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Coupa for Suppliers

Coupa Supplier Portal (CSP) –
Create an Invoice from a PO

2. Create an Invoice from a PO

How do I create an invoice?

1. On the main menu, click on the **Orders** tab.

2. If you are connected to more than one Coupa customer, select IQVIA name from the **Select Customer** dropdown menu.

Please note that before creation first invoice, there needs to be [set-up E-invoicing](#) which includes set-up **Remit-To Address with your banking information**.

coupa supplier portal

ABHAY | NOTIFICATIONS 4 | HELP

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

ABHAY LADDU C000319

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IQVIA

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Orders Order Lines

Select Customer IQVIA

Configure PO Delivery

Purchase Orders

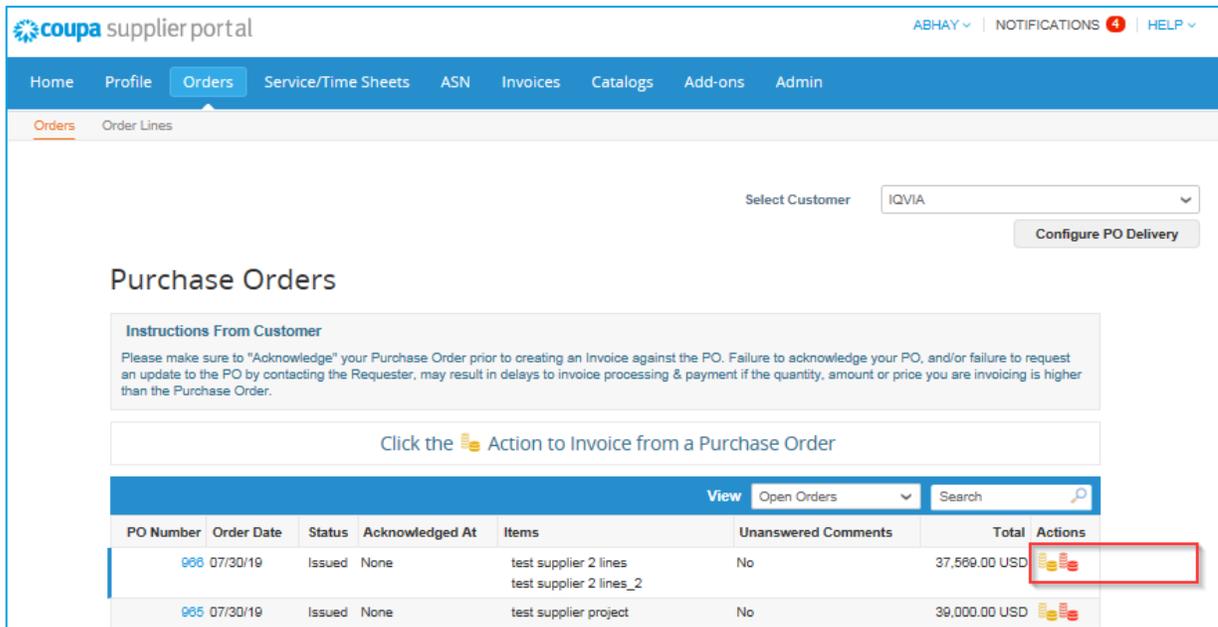
Instructions From Customer

Click the Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
066	07/30/19	Issued	None	test supplier 2 lines test supplier 2 lines_2	No	37,500.00 USD	
065	07/30/19	Issued	None	test supplier project	No	39,000.00 USD	

To flip a PO into an invoice, do one of the following:

Click on the **Create Invoice** () icon for the PO in the **Purchase Orders** table.



coupa supplier portal

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

Orders Order Lines

Select Customer IQVIA [Configure PO Delivery](#)

