



IMS Health & Quintiles are now



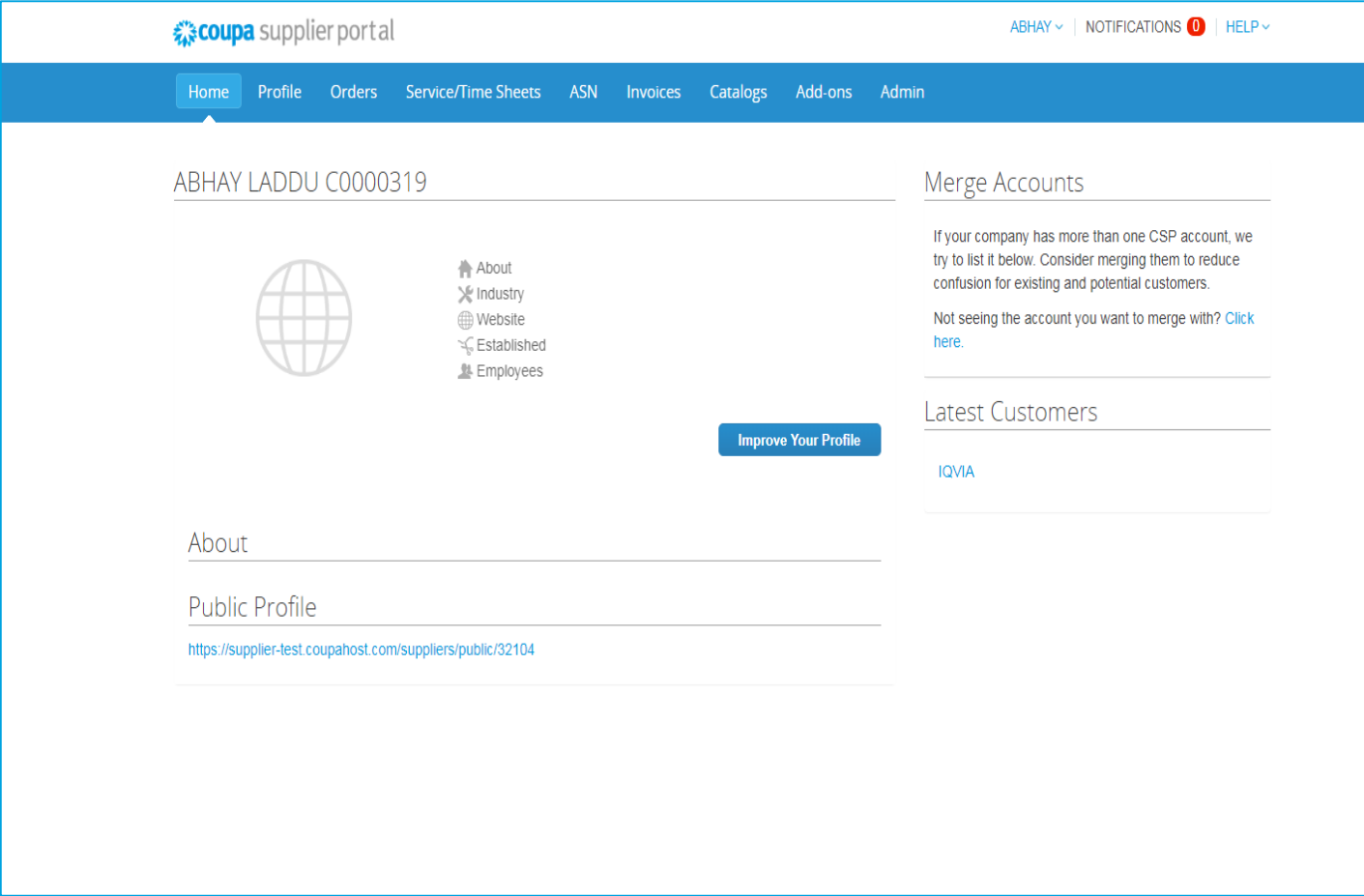
COUPA for Suppliers

Coupa Supplier Portal (CSP) – Manage your account

Covered topics

- + [Am I linked with IQVIA?](#)
- + [Create IQVIA's profile](#)
- + [Manage your account](#)
- + [Configure the PO Delivery Method](#)
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Main menu of Coupa Supplier Portal



Menu Item	Description
Home	View and improve your public company profile, see the list of customers you are connected to, edit your customer-specific company profile, and merge accounts. You can go to the Home page from any page by clicking on the Coupa Supplier Portal logo/link in the top left corner above the main menu.
Profile	Create, modify and manage your public and customer-specific profiles, and specify which remit-to addresses each customer use.
Orders	View the purchase orders you received from your customers.
Service/Time sheets	View the list of service/time sheets and related purchase order lines.
ANS	Send advance ship notice, that is, notifications about when you ship items to your customers.
Invoices	Create and manage invoices to send to your customers.
Catalogs	Create and manage customer-specific catalogs.
Add-ons	Access Coupa supplier add-ons, for example, Coupa Advantage, Coupa Accelerate, supplier profile update, and more.
Admin	Manage users, merge requests, and remit-to addresses, set up electronic invoicing, add fiscal representatives, view and accept the Terms of Use and set up preferred accelerated payments terms.

Am I linked with IQVIA?

How to make sure you are connected with IQVIA.

1. Log into CSP. CSP is available at <https://supplier.coupahost.com/>
2. On the **Home page** click on the **Profile** tab.
3. IQVIA should be visible in your **Profile drop-down list** as one of your customers.

Note: If you don't see IQVIA in drop-down list on **Profile page**, it means that you are not connected yet. That also means you are not able to see IQVIA in the **Select Customer** dropdown list on the **Purchase Orders, Advance Ship Notices, Invoices**, and **Catalogs** pages either. Please contact IQVIA on procurement@iqvia.com

01

02

In the CSP, you have a **public profile** and **specific profiles** for your customers who you are connected with. You can view and update your public and customer-specific profiles from the **Home** page or the **Profile** page.

Your **public profile** is created when you create your account and it contains general information about your company, for example, your name, logo, a description, and contact information.

On the **Home** page, click **Improve Your Profile > Edit Profile** to make changes.

The screenshot displays the Coupa Supplier Portal interface. At the top, the header includes the Coupa logo, the text 'supplier portal', and user information: 'ABHAY' with a dropdown arrow, 'NOTIFICATIONS' with a red badge showing '4', and 'HELP' with a dropdown arrow. Below the header is a blue navigation bar with the following links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The 'Home' link is highlighted with a red box and a red circle containing the number '1'. The main content area shows the user's name 'ABHAY LADDU C0000319' and a large globe icon. To the right of the globe is a list of links: About, Industry, Website, Established, and Employees. Below this list is a red box labeled '2' containing the 'Improve Your Profile' button. To the right of the main content area, there are two sections: 'Merge Accounts' and 'Latest Customers'. The 'Merge Accounts' section contains text about merging accounts and a link 'Click here'. The 'Latest Customers' section shows a single customer entry 'IQVIA'. At the bottom of the page, there is a section for 'About' and 'Public Profile' with a URL: 'https://supplier-test.coupahost.com/suppliers/public/32104'.

Create IQVIA's profile

To update IQVIA's profile, you have the following options:

1. Click on a IQVIA under the **Latest Customers** section on the **Home** page and click **Edit**.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes the Coupa logo, the text 'supplier portal', and user information 'ABHAY' with a dropdown arrow, 'NOTIFICATIONS' with a red badge showing '4', and a 'HELP' dropdown. Below this is a blue navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area displays the profile for 'ABHAY LADDU C0000319'. On the left, there is a globe icon and a list of links: About, Industry, Website, Established, and Employees. A blue button labeled 'Improve Your Profile' is positioned to the right of these links. Below the globe icon, there is a section titled 'About' and 'Public Profile' with a URL: <https://supplier-test.coupahost.com/suppliers/public/32104>. On the right side of the profile, there is a section titled 'Merge Accounts' with text explaining the purpose of merging accounts and a link 'Click here.' Below this, there is a section titled 'Latest Customers' which contains a single entry for 'IQVIA'. A red rectangular box highlights the 'Latest Customers' section, and a red circle with the number '01' points to it.

