page features the Coupa logo, which consists of a gear icon followed by the word "coupa".

- Once the screen refreshes, you will be able to edit the profile.

Supplier Information LHBauman LLC

* Display Name LHBauman LLC

Doing Business As

Full Name of Company (Trading or Doing Business As Name of Business)

Parent Company Name

Official company name, when different to Display Name

Only populate if your Registered Name is different from that which you are doing business (i.e. you are registered with the IRS with a holding company and are doing business as another name)

* Intended Use TEST

Type of business

* PO Email lhbauman0524@gmail.com

* Remittance Email lhbauman0524@gmail.com

Guide For Tax Fields

Guide_For_Tax_Fields.docx

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

VAT Registration Number (please include country code in front of number for EU/UK)

Tax Number 1 Type Select an Option

Tax Number 1

Tax Number 2 Type Select an Option

Tax Number 2

Tax Number 3 Type Select an Option

Tax Number 3

This section only needs to be populated if your company is either in a country that has more than one type of tax or in a country that does not utilize VAT Registration numbers (i.e. France-SIRET/SIREN, US-FEIN, Poland- NIP etc.)

Not VAT Registered

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

* Preferred Currency USD

* Preferred Language English (en)

DUNS Number

Italy Date of Birth mm/dd/yy

Required for Independent contractors in Italy

Italy City of Birth

Required for Independent contractors in Italy

France Supplier Classification Select an Option

France DAS 2 Reporting

Diversity Disabled Person Owned Business Enterprise, Hubzone, Lesbian / Gay / Bisexual / Transgender Owned Business Enterprise, Minority Business Enterprise, US Supplier Diversity Programme

* First Name
Supplier Contact Information

* Last Name
Supplier Contact Information

* Email address ⓘ
Supplier Contact Information

Mobile Phone
650-555-1212
Supplier Contact Information

Work Phone
650-555-1212
Supplier Contact Information

Primary Contact for your company. This person can add additional users by inviting them in the admin section of the Coupa Supplier Portal.

Primary Address

Location Code

Address Name

PO Box

PO Box Postal Code

Street Address

Street Address 2

Postal Code

City

State Region

Country

The Primary Address should be the registered address of your company.

The next section "Remit to addresses" should only be used for adding remit to addresses. If you require changes to a remit to address that you have previously submitted to us please fill in this form (www.iqvia.com/suppliers/form) and submit to GlobalVendorSetup@iqvia.com.

Remit-To Address Lines

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

Add

Before submitting your form for approval, you must add a Remittance Address/Banking. This is very important and if this section is missed we will be unable to approve the form. To do this, click the ADD button.

Add a Remit-To Address

- If you have already created a Remit-to Location in the Admin section, you can select it here. If you have not created one, you will be able to create it now.

Choose Remit-To Address

Choose a Remit-to Location below - Recommended
*It's a few more fields, but provides compliance, verification, and re-usability.
Otherwise, click 'Cancel' to add info to you customer's form manually.*

Create new Compliant Remit-To Address

+ Create New

1510 Valley Center Pkwy
Ste 130
Bethlehem, PA 18017
United States
United States (211-11-1234)

Choose

Cancel

- Click **Create New** to either set up a Remit-to or to create an additional Remit-to Location
- The information you will be adding in this section is not configurable and there are a few details that you may have already populated on the IQVIA Form. These are fields required by Coupa and are necessary to create your location.

- 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

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**

Tell your customers about your organization

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 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](#)

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.

This address would be the same as your primary address. If you list a different address on your invoice in which you would receive a check, you would uncheck the Use this Address for Remit-To.

If you receive your payment electronically, and you don't want to enter multiple addresses, you can leave the box checked. (in this example, we are going to leave the box checked)

This would also apply to the Ship From Address.

Banking information i

Bank Account Country: ▼

Bank Account Currency: ▼

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number: ▼

Account Number: i

Account Number Confirm:

IBAN: i

SWIFT/BIC Code: i

Bank Account Type: ▼

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: ▼

Postal Code:

What is your Tax ID? i

Country ▼ ×

Tax ID

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code i

Preferred Language ▼

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.

We do not require the address of the bank.

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.

You can skip this section.

- 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

- In the appearing **Where do you ship goods from?** window, verify the information on the next screen and click **Done**

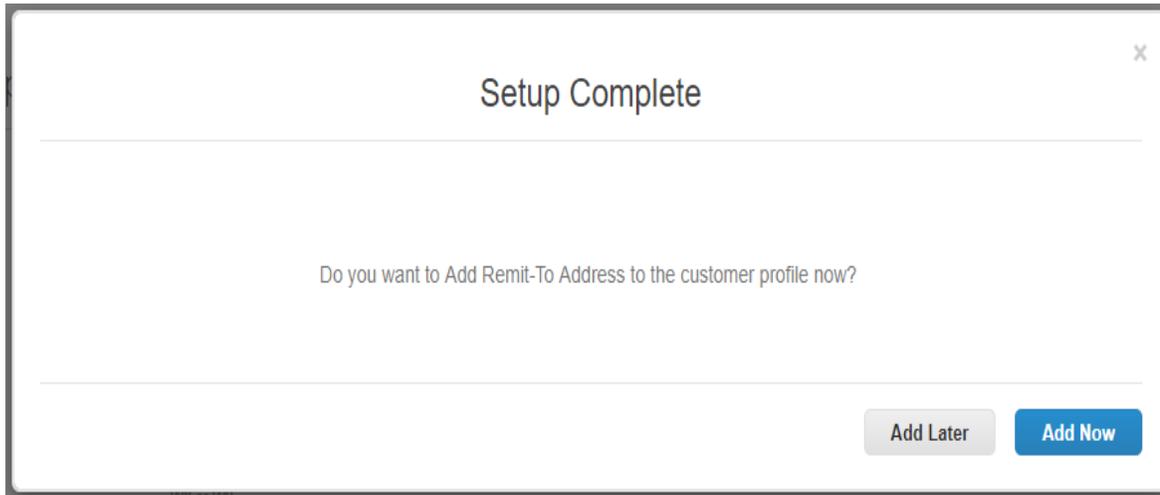
Where do you ship goods from?

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	
2341 Summit Ave. Brooklyn New York NY 11234 United States	Active	Manage

Deactivate Legal Entity Done



Once you reach the Setup Complete screen, click **Add Now**.

Primary Address

Location Code	
Address Name	
PO Box	
PO Box Postal Code	
Street Address	1234 Alley Way
Street Address 2	
Postal Code	18017
City	Bethlehem
State Region	PA
Country	United States

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Remit-To Address Lines

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Add

Address Name		✖
Street Address	1510 Valley Center Parkway	
Street Address 2		
Postal Code	18052	
City	Bethlehem	
State Region	PA	
Country	United States	
Beneficiary Name	LHB LLC	
Bank Account Number	*****123	
Bank Routing Number	123456789	i
IBAN Number		i
Sort Code		i
SWIFT Code (BIC)		i
Account Type		
Active	Active	

Decline Save **Submit for Approval**

The information you entered should now be located under the Primary Address.

Once you have verified that the Remit-to Location is visible, you can **submit the form for approval** and the IQVIA Vendor Setup Team will review your registration information.

If you have any questions or need help, feel free to reach out via e-mail (lori.bauman@iqvia.com)