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IQVIA™

COUPA SUPPLIER PORTAL

FREQUENTLY ASKED QUESTIONS
(FAQs)

coupa

A. General Information

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

Q: What is Coupa Supplier Portal?
A: Coupa Supplier Portal (CSP) is a supplier business network offered by Coupa where suppliers can perform business transactions including order confirmation, invoice creation, upload catalogs, check the status of transactions and more.

Q: How much does it cost to join the CSP?
A: Coupa does not charge suppliers to use the Coupa Supplier Portal.

Q: I am already on Coupa Supplier Portal (CSP). How do I connect with IQVIA in my CSP profile?
A: What needs to be ensured is that you receive invitation email from IQVIA's side. Email includes specific link which will transfer you directly on CSP and ensure automatic connection between your company and IQVIA as your customer.

To receive invitation email, your company needs to be added in IQVIA's Coupa system first. Please contact the person you work with from IQVIA, who will require your addition via New Supplier Request Form, available for him on Coupa portal. After successful approvals, you will receive the invitation email. Please note that invitation email needs to be send on the same email address which you used before for registration into CSP (Admin email address) with your other customer(s).

Q: Whom do I need to reach out to for any additional support?
A: For any issues related to purchase order and invoice process, please contact IQVIA's procurement team on procurement@iqvia.com and regarding issues with payment an invoice, please contact Iqvia AP team on supplier.queries@iqvia.com (legacy Q) or GFSS_AP_SAP_External_Inquiries@iqvia.com (legacy I).

B. Account, Login, Registration

Q: How do I register and connect with IQVIA?
A: You need to request an invitation to join the CSP. To receive invitation email, your company needs to be added in IQVIA's Coupa system first. Please contact the person you work with from IQVIA, who will require your addition via New Supplier Request Form, available for him on

Coupa portal. After successful approvals, you will receive the invitation email. When you register with the link you received, you are automatically linked to IQVIA.

Q: Why haven't I received the email invitation to join Coupa?
A: Check your spam/junk email folder. Emails sometimes get flagged as spam. Please make sure to use the same email address to register that IQVIA has used to invite you. If you still cannot find the email invitation, please reach out to procurement@iqvia.com.

Q: Where do I sign in to the CSP?
A: Open web browser and open URL: http://supplier.coupahost.com. Below screen will appear, you need to provide your credentials to login to CSP. The login information is the one you provided to IQVIA.
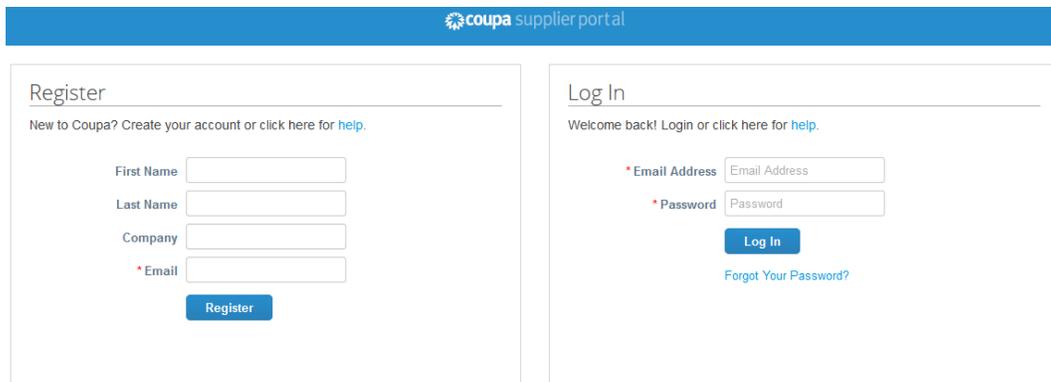
Q: How do I know that I'm connected to IQVIA?
A: Once you're signed into the CSP, you will find "IQVIA" in the <u>Latest Customers</u> on the bottom right of the page.
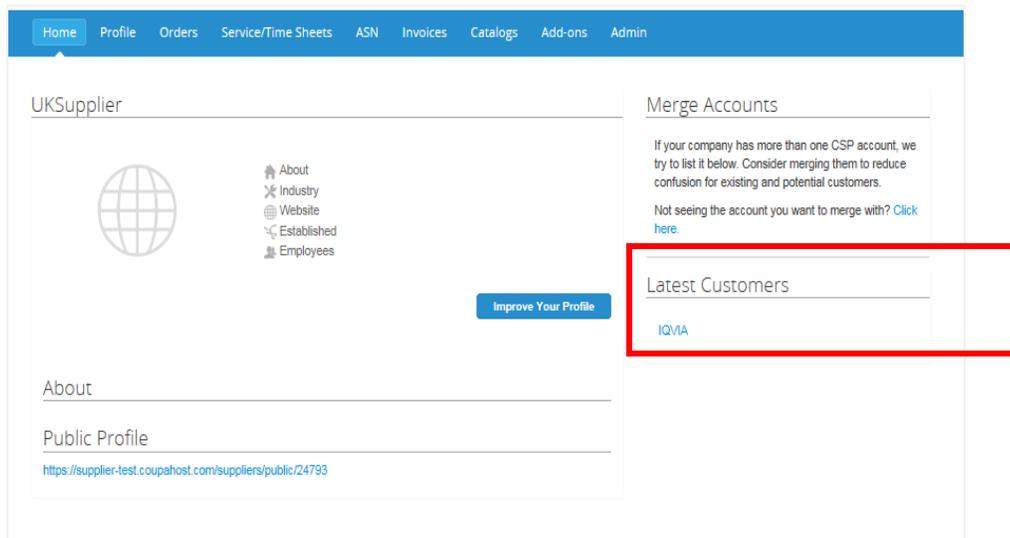
If you do not see IQVIA in the customer section, it's probably because you registered for the CSP using a different email address than what IQVIA used for the invite.

