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Coupa for Suppliers

Coupa Supplier Portal (CSP) – Invoice Processing

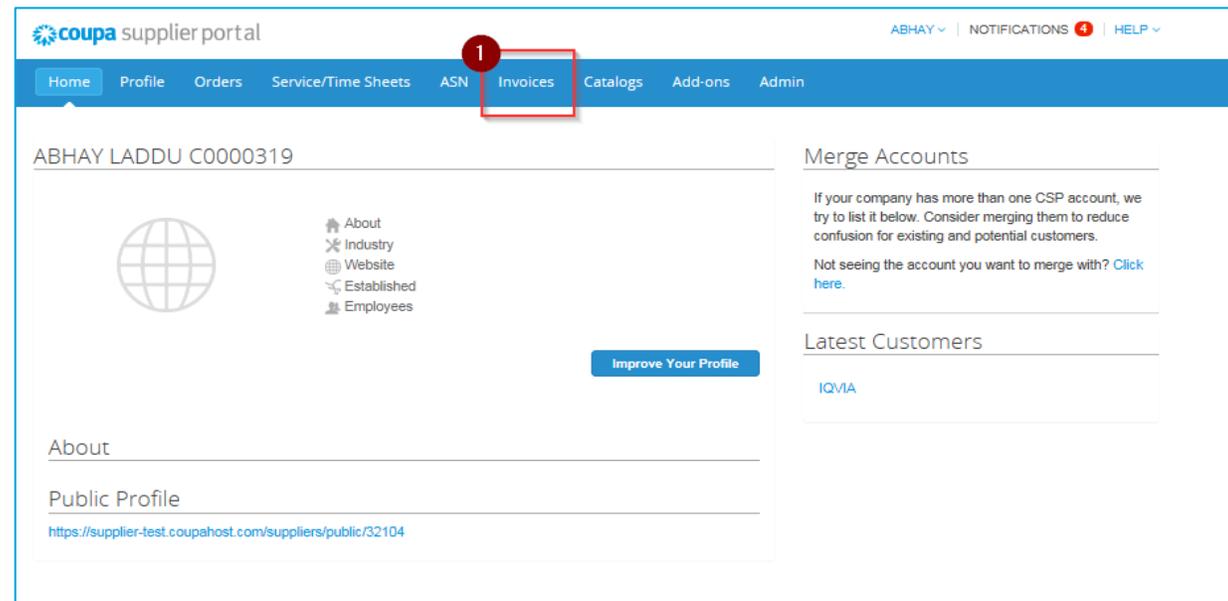
Covered Topics

- [View and Manage Invoices](#)
- [Create an Invoice from a PO](#)
- [Set up E-invoicing](#)
- [Create or Edit Credit Note](#)
- [FAQ](#)
- [Support](#)

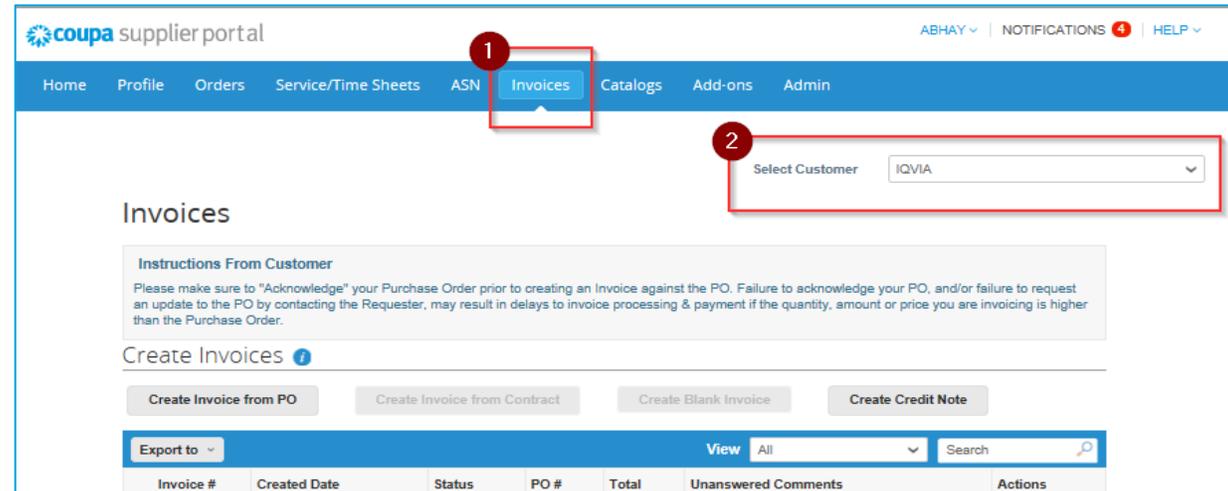
1. View and Manage Invoices

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
Invoice #	Invoice number generated by Coupa. Click on it to view the invoice.
Created Date	Date when the invoice was created.
Status	Current status of the invoice. For more information, see the invoice status list .
PO #	PO number generated by Coupa for the order on which the invoice is based. Click on it to view the PO.
Total	Total amount of the invoice with specific currency.
Unanswered Comments	You can see all IQVIA's comments or add your comments for the IQVIA when you open the invoice.
Actions	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 Coupa 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	986	11,105.00 USD	No	
NY111	08/06/19	Pending Approval	986	11,105.00 USD	No	
None	08/06/19	Draft	986	-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.

