

**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](mailto:procurement@iqvia.com). For payment and invoice-related issues, contact IQVIA's Accounts Payable team at [supplier.queries@iqvia.com](mailto: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](mailto:GFSSVendorMasterData@iqvia.com).

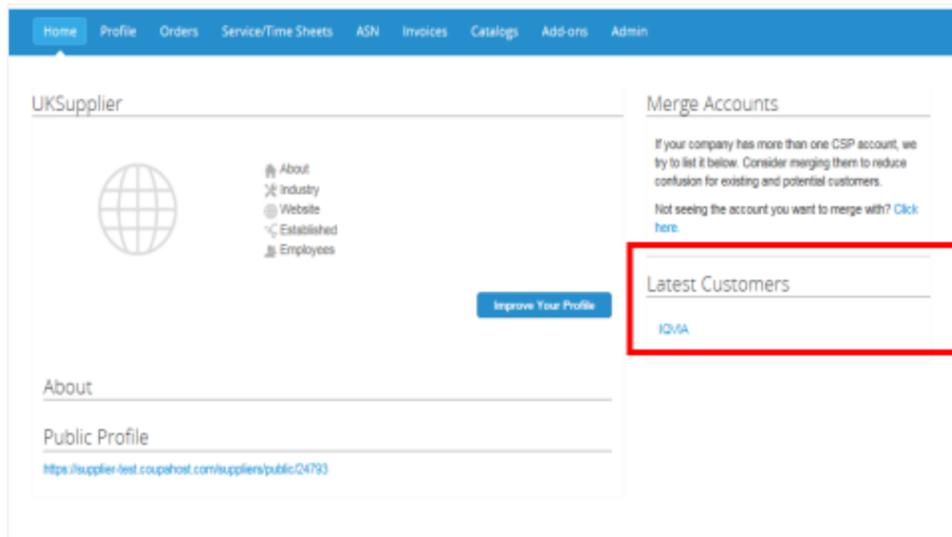
### Q: Where do I sign in to the CSP?

**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.

The image shows two side-by-side forms from the Coupa Supplier Portal. The top header is blue with the Coupa logo and the text 'coupa supplier portal'. The left form is titled 'Register' and includes the text 'New to Coupa? Create your account or click here for help.' Below this are input fields for 'First Name', 'Last Name', 'Company', and '\* Email'. A blue 'Register' button is at the bottom. The right form is titled 'Log In' and includes the text 'Welcome back! Login or click here for help.' Below this are input fields for '\* Email Address' and '\* Password'. A blue 'Log In' button is at the bottom, along with a link for 'Forgot Your Password?'.

**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](mailto: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](mailto: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](mailto: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?**

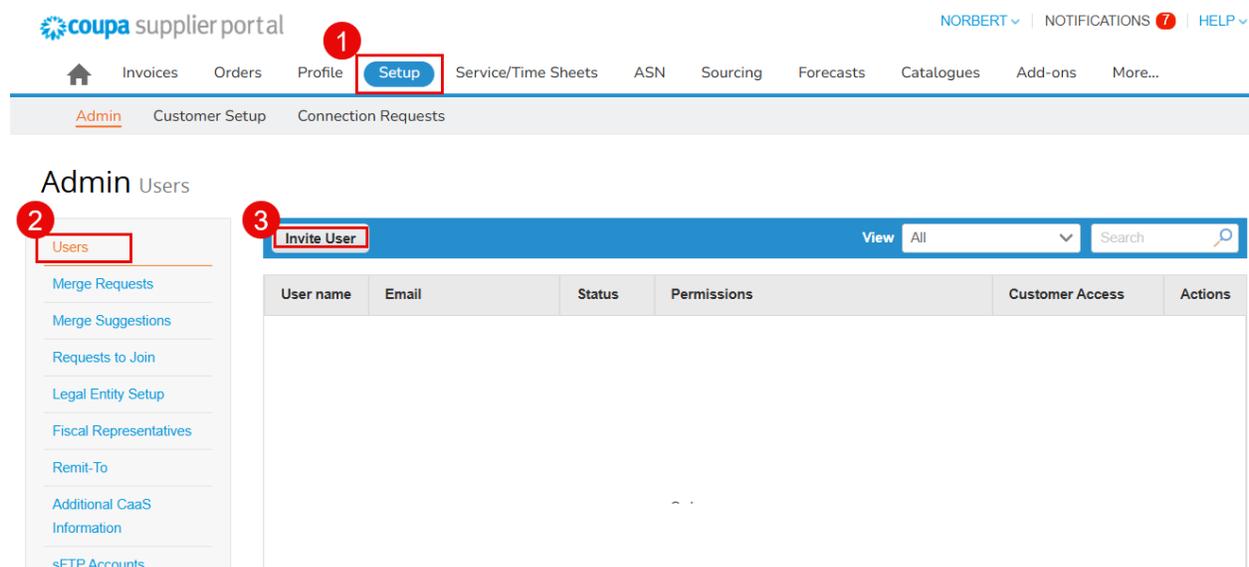
**A:** To enable two-factor authentication, log in to the CSP and go to "Account Settings" under your login name in the top right corner of the page. From there, you can enable two-factor authentication.

