Q: What is Coupa?

A: Coupa is a business-to-business (B2B) cloud platform for managing business spend, delivering measurable value through real-time visibility, control, compliance, and agility. All new purchase orders (POs) will be generated from the Coupa platform.

Q: What is the Coupa Supplier Portal (CSP)?

A: The Coupa Supplier Portal (CSP) is a supplier business network provided by Coupa. Suppliers can perform various business transactions including order confirmation, invoice creation, catalog uploads, and check the status of transactions.

Q: How much does it cost to join the CSP?

A: There is no charge to use the Coupa Supplier Portal. The CSP is a free web application that enables suppliers to track orders, create invoices, and manage company information and notifications.

Q: I am already on the Coupa Supplier Portal (CSP). How do I connect with IQVIA in my CSP profile?

A: To connect with IQVIA, you must first receive an invitation email from IQVIA. This email will include a specific link that will direct you to the CSP and automatically connect your company with IQVIA as your customer. Your company needs to be added to IQVIA's Coupa system before you receive the invitation email. Please contact your IQVIA representative, who will submit your details via the New Supplier Request Form in the Coupa portal. After approval, you will receive the invitation email. Please note that the invitation email should be sent to the same email address you used for registration in the CSP (Admin email address) for your other customers.

Q: Whom do I need to reach out to for additional support?

A: For purchase order-related queries, please contact your IQVIA PO owner. For technical issues, contact IQVIA's Procurement team at procurement@iqvia.com. For payment and invoice-related issues, contact IQVIA's Accounts Payable team at supplier.queries@iqvia.com.

Q: How do I register and connect with IQVIA?

A: To register and connect with IQVIA, you need to request an invitation to join the CSP. Once your company is added to IQVIA's Coupa system, your IQVIA contact will send you an invitation. After the necessary approvals, you will receive an email with a registration link. When you use this link to register, your company will automatically be connected with IQVIA.

Onboarding Process

Currently, this is a two-step process requiring suppliers to self-register via an online form in Coupa, followed by registration on the Coupa Supplier Portal (CSP) to complete the onboarding.

1. **Email requesting profile update for IQVIA:** This is the first email sent after your IQVIA contact initiates the onboarding request and all approvals have been obtained. Click the link in the email and complete the online registration in Coupa. Ensure all required fields are filled out before submitting the form.

2. **Email confirming profile information has been approved:** Once you submit your form, it will be reviewed and approved by our Vendor Data Management team. You will be notified via email once approval is granted.

3. **Email confirming connection to IQVIA via Coupa:** Once your company has been set up in our system, you will receive an email with a link to connect to IQVIA through the Coupa Supplier Portal. This link will prompt you to create your login credentials. If you are already registered with Coupa, IQVIA will be added as a customer upon clicking the link. If not, you will need to sign up to connect with IQVIA.

Note: Please check your spam or junk folder if you do not see these emails in your inbox.

Q: Why haven't I received the email invitation to join Coupa?

A: First, check your spam/junk email folder. Emails are sometimes flagged as spam. Ensure you are using the same email address that IQVIA used to send the invitation. If you still cannot find the email, please reach out to GFSSVendorMasterData@iqvia.com .

Q: Where do I sign in to the CSP?

A: To sign in to the CSP, open your web browser and visit: http://supplier.coupahost.com. Enter your login credentials, which should be the email address you provided to IQVIA.

Q: How do I know that I'm connected to IQVIA?