2. Or select the IQVIA from the **Profile** drop- down on the **Profile** page and click **Edit**.

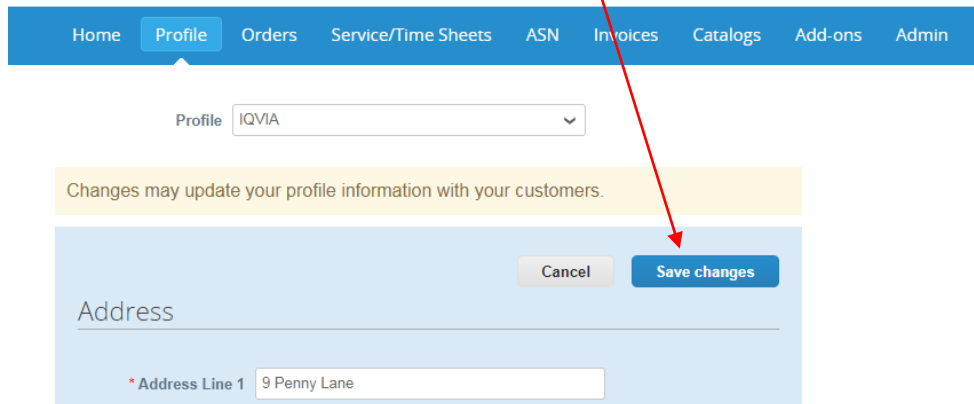
01

ABHAY LADDU C0000319

02

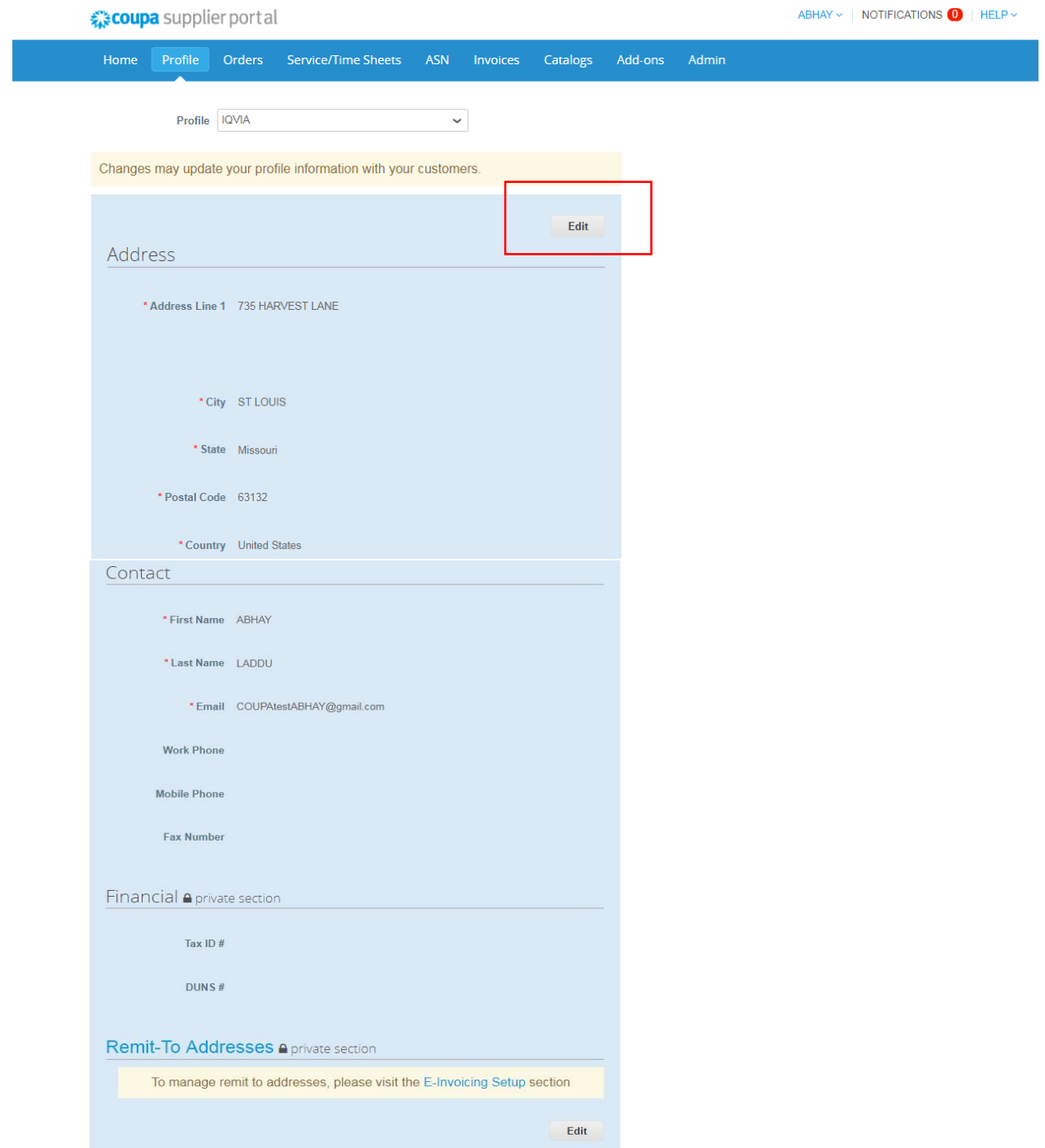
On the appearing page, to create a new IQVIA's specific profile :

- click on **Edit** button visible on the top right corner of the page,
- fill in the fields which are required,
- then click **Save Changes** (visible instead of Edit button on the top right corner of the page).



The screenshot shows the 'Profile' tab selected in the top navigation bar. Below the navigation bar, there is a dropdown menu for 'Profile' set to 'IQVIA'. A yellow banner states 'Changes may update your profile information with your customers.' Below this, the 'Address' section is visible with a text input field for 'Address Line 1' containing '9 Penny Lane'. At the bottom right of the address section, there are two buttons: 'Cancel' and 'Save changes'. A red arrow points from the 'Save changes' button in this screenshot to the 'Save Changes' button in the list above.

*Please keep your information accurate and up to date for each of your customers.



The screenshot shows the 'Profile' tab selected in the top navigation bar. Below the navigation bar, there is a dropdown menu for 'Profile' set to 'IQVIA'. A yellow banner states 'Changes may update your profile information with your customers.' Below this, the 'Address' section is visible with fields for 'Address Line 1' (735 HARVEST LANE), 'City' (ST LOUIS), 'State' (Missouri), 'Postal Code' (63132), and 'Country' (United States). Below the address section, the 'Contact' section is visible with fields for 'First Name' (ABHAY), 'Last Name' (LADDU), 'Email' (COUPAtestABHAY@gmail.com), 'Work Phone', 'Mobile Phone', and 'Fax Number'. Below the contact section, the 'Financial' section is visible with fields for 'Tax ID #' and 'DUNS #'. Below the financial section, the 'Remit-To Addresses' section is visible with a message: 'To manage remit to addresses, please visit the E-Invoicing Setup section'. At the bottom right of the page, there is an 'Edit' button highlighted with a red box.