Q: How do I cancel my CSP account?
A: If you're no longer doing business with the IQVIA, ask the Procurement team on procurement@iqvia.com to make you inactive in the system.

Q: What do I do if I am locked out of the CSP?
A: Using two-factor authentication protects you against fraud.

If you don't have your six-digit backup validation code, contact IQVIA Procurement team on procurement@iqvia.com who will ask you to fill in a declaration form and provide either a copy of your photo ID or passport or your CSP login email to verify your identify.

Q: How can I log in if I forgot my two-factor authentication code, the code is not working, or I lost my device?
A: If you cannot log in because of missing two-factor authentication codes, try to find and recover them first by using Google Authenticator or your device for text messages (SMS) to get new codes, or by using backup codes that you were told to copy or write down during your first registration in CSP.
If you lost your codes, contact supplier@coupa.com. You need to provide proof of identification to ensure security of spend-related transactions for you and IQVIA.

Q: What do I do if I am not the admin/owner of my CSP account, but I can't log in or do not have full access?
A: Contact your admin (colleague with full access) to activate your account or set your permissions.

Q: How do I enable two-factor authentication?
A: After logging in to the CSP, go to Account Settings under your login name in the top right of the page to enable two-factor authentication.

Q: How can I disable two-factor authentication?
A: You can disable two-factor authentication from the Account Settings under your login name in the top right of the page.

C. Admin

Q: How do I add an employee?

A: On the main menu, click on the Admin tab. On the Users tab, click on the Invite User button. Provide the required info in the window that opens. It gives you an option to set up multiple users accessing different functionalities of the same supplier portal.


Q: Why can't I access POs/invoices?

A: On the main menu, click on the Admin tab and check if you have access to the right roles and customers. If you have access but do not have the right roles or customers, add them. If you do not have access, ask your admin person from your company (colleague with full access) to give you access to the right roles or customers.

Q: What should I do if I used to receive notifications from Coupa on my email address, but I don't want to?