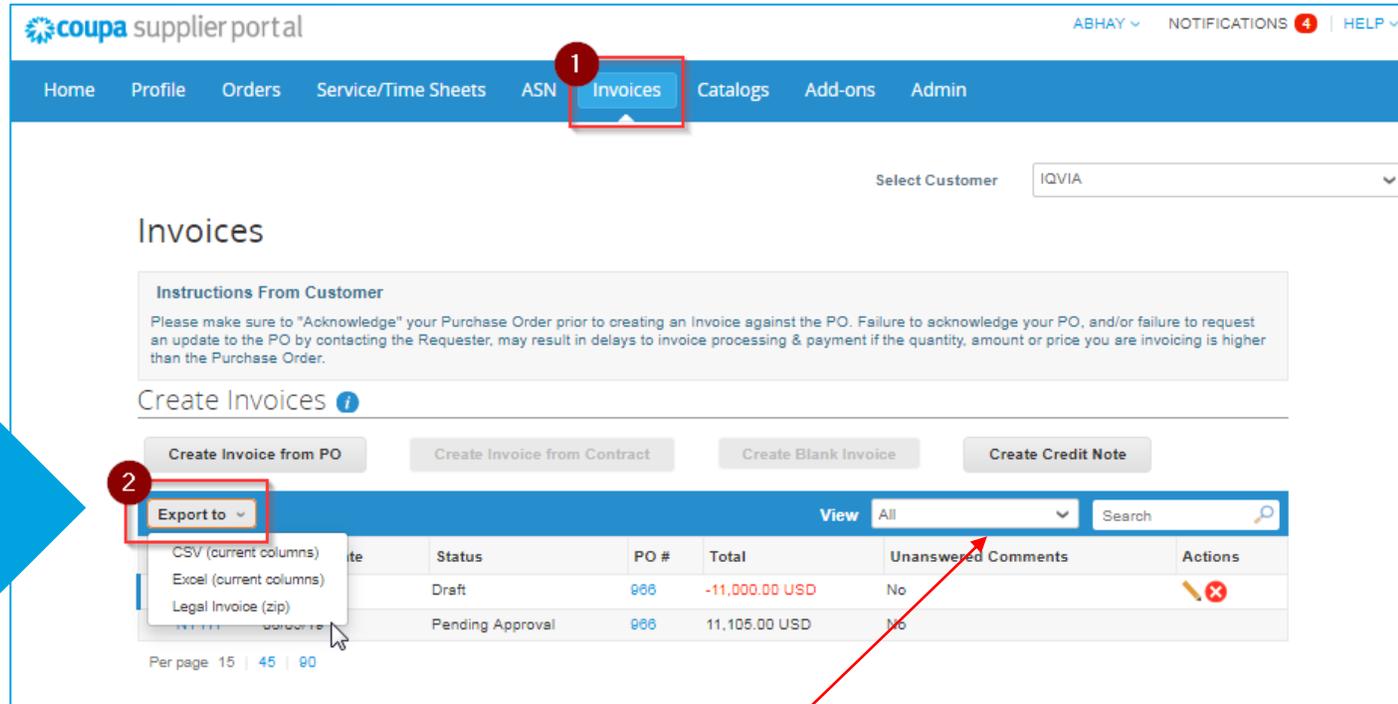
- **Correct Invoice**

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

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

2

Export to

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.

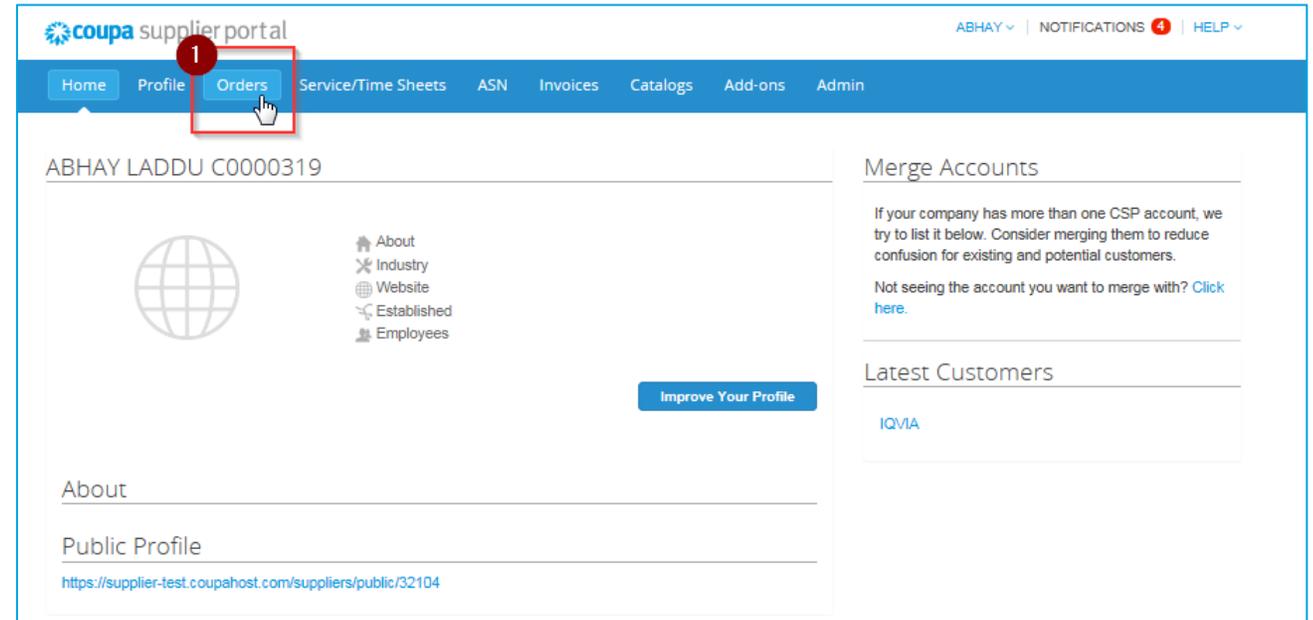
2. Create an Invoice from a PO

How do I create an invoice?

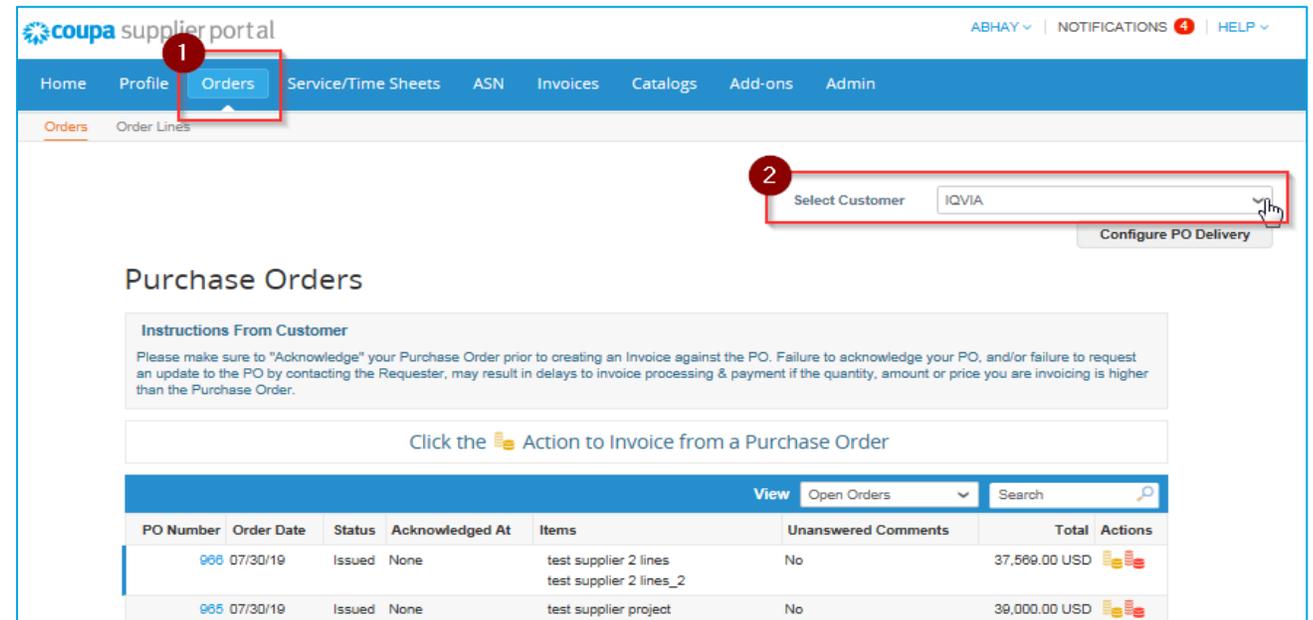
1. On the main menu, click on the **Orders** tab.