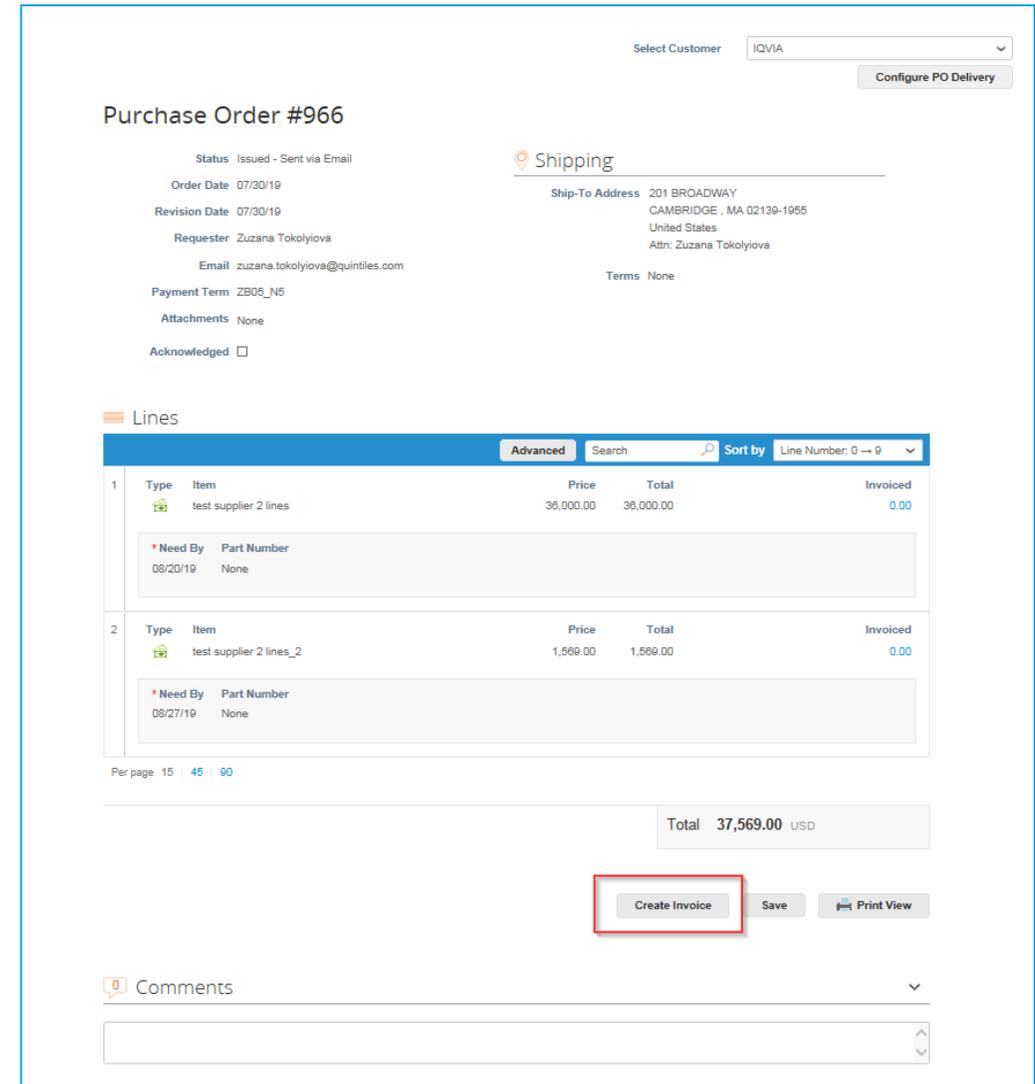
Purchase Orders

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	  

Click on the **PO Number** link to open the purchase order and click on the **Create Invoice** button.



