



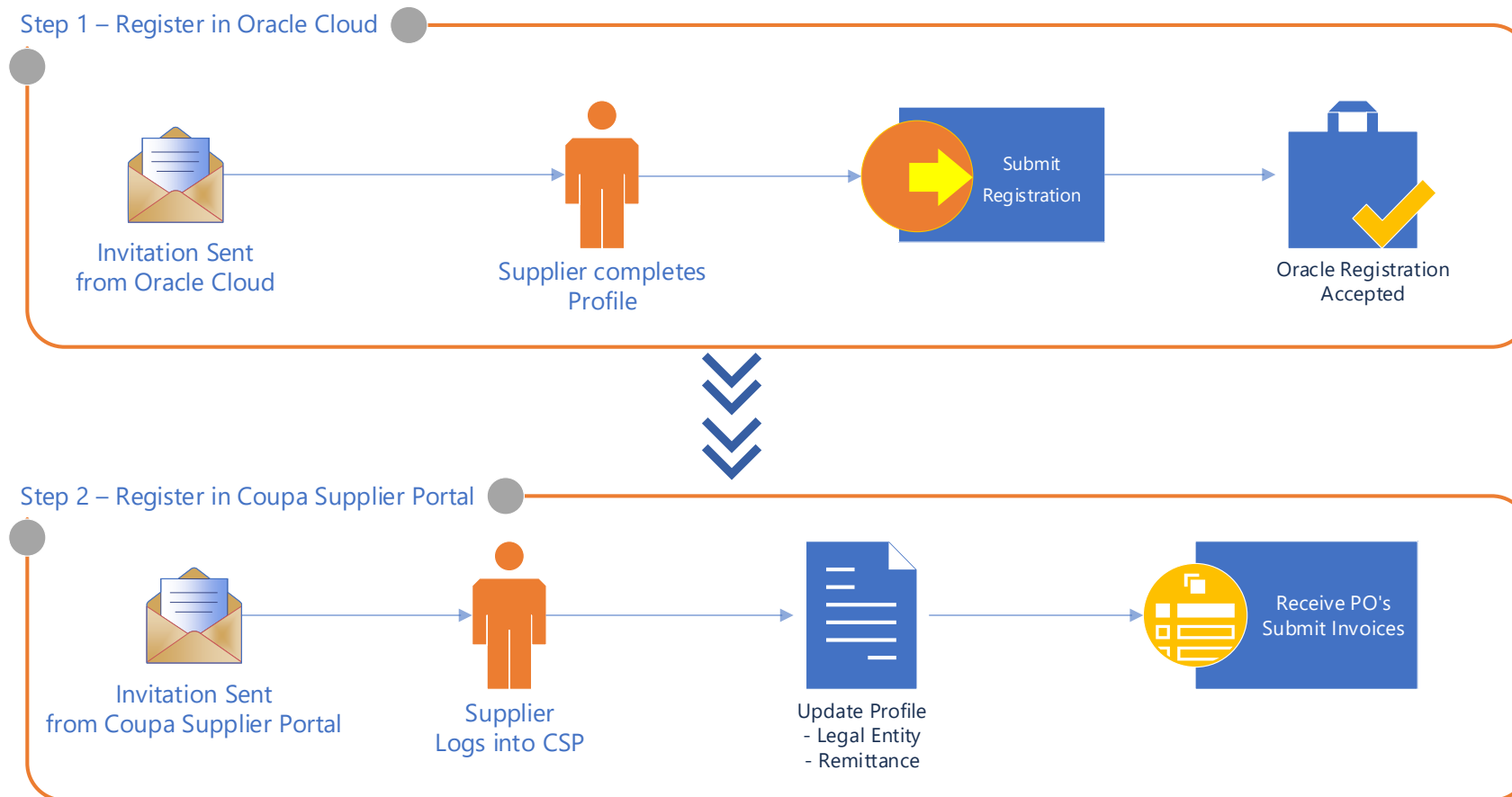
IQVIA: Supplier Registration in Oracle

Coupa Suppliers

11 September 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

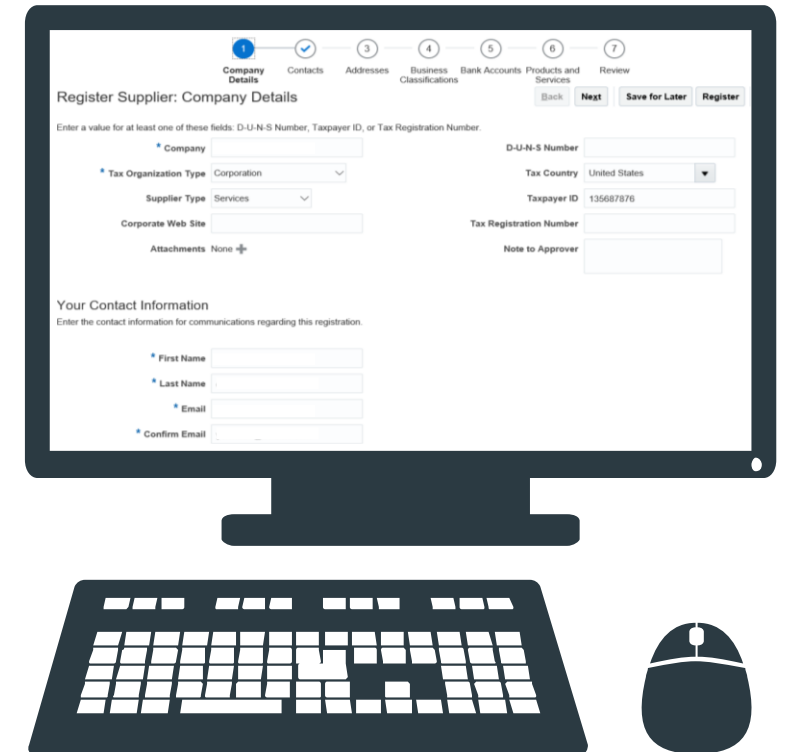


Oracle Registration

IQVIA Finance ERP Supplier Portal

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

- Manage supplier contact information and user accounts for supplier portal access
- Onboard suppliers through self-service registration with approval workflow
- Required information includes:
 - VAT/Tax registration information
 - Primary contact information
 - Company address
 - Banking with remittance information



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'. A yellow callout box 'c. Click Next.' points to the 'Next' button. The main form area is titled 'Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.' and contains several input fields: '* Company' (Deloitte LLC), 'D-U-N-S Number', '* Tax Organization Type' (Corporation), 'Tax Country' (United States), 'Supplier Type' (Coupa), 'Taxpayer ID' (135687876), 'Corporate Web Site', 'Tax Registration Number', 'Attachments' (None), and 'Note to Approver'. A red box highlights these fields, with a yellow callout box 'a. Enter Company, Tax Organization Type, DUNS Number, Tax Country, Tax Payer ID and Registration Number.' pointing to it. Below this is the 'Your Contact Information' section, titled 'Enter the contact information for communications regarding this registration.' It contains four input fields: '* First Name', '* Last Name', '* Email', and '* Confirm Email'. A red box highlights these fields, with a yellow callout box 'b. Enter First Name, Last Name, Email and Confirm Email.' pointing to it.

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**, **Tax Organization Type**, **DUNS Number**, **Tax Country**, **Tax Payer ID** and **Registration Number** under **Company Details**. You should also select **Supplier Type** as **COUPA**.

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 tabs for 'Company Details', 'Contacts', 'Addresses', 'Business Classifications', 'Bank Accounts', 'Products and Services', and 'Review'. The 'Contacts' tab is active. On the right, there are buttons for 'Back', 'Next' (highlighted with a red box), 'Save for Later', and 'Register'. Below the tabs, 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 columns: 'Name', 'Job Title', 'Email', 'Administrative Contact', 'Request User Account', and 'Edit'. A single row is visible, 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 'a. Click the Create icon.' points to the '+ Create' button. Another yellow callout box 'c. Click Next.' points to the 'Next' button. A third yellow callout box 'b. Enter Name and Email ID.' points to the empty row in the table. 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**. Ordering address is the legal address. Enter email address where PO's should be submitted.

