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# COUPA for Suppliers

Coupa Supplier Portal (CSP) registration

# Covered Topics

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# Get Started with Coupa

# Coupa for Suppliers

- ❖ Suppliers can **receive Purchase Orders (PO)** and **submit Invoices** electronically.
- ❖ After receiving an invitation, you can create your CSP account. Supplier can log into the CSP using single or two-factor authentication for additional security.
- ❖ Suppliers who provide catalogues can **manage their catalogues** through a supplier portal called the “Coupa Supplier Portal” (CSP). Supplier can also update and setup public and customer-specific company profiles.
- ❖ Suppliers can **manage their own information** (e.g. change of address, phone numbers, etc.) through the CSP.
- ❖ New and existing suppliers can submit additional information via the **Supplier Information requests forms** when additional information are requested by IQVIA. Information gathering is facilitated through CSP.

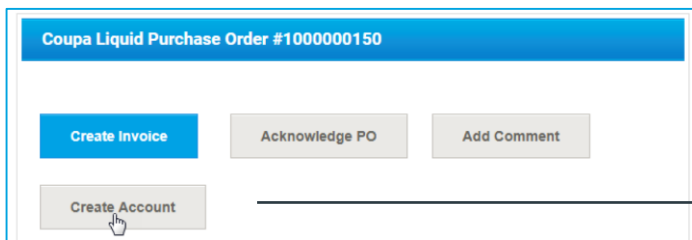
# Benefits of Coupa

- ❖ User friendly interface
- ❖ Direct communication (requester, procurement, accounts payable, etc.)
- ❖ More efficient process by implementing and e-Invoicing solution
- ❖ Standardized workflow and simple approvals
- ❖ One combined PO system
- ❖ Advantage of easily convert a PO to an invoice
- ❖ Supplier can easily track their POs and Invoice payments
- ❖ Systematic notification regarding transactions or invoice status

# Register for Coupa Supplier Portal

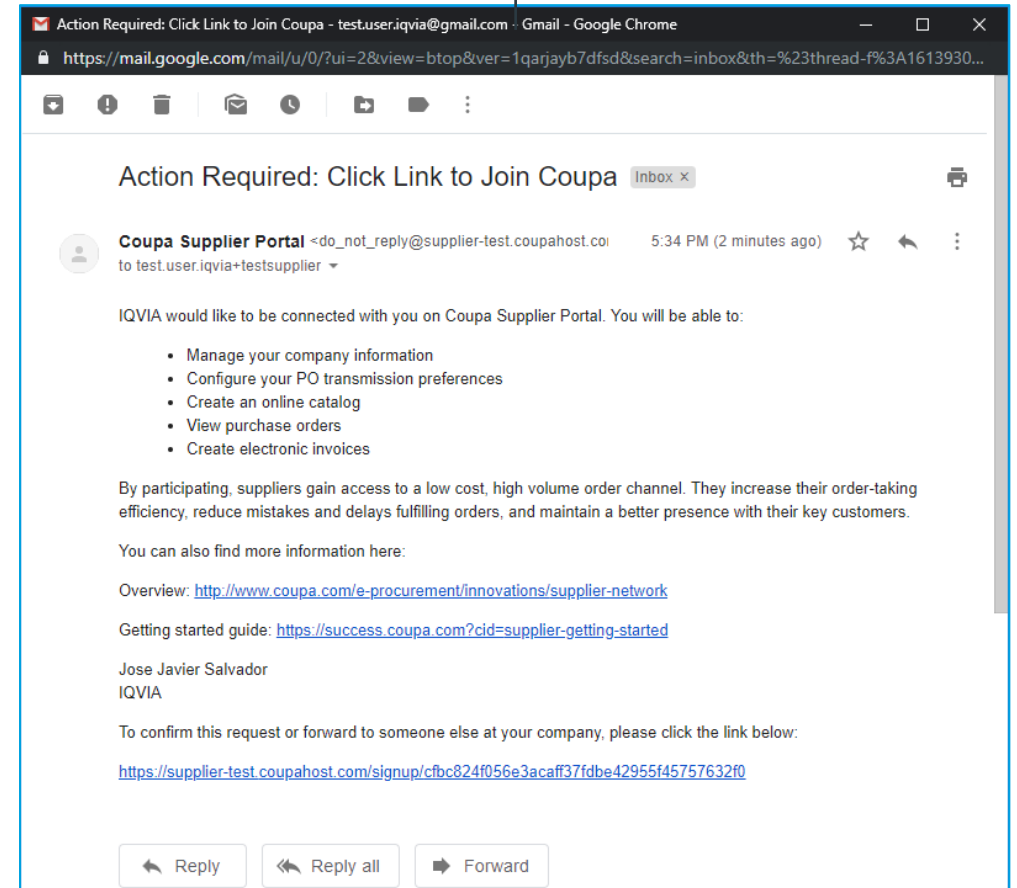
# Coupa Supplier Portal (CSP)