Select Customer IQVIA [Configure PO Delivery](#)

Purchase Order #966

Status Issued - Sent via Email

Order Date 07/30/19

Revision Date 07/30/19

Requester Zuzana Tokolyiova

Email zuzana.tokolyiova@quintiles.com

Payment Term ZB05_N5

Attachments None

Acknowledged

Shipping

Ship-To Address 201 BROADWAY
CAMBRIDGE, MA 02139-1955
United States
Attn: Zuzana Tokolyiova

Terms None

Lines

Advanced Search Sort by Line Number: 0 -> 9

Type	Item	Price	Total	Invoiced
	test supplier 2 lines	36,000.00	36,000.00	0.00
* Need By 08/20/19		Part Number None		
	test supplier 2 lines_2	1,569.00	1,569.00	0.00
* Need By 08/27/19		Part Number None		

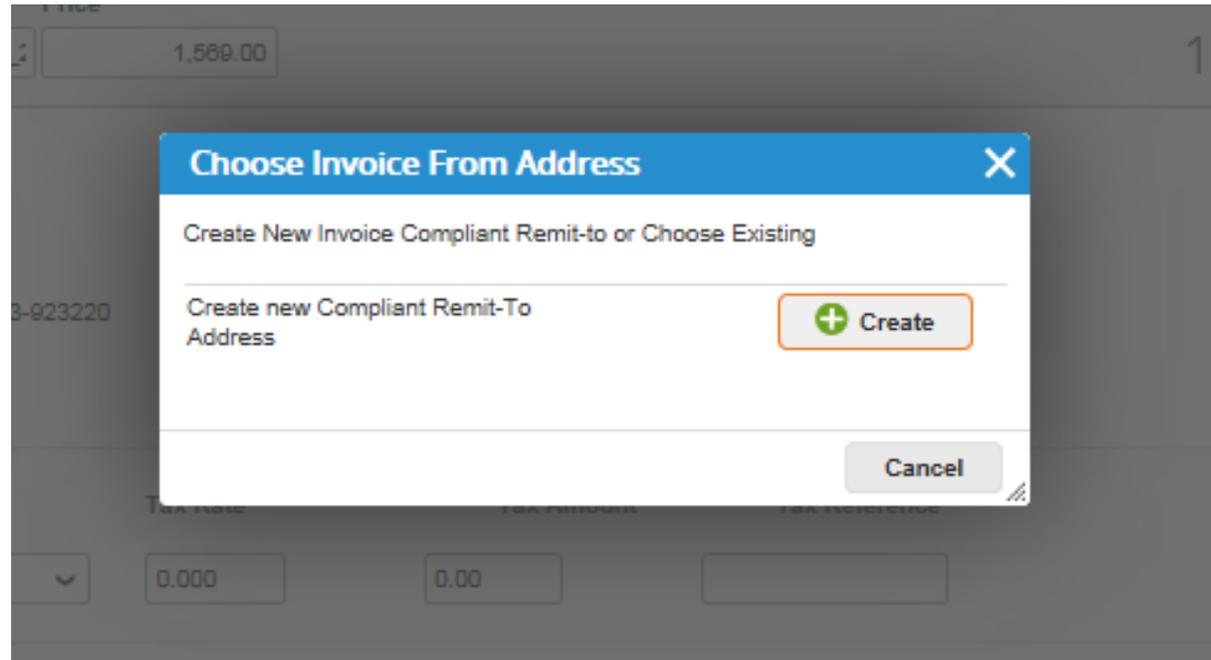
Per page 15 45 90

Total 37,569.00 USD

[Create Invoice](#) [Save](#) [Print View](#)

Comments

- Before first creation of invoice, you need to [set up E-invoicing](#) (especially remit to address and banking information, therefore when you click **Create invoice** button pop-up notification **Choose Invoice From Address** will appear.
- If you have already created remit-to address, you will have option to choose your existing Remit-to or create new one as it shows below:



Create invoice page

Fill in at least the mandatory fields (marked with a red asterisk *).

- **Invoice #** - enter your specific invoice number
- **Invoice Date** – enter the date from the invoice. Invoice date cannot exceed 10 days. Coupa calculates the Payment date based on the Payment terms.
Example: Invoice date 15th Jan.2020 + PT 30 days
Payment date will be 14th Feb 2020.
- **Payment Terms** - depending on what you have agreed with the IQVIA
- **Currency** – uneditable – if displayed currency is not correct, please contact requester directly as it is automatically created based on purchase order

You can create or choose an invoice from, a remit-to, and/or a ship from address by clicking on the corresponding **Search** (magnifying glass) icon in the **From** section.

