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# Coupa for Suppliers

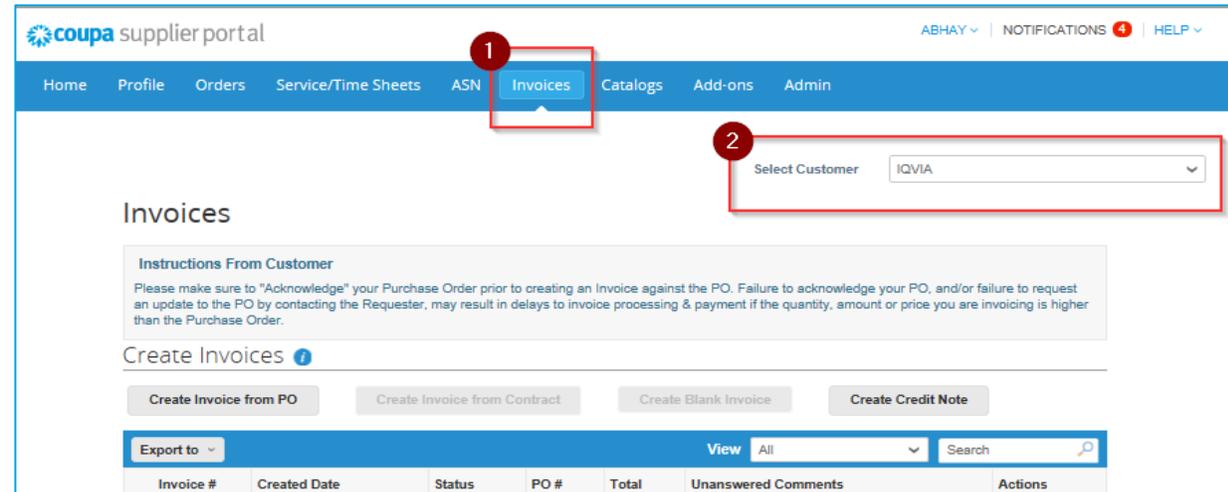
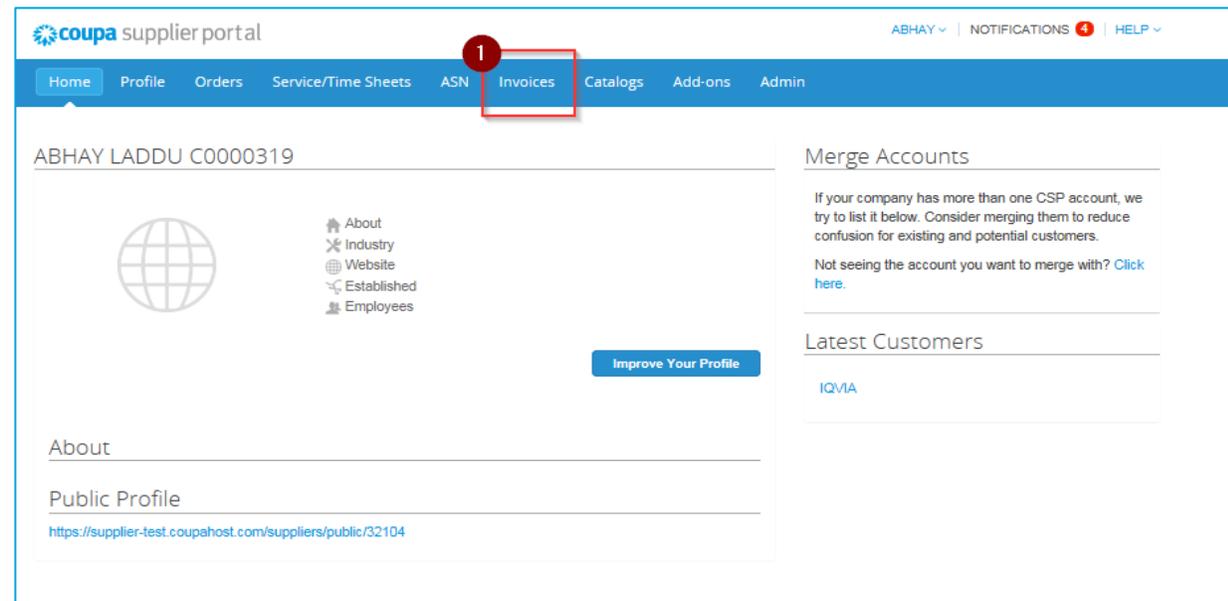
Coupa Supplier Portal (CSP) –  
View and Manage Invoices

# 1. View and Manage Invoices

# Invoices page

1. Click on the **Invoices** tab on the CSP homepage. The **Invoices** page appears

2. From the **Select Customer** drop-down list in the top right corner, select the IQVIA whose invoices you want to see.



**Note:** When you visit the page again, it shows you the invoices for the customer you selected last time.

# Invoice description

The **Invoices** table shows the following information for all the invoices you sent to IQVIA.