A: Once you're signed into the CSP, you will find "IQVIA" in the Latest Customers on the bottom right of the page.
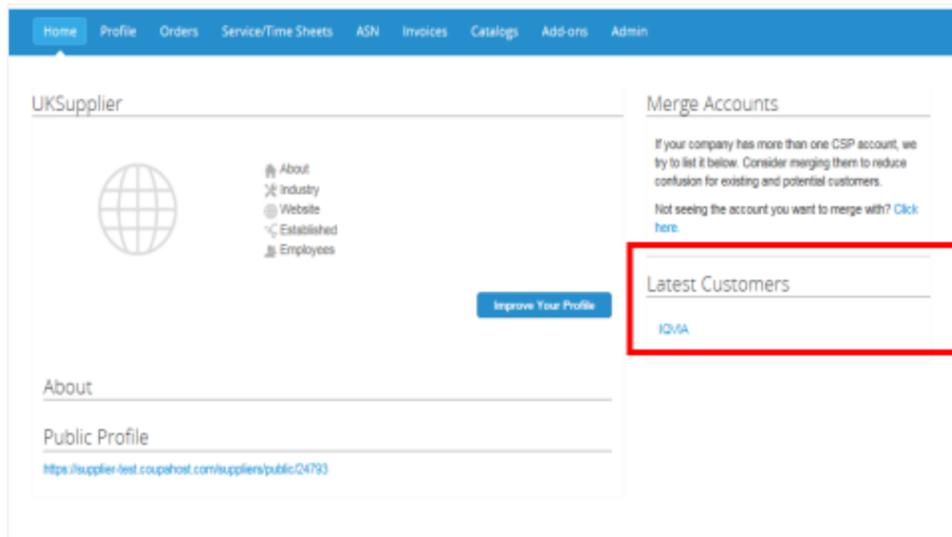
Q: If I do not see IQVIA in the customer section, what should I do?

A: If you do not see IQVIA in the customer section, it is likely because you registered for the CSP using a different email address than the one IQVIA used to send the invite. Please verify that you're using the same email address that was used for the invitation.

Q: How do I cancel my CSP account?

A: If you are no longer doing business with IQVIA, please contact the Procurement team at procurement@iqvia.com to request that your account be made inactive in the system.

Q: What do I do if I am locked out of the CSP?

A: If you're locked out of the CSP, it may be due to two-factor authentication. If you don't have your six-digit backup validation code, contact the Vendor Data Management team at GFSSVendorMasterData@iqvia.com . They will ask you to fill out a declaration form and provide either a copy of your photo ID or passport, or your CSP login email to verify your identity.

Q: What do I do if I forgot my two-factor authentication code, the code is not working, or I lost my device?

A: If you're unable to log in due to missing two-factor authentication codes, first attempt to recover the codes via Google Authenticator or through your device's SMS messages. You may also use backup codes that you were instructed to copy or write down when you first registered for CSP. If you're still unable to recover the code, contact supplier@coupa.com . You will need to provide proof of identification to ensure the security of your transactions with IQVIA.

Q: What should I do if I am not the admin/owner of my CSP account and cannot log in or do not have full access?

A: If you're unable to log in or lack full access, please contact your CSP account admin (the colleague with full access) to activate your account or adjust your permissions.

Q: How do I enable two-factor authentication?

A: To enable two-factor authentication, log in to the CSP and go to "Account Settings" under your login name in the top right corner of the page. From there, you can enable two-factor authentication.

Q: How can I disable two-factor authentication?

A: To disable two-factor authentication, go to "Account Settings" under your login name in the top right corner of the page and disable it from there.

Q: How do I add an employee or give another person from my company access to the Coupa Supplier Portal?