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**.



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with the following items: Home, Profile, Orders (highlighted with a red box and a circled '1'), Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below the navigation bar, the user's profile information is displayed: ABHAY LADDU C000319. There is a globe icon and a list of links: About, Industry, Website, Established, and Employees. A button labeled 'Improve Your Profile' is visible. On the right side, there are sections for 'Merge Accounts' and 'Latest Customers' (showing IQVIA).



The screenshot shows the 'Purchase Orders' page in the Coupa Supplier Portal. The 'Orders' tab is highlighted with a red box and a circled '1'. A dropdown menu for 'Select Customer' is open, showing 'IQVIA' selected, with a red box and a circled '2' around it. The page displays a table of purchase orders with the following columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
068	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.

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'. Below this is a 'Purchase Orders' section with a 'Select Customer' dropdown set to 'IQVIA' and a 'Configure PO Delivery' button. A message box contains instructions from the customer. Below that, a table lists purchase orders. The first row is highlighted, and the 'Actions' column for that row contains a 'Create Invoice' icon (📄) which is circled in red.

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.

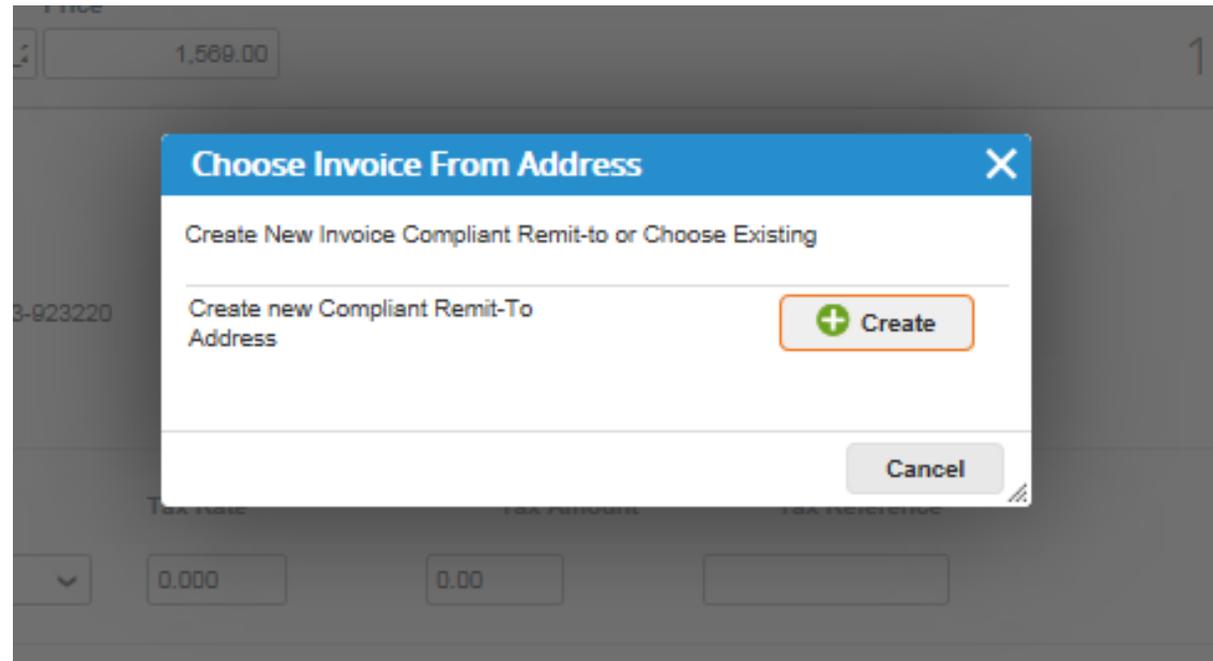
The screenshot shows the details for Purchase Order #966. It includes a 'Shipping' section with the ship-to address: 201 BROADWAY, CAMBRIDGE, MA 02139-1955, United States. Below this is a 'Lines' section with a table of items. At the bottom right, there is a 'Total' of 37,569.00 USD and a 'Create Invoice' button highlighted with a red box, along with 'Save' and 'Print View' buttons.

Type	Item	Price	Total	Invoiced
1	test supplier 2 lines	36,000.00	36,000.00	0.00
2	test supplier 2 lines_2	1,569.00	1,569.00	0.00

Total 37,569.00 USD

Create Invoice Save Print View

- 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 page is divided into several sections:

- General Info:** Fields for Invoice # (NY111), Invoice Date (08/01/19), Payment Term (ZB05_N5), Currency (USD), Delivery Number, Status (Draft), Image Scan (Browse...), and Supplier Note.
- From:** Fields for Supplier (ABHAY LADDU C0000319), Supplier Tax ID (15258853), Invoice From Address, Remit-To Address, and Ship From Address. Each address field has a search icon.
- To:** Fields for Customer (IQVIA), Bill To Address, Buyer Tax ID (None), and Ship To Address.

The page also has a navigation bar with 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Orders' tab is selected. The 'Orders' section has a sub-tab 'Order Lines'. The 'Select Customer' dropdown is set to 'IQVIA'. There is a 'Configure PO Delivery' button.

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' interface with two PO lines. The top line is selected, showing a price of 36,000.00. The bottom line shows a price of 1,569.00. A red X icon is highlighted in the top right corner of the top line, and a red arrow points from the X icon in the text to this icon. The bottom line has a 'Delete line' button highlighted in a red box.

Type	Description	Price	
test supplier 2 lines		36,000.00	X
PO Line	Contract	Supplier Part Number	
966-1			
Billing	QUBOS-54460-162-883-923220		
Taxes			
Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	
Add Tag			
Type	Description	Price	
test supplier 2 lines_2		1,569.00	X Delete line
PO Line	Contract	Supplier Part Number	
966-2			
Billing	QUBOS-53400-162-883-923220		
Taxes			
Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	
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

Lines

Type	Description	Price	Total
1	test supplier 2 lines	10,000.00	36,000.00

PO Line: 986-1
Contract: [Dropdown]
Supplier Part Number: [Text Box]

Billing: QUBOS-54450-162-683-923220

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
[Dropdown]	0.00%		

Totals & Taxes

Lines Net Total	36,000.00
Lines Tax Totals	0.00

Lines

Type	Description	Price	Total
1	test supplier 2 lines	10,000.00	36,000.00

PO Line: 986-1
Contract: [Dropdown]
Supplier Part Number: [Text Box]