A: To change your notification preferences, click on the Notification Preferences button in the top tight corner. Or click on your name link and on the Notification Preferences link.
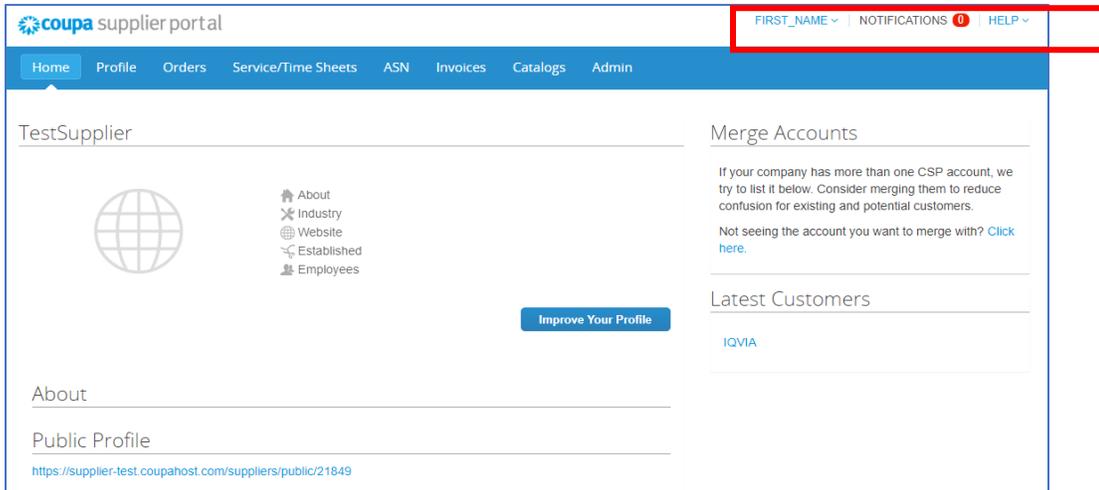
Q: Is it possible to have PO email address different than primary email address in COUPA setup? And if so, will still primary address receive POs anyway?
A: Yes, it is possible to have different PO email address and primary email address. The primary email will not be able to receive any POs, the PO one is the only one that will receive the POs.

D.   Invoices

Q: How do I create an invoice?
A: On the main menu, click on the Orders tab. If you are connected to more than one Coupa customer, select IQVIA from the Select Customer dropdown menu. In the PO table that appears, choose the PO you want to invoice, and then click on the yellow coins to create an invoice. For more information and details open Invoice Processing presentation prepared by IQVIA procurement team available on the website.

NOTE: Before creation your first invoice, there needs to be set-up **E-invoicing** by adding legal entities with your Remit-To Address (specific address you use to receive payments). For more information check our presentation Invoice Processing.

Q: Do I need to upload invoice manually through Coupa?
A: Yes, the invoices will need to be uploaded manually through Coupa. No PDF version is allowed. You will receive an email notification when a Purchase Order is created. From this email you can directly submit the invoice with only a few clicks.
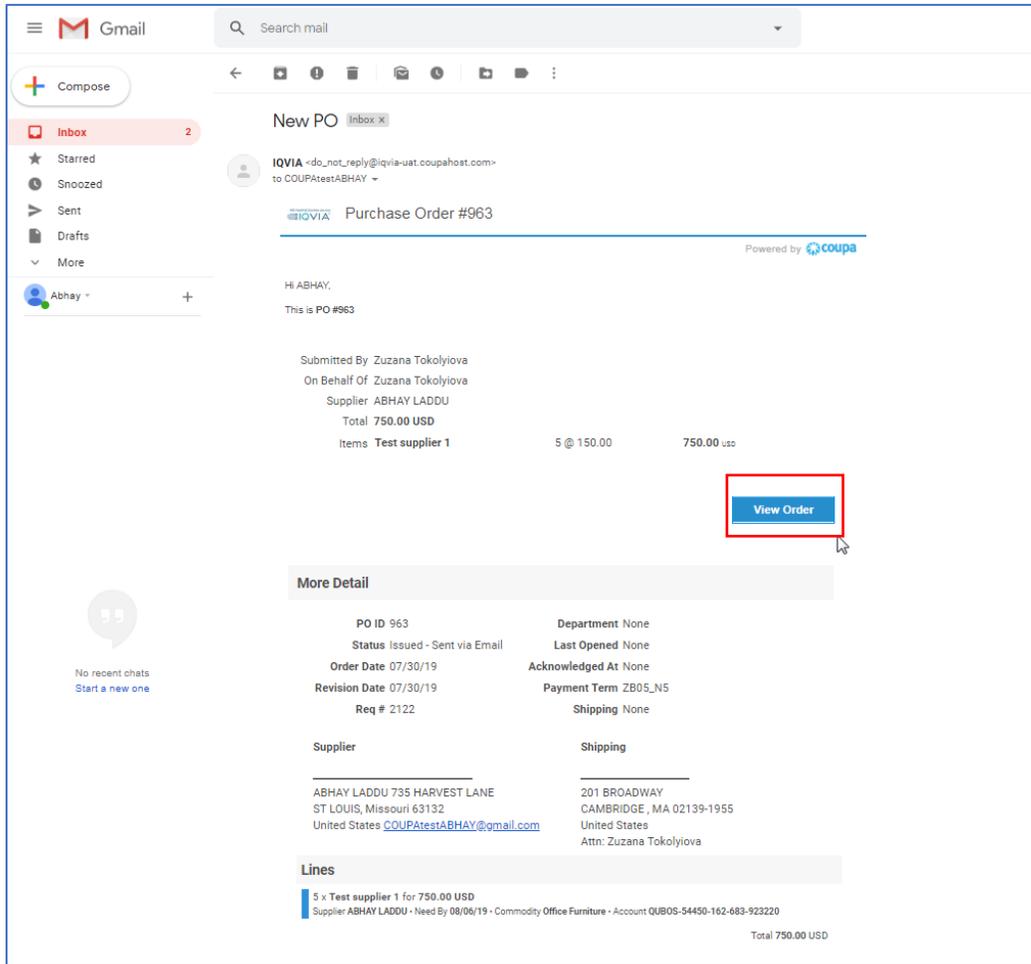
Q: How do I know if an invoice has been registered?