Invoices						
Export to ▾		View			All ▾	Search 
Invoice #	Created Date ▾	Status	PO #	Total	Unanswered Comments	Actions
123	06/01/17	Draft	3050	113.20	No	
456	06/01/17	Disputed	None	150.00	No	
789	05/27/17	Pending Approval	2949	3,750.00	No	

Column	Description
<b>Invoice #</b>	Invoice number generated by Coupa. Click on it to view the invoice.
<b>Created Date</b>	Date when the invoice was created.
<b>Status</b>	Current status of the invoice. For more information, see the <a href="#">invoice status list</a> .
<b>PO #</b>	PO number generated by Coupa for the order on which the invoice is based. Click on it to view the PO.
<b>Total</b>	Total amount of the invoice with specific currency.
<b>Unanswered Comments</b>	You can see all IQVIA's comments or add your comments for the IQVIA when you open the invoice.
<b>Actions</b>	Click on the Edit  icon to edit an invoice. You can edit only draft invoices.

# Invoices status

Invoices can have the following statuses:

Invoice Status	Definition	Possible Next Status
New	Invoice that has just been created and is currently being entered.	Draft / On Hold / Pending Receipt / Pending Approval / Approved / Disputed
Draft	Invoice entered into <u>Coupa</u> and saved but not yet submitted for approval.	On Hold / Pending Receipt / Pending Approval / Approved / Disputed
Pending Receipt	For suppliers setup with 3-way match, waiting for Buyer to enter a Goods Receipt.	On Hold / Pending Approval / Approved / Disputed
On Hold	Invoice failed Coupa's automated tolerance.	Pending Approval
Booking Hold	Invoice contains new remit-to address	Pending Receipt / Pending Approval / Approved / Disputed
Pending Approval	Invoice currently with business approver.	Approved / Disputed
Disputed	Requester or Buyer has instructed Accounts Payable to dispute the invoice or the invoice has been automatically disputed	Approved / Disputed
Voided	AP closes out the invoice without paying. Invoice has been voided by the AP Supervisor.	-
Approved	Ready to be Paid	-

You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering.

# Verify payment status

1. Log into CSP
2. Navigate to Invoice tab
3. Search invoice/click on invoice #

The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as ABHAY, with 4 notifications and a help menu. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (highlighted), Catalogs, Add-ons, and Admin. A 'Select Customer' dropdown is set to IQVIA. The main heading is 'Invoices', followed by 'Instructions From Customer' and 'Create Invoices' options. A table lists invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row, with invoice # NY111, is highlighted.

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

## 4. Scroll to the payment section to verify payment status

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

Select Customer IQVIA

### Invoice #NY111 [Back](#)

Invoice # NY111  
Invoice Date 08/01/19  
Payment Term ZB05\_N5  
Currency USD  
Delivery Number None  
**Status Pending Approval**  
Shipping Term None  
Legal Invoice [download](#)  
Image Scan None  
Supplier Notes None  
Attachments None

Supplier ABHAY LADDU C0000319 

Invoice From ABCD  
2341 Summit Ave.  
Brooklyn  
New York, NY 11234  
United States

Remit To ABCD  
2341 Summit Ave.  
Brooklyn  
New York, NY 11234  
United States

Ship From ABCD  
2341 Summit Ave.  
Brooklyn  
New York, NY 11234  
United States

Supplier Tax ID 15256853  
Customer IQVIA

Bill To Address IQVIA Market Intelligence LLC  
P O Box 14325  
Research Triangle Park, NC 27709  
United States

Ship To Address 201 BROADWAY  
CAMBRIDGE , MA 02139-1955  
United States

Buyer Tax ID None

**Paid No**  
Payment Date None  
Payment Notes None

# Disputed Invoice

Invoices with disputed status are invoices with information that IQVIA does not agree to, needs clarification on, or finds incorrect.

**When the status of an invoice changes to "Disputed", you receive an email notification with:**

- invoice number,
- date of the dispute,
- reason for the dispute,
- optionally IQVIA can leave any additional comments on the bottom on the invoice page in CSP.

**Warning:** IQVIA does not process disputed invoices for payment until you [resolve the dispute](#).

In the **Invoices** table, click on the invoice number or on the **Resolve** button in the **Actions** column for the disputed invoice that you want to resolve.

To resolve a dispute, click on the relevant button at the bottom of the invoice.  
Depending on the type of invoice, you have the following options:

1

## Country compliant e-invoice

**Tip:** Country compliant e-invoices are marked with a green checkmark next to the country code in their top right corner.

- **Cancel Invoice**

If an invoice was issued in duplicate, [create a credit note](#) to cancel it.

If an invoice has some incorrect information (other than price or quantity), for example, incorrect tax rate or item description, create a credit note to cancel it and issue a new corrected invoice. The original invoice remains in disputed status and the corrected invoice is submitted for approval.