A: To add a new user, go to the main menu, click on the "Setup" tab, and select the "Users" tab on the left side. Click on the "Invite User" button. Provide the required information in the window that appears. This will allow you to set up multiple users with access to different functionalities of the CSP.
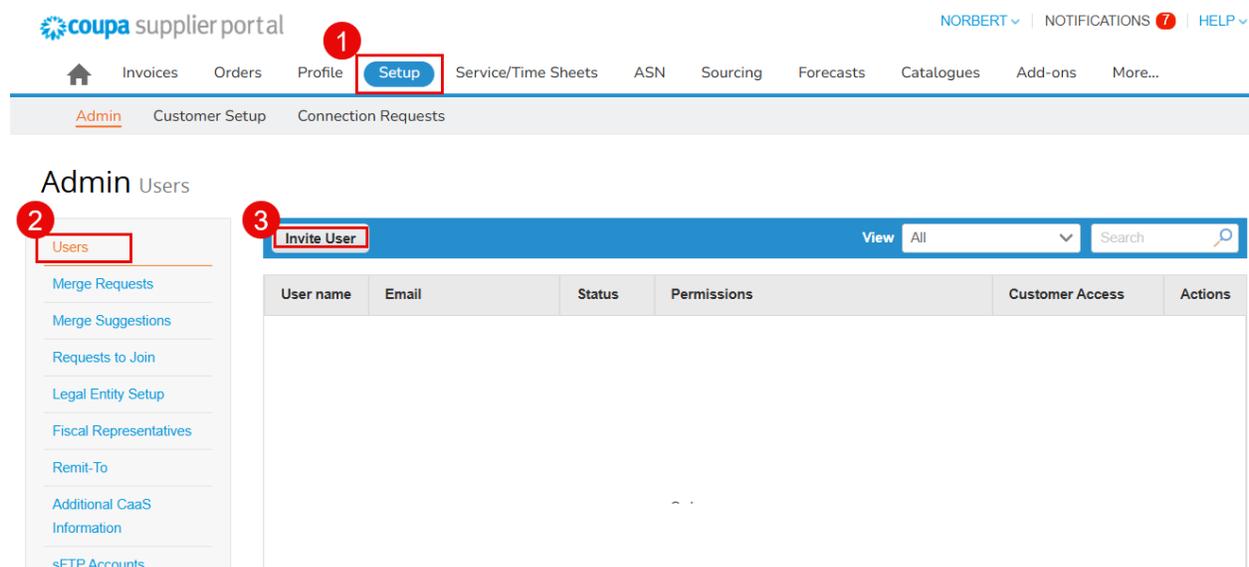
Q: Why can't I access POs/invoices?

A: To resolve this issue, go to the main menu, click on the "Setup" tab, and verify that you have the correct roles and customers assigned to your account. If you have access but do not have the right roles or customers, you can add them. If you do not have access at all, contact the admin from your company (the colleague with full access) to request the appropriate roles or customer access.

Q: What should I do if I used to receive notifications from Coupa on my email address, but no longer want to?

A: To change your notification preferences, click on the "Notification Preferences" button in the top-right corner. Alternatively, you can click on your name link and select the "Notification Preferences" option from the menu to adjust your settings.
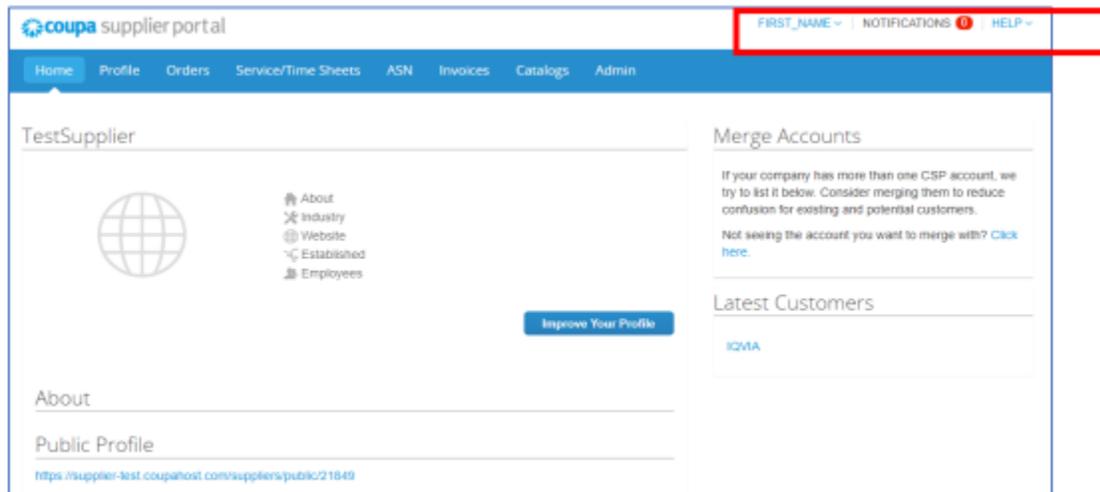
Q: Is it possible to have a different PO email address than the primary email address in the COUPA setup? And if so, will the primary address still receive POs?