Billing: QUBOS-54450-162-683-923220

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
[Dropdown]	10.00%	1,000.00	

Add Tag

Add Line

Totals & Taxes

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

Lines

Type	Description	Price
1	test supplier 2 lines	36,000.00

PO Line: 986-1, Contract: [dropdown], Supplier Part Number: [input]
Billing: QUBOS-54450-162-683-923220

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
[dropdown]	10.000	1,000.00	[input]

Totals & Taxes

Lines Net Total	36,000.00
Lines Tax Totals	0.00
Shipping	100
Tax	5 %
Tax Reference	Enter a tax reason description.
Misc	[input]
Tax	[input] %
Tax Reference	Enter a tax reason description.
Total Tax	0.00
Net Total	36,000.00
Total	36,000.00

Buttons: Delete, Cancel, Save as Draft, Calculate, Submit

Lines

Type	Description	Price
1	test supplier 2 lines	10,000.00

PO Line: 986-1, Contract: [dropdown], Supplier Part Number: [input]
Billing: QUBOS-54450-162-683-923220

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
[dropdown]	10.000	1,000.00	[input]

Totals & Taxes

Lines Net Total	10,000.00
Lines Tax Totals	1,000.00
Shipping	100
Tax	5 %
Tax Reference	Enter a tax reason description.
Misc	[input]
Tax	[input] %
Tax Reference	Enter a tax reason description.
Total Tax	1,005.00
Net Total	10,100.00
Total	11,105.00

Buttons: Delete, Cancel, Save as Draft, Calculate, Submit

- 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](#)

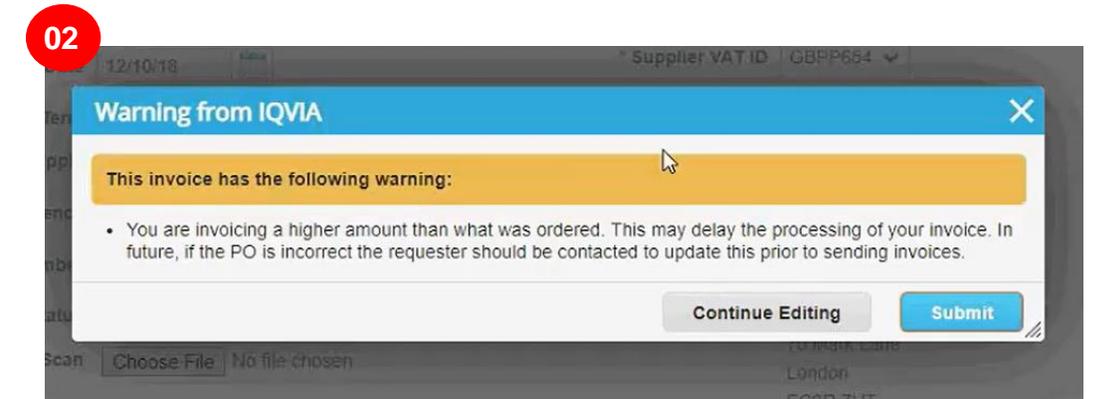
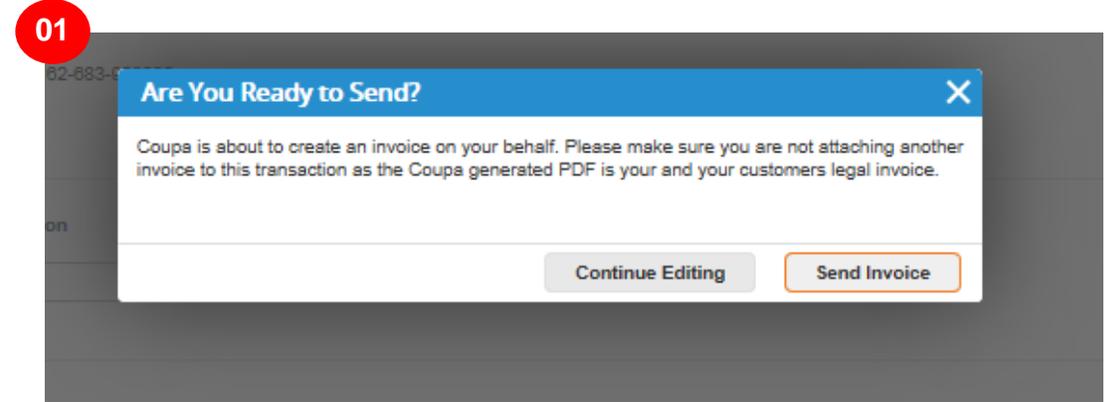
First you will get pop-up notification „ if you are ready to send your invoice“. There are following options:

- **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 shows 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'. Underneath, there are 'Instructions From Customer' and a 'Create Invoices' section with buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table below lists invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row shows invoice #NY11 with a status of 'Processing' and a total of 11,105.00 USD. A red arrow points to the 'Processing' status. The second and third rows show draft invoices with totals of 37,569.00 USD and -11,000.00 USD respectively. The fourth row shows a 'Pending Approval' invoice with a total of 11,105.00 USD. At the bottom left, it says 'Per page 15 | 45 | 90'.

