



View and Manage POs

Supplier Instructions

View and Manage POs

1. Click on the **Orders** tab on the CSP homepage.
2. The **Purchase Orders** page appears.
3. From the **Select Customer** drop-down list in the top right corner, select IQVIA. 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.

The screenshot shows the Coupa Supplier Portal interface. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Orders' tab is selected. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'IQVIA' and a 'Configure PO Delivery' button. The main content area is titled 'Purchase Orders' and contains an 'Instructions From Customer' section. Below the instructions, there is a table of purchase orders. The table has columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The table contains four rows of data. A 'View' dropdown and search bar are located above the table.




PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
008	07/30/19	Issued	None	test supplier 2 lines test supplier 2 lines_2	No	37,500.00 USD	
005	07/30/19	Issued	None	test supplier project	No	30,000.00 USD	
004	07/30/19	Issued	None	test supplier PS asset	No	25,000.00 USD	
003	07/30/19	Issued	None	5 Each of Test supplier 1	No	750.00 USD	





Note: In case you have other customers in Coupa except for IQVIA, when you visit the page again, it shows you the POs from the company you selected last time.



Purchase Orders table

The **Purchase Orders** table shows the following information for all the POs you received from IQVIA.





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	  

Column	Description
PO Number	PO number generated by Coupa. Click on it to view the PO.
Order Date	Date when the PO was created.
Status	Current status of the PO. For more information, see the PO status list below.
Acknowledged At	Date when you acknowledged the receipt of the PO, or "None" if not acknowledged. You can choose to let your customer know that you received their PO by selecting the Acknowledged At checkbox on the PO. When you select the checkbox, the current date appears in the Acknowledged At column. This checkbox is a simple toggle, so you can also un-acknowledge an invoice by deselecting the checkbox. If you re-acknowledge at a later time, the new date appears.
Items	List of items on the PO.
Unanswered Comments	Your comments on the PO for your customer. Also, your customer's comments that you need to respond to. You can see all your customer's comments or add your comments for the customer when you open the PO.
Total	Total amount of the PO.
Actions	Click on the icons for the following actions: <ul style="list-style-type: none"> - Create (flip the PO into) an invoice. - Create a credit note. - Create a service/time sheet. - Create (flip the PO into) an advance ship notice (ASN).



Purchase order details

For more details click on the **PO Number** link to open the PO.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
998	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	 

At the bottom of PO page there are 3 buttons for action.

1. [Create Invoice](#) – one of two options how to create invoice from a PO
2. [Save](#)
3. [Print View](#) – You can also print POs if you want to.

Also, at the bottom of this page, you can add **Comments** to provided area, if any additional information is needed.

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Orders' section is active. Below the navigation bar, there's a search bar and a 'Select Customer' dropdown menu set to 'IQVIA'. The main content area displays 'Purchase Order #965' with details: 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), and Acknowledged (checkbox). The 'Shipping' section shows the Ship-To Address: 201 BROADWAY, CAMBRIDGE, MA 02138-1955, United States, Attn: Zuzana Tokolyiova, and Terms (None). Below the shipping information is a 'Lines' table with one line item: 'test supplier project' with a price of 39,000.00 USD and a total of 39,000.00 USD. At the bottom of the page, there are three buttons: 'Create Invoice', 'Save', and 'Print View'. Below these buttons is a 'Comments' section with a text input field and an 'Add Comment' button.



POs can have the following statuses

Status	Description
Buyer Hold	The PO is approved but pending buyer review (handled by Procurement department)
Canceled	The PO is cancelled and doesn't need to be fulfilled (handled by Requester)
Closed	The issued PO was received and then closed, either manually or automatically within Coupa.
Currency Hold	<p>The PO is on hold due to a currency exchange rate issue.</p> <p>Currency Hold happens when the currency of the Chart of Account (i.e. company code or BU) and the currency of the item does not have an exchange rate to link the 2 currencies. Only Admins can release the currency hold and they should map the exchange rates of the 2 currencies before releasing.</p>
Error	There's something wrong with the PO. Contact IQVIA to get the PO back on track.
Issued	The PO was approved and sent to you.
Soft Closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.



Under what circumstances Coupa could close the PO

Manually

1. IQVIA can do it manually by first 'soft closing' ("Soft Closed" status) the PO, then 'fully closing' ("Closed" status) the PO.
2. IQVIA can manually reopen POs in "Soft Closed" status. POs in "Closed" status cannot be reopened or returned to "Soft Closed".

Automatically

1. POs are automatically soft closed after 545 days since its last activity (545 days of inactivity).
2. Fully invoiced POs are automatically soft closed after 60 days.
3. For both #1 and #2 point, POs in "Soft Closed" status are automatically fully closed ("Closed" status) after 365 days of inactivity.