A: Yes, it is possible to set a different PO email address than the primary email address. However, the primary email address will not receive any POs; only the PO email address will receive them.

Q: How do I create an invoice?

A: To create an invoice, go to the main menu and click on the "Orders" tab. If you're connected to multiple Coupa customers, select IQVIA from the "Select Customer" dropdown menu. In the PO table that appears, choose the PO you want to invoice and click on the yellow coin icon to create an invoice. For more details, you can open the "Invoice Processing" presentation prepared by the IQVIA procurement team, available on the website.

NOTE: Before creating your first invoice, E-invoicing must be set up by adding legal entities with your Remit-To Address (the address where you receive payments). For more details, refer to the "Invoice Processing" presentation.

Q: Why can't I send cXML invoices?

A: Check if you are using the supported protocols: TLS 1.1 or TLS 1.2. If you still have problems, contact supplier@coupa.com.

Q: Do I need to include accounting information on cXML invoices?

A: Invoices against a PO don't need accounting information, because that information is part of the requisition and is carried over to the PO. When an invoice references a PO line number, Coupa takes the accounting information associated with the line and adds it to the invoice.

Q: Do I need to upload the invoice manually through Coupa?

A: Yes, invoices must be uploaded manually through Coupa, and PDF versions are not allowed. You will receive an email notification when a Purchase Order is created. From that email, you can directly submit the invoice with just a few clicks.
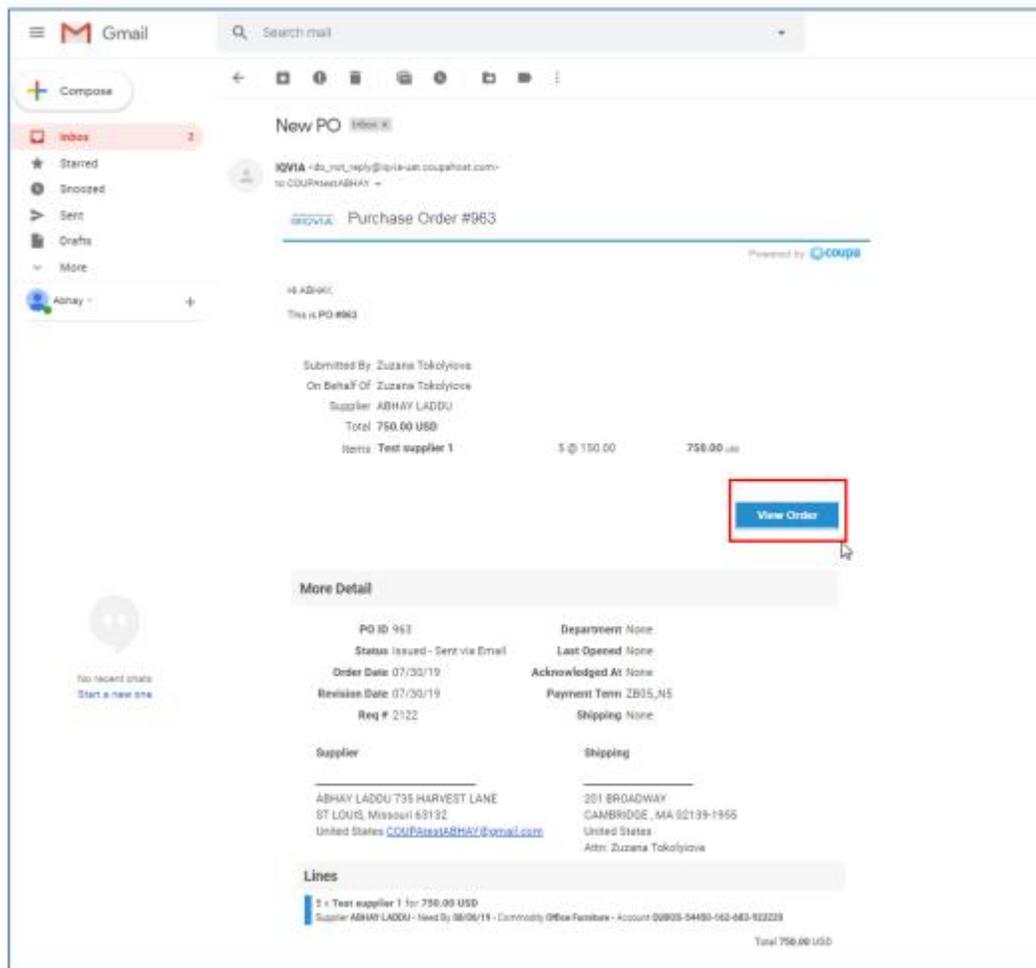
Q: How do I know if an invoice has been registered?