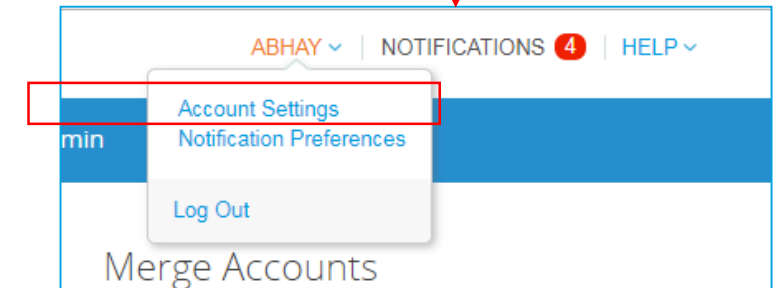
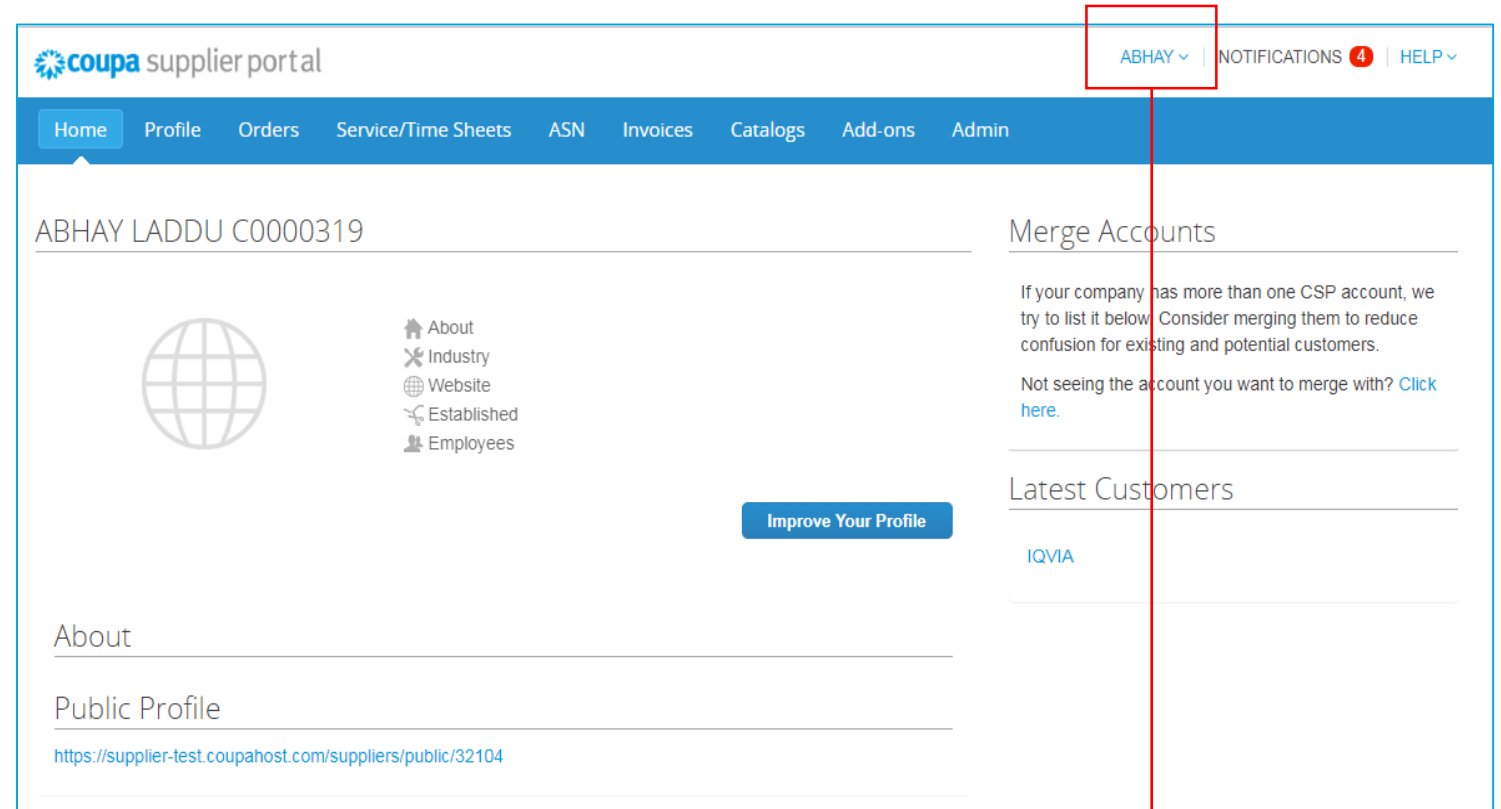
Manage Your Account

To change your account settings :

- click on your name link
- and click on the **Account Settings** link

On the **My Account** page you can make changes to your:

1. personal information (name, photo, and password),
2. notification preferences,
3. enable/disable two-factor authentication.



1. Personal Information

On the appearing **My Account Password** page, fill in the fields you want to change, and then click **Save**. The asterisk (*) indicates mandatory fields.

Please note that ***Email** field can't be changed. If you want to change it, you have to create a new CSP account and connect it to your company.

The screenshot shows the 'My Account Password' page in the Coupa Supplier Portal. The page has a blue header with the Coupa logo and 'supplier portal' text, and a user dropdown menu showing 'ABHAY'. Below the header is a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is titled 'My Account Password'. On the left, there is a sidebar with links: Settings (highlighted in orange), Notification Preferences, Security & Two-Factor Authentication, and a blank link. The main form contains the following fields: * First Name (ABHAY), * Last Name (LADDU), * Email (COUPAtestABHAY@gmail.com), * Current Password (empty), Password (empty), and Password Confirmation (empty). A note below the Password field states: 'Use at least 8 characters and include a number and a letter.' A blue 'Save' button is located at the bottom right of the form.

coupa supplier portal ABHAY ▾

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

My Account Password

[Settings](#)

[Notification Preferences](#)

[Security & Two-Factor Authentication](#)

* First Name

* Last Name

* Email

* Current Password

Password

Use at least 8 characters and include a number and a letter.

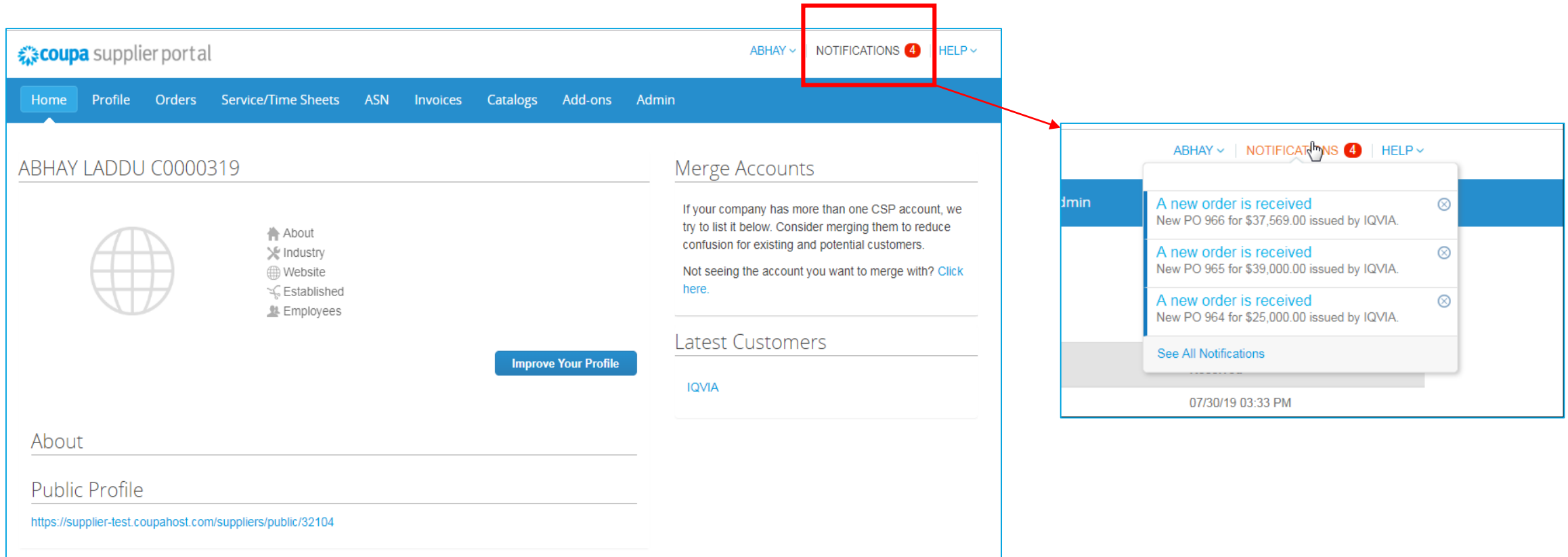
Password Confirmation

Save

2. View and Manage Notifications

Hover your cursor over the **Notifications** link to see your unread system notifications.

To view details of your notifications and to manage them, click on the **Notifications** link.