**Warning:** The corrected invoice must have a new number.

- **Adjust**

If the price and/or the quantity for invoice lines(s) is incorrect on an invoice, issue an adjustment credit note (partial credit) to correct it. You can adjust credit line quantity also in case of returned goods or if an invoice has already been paid for.

2

## Standard e-invoice

- **Void**

If an invoice was issued in duplicate or has already been paid for through an earlier invoice, void it.

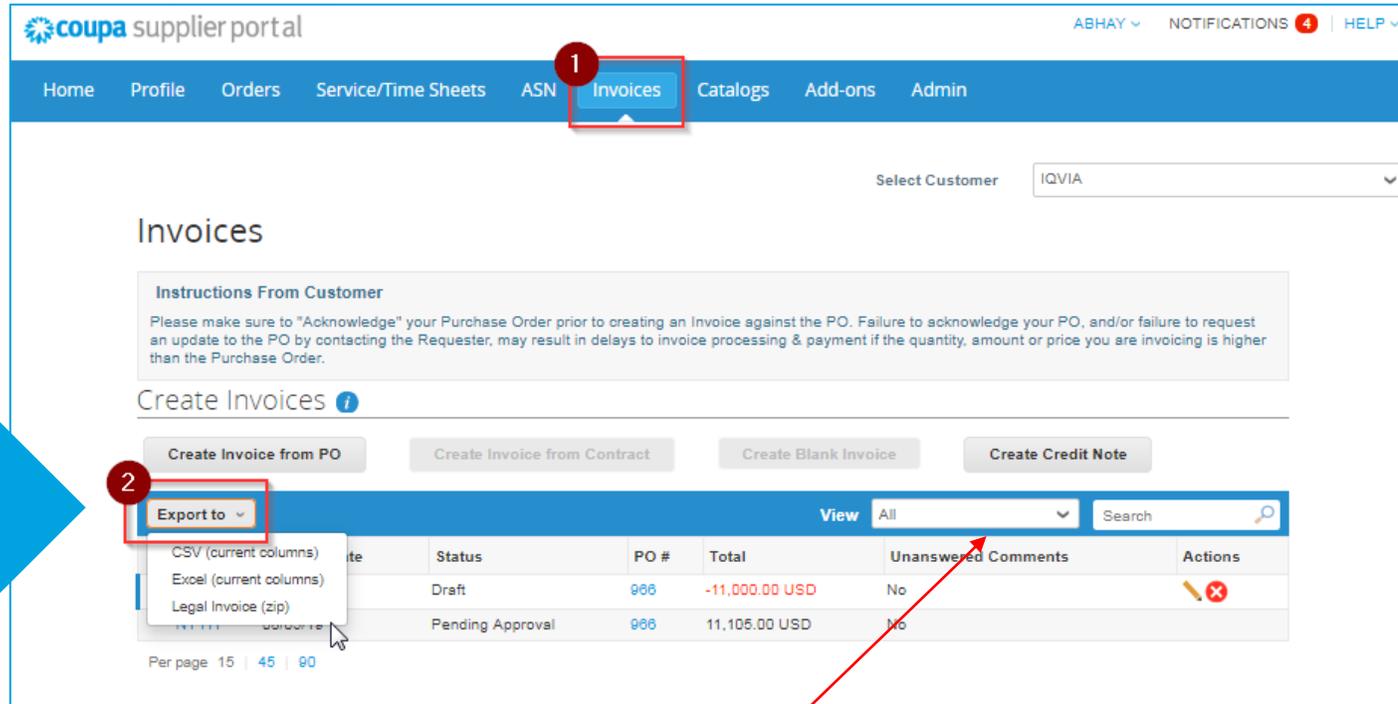
- **Correct Invoice**

If an invoice has some incorrect information, correct it. When submitting a corrected invoice, you can use the same invoice number.

If IQVIA disputes an invoice in error, or you choose not to resolve the dispute, IQVIA can withdraw the invoice from dispute and process it.

# Export the invoices

If IQVIA use country compliant invoicing, you can also bulk export all the legal invoice attachments (usually PDFs) in a compressed (.zip) file by selecting the **Legal Invoice (zip)** option from the **Export to** dropdown.



**1**

**2**

Select Customer: IQVIA

### Invoices

**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.

Create Invoices ⓘ

Create Invoice from PO   Create Invoice from Contract   Create Blank Invoice   Create Credit Note

Export to   View: All   Search

Date	Status	PO #	Total	Unanswered Comments	Actions
	Draft	006	-11,000.00 USD	No	
	Pending Approval	006	11,105.00 USD	No	

Per page: 15 | 45 | 90

After : A green message bar informs you that "The data you requested will be emailed to you shortly."

**Tip:** You can set your **Invoices** table view to show and export your legal invoices by status, created date, invoice date, period of time by creating your own view in **View** drop-down list.

**Note:** The export usually takes about one minute. In case of a large number of invoices it may take longer.