A: To check in an invoice has been registered, go to the main menu, and click on the "Invoice" tab. Look for nay invoices listed as drafts – these need to be edited and submitted. If the invoice is not listed, it has not been registered in the system.

Q: How do I add shipping charges to an invoice?

A: You can add shipping charges at the bottom of the invoice or at the line-item level.

Q: How do I credit or cancel an invoice that's already been billed?

A: To create a credit, enter a negative quantity. For more details, refer to the "Creating a Credit Note" section in the Invoice Processing presentation. Once an invoice is submitted, it cannot be edited or changed.

Q: How do I make a partial claim on an invoice?

A: You can invoice multiple times against a single PO. Simply click the gold coin icon and enter the amount or quantity you'd like to invoice for at that time.

Q: Why can't I edit, void, or delete an invoice?

A: Once an invoice has been submitted, it cannot be changed to maintain processing integrity. However, you can:

     1.   Request the IQVIA AP Team at supplier.queries@iqvia.com to reject or void the existing invoice, after which you can create a new one.

     2.   Create a credit memo to credit the original invoice value and then issue a new invoice.

Q: What do I do if an invoice was rejected?

A: Simply create a new invoice to replace the rejected one.

Q: Once an invoice has been approved, what do I need to do next?

A: Nothing. The invoice is in IQVIA's queue, and you will be paid based on the agreed payment terms.

Q: Do I need to see a purchase order on the CSP before I can invoice IQVIA?

A: Yes, a purchase order must be visible on the CSP before you can create an invoice.

Q: What does the Export to button do?

A: The "Export to" button allows you to export the rows to a CSV file, an Excel document, or bulk export legal invoices in a compressed (.zip) file. The maximum number of rows you can export by default is 200,000. When exporting tables with fewer than 500 rows, the file downloads immediately; for larger tables, the file will be emailed.

Q: Why do I get the "VAT ID format incorrect" error?

A: You need to add your country code (e.g., GB for the United Kingdom) in front of the VAT number. The VAT number should be in the ISO country format (e.g., GB508811745). To correct this, click on the Admin tab and add the correct VAT ID in the E-Invoicing Setup section.

Q: What types of files can I attach to an invoice?

A: Accepted file types for invoice image scans are PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF. Each attachment can be up to 100 MB, but it's recommended to keep the attachment size under 16 MB for performance reasons.

Q: What if I have an invoice that has not been paid?

A: For payment-related inquiries, contact IQVIA's AP Team directly at supplier.queries@iqvia.com . You may also find payment details on the invoice document in Coupa, and you can enable email notifications for payment updates in your notification settings.

Q: How can I see my purchase orders from IQVIA?