The screenshot displays the Coupa Supplier Portal interface. The top navigation bar includes the Coupa logo, the user name 'ABHAY', and the 'NOTIFICATIONS 4' link, which is highlighted with a red box. Below the navigation bar, the main content area shows the user's profile information, including the name 'ABHAY LADDU C0000319' and a 'Public Profile' link. The right sidebar contains sections for 'Merge Accounts' and 'Latest Customers'. A red arrow points from the 'NOTIFICATIONS 4' link to a detailed view of the notifications, which shows a list of three notifications: 'A new order is received' for New PO 966, New PO 965, and New PO 964, all issued by IQVIA. The notifications are listed with their respective amounts and a 'See All Notifications' link at the bottom. The date and time '07/30/19 03:33 PM' are displayed at the bottom of the notifications panel.

On the **My Notifications** page, you can view all your (read and unread) notifications, or you can filter by category (FYI, Todo, or Unread). You can select and delete them all or one-by-one.

coupa supplier portal

ABHAY ▾ **NOTIFICATIONS 4** ▾ HELP ▾

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

My Notifications

Notification Preferences

View ▾

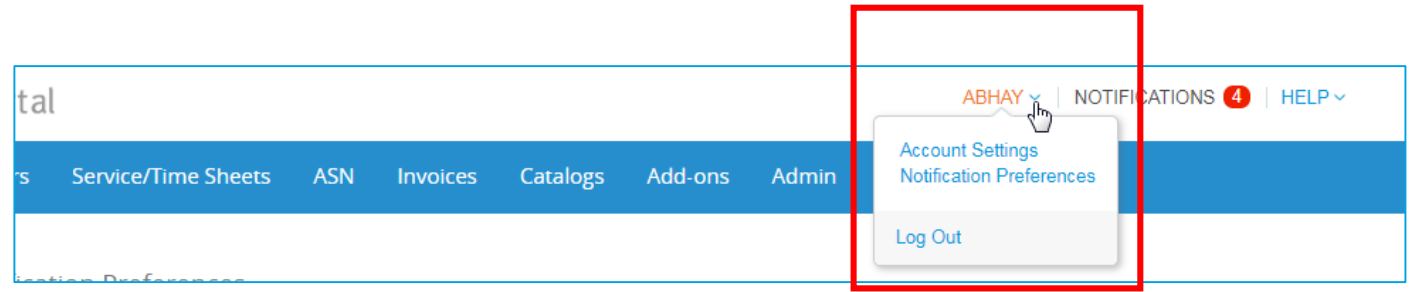
- All
- FYI
- Todo
- Unread
- Announcements

	Message	Received
<input type="checkbox"/>	New PO 966 for \$37,569.00 issued by IQVIA.	07/30/19 03:33 PM
<input type="checkbox"/>	New PO 965 for \$39,000.00 issued by IQVIA.	07/30/19 03:25 PM
<input type="checkbox"/>	New PO 964 for \$25,000.00 issued by IQVIA.	07/30/19 03:24 PM
<input type="checkbox"/>	New PO 963 for \$750.00 issued by IQVIA.	07/30/19 03:21 PM

Delete Mark as Read

To change your notification preferences:

- click on your name link in the top right corner.
- click on the **Notification Preferences** link

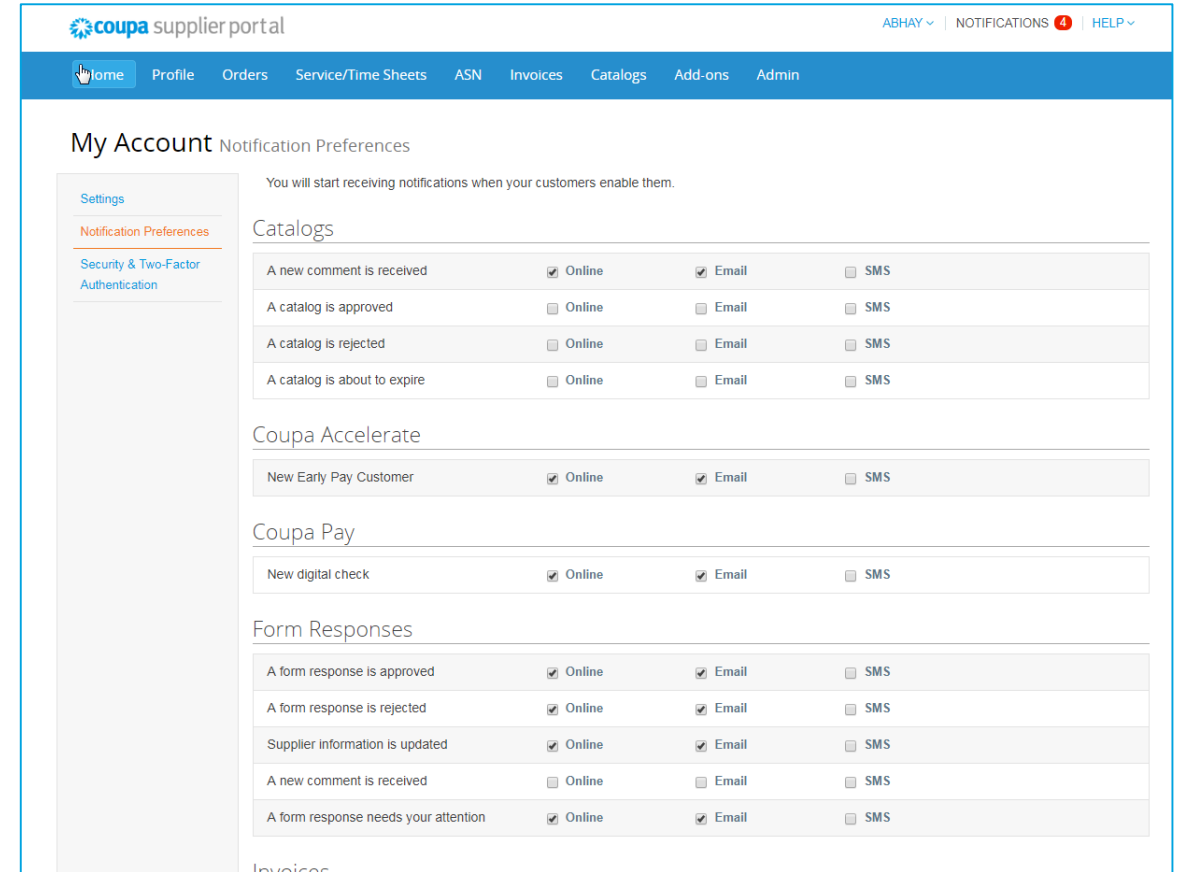


On the appearing **My Account Notification Preferences** page, select the radio buttons for the items that you want to receive any or all of the notification types:

- online (to do list)
- Email
- SMS (short text message)

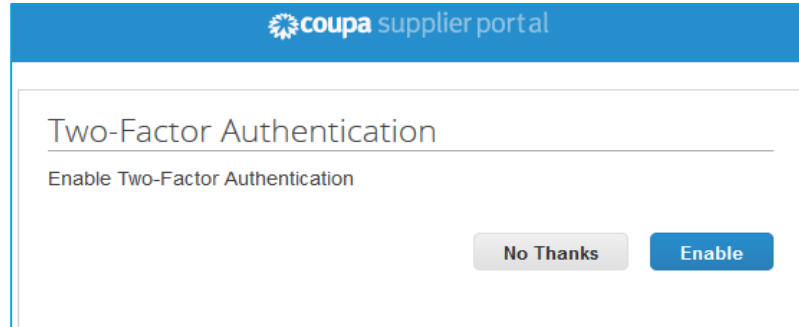
If you change your notification preferences, remember to save them!

SMS notifications are turned off by default. Your SMS notification selections are deleted if you disable mobile phone verification. For more information, see [Enable or Disable Two-Factor Authentication](#).