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

Per page: 15 | 45 | 90

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

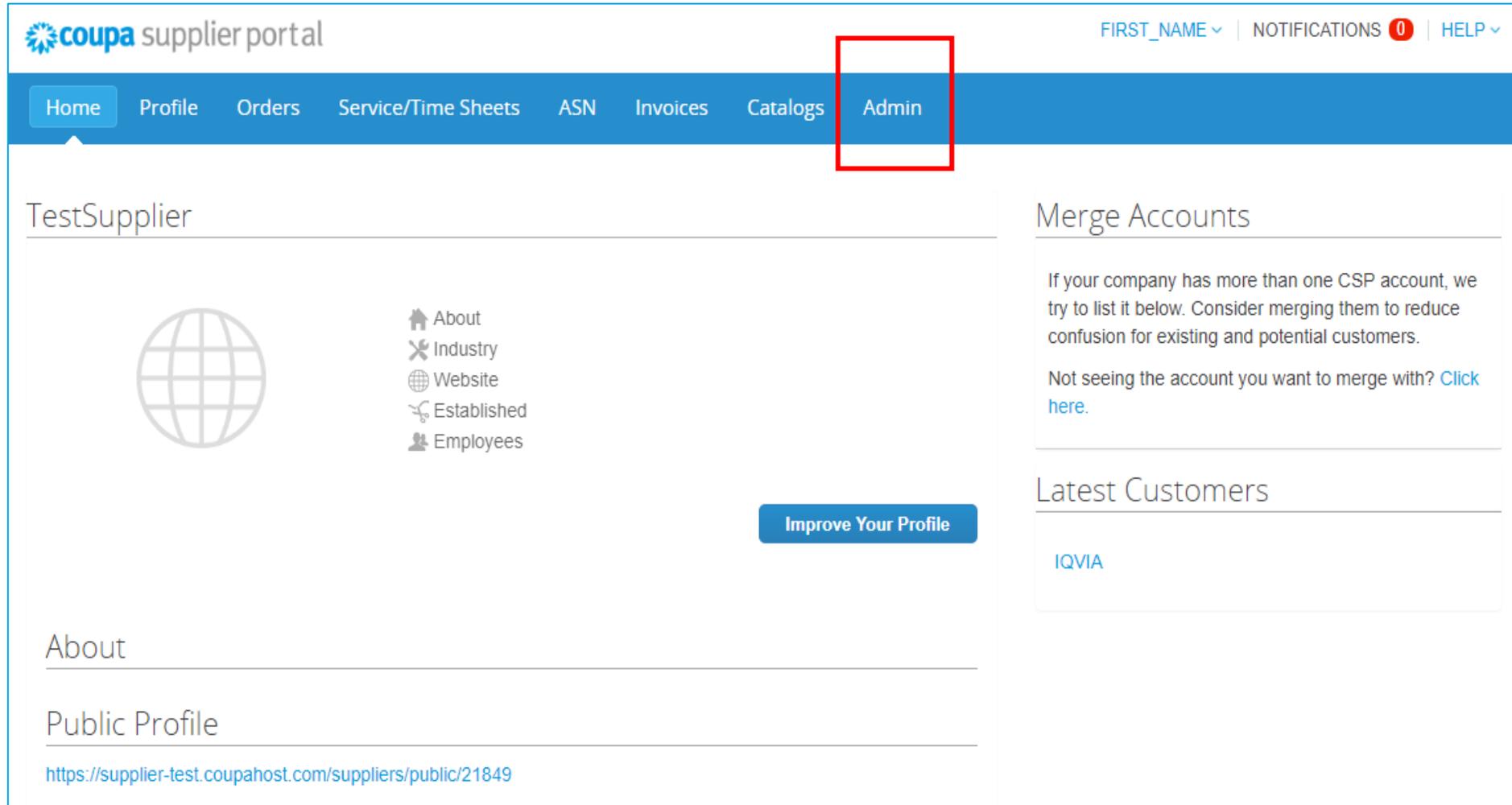
Type	Item	Price	Total	Invoiced
	Test item 0	8,000.00	8,000.00	400.00

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

3. Set up E-invoicing

Set up your account to create electronic invoices

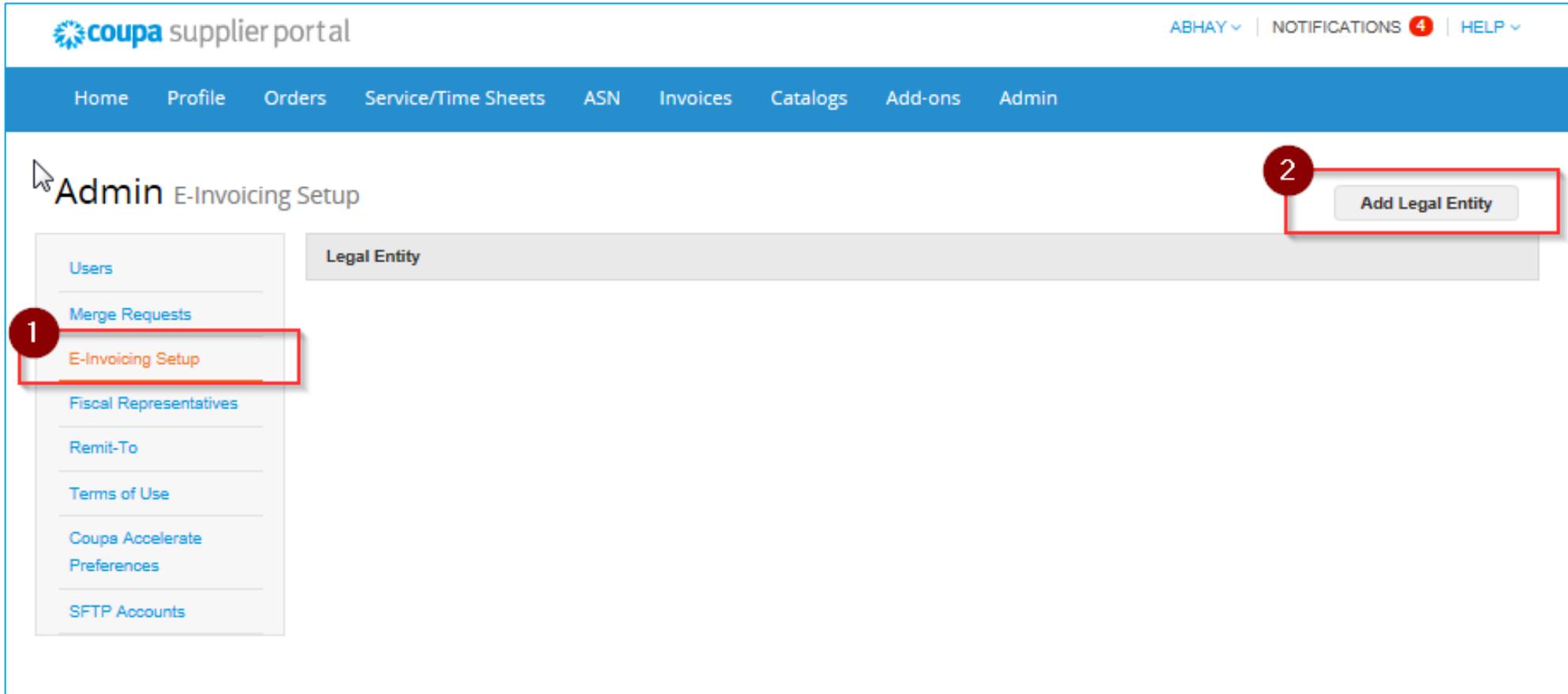
- click on **Admin** tab on the main menu



The screenshot shows the Coupa Supplier Portal interface. At the top left is the logo "coupa supplier portal". On the right side of the top bar, there are links for "FIRST_NAME", "NOTIFICATIONS" (with a red circle containing the number 0), and "HELP". The main navigation bar contains several tabs: "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin". The "Admin" tab is highlighted with a red rectangular box. Below the navigation bar, the page content is divided into two main sections. The left section is titled "TestSupplier" and features a globe icon on the left and a list of links on the right: "About", "Industry", "Website", "Established", and "Employees". A blue button labeled "Improve Your Profile" is positioned below these links. Below this section, there are two more links: "About" and "Public Profile". At the bottom of this section, a URL is displayed: "https://supplier-test.coupahost.com/suppliers/public/21849". The right section is titled "Merge Accounts" and contains a paragraph of text: "If your company has more than one CSP account, we try to list it below. Consider merging them to reduce confusion for existing and potential customers." Below this text is a link: "Not seeing the account you want to merge with? [Click here.](#)". Below the "Merge Accounts" section is another section titled "Latest Customers" which lists "IQVIA".