The screenshot shows the 'Create Invoice' page in the Coupa Supplier Portal. The page is titled 'Create Invoice' and has a 'Create' button. The 'General Info' section includes fields for Invoice # (NY111), Invoice Date (08/01/19), Payment Term (ZB05_N5), Currency (USD), Delivery Number, Status (Draft), Image Scan, and Supplier Note. The 'From' section includes Supplier (ABHAY LADDU C0000319), Supplier Tax ID (15258853), Invoice From Address, Remit-To Address, and Ship From Address, all with search icons. The 'To' section includes Customer (IQVIA), Bill To Address, Buyer Tax ID (None), and Ship To Address.

PO with multiple lines – How to raise an invoice against just one line

- Select the line against which you would like to raise an invoice
- Remove rest of the lines by clicking red X icon available on the top right corner of all existing lines

The screenshot displays the 'Lines' section of a software interface. It contains two line items:

Type	Description	Price									
	test supplier 2 lines	36,000.00	36,000.00								
PO Line	Contract	Supplier Part Number									
966-1		<input type="text"/>									
Billing	QUBOS-54450-162-683-923220										
Taxes	<table border="1"><thead><tr><th>Tax Description</th><th>Tax Rate</th><th>Tax Amount</th><th>Tax Reference</th></tr></thead><tbody><tr><td></td><td>0.000</td><td>0.00</td><td><input type="text"/></td></tr></tbody></table>			Tax Description	Tax Rate	Tax Amount	Tax Reference		0.000	0.00	<input type="text"/>
Tax Description	Tax Rate	Tax Amount	Tax Reference								
	0.000	0.00	<input type="text"/>								
	Add Tag										

Type	Description	Price									
	test supplier 2 lines_2	1,569.00	1,569.00								
PO Line	Contract	Supplier Part Number									
966-2		<input type="text"/>									
Billing	QUBOS-53400-162-683-923220										
Taxes	<table border="1"><thead><tr><th>Tax Description</th><th>Tax Rate</th><th>Tax Amount</th><th>Tax Reference</th></tr></thead><tbody><tr><td></td><td>0.000</td><td>0.00</td><td><input type="text"/></td></tr></tbody></table>			Tax Description	Tax Rate	Tax Amount	Tax Reference		0.000	0.00	<input type="text"/>
Tax Description	Tax Rate	Tax Amount	Tax Reference								
	0.000	0.00	<input type="text"/>								
	Add Tag										

- Change the **Price** box of the line if needed
- Setup the tax rate by selecting it from the **Tax Description** sheet or typing Tax Rate manually in the **Tax rate box** - then the amount in the Tax amount box will be recalculated from the total amount

The screenshot shows the 'Lines' form with the following details:

- Line 1:** Type: test supplier 2 lines, Description: test supplier 2 lines, Price: 10,000.00, Total: 36,000.00
- PO Line:** 986-1
- Billing:** QUBOS-54450-162-683-923220
- Taxes:** Tax Description dropdown is open, showing a list of tax codes such as 'US: 01 - Purchases/Svcs not subject to sales/u...', 'US: 05 - Tax Return/Pay- Tax/License/Registion...', 'US: 08 - Rental of Real Property US - 0.0%', 'US: 09 - Purch of Food not immed cons/cloth/me...', 'US: 10 - Purchases for resale US - 0.0%', 'US: 11 - Contributions/Donations to Charity US - 0.0%', 'US: 17 - Tax included in total - See invoice US - 0.0%', 'US: GENERIC;G - GENERIC TAX CODE - 0.0%', 'US: GENERIC;S - GENERIC TAX CODE - 0.0%', 'US: KSUSETAX;G - KS Use Tax - 0.0%', 'US: KSUSETAX;S - KS Use Tax - 0.0%', 'US: S2 - A/P Sales Tax - Taxable US - 0.0%', and 'US: U1 - A/P Use Tax, taxable, self assessed US - 0.0%'.
- Totals & Taxes:** Lines Net Total: 36,000.00, Lines Tax Totals: 0.00