**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.

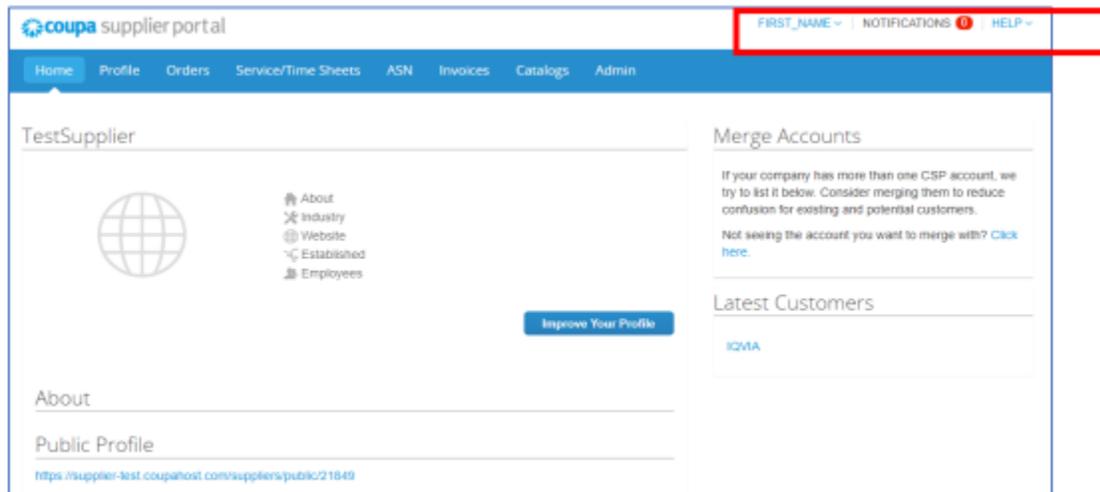


**Q: Why can't I access POs/invoices?**

**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?**

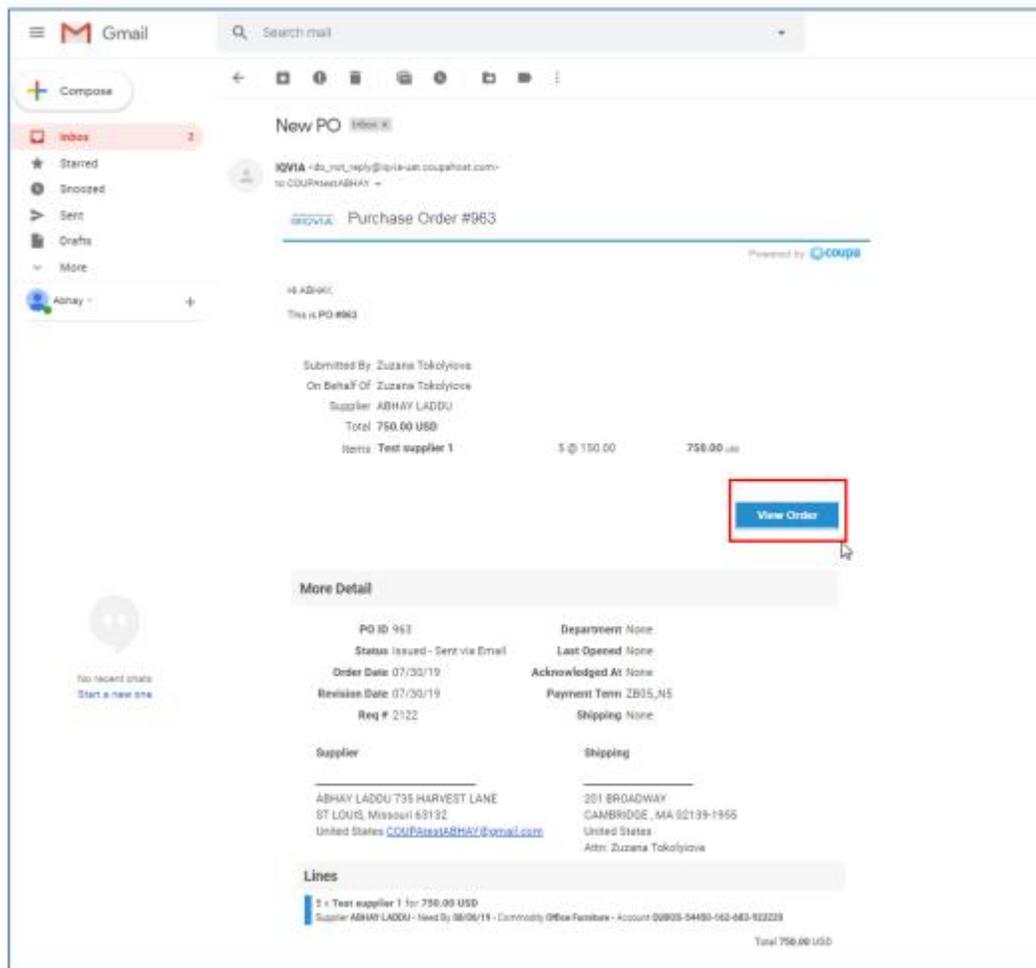
**A:** Check if you are using the supported protocols: TLS 1.1 or TLS 1.2. If you still have problems, contact [supplier@coupa.com](mailto:supplier@coupa.com).