A: On the main menu, click on the Invoices tab. Look for invoices that are still listed as drafts. They need to be edited and then submitted. If the invoice is not there, it's not 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?
To create a credit, enter a negative quantity. For more information, see Creating a Credit Note in the Invoice Processing presentation. Once an invoice is submitted, it can't be changed in any way.

Q: How do I make a part claim on an invoice?
A: You can invoice multiple times against a single PO. Just click the gold coin icon and enter the amount/quantity you'd like to appear on the invoice.

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

A: Once an invoice has been submitted, it can't be changed in any way. This ensures invoice processing integrity.

However, you still have options:

1. Ask IQVIA AP Team on supplier.queries@iqvia.com (legacy Q) or GFSS_AP_SAP_External_Inquiries@iqvia.com (legacy I) to reject or void the existing invoice. You can then create a new one.
2. Create a new credit memo that credits the IQVIA for the original value, and then create a new invoice.

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

A: Just create a new invoice to replace the one that was rejected.

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'll be paid based on the payment terms you set with.

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

A: Yes.

Q: What does the Export to button do?

A: You can export the rows to a CSV file, an Excel document, or bulk export legal invoices in a compressed (.zip) file. By default, the maximum number of rows that you can export is 200,000.

Note: There is no limitation on the number of invoices or file size when exporting legal invoices. When you export a table with less than 500 rows, the file downloads to your computer immediately. When a table has more than 500 rows, you receive the exported file zipped in an email.

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

A: You need to add your country code (e.g. GB for United Kingdom) in front of the VAT number. VAT number needs to be in form with ISO of the country (for example GB508811745). On the main menu, click on the Admin tab to add a legal entity with the correct VAT ID under E-Invoicing Setup.

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

A: For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so**.**

Q: What if I have an invoice that has not been paid?
A: For questions regarding payment information, please contact IQVIA AP Team directly on supplier.queries@iqvia.com (legacy Q) or GFSS_AP_SAP_External_Inquiries@iqvia.com (legacy I). Some payment details might be on the invoice document in Coupa. Also, in your notification settings you can choose to receive payment notifications via email.