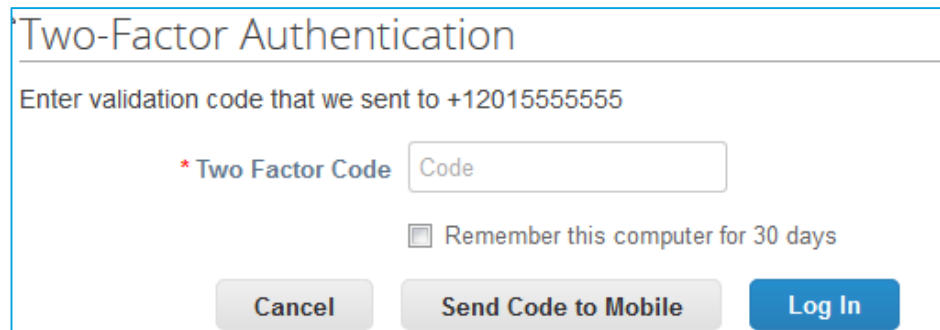
3. Two-factor authentication

When you log in for the first time, you are prompted to enable two-factor authentication.



The screenshot shows the 'coupa supplier portal' header. Below it, a box titled 'Two-Factor Authentication' contains the text 'Enable Two-Factor Authentication'. At the bottom right of the box are two buttons: 'No Thanks' and 'Enable'.

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



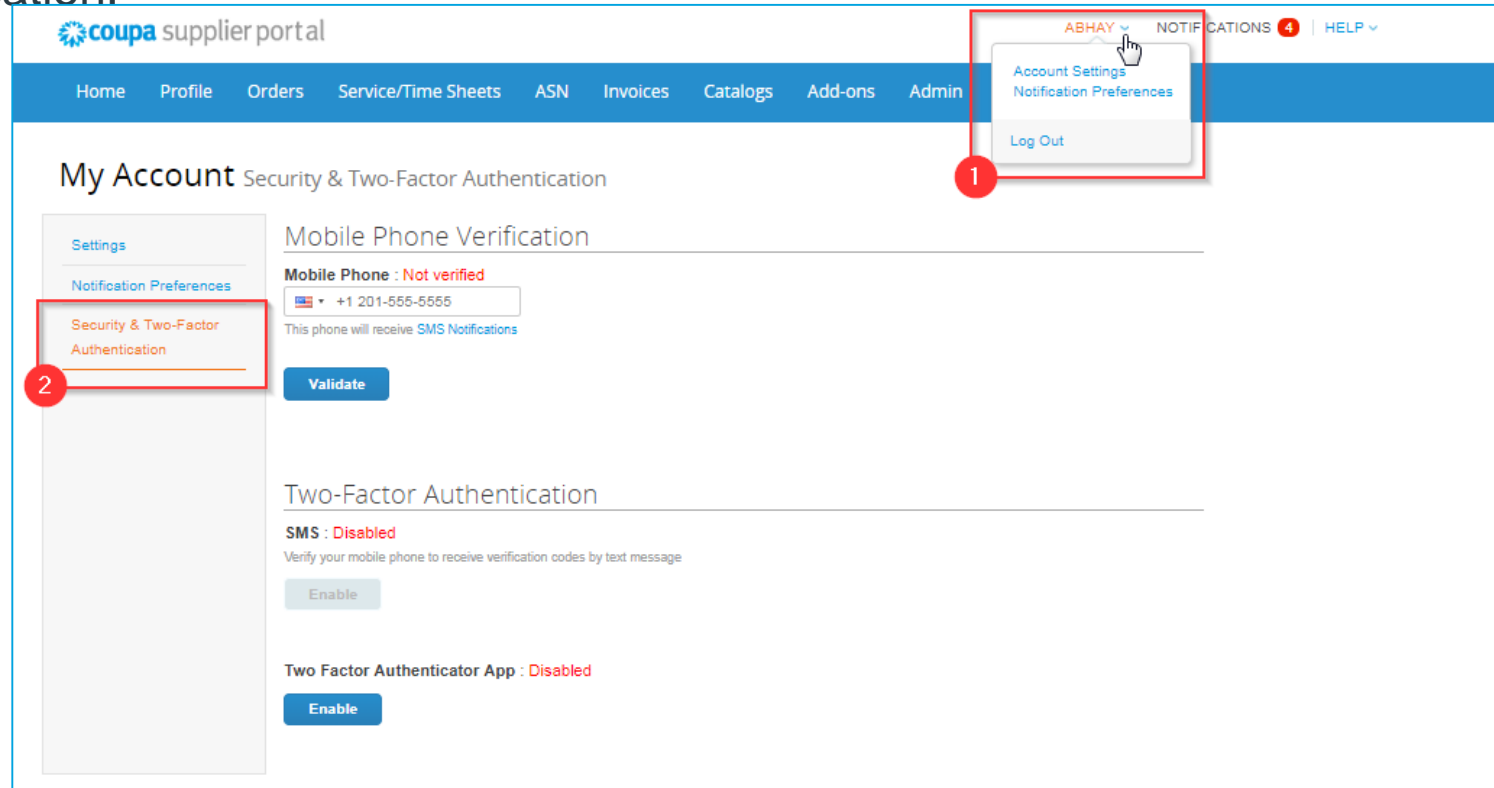
The screenshot shows a 'Two-Factor Authentication' window. It prompts the user to 'Enter validation code that we sent to +12015555555'. Below this is a label '* Two Factor Code' next to a text input field containing the placeholder text 'Code'. There is a checkbox labeled 'Remember this computer for 30 days'. At the bottom are three buttons: 'Cancel', 'Send Code to Mobile', and 'Log In'.

If you enabled two-factor authentication for SMS, check your text messages to get the verification code.

Type the two-factor authentication code in the appropriate field, choose **Remember this computer for 30 days** if you're not using a shared or public computer, and click **Log In**.

Manage Two-factor authentication

On the **My Account** page, click on the **Security and Two-Factor Authentication** link to enable or disable two-factor authentication.