The screenshot shows the 'Lines' form with the following details:

- Line 1:** Type: test supplier 2 lines, Description: test supplier 2 lines, Price: 10,000.00, Total: 36,000.00
- PO Line:** 986-1
- Billing:** QUBOS-54450-162-683-923220
- Taxes:** Tax Description dropdown is open, Tax Rate field is set to 10.000, Tax Amount field is set to 1,000.00.
- Totals & Taxes:** (Labels are present but values are not visible in this view)

Please note, that the price should be always created with positive value, not negative. For negative, create [Credit note](#).

- Add shipping fees and Tax if required
- There is field for amount (100 in this case) and also field for Tax for shipping (5% in this case).

- Clicking **Calculate** will give you the gross total amount considering the tax values.

1. Total Tax is Tax Amount + tax from shipping
2. Net Total is line item + shipping
3. Total line item + tax + shipping + tax for shipping

The screenshot shows a 'Lines' form with one line item. The 'Price' field is set to 36,000.00. In the 'Totals & Taxes' section, the 'Shipping' amount is 100 and the 'Tax' rate is 5%, which is highlighted with a red box. The 'Total' is 36,000.00.

Totals & Taxes	
Lines Net Total	36,000.00
Lines Tax Totals	0.00
Shipping	100
Tax	5 %
Misc	0.000
Total Tax	0.00
Net Total	36,000.00
Total	36,000.00

The screenshot shows the same 'Lines' form but with a price of 10,000.00. The 'Totals & Taxes' section shows a shipping amount of 100 and a tax rate of 5%. The 'Total Tax' is 1,005.00, 'Net Total' is 10,100.00, and 'Total' is 11,105.00. The 'Calculate' button is highlighted with a red box.

Totals & Taxes	
Lines Net Total	10,000.00
Lines Tax Totals	1,000.00
Shipping	100
Tax	5 %
Misc	0.000
Total Tax	1,005.00
Net Total	10,100.00
Total	11,105.00

- If everything fits as you want click **Submit** the invoice or **Save** it as a draft to submit it later.
- You can also add comments for IQVIA.

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
<input type="text"/>	10.000	1,000.00	<input type="text"/>

[Add Tag](#)

[+ Add Line](#)

Totals & Taxes

Lines Net Total	10,000.00
Lines Tax Totals	1,000.00
Shipping	
<input type="text"/>	100
Tax	<input type="text"/> 5 % <input type="text"/> 5.00
Tax Reference	<input type="text"/>
Misc	
<input type="text"/>	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/> 0.000
Tax Reference	<input type="text"/>
Total Tax	1,005.00
Net Total	10,100.00
Total	11,105.00

[Delete](#) [Cancel](#) [Save as Draft](#) [Calculate](#) [Submit](#)

Comments

[Add Comment](#)