Add Legal Entity

1. click on the **E-Invoicing Setup** link on the left of the **Admin** page. The **Legal Entity** page appears. You can add new legal entities or manage or deactivate existing ones.



2. To add a legal entity, click on the **Add Legal Entity** button in the top right corner

- On the appearing page **Where's your business located?** enter the **official name of your business** that is registered with the local government
 - select the **country** where it is located
- (Depending on the country, another window(2) may appears with additional location information)

Supplier portal ABHAY NOTIFICATIONS

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country

This is the official name of your business that is registered with the local government and the country where it is located.

Cancel Continue

Supplier portal CHRIS NOTIFICATIONS

Miscellaneous Information

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

Country

* Type of Company

Board of Directors

Conducting business in certain countries requires your invoice to contain specific information about your company.

Cancel Save & Continue

- Click **Save & Continue**

In the appearing **Tell your customers about your organization** window, fill in at least the mandatory fields, that is, the fields marked with a red asterisk (*), and click **Done**

supplier portal CHRIS NOTIFICATION

Tell your customers about your organization

1 2 3 4

Which customers do you want to see this?

All
 IQVIA

What address do you invoice from?

* Address Line 1

Address Line 2

* City

State

* Postal Code

Country United Kingdom

Use this address for Remit-To ⓘ
 Use this for Ship From address ⓘ

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. ⓘ

1. Which customers do you want to see this?

Select all or the specific customer(s) that you want to see your legal entity information.

2. What address do you invoice from?

Required for invoicing. Registered address of your legal entity.

Do not forget to tick:

- **Use this address for Remit-To:** Selected by default. Deselect it if your remit-to address is different from your invoice-from address or you have more than one remit-to locations.
- **Use this for Ship From address:** Selected by default. Deselect it if your ship-from address is different from your invoice-from address or you have more than one location.

Banking information ⓘ

Bank Account Country:

Bank Account Currency:

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number:

Account Number:

Account Number Confirm:

IBAN:

SWIFT/BIC Code:

Bank Account Type:

Bank address

Address Line 1:

Address Line 2:

City:

State:

Postal Code:

What is your Tax ID? ⓘ

Country:

* VAT ID:

I don't have a VAT/GST Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code:

Preferred Language:

3. Banking information (mandatory*)

Banking information for the remit-to address. You can use both domestic and international (global) banking information.

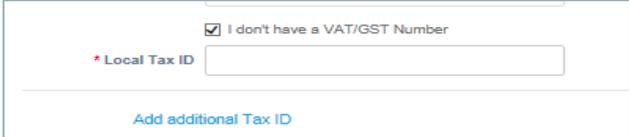
4. What is your Tax ID?

Select your **tax country** from the drop-down list. Enter the **tax/VAT ID**, including the prefix to the number, for example, **GB1234567890**. Please note that you can add more tax IDs by clicking on the Add additional Tax ID.

In case you do not have VAT number, please tick

- **“I do not have a VAT/GST Number”**

And enter your Local Tax ID.



5. Click Save & Continue

- In the appearing **Where do you want to receive payment** window, verify the information on this screen and if everything looks ok, click **Next**.

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To	Banking information	Status	
1510 Valley Center Parkway Bethlehem PA 18017 United States	Wells Fargo LHB LLC *****9123 123456789	Active	Manage

Deactivate Legal Entity Cancel Next

- you can deactivate your existing address by clicking on **Deactivate Remit-To**. Column Status – “Active” will change on “Deactivated”.

Please note that there needs to be always at least one Remit-To address active for using this legal entity.

Where do you want to receive payment?

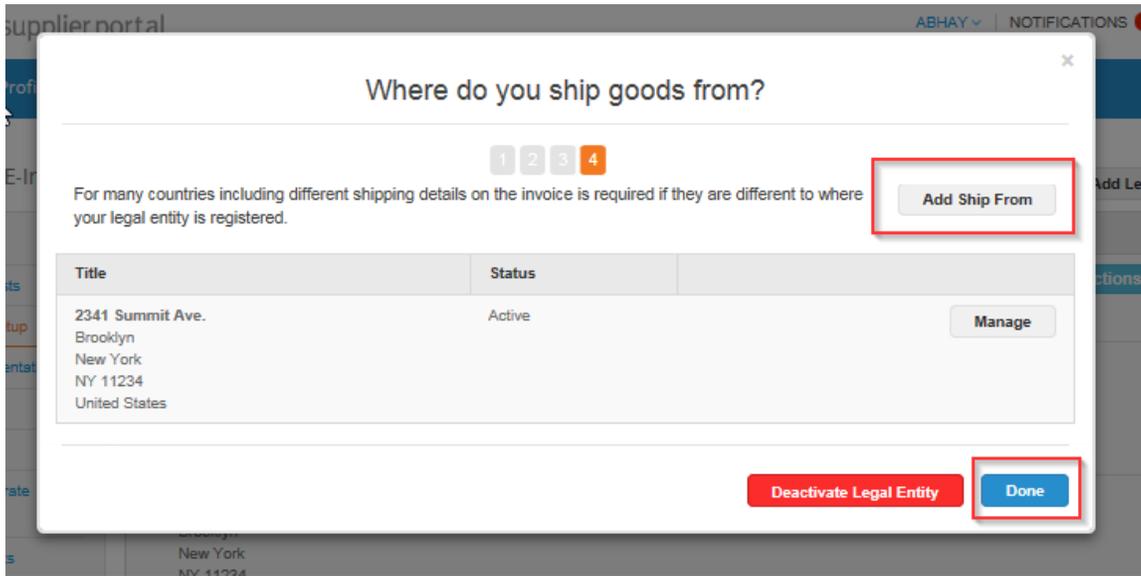
1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To	Banking information	Status	
1510 Valley Center Parkway Bethlehem PA 18017 United States	Wells Fargo LHB LLC *****9123 123456789	Active	Manage