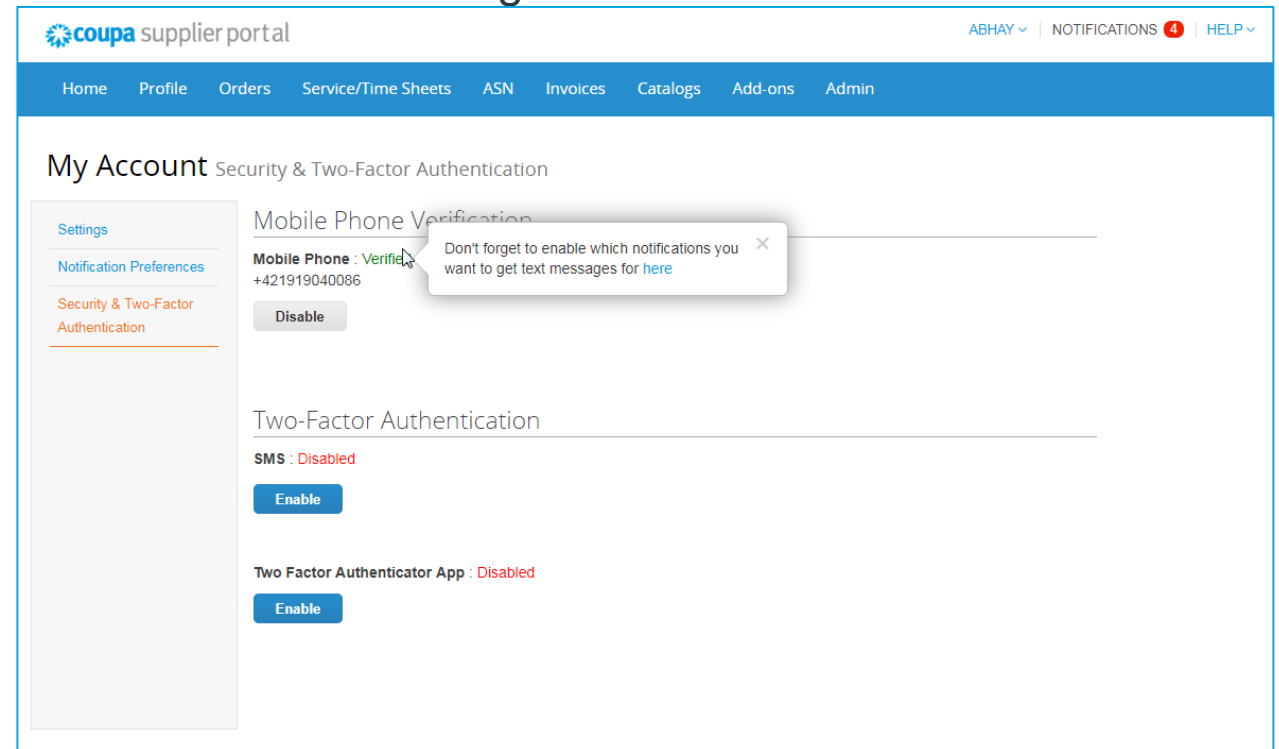
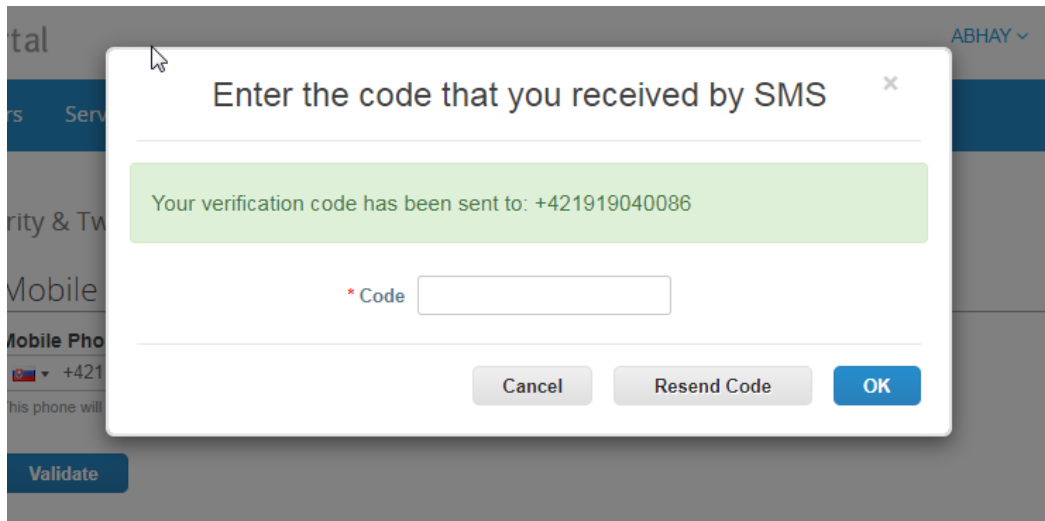
Under **Two-Factor Authentication** click **Enable**

- for [SMS](#) or
- for [Two Factor Authenticator App](#) depending on how you want to receive the verification codes.

Two Factor Authenticator - SMS

If you want to receive SMS notifications or verification codes, you must enter and validate your phone number under **Mobile Phone Verification**.

After successful validation, you receive the verification codes in text messages.



Two Factor Authenticator - App

For installing and using **Google Authenticator**, follow the on-screen Instructions.

- keep unauthorized users out of your password and your phone
- set up two/factor authentication codes with these 3 easy steps
- you will only be asked to enter validation codes once every 30 days, or when you try to log in from a different computer

Choose **Remember this computer for 30 day** if you're not using a shared or public computer, and click **Enable**.

Print your backup codes or email them to yourself before you click **OK**. If you ever lose your device, you need these to regain access to your CSP account.

Note: You can only use a recovery code once, so refresh your list if you have to use a recovery code. Go to **Account Settings > Security & Two-Factor Authentication** and click **Regenerate Recovery Codes** to get a new list of codes.

Two-Factor Authentication

Keep unauthorized users out of your account by using both your password and your phone. Setup your two-factor authentication codes with these 3 easy steps. You will only be asked to enter validation codes once every 30 days, or when you try to login from a different computer.

1. Download Google Authenticator mobile app

Download on the App Store | GET IT ON Google play

2. Scan this QR code using Google Authenticator app

3. Enter the 6-digit validation code - open your mobile device's 'Google Authenticator' app to get this. If you lost your phone or deleted the app, use a backup code to get logged in.

Two Factor Code

☐ Remember this computer for 30 days

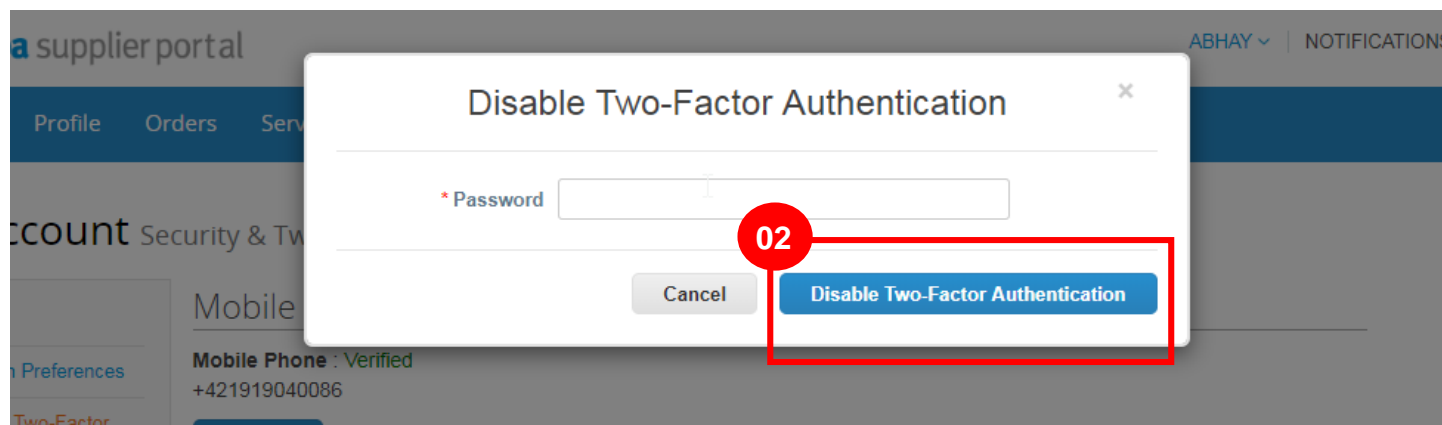
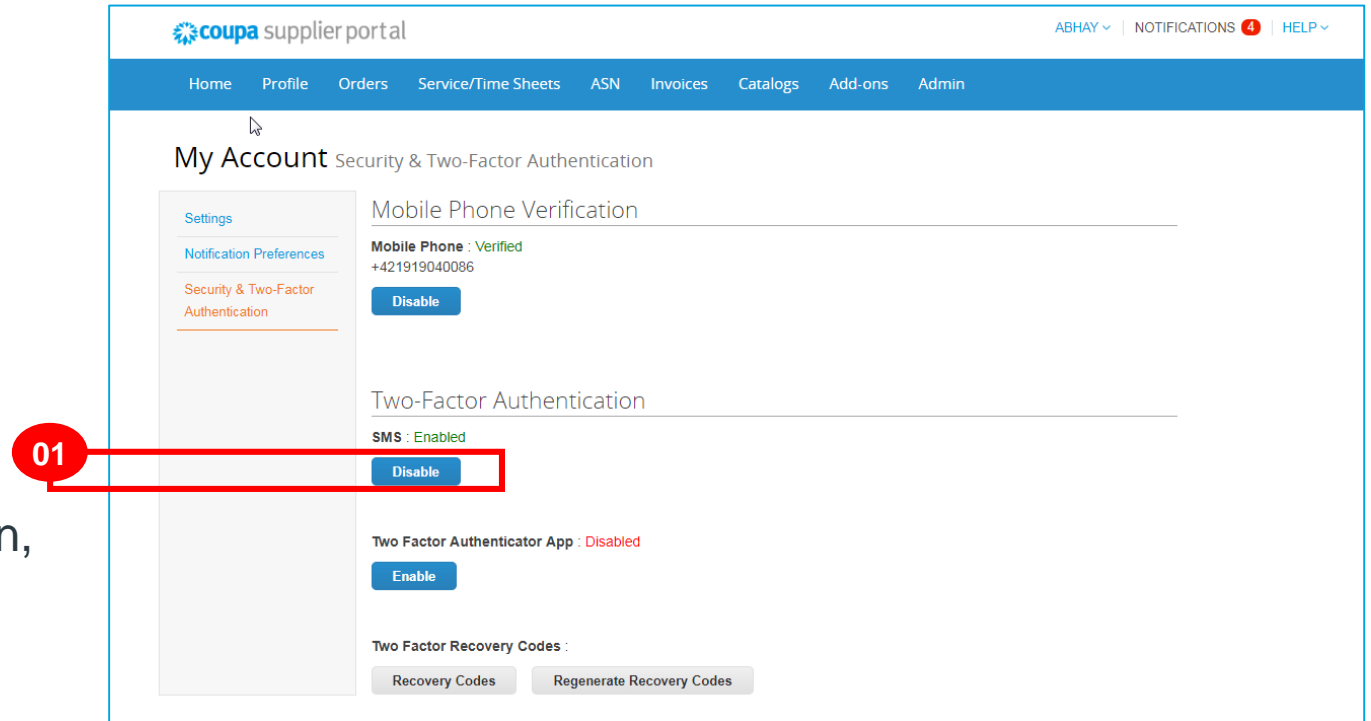
No Thanks. Continue without additional security | Enable