- ❖ 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

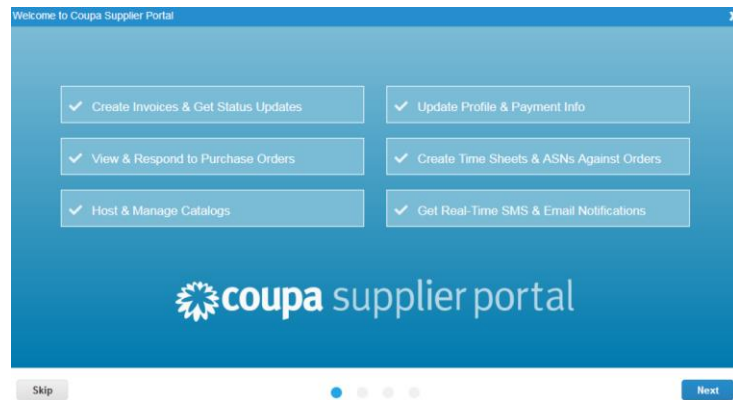
I accept the [Privacy Policy](#) and the [Terms of Use](#).



# Coupa Supplier Portal

## Getting started with CSP

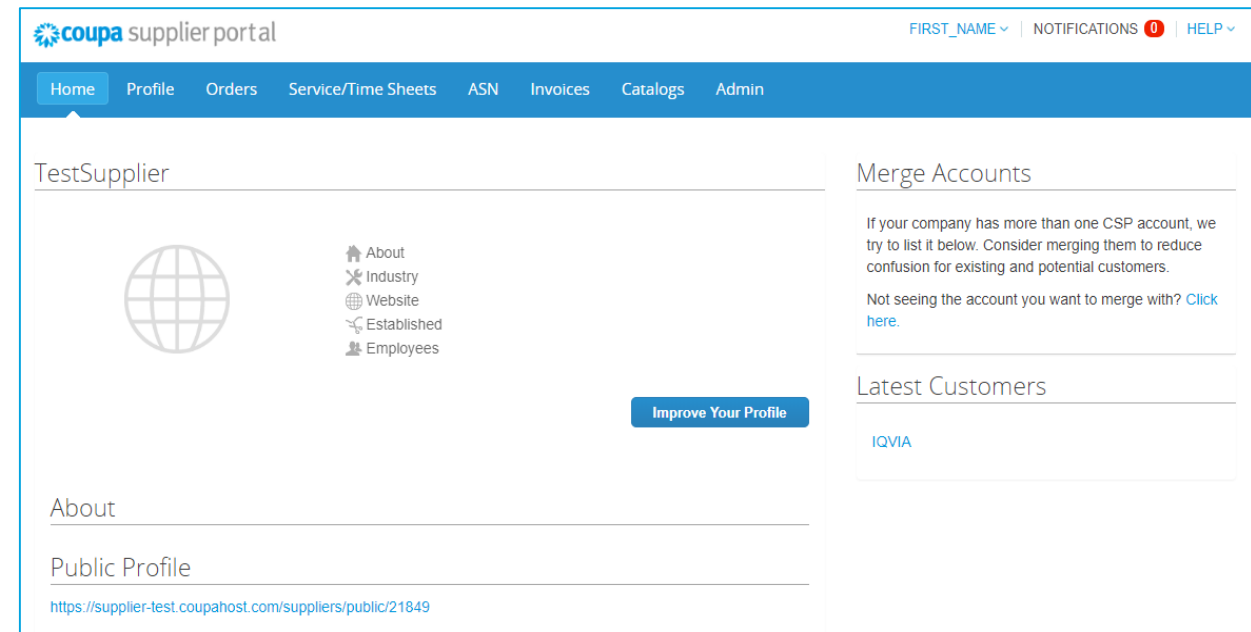
- ❖ On your first log in, Coupa takes you on a welcome tour.