E. Orders

Q: How can I see my purchase orders from IQVIA?
A: On the main menu, click on the Orders tab. If you are connected to more than one Coupa customer, select IQVIA from the Select Customer dropdown menu. For more information regarding purchase order, please open PO Processing presentation.
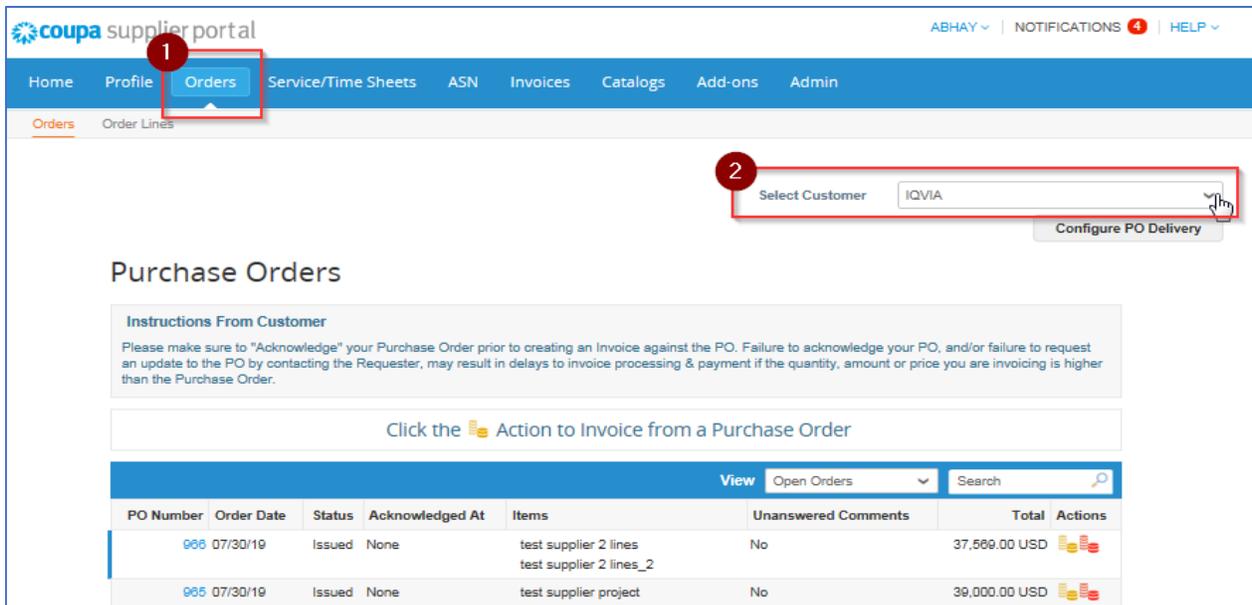
Q: How do I change a price on a purchase order?
A: You cannot change a price on a PO through the CSP. If you need a change order on a PO, talk to your requestor. Requestor can change it.

Q: What is the purpose of the PO acknowledgement by the supplier?
A: You can let IQVIA know that you've received the order.

Q: How do I invoice a blanket purchase order?
A: You can invoice multiple times against a single PO. Just click the gold coin icon for the PO as you normally would and enter the amount you'd like to appear on the invoice. The next time you want to invoice against the PO, just do the same thing.

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

A: IQVIA can provide you with information on closed purchase orders. Both suppliers and procurement team procurement@iqvia.com can see the status of the PO including "Soft Closed" and "Hard Closed" statuses.

Compared to Hard Closed PO which is not possible to reopen, Soft Closed PO is a PO that IQVIA Procurement can reopen, for example, if an invoice or credit memo submission is needed, or if a PO is closed prematurely or by mistake. 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
- On the appearing Orders window select IQVIA from customer drop-down list
- Select **Create view**
- in **Conditions** section create view with specific type of status

Q: How to see available funds on the PO?

A: When you click on the purchase order, you can see what has already been invoiced. Please note that you are able see that, only after the invoice has been approved by IQVIA AP team.

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F. Other

Q: Where can I find payment information?
A: You can find it on the PO after you receive notification with created purchase order.

Q: If I use the CSP, who pays me?
A: IQVIA, who uses Coupa, is still responsible for paying you directly. Coupa does not pay suppliers on behalf of others.

Q: What does "pending receipt" mean?
A: This status shows that IQVIA is in the process of receiving the goods/services into their system. Once IQVIA enters the receipt, the invoice is 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.