**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 any 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.

The screenshot shows a web interface for editing an invoice line item. At the top, a table lists the line item with a gold coin icon, a description 'test supplier 2 lines', and a price of 10,000.00. Below this, there are fields for PO Line (005-1), Contract, and Supplier Part Number. A Billing section contains the number QUBOG-54450-162-683-623220. A Taxes table shows a tax rate of 10.00 and a tax amount of 1,000.00. An 'Add Line' button is visible. The 'Totals & Taxes' section is highlighted with a red box and contains the following fields: Shipping (100), Tax (5% resulting in 5.00), and a Tax Reference field. Below this, there are 'Misc' fields for Tax (0.00) and Tax Reference. A summary table at the bottom shows: Lines Net Total (10,000.00), Lines Tax Totals (1,000.00), Total Tax (1,005.00), Net Total (10,100.00), and a bolded Total of 11,105.00. At the very bottom, there are buttons for Delete, Cancel, Save as Draft, Calculate, and Submit.

**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](mailto: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?**

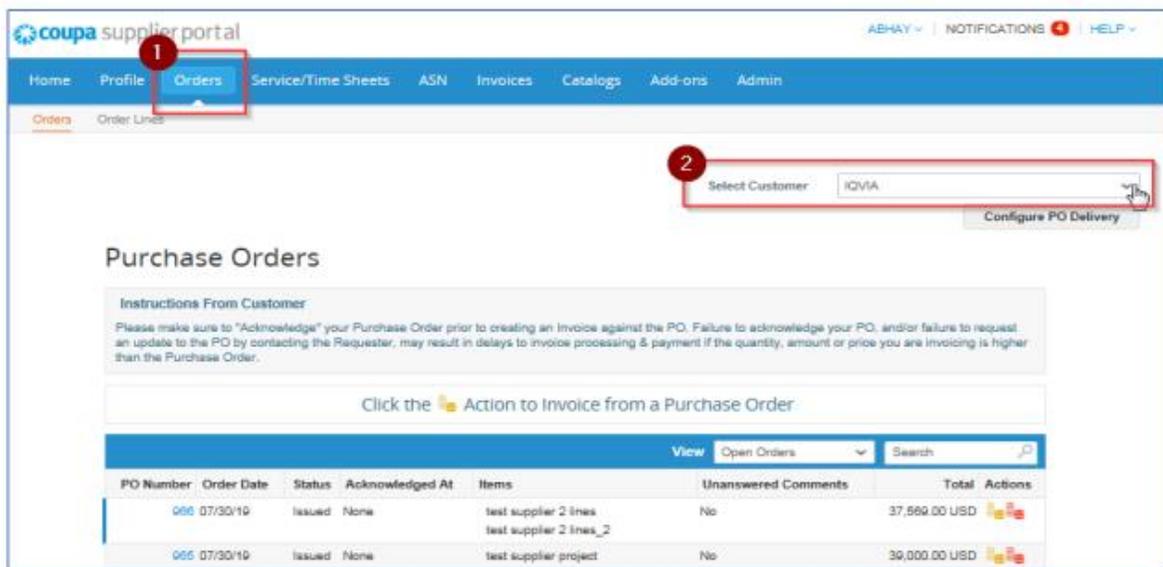
**A:** Accepted file types for invoice image scans are PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF. Each attachment can be up to 100 MB, but it's recommended to keep the attachment size under 16 MB for performance reasons.