Deactivate Legal Entity Cancel Next



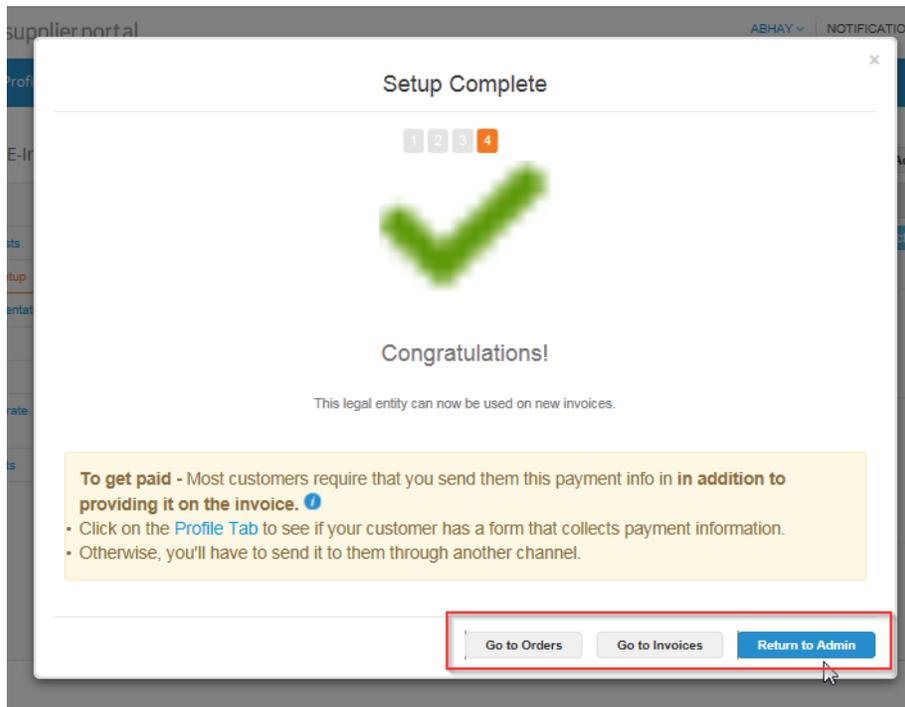
In the appearing **Where do you ship goods from?** window, manage or add another ship from address and after click **Done**.

For many countries including different shipping details on the invoice is required if they are different to where your legal entity is registered.

After completing the e-invoicing setup by clicking **Done**, that is, after adding a legal entity, you can use it on new invoices.

From the **Setup Complete** page you can choose to

- **Go to Orders,**
- **Go to Invoices,** or
- **Return to Admin** page.



Deactivate Legal Entity

If you click on **Actions** button and select **deactivate legal entity**, all information will disappear. After you can add legal entity from beginning with correct information.

The image shows two screenshots of the Coupa Supplier Portal Admin E-Invoicing Setup page. The top screenshot shows the 'Legal Entity' section with a table containing one entry: 'ABCD' with address '2341 Summit Ave. Brooklyn New York NY 11234 United States' and Tax ID 'GB1234567890'. A red box labeled '1' highlights the 'Admin' menu item in the top navigation bar. A red box labeled '2' highlights the 'E-Invoicing Setup' menu item in the left sidebar. A red box labeled '3' highlights the 'Actions' button, which has a dropdown menu open showing 'Manage' and 'Deactivate Legal Entity'. A red arrow points from the 'Deactivate Legal Entity' option down to the bottom screenshot. The bottom screenshot shows the same page but with the 'Legal Entity' table empty, indicating that the entity has been successfully deactivated.

How to set up multiple Remit to addresses

- **What is your Remit-To Address?**

- Address containing bank details where you want to receive payment. (If you receive payments to a different location than where your business is registered, you will need a new Remit to address for each location).
- Includes mandatory address-specific fields: Address Line 1, Address Line 2, City, State, Postal Code, and Country/Region

- 1. Log in to the CSP

- 2. Click on **Setup**



- 3. On the left of the **Admin page**, click on the **Legal Entity Setup** then on **Actions** and select **Managed Remit-To Accounts**

Admin Legal Entity Setup



- 4. In new pop-up window, click on **Add Remit –To**

Add a new Remit-To account

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.



Remit-To Account	Remit-To Address	Status	
Address	12 Clover Field London JY1 891 United Kingdom	Active	Manage

- 5. Select **Payment Type Address** and fill in all mandatory fields mark with *
- 6. Open the **Integration Code** and write based on instruction in the table below.
- *Note: This Integration Code helps you to select correct Remit to once you will create invoices.



Integration Code?	Code to tie your CSP remit-to address to the corresponding address in your ERP. IMPORTANT: Write European in EUR for all European POs with currency EUR Write European in GBP for all European POs with currency GBP Write US in USD for all US and Canada POs with currency USD Etc.
--------------------------	--

- 7. Click on **Save & Continue**

Add a new Remit-To account

- 8. Remit to address has been created

- 9. If you have multiple Remit to Addresses, you will have to select the appropriate one with each new invoice when creating the invoice.

- 10. To manage your remit-to accounts, go to Setup > Admin > Remit-To. For more information, see View and Manage Remit-to Information.

Payment Type: Address

What is your Remit-To Address?

Address Line 1

Address Line 2

City

State: Select an Option

Postal Code

Country/Region

What is your Remit-To Integration Code? (optional) ⓘ

Code

Cancel Save & Continue

4. Create or Edit Credit Note

Create a Credit Note

You can issue a credit note to:

- Resolve a dispute on an invoice.
- Record miscellaneous credit, for example, return/cancelation of goods, price adjustments, rebates and refunds.

Credit notes can be issued against invoices only, not POs

To create a credit note please:

1. click on the **Invoices** tab on the main menu
2. click on the **Create Credit Note** button

coupa supplier portal ABHAY ▾ | NOTIFICATIONS 4 | HELP ▾

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

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 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
NY111	08/05/19	Pending Approval	966	11,105.00 USD	No	

Per page 15 | 45 | 90

In the appearing **Credit Note** popup, select the reason for your credit note.

Resolve a dispute

1. Select the **Resolve issue for invoice number**
2. From the drop-down list, select the invoice number.
3. Click **Continue** to select how you want to resolve the issue.

You can choose to issue a credit note :

- a) to [completely cancel the invoice](#) with a credit note or
- b) to [adjust invoice with a credit note](#)

1

Credit Note X

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason Resolve issue for invoice number Other (e.g. rebate)

Select an Option

Cancel Continue

2

Credit Note X

How do you want to correct invoice "NY111" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*

Cancel Create

Cancel the invoice with a credit note

Window with creating Credit Note will appear.

You can edit only the following fields: **Credit Note #**, **Credit Note Date** and **Credit Reason**. The other fields are pre-populated and not editable so that all the information is carried over from the original invoice.

When approved, the credit will fully cancel the invoice's impact to the transaction.

The screenshot shows the 'Create Credit Note' form in the Coupa Supplier Portal. The form is titled 'Create Credit Note' and includes a yellow banner stating: 'This credit note applies to invoice NY111. When approved, the credit will fully cancel the invoice's impact to the transaction.' The form is divided into 'General Info' and 'From' sections. The 'General Info' section includes fields for Credit Note #, Credit Note Date (08/06/19), Payment Term (ZB05_N5), Currency (USD), Delivery Number, Status (Draft), Original Invoice # (NY111), Original Invoice Date (08/01/19), Image Scan (Choose File), and Supplier Note. The 'From' section includes fields for Supplier (ABHAY LADDU C0000319), Supplier Tax ID (15256853), Invoice From Address (ABCD, 2341 Summit Ave., Brooklyn, New York, NY 11234, United States), Remit-To Address (ABCD, 2341 Summit Ave., Brooklyn, New York, NY 11234, United States), Ship From Address (ABCD, 2341 Summit Ave., Brooklyn, New York, NY 11234, United States), Customer (IQVIA), Bill To Address (IQVIA Market Intelligence LLC, P O Box 14325, Research Triangle Park, NC 27709, United States), Buyer Tax ID (None), and Ship To Address (201 BROADWAY).