A: On the main menu, click the Orders tab. If you're connected to more than one Coupa customer, select IQVIA from the "Select Customer" dropdown menu. For additional details, refer to the PO Processing presentation.
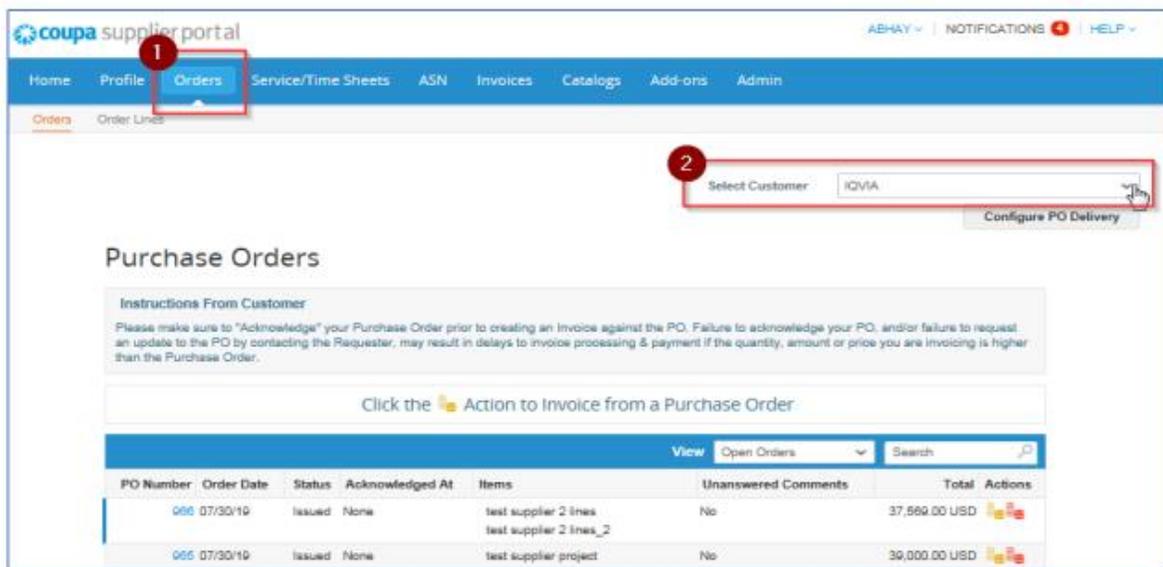
Q: How do I change a price on a purchase order?

A: You cannot change the price on a PO through the CSP. If you need a change order on a PO, you will need to speak to your requestor. They can initiate the change.

Q: What is the purpose of the PO acknowledgement by the supplier?

A: The PO acknowledgement allows you to confirm to IQVIA that you've received the order.

Q: How do I invoice a blanket purchase order?

A: You can invoice multiple times against a single blanket PO. Simply click the gold coin icon for the PO, enter the amount you'd like to invoice, and submit. The next time you need to invoice, repeat the same process.

Q: How can I view historical (closed) purchase orders in my customer's instance? What is the difference between Hard closed and Soft closed PO?

A: IQVIA can provide you with information on closed purchase orders. Both suppliers and the procurement team (procurement@iqvia.com) can view the status of a PO, including whether it is "Soft Closed" or "Hard Closed." A Hard Closed PO cannot be reopened, while a Soft Closed PO can be reopened by IQVIA Procurement if needed, such as for submitting an invoice or credit memo, or if the PO was closed prematurely or by mistake. Note that you cannot invoice against a Soft Closed PO.

You can create your own view with different types of statuses as shown below.

• Click on Orders tab

• In the **Select Customer** window select IQVIA from the drop-down list

• Select Create view

• in Conditions section create view with specific type of status

Q: How do I see available funds on the PO?

A: When you click on the purchase order, you can see the amount that has already been invoiced. Please note that this information will only be available after the invoice has been approved by IQVIA AP team.

Q: Where can I find payment information?

A: You can find it on the Purchased Order (PO) after you receive notification indicating that the PO has been created.

Q: If I use the CSP, who pays me?

A: IQVIA, who uses Coupa, is responsible for paying you directly. Coupa does not pay suppliers on behalf of others.

Q: What does "pending receipt" mean?

A: This status indicates that IQVIA is in the process of receiving the goods or services into their system. Once the receipt is entered by IQVIA, the invoice will be matched against it.

Q: Is the information in the CSP archived?

A: No, the information in the CSP is not archived, but you can access it as long as you have a CSP account.