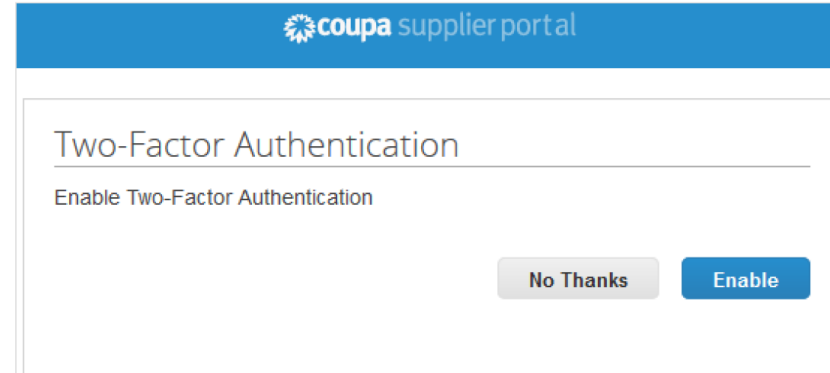
- ❖ Warning: After logging in to the CSP as a non-admin user, you can see a banner listing your existing permissions and the permissions you can request from your admins. CSP admins that manage users are also notified through a banner to check their users' permissions.

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



- ❖ When you log in for the first time, you are prompted to enable two-factor authentication. [Enable or Disable Two-Factor Authentication.](#)



Note: Some customers may require you to use two-factor authentication when accessing their information.

- ❖ If you have enabled two-factor authentication, the Two-Factor Authentication window opens when you want to log in to the CSP.

- ❖ At least all mandatory fields marked with \* should be entered.
- ❖ In case you would like to change or update information in Coupa, please trigger an update form from IQVIA.

Remit-to address: Please note in case additional information (hovering over the blue “i” icon) does not appear, use the red “X” to cancel the Remit-to Address form and start from step 3 again to complete the Remit-to address steps correctly by using “Create New”. This is only temporary issue and it should be resolve later this year.

**Supplier Information**

\* Display Name   
Doing Business As

Parent Company Name   
Official company name, when different to Display Name

\* PO Email  *i*

\* Remittance Email

\* First Name

\* Last Name

\* Email address  *i*

Mandatory information in case you are a new supplier.

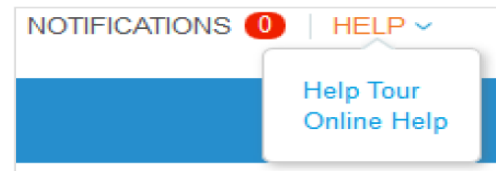
## What are next steps?

- ❖ Once a form has been submitted, it will be reviewed by IQVIA
- ❖ Form finalization within 3-5 business days
- ❖ Registration will be finalized by receiving email with confirmation

# Coupa navigate and get 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)