Disable two-factor authentication

Under Two-Factor Authentication:

- click **Disable** for **SMS** or for **Two Factor Authenticator App**
- in the appearing window, enter your CSP password
- click **Disable Two-Factor Authentication**.

If you enable or disable two-factor authentication, you get an email notification of the change.



Configure the PO Delivery Method

Configure the PO Delivery Method

You can configure how you receive POs from IQVIA.

1. On the **Purchase Orders** or **Purchase Order Lines** page, select the IQVIA whose settings you want to modify and click on the **Configure PO Delivery** button.
2. In the appearing window, **select your PO delivery method (cXML or Email)** and provide the necessary information.

Purchase Orders

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 Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
966	07/30/19	Issued	None	test supplier 2 lines test supplier 2 lines_2	No	37,569.00 USD	
965	07/30/19	Issued	None	test supplier project	No	39,000.00 USD	
964	07/30/19	Issued	None	test supplier PS asset	No	25,000.00 USD	
963	07/30/19	Issued	None	5 Each of Test supplier 1	No	750.00 USD	

Configure PO Delivery for IQVIA

You can let your customers know how you can receive purchase orders. Your customers will be able to select from these options to send you purchase orders. When you fill out these fields, they will be sent to your customer.

Purchase Order Method: Email

PO Email: poemail@iqvia.com

CXML URL:

CXML Domain:

CXML Identity:

CXML Supplier Domain:

CXML Supplier Identity:

CXML Secret:

CXML Protocol:

Cancel OK

If you select email delivery method, this specific email address will be the only one for receiving all notification regarding new purchase orders raised for you.

PO delivery settings

Column	Description
Purchase Order Method	Choose how to receive POs from IQVIA : <ul style="list-style-type: none">• Email: Coupa automatically emails POs to the email address you enter.• cXML: Coupa sends the PO via cXML. You have to enter the cXML settings to use this option.
PO Email	This field is required for receiving POs via email. Coupa sends POs to this email address. To specify multiple addresses, separate them with a comma.
cXML URL	The full PO routing URL to receive POs.
cXML Domain	Part of the From section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it's usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
cXML Identity	Your customer's <code>DUNS</code> or <code>NetworkID</code> .
cXML Supplier Domain	Part of the To section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it's usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
cXML Supplier Identity	Your <code>DUNS</code> or <code>NetworkID</code> .
cXML Secret	A password that you and the customer agreed upon. If no shared password is specified, Coupa automatically passes <code>none</code> .
cXML Protocol	This field should always be <code>cxml</code> .



Manage Users

You can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform with their assigned customers.

Click on the **Admin** tab on the main menu. The **Admin Users** page appears.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin' (highlighted with a red box and number 1). The 'Admin Users' section is visible on the left, with 'Users' highlighted (number 2). The main content area displays a table with columns: 'Users', 'Permissions', and 'Customer Access'. A row shows user 'ABHAY LADDU' with email 'COUPAtestABHAY@gmail.com' and permissions for ASNs, Admin, Catalogs, Invoices, Orders, Payments, Profiles, and Service/Time Sheets. An 'Edit' button is next to the user name. An 'Invite User' button (number 3) is located at the top right of the table, with a red arrow pointing to a modal window titled 'Invite User'. The modal contains fields for 'First Name', 'Last Name', and 'Email'. Below these are two sections: 'Permissions' and 'Customers'. The 'Permissions' section has checkboxes for 'All', 'Admin', 'Orders', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', and 'Payments'. The 'Customers' section has checkboxes for 'All' and 'IQVIA'. At the bottom of the modal are 'Cancel' and 'Send Invitation' buttons.

Users	Permissions	Customer Access
ABHAY LADDU COUPAtestABHAY@gmail.com Edit	ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time Sheets	IQVIA

The **Invite User** and **Edit user access for [User Name]** windows are almost identical, but when you invite a user, you can specify an email address.

Click on the **Edit** button to open the **Edit user access for [User Name]** window.

Edit user access

- You can change the user's name, modify the user's permissions and customer access, or deactivate the user.

You can't change the user's email address. If a user wants to change the email address, send a new invitation to that user.

- For auditing purposes, **Coupa doesn't allow users to be deleted**, so you can not delete a user from your profile. Instead, you can deactivate a user when you no longer want that user to be able to access the account.
- If you deactivate users, you can always reactivate them later.**

Note: The **Deactivate User** button is inactive when you edit your own access to avoid deactivating your own account.

al

ABHAY ▾

Edit user access for ABHAY LADDU ×

User info

* First Name ABHAY

* Last Name LADDU

* Email COUPAtestABHAY@gmail.com

Users

ABHAY LA

COUPAtes

Edit

Cust

IQVIA

Permissions

☒ All

☒ Admin

☒ Orders

☒ Invoices

☒ Catalogs

☒ Profiles

☒ ASNs

☒ Service/Time Sheets

☒ Payments

Customers

☒ All

☒ IQVIA

Cancel Deactivate User Save

User permissions

Permissions	Description
All	Gives full access to all CSP functions, except for user administration.
Admin	Has full access to all CSP functions, including user administration. Non-admin users can still view the Users tab of the Admin page and invite users, but they can't edit existing users. The permissions on the invitation can't exceed the permissions of the user creating the invitation.
Orders	Allows viewing and managing purchase orders (POs) received from customers.
Invoices	Allows creating and sending invoices to customers.
Catalogs	Allows creating and managing customer-specific electronic catalogs.
Profiles	Allows modifying customer-specific profiles. Note: All users, regardless of permissions, can edit the public profile.
ASNs	Allows creating and sending advance ship notices (ASNs) to customers.
Service/Time Sheets	Allows creating and submitting service/time sheets against POs.

Manage Merge Requests

Manage Merge Requests

Your company may have more than one account/profile in the CSP. This can happen when several users from the same company register or are invited to the CSP through different email addresses.

The suggestions to merge accounts are based on email domain. For example, all the users with the @supplier.com domain get suggestions to merge. Merge suggestions appear in the right-hand column on the **Home** page.

- If you know that a suggestion is invalid, click on the **Remove** button and you won't see the request again.
- If you want to merge an account, click on the **Request Merge** button and select an account to be the parent account and add a note.

The screenshot shows the Coupa Supplier Portal Home page for user ABHAY LADDU C0000319. The page has a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is divided into three columns. The left column contains a profile card for ABHAY LADDU C0000319 with a globe icon and links to About, Industry, Website, Established, and Employees. The middle column contains a 'Merge Accounts' section with a red box around it. The right column contains a 'Latest Customers' section with a link to IQVIA. A red arrow points from the 'Merge Accounts' section to a detailed view of this section on the right.

Merge Accounts

If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers.