The screenshot displays the 'Register Supplier: Addresses' interface. At the top, there are three tabs: 'Company Details', 'Contacts', and 'Addresses', with 'Addresses' being the active tab. Below the tabs, the text 'Enter at least one address.' is followed by a table with columns 'Address Name' and 'Address'. A yellow callout 'a. Click the Create icon.' points to a '+ Create' button in the table's action menu. To the right, the 'Create Address' dialog box is open, containing fields for 'Address Name', 'Country', 'Address Line 1', 'Address Line 2', 'City', 'State', and 'Postal Code'. There are also checkboxes for 'Address' (with 'Ordering' selected) and 'Purpose' (with 'Remit to' selected). A yellow callout 'b. Enter Address Name, Address, and Country.' points to these fields. At the bottom of the dialog, there is an 'OK' button highlighted with a red box and a yellow callout 'c. Click OK.', along with 'Create Another' and 'Cancel' buttons.

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**.

The screenshot displays the 'Register Supplier: Bank Accounts' interface. At the top, a progress bar shows seven steps: Company Details, Contacts, Addresses, Business Classifications, Bank Accounts (highlighted with a blue circle and the number 5), Products and Services, and Review (highlighted with a circle and the number 7). Below the progress bar, the main interface has a 'Create Bank Account' pop-up form. The form is divided into several sections: 'Create Bank Account' (with fields for Country, Bank, Branch, Account Number, IBAN, and Currency), 'Additional Information' (with fields for Account Name, Agency Location Code, Alternate Account Name, Account Type, Account Suffix, and Description), and 'Comments' (with a 'Note to Approver' field). A red box highlights the 'Create' icon in the top left of the pop-up, the 'Next' button in the top right, and the 'Note to Approver' field in the bottom left. A blue callout box points to the 'Create' icon, and a yellow callout box points to the 'Next' button. A yellow callout box points to the 'Note to Approver' field. A blue callout box points to the 'Note to Approver' field. The 'Note to Approver' field contains the text 'My bank is not available in the list of values'. The 'Next' button is labeled 'Next' and is highlighted with a red box. The 'Create Another', 'OK', and 'Cancel' buttons are at the bottom of the pop-up. The 'OK' button is highlighted with a red box.

a. Click the **Create** icon.

b. Enter **Country, Bank, Branch, Account Number, IBAN, and Currency**.

c. Click **OK**.

d. Click **Next**.

It is important to add a note if the Bank is not listed. Please add a **Note to Approver: My Bank is not available in the list of values.**

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.

If no Products and Services are displayed, please select “Default”

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

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

Company Details

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

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

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

From: 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.

For any issues, contact your system administrator.

Thank You,
Oracle Fusion Applications