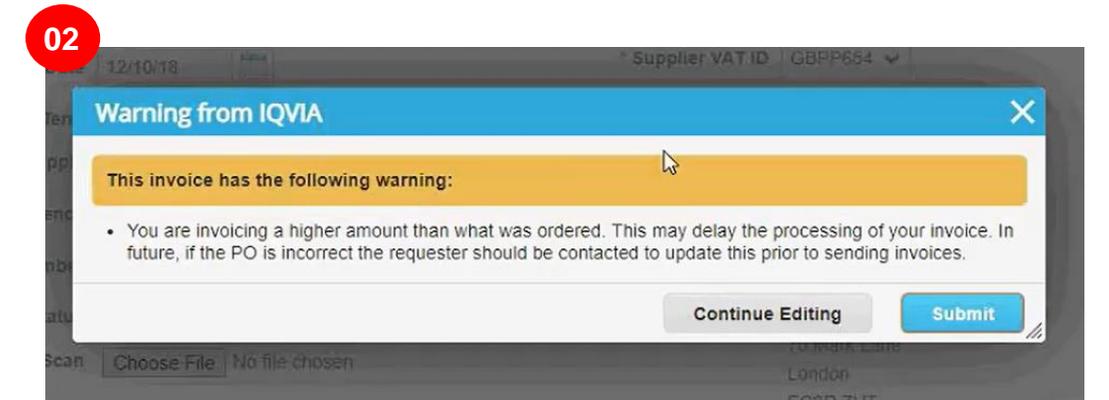
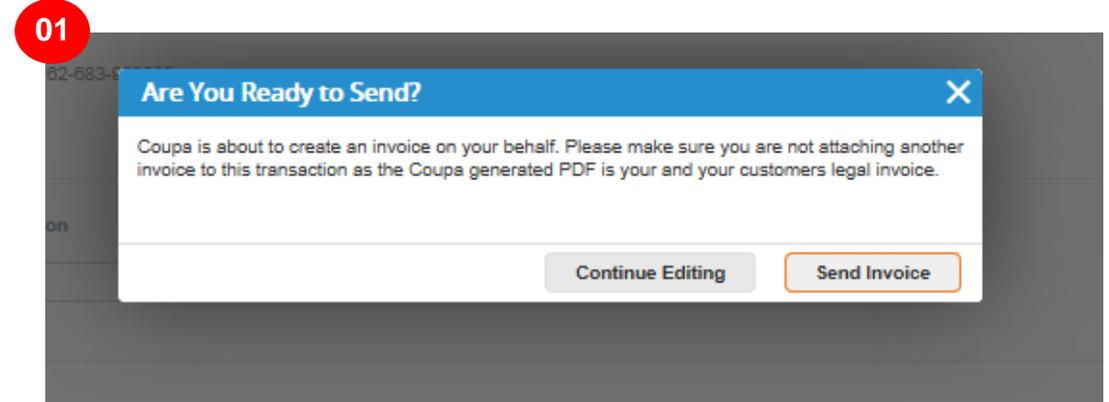
First you will get pop-up notification „ if you are ready to send your invoice“. There are following options:

- **Continue Editing** – if you forgot to change anything, you can go back
- **Send Invoice**

Then another pop-up warning can shows. Warning says IQVIA assumes your quantity or amount is higher or your tax is different than what IQVIA expects.

Again there are 2 options:

- **Continue Editing**
- **Submit**



After submitting all notifications, green line will appear.

The screenshot displays the 'Invoices' section of the Coupa system. At the top, there is a 'Select Customer' dropdown menu set to 'IQVIA' and a 'Configure PO Delivery' button. Below this, a green notification bar states 'ABHAY LADDU C0000319 invoice #NY11 is processing'. An 'Instructions From Customer' section provides a warning about acknowledging the Purchase Order. The 'Create Invoices' section includes buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table below shows a list of invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row, invoice #NY11, is highlighted in blue and has a status of 'Processing'. A red arrow points to this row. The table also shows two draft invoices and one pending approval invoice.

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
NY11	08/06/19	Processing	966	11,105.00 USD	No	
None	08/06/19	Draft	966	37,569.00 USD	No	
None	08/06/19	Draft	966	-11,000.00 USD	No	
NY111	08/05/19	Pending Approval	966	11,105.00 USD	No	

Before submitting the invoice, you can cancel or delete it. You can delete only draft invoices.

As you can see your invoice have status „**Processing**“. You can open your invoice again and take a look what you submitted.

After you submit your Coupa invoices, invoices will be routed to the AP Team for review and approval. During this time all invoices are visible just for AP team. It is all that needs to be done. Based on agreed payment terms, you will receive payments subsequently. If there will be some issue with submitted invoice, you will receive notification saying your invoice was rejected because of some reason.

Types of purchase order

In Coupa you can receive **Amount(Services)** or **Quantity(Goods)** based PO.