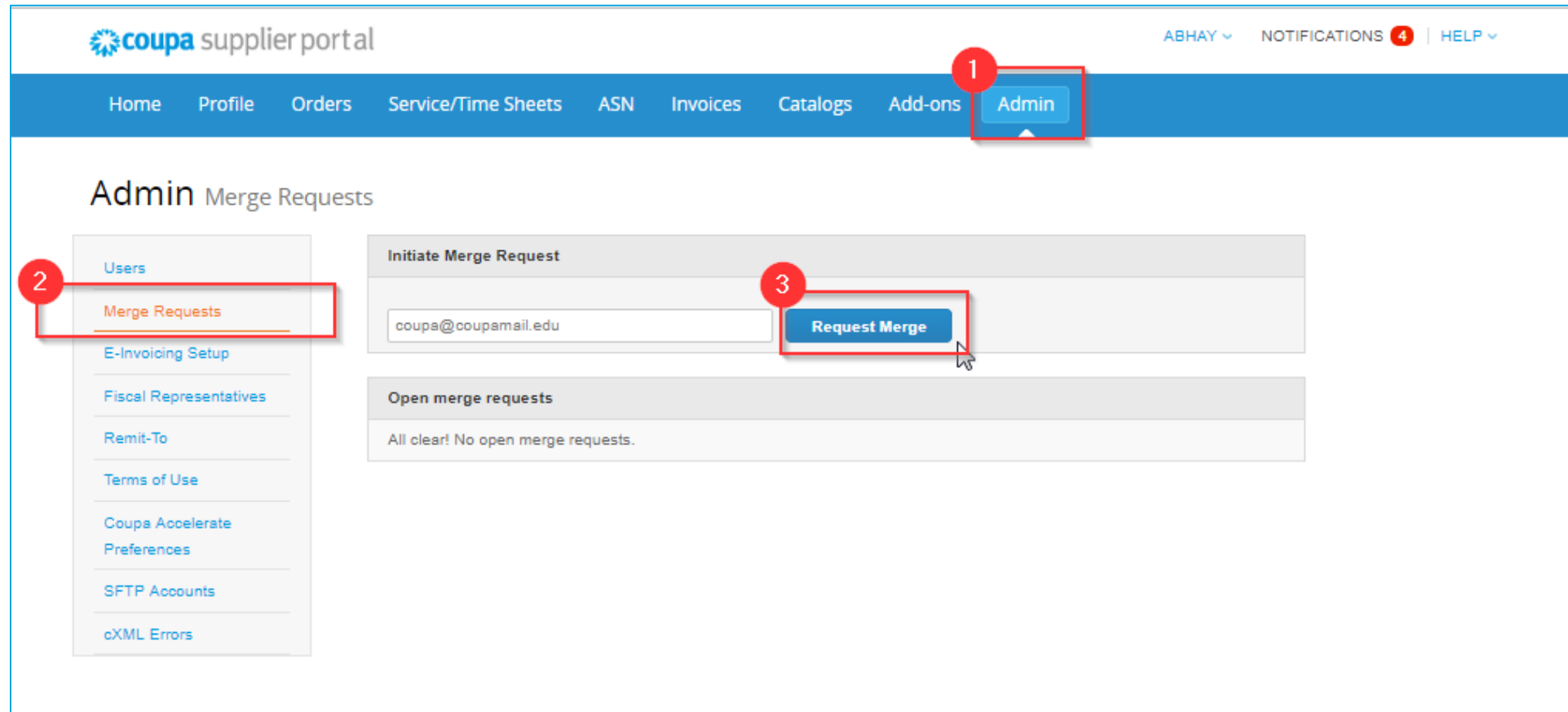
Not seeing the account you want to merge with? [Click here.](#)

SupplierA
supplierA@supplier.com
[Request Merge](#) [Remove](#)

SupplierB
supplierB@supplier.com
[Request Merge](#) [Remove](#)

You can also search for a specific account to merge, for example, if the account isn't listed.

- You can access this page by clicking on the **Admin** tab on the main menu and on the **Merge Requests** link on the left.



Provide the email address of the account you want to merge, and click **Request Merge**.

You can see purchase orders and create invoices for both supplier records after selecting a customer from the **Select Customer** drop-down.

Selection	Description
My Account	This causes the other account to be merged into your company account. The other user's company account is removed. You continue to be the administrator for the merged company account, and the previous administrator becomes a regular user in the merged account. You can make them an administrator if you want. For more information. See Manage Users .
Their Account	Your company account is removed. The other user's company account becomes the only company account. You can no longer be the account administrator, but the administrator of the existing account can choose to make you an administrator of the merged account.

Request Account Merge

You're about to merge your profile and users with **SupplierA**. Select the owner for the merged account. For more info on merging, [Click here](#).


* Account Owner

☒ My Account
 ☐ Their Account

By choosing this option I understand that I will no longer be the account owner.

* Note

☐ I'm not a robot



reCAPTCHA

Privacy - Terms

Cancel

Send Request

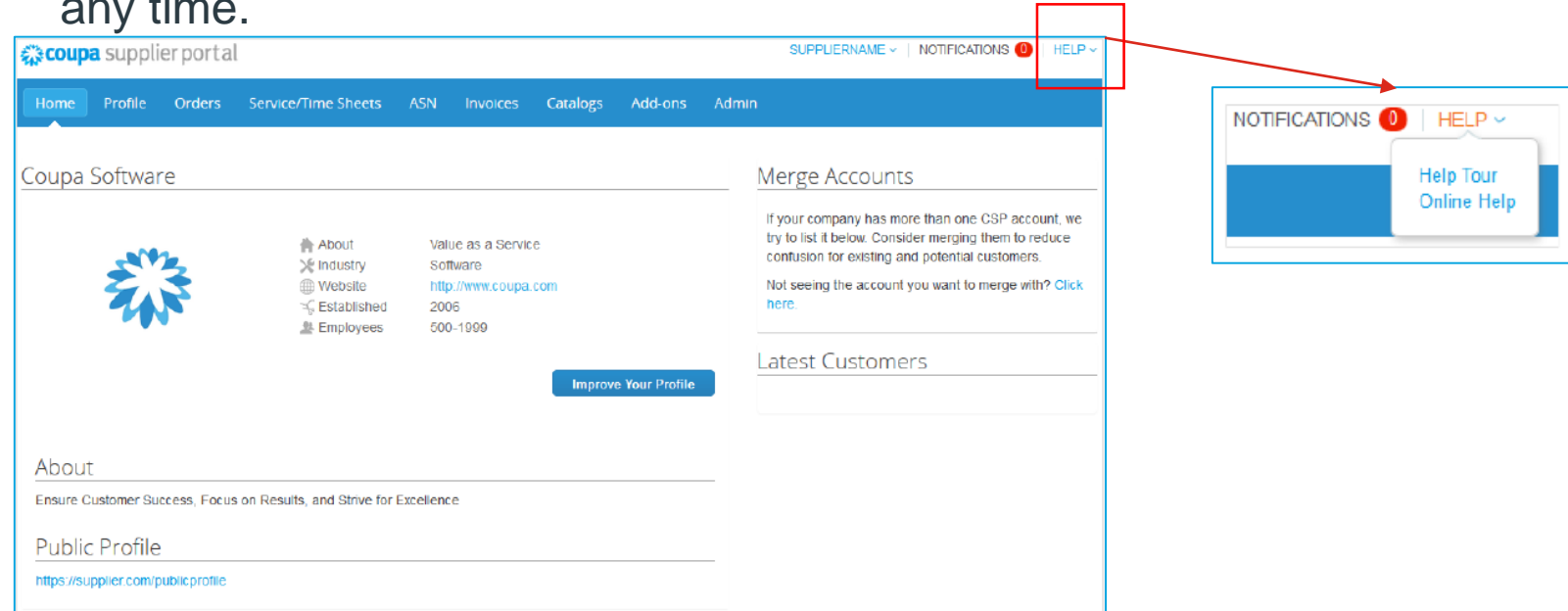
Merged accounts use the following rules:

Element	Merge Behavior
Connected customers and customer profiles	Any connected customers are retained in the new account. The existing email address remains the contact email for the customer. If the customer is connected to both accounts, the parent account connection is retained and the merged account connection is removed.
Remit-to addresses	Remit-to information is transferred only for addresses that are available to all customers.

Navigate and Get Help

Support

- ❖ 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