**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](mailto: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](mailto: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.

### 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 Registrar, may result in delays to invoice processing & payment if the quantity, amount or price you are invoicing is higher than the Purchase Order.

View: All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
240	02/04/19	Cancelled	None	10 Each of 10ML EDTA CELL FREE DNA BCT TU	No	1,000.00 USD	
225	02/04/19	Issued	None	10 Each of 10ML EDTA CELL FREE DNA BCT TU	No	1,000.00 USD	
230	02/04/19	Issued	None	10 Each of 10ML EDTA CELL FREE DNA BCT TU	No	1,000.00 USD	
225	02/04/19	Closed	None	1 Each of 10ML EDTA CELL FREE DNA BCT TU	No	7,000.00 USD	
228	02/04/19	Soft Closed	None	10 Each of 10ML EDTA CELL FREE DNA BCT TU	No	1,000.00 USD	

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

**coupa supplier portal** ABHAY NOTIFICATIONS HELP

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

Orders **Order Lines**

Select Customer: IQVIA Configure PO Delivery

### Purchase Order Lines

Export to View: All Create View Search

PO Number (Header)	Line	Order Status (Header)	Items	Qty	Line Total
955	2	Issued	test supplier 2 lines_2	None	1500.00
955	1	Issued	test supplier 2 lines	None	30000.00
955	1	Issued	test supplier project	None	30000.00
954	1	Issued	test supplier PS asset	None	20000.00
952	1	Issued	5 Each of Test supplier 1	5	750.00

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

Orders Order Lines

Select Customer: IQVIA Configure PO Delivery

### Create New data table view

General

Name:

Visibility:  Only Me  Everyone

Start with view: All

Conditions

Match all conditions

Status is Buyer Hold  
Cancelled  
Closed  
Currency Hold

Add group of conditions

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order

Available Columns	Selected Columns
Comments	PO Number
PO ID	Order Date
	Status
	Acknowledged At
	Items
	Unanswered Comments
	Total
	Actions

Default Sort Order

Sort by:  in  order

Cancel Save

**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.

### Purchase Order #1672

Status: Issued - Sent via Email

Order Date: 01/23/19

Revision Date: 01/23/19

Requestor: Carmela PaganFisherFisher

Email: mc.carmela.pagan@accure.com

Payment Term: None

Attachments: None

Acknowledged:

#### Shipping

Ship-To Address: Quilbes Commercial UK Ltd  
500 Brook Drive, Green Park  
Reading  
RG2 8UP  
United Kingdom  
Attn: Carmela Fisher

Terms: None

#### Lines

Advanced Search Sort by Line Number: 0 - 0

Type	Item	Price	Total	Invoiced
✓	Relevant 0	\$ 0.00	\$ 0.00	\$0.00

\* Need By: 01/23/19    Part Number: None    Tax Amount: None

**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.

**Purchase Order #10**

HI UAT,  
This is PO #10

Submitted By Janka Matejakova  
On Behalf Of Janka Matejakova  
Supplier Grey Wolf Studios Limited  
Total 10,000.00 USD  
Items Software Maintenance and Support 10 @ 1,000.00 10,000.00 USD

[View Order](#)

**More Detail**

PO ID 10	Department None
Status Issued - Pending Manual	Last Opened None
Order Date 01/14/19	Acknowledged At None
Revision Date 01/14/19	Payment Term ZB30_30D
Req # 70	Shipping None

**Supplier**  
Grey Wolf Studios Limited 1 Coachworks  
Kimberly Road  
London  
NW6 7SG  
United Kingdom [janka.matejakova@qumtiles.com](mailto:janka.matejakova@qumtiles.com)

**Shipping**  
Innovex Europe Ltd  
Station House, Market Street  
Bracknell  
RG12 1HX  
United Kingdom  
Attn: Janka Matejakova

**Lines**

10 x Software Maintenance and Support for 10,000.00 USD  
Supplier Grey Wolf Studios Limited - Need By 01/31/19 - Commodity Software Maintenance and Support - Account QUTHV-16160-200-663-950320

Total 10,000.00 USD

**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.