Purchase Order #964

Status: Issued - Sent via Email
Order Date: 07/30/19
Revision Date: 07/30/19
Requester: Zuzana Tokolyiova
Email: zuzana.tokolyiova@quintiles.com
Payment Term: ZB05_N5
Attachments: None
Acknowledged:

Shipping

Ship-To Address: 201 BROADWAY
CAMBRIDGE, MA 02139-1955
United States
Attn: Zuzana Tokolyiova
Terms: None

Lines

Type	Item	Price	Total	Invoiced
1	test supplier PS asset	25,000.00	25,000.00	0.00

* Need By: 08/28/19
Part Number: None

Total: 25,000.00 USD

Buttons: Create Invoice, Save, Print View

Comments:
Add Comment

Purchase Order #963

Status: Issued - Sent via Email
Order Date: 07/30/19
Revision Date: 07/30/19
Requester: Zuzana Tokolyiova
Email: zuzana.tokolyiova@quintiles.com
Payment Term: ZB05_N5
Attachments: None
Acknowledged:

Shipping

Ship-To Address: 201 BROADWAY
CAMBRIDGE, MA 02139-1955
United States
Attn: Zuzana Tokolyiova
Terms: None

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Test supplier 1	5	Each	150.00	750.00	0.00

* Need By: 08/08/19
Part Number: None

Total: 750.00 USD

Buttons: Create Invoice, Save, Print View

Comments:
Add Comment

UNIT OF MEASURE codes

Select Customer: IQVIA Configure PO Delivery

Purchase Order #963

Status: Issued - Sent via Email

Order Date: 07/30/19

Revision Date: 07/30/19

Requester: Zuzana Tokolyiova

Email: zuzana.tokolyiova@quintiles.com

Payment Term: ZB05_N5

Attachments: None

Acknowledged:

Shipping

Ship-To Address: 201 BROADWAY
CAMBRIDGE, MA 02139-1955
United States
Attn: Zuzana Tokolyiova

Terms: None

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
1	Test supplier 1	5	Each	150.00	750.00	0.00

* Need By: 08/06/19 | Part Number: None

Total: 750.00 USD

Create Invoice Save Print View

Comments

Add Comment

Code	Name
EA	Each
BX	Box
DZ	Dozen
CS	Case
PK	Cello Pack
HRS	Hours
CT	Carton
KT	Kit
PD	Pad
PR	Pair
RM	Ream
MHR	Work Hour
UNT	Units (Generic)
SLV	Sleeve
ST	Short Tons
SH	Sheet
SET	Set
RL	Roll
RK	Rack
LBS	Pounds
PC	Piece

Code	Name
THO	Per Thousand
PL	Pallet
ML	Milliliters
MG	Milligrams
M	Meters
LOT	Lot, Batch
LT	Long Tons
L	Liters
KG	Kilograms
JB	Job
HUN	Hundreds
G	Grams
GAL	Gallon - Liquid Measure
BDL	Bundle
BLK	Bulk
BBL	Barrel - Liquid Measure
BG	Bag
PCK	Pack
GS	Gross
BT	Bottle

Available funds on the PO

When you click on the PO, you can see what has already been invoiced. You can see available funds on the PO only after the invoice has been approved by AP team.

Purchase Order #1672

Status: Issued - Sent via Email

Order Date: 01/23/19

Revision Date: 01/23/19

Requester: Carmina PailanPailanPailan

Email: ma.carmina.d.pailan@accenture.com

Payment Term: None

Attachments: None

Acknowledged

Shipping

Ship-To Address: Quintiles Commercial UK Ltd
500 Brook Drive, Green Park
Reading
RG2 6UU
United Kingdom
Attn: Carmina Pailan

Terms: None

Lines

Advanced Search Sort by Line Number 0 - 9

Type	Item	Price	Total	Invoiced
	Test item 0	8,000.00	8,000.00	400.00

* Need By: 01/30/19 Part Number: None Tax Amount: None