The screenshot shows the 'Lines' section of the Coupa Supplier Portal. It displays a table with columns for Type, Description, and Price. The table contains one row with Type 'test supplier 2 line' and Price '-10,000.00'. Below the table, there are fields for PO Line (906-1), Contract, and Supplier Part Number. The Billing information is QUBOS-64450-162-683-923220. The Taxes section includes a table with columns for Tax Description, Tax Rate, Tax Amount, and Tax Reference. The table contains one row with Tax Rate '10.000' and Tax Amount '-1,000.00'. The Totals & Taxes section includes a table with columns for Lines Net Total, Lines Tax Totals, Shipping, Tax, Tax Reference, Misc, Tax, Tax Reference, Total Tax, Net Total, and Total. The table contains the following values: Lines Net Total (-10,000.00), Lines Tax Totals (-1,000.00), Shipping (-100.000), Tax (5.0 % -5,000), Tax Reference (Enter a tax reason description), Misc (0.000), Tax (% 0.000), Tax Reference (Enter a tax reason description), Total Tax (-1,005.00), Net Total (-10,100.00), and Total (-11,105.00). At the bottom of the form, there are buttons for Delete, Cancel, Save as Draft, Calculate, and Submit.

Adjust the information on invoice lines

Window with creating Credit Note will appear

You can edit the following fields: **Credit Note #**, **Credit Note Date**, **Credit Reason**, and **Line adjustment information** (for example, price and quantity). For invoices with multiple lines you can edit the price of each line separately. Line level taxes are carried over from the invoice and are prorated based on the credit amount. When approved, the credit will adjust the invoice's impact to the transaction.

The screenshot shows the 'Create Credit Note' form in the Coupa Supplier Portal. The form is divided into several sections:

- General Info:** Includes fields for Credit Note #, Credit Note Date (08/08/19), Payment Term (ZB05_N5), Currency (USD), Delivery Number, Status (Draft), Original Invoice # (NY111), Original Invoice Date (08/01/19), Image Scan (Choose File), and Supplier Note.
- From:** Includes Supplier (ABHAY LADDU C0000319), Supplier Tax ID (15256853), Invoice From Address (2341 Summit Ave., Brooklyn, NY 11234), Remit-To Address (same as invoice from), and Ship From Address (same as invoice from).
- To:** Includes Customer (IQVIA), Bill To Address (IQVIA Market Intelligence LLC, P O Box 14325, Research Triangle Park, NC 27709), Buyer Tax ID (None), and Ship To Address (201 BROADWAY, CAMBRIDGE, MA 02139-1955).

A yellow banner at the top of the form states: "This credit note applies to invoice NY111. When approved, the credit will adjust the invoice's impact to the transaction."

The screenshot shows the 'Lines' adjustment interface. It features a table for adjusting line items:

Type	Description	Price	
test supplier 2 lines		-10,000.00	-10,000.00

Below the table, there are sections for Billing (QUBOS-64450-162-683-923220), Taxes (with a table for Tax Description, Tax Rate, Tax Amount, and Tax Reference), and Totals & Taxes. The Totals & Taxes section shows:

Lines Net Total	-10,000.00
Lines Tax Totals	-1,000.00
Total Tax	-1,000.00
Net Total	-10,000.00
Total	-11,000.00

At the bottom, there are buttons for Delete, Cancel, Save as Draft, Calculate, and Submit.

View existing credit notes

1. Select **Invoices** page
2. Find **View** drop-down list to filter what type of columns you would like to be visible
3. In the appearing pop-up, choose “**Credit notes**”.

The screenshot shows the Coupa Supplier Portal interface. At the top, the 'Invoices' menu item is highlighted with a red box and a circled '1'. Below the navigation bar, there is a 'Select Customer' dropdown menu set to 'IQVIA'. The main heading is 'Invoices', followed by an 'Instructions From Customer' box. Below that, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table of invoices is displayed with columns for Invoice #, Created Date, Status, PO #, and Total. The 'View' dropdown menu is open, showing a list of options including 'All', 'Abandoned', 'Approved', 'Credit Notes', 'Disputed', 'Disputes with a supplier response', 'Disputes without supplier response', 'Draft', 'Payment Information', 'Pending Approval', 'Processing', 'Voided', and 'Create View'. The 'Credit Notes' option is highlighted with a red box and a circled '3'. The table contains two rows: one with 'None' as the invoice number and a total of -11,105.00 USD, and another with 'NY111' as the invoice number and a total of 11,105.00 USD.

Invoice #	Created Date	Status	PO #	Total	Actions
None	08/06/19	Draft	966	-11,105.00 USD	
NY111	08/05/19	Pending Approval	966	11,105.00 USD	

Frequently Asked Questions

How do I submit an invoice? In case, I have not received a PO yet.

Your account needs to be configured to handle invoices through IQVIA's Coupa instance.

Why can't I send cXML invoices?

Check if you are using the supported protocols: TLS 1.1 or TLS 1.2. If you still have problems, contact supplier@coupa.com.

Do I need to include accounting information on cXML invoices?

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

How do I add shipping charges to an invoice?

You can add shipping charges at the bottom of the invoice.

Lines

1Type	Description	Price	
	test supplier 2 lines	10,000.00	10,000.00 ✕

PO Line: 988-1 Contract: Supplier Part Number:

Billing: QUBOS-54450-162-883-923220

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
<input type="text"/>	10.00	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" value="100"/>
Tax	<input type="text"/> 5% <input type="text" value="5.00"/>
Tax Reference	<input type="text" value="Enter a tax reason description."/>
Misc	<input type="text"/>
Tax	<input type="text"/> % <input type="text" value="0.000"/>
Tax Reference	<input type="text" value="Enter a tax reason description."/>
Total Tax	1,005.00
Net Total	10,100.00
Total	11,105.00

✕ Delete Cancel Save as Draft Calculate Submit

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](#).

Once an invoice is submitted, it can't be changed in any way.

How do I make a part claim on an invoice?

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.

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

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](mailto: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.

What do I do if an invoice was rejected?

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

Once an invoice has been approved, what do I need to do next?

Nothing. The invoice is IQVIA's queue and you'll be paid based on the payment terms you set with .

How do I know if an invoice has been registered?

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.

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

Yes.

What does the Export to button do?

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. If you try to export a larger table, you receive an error message stating that only 200,000 rows are exported.

Note: There is no limitation on the number of invoices or file size when exporting legal invoices.

Tip: For the best performance, it is recommended not to export more than 1,000 invoices at a time.

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.

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

You need to add your country code (e.g. GB for United Kingdom) in front of the VAT number. On the main menu, click on the **Admin** tab to add a legal entity with the correct VAT ID under [E-Invoicing Setup](#).

What types of files can I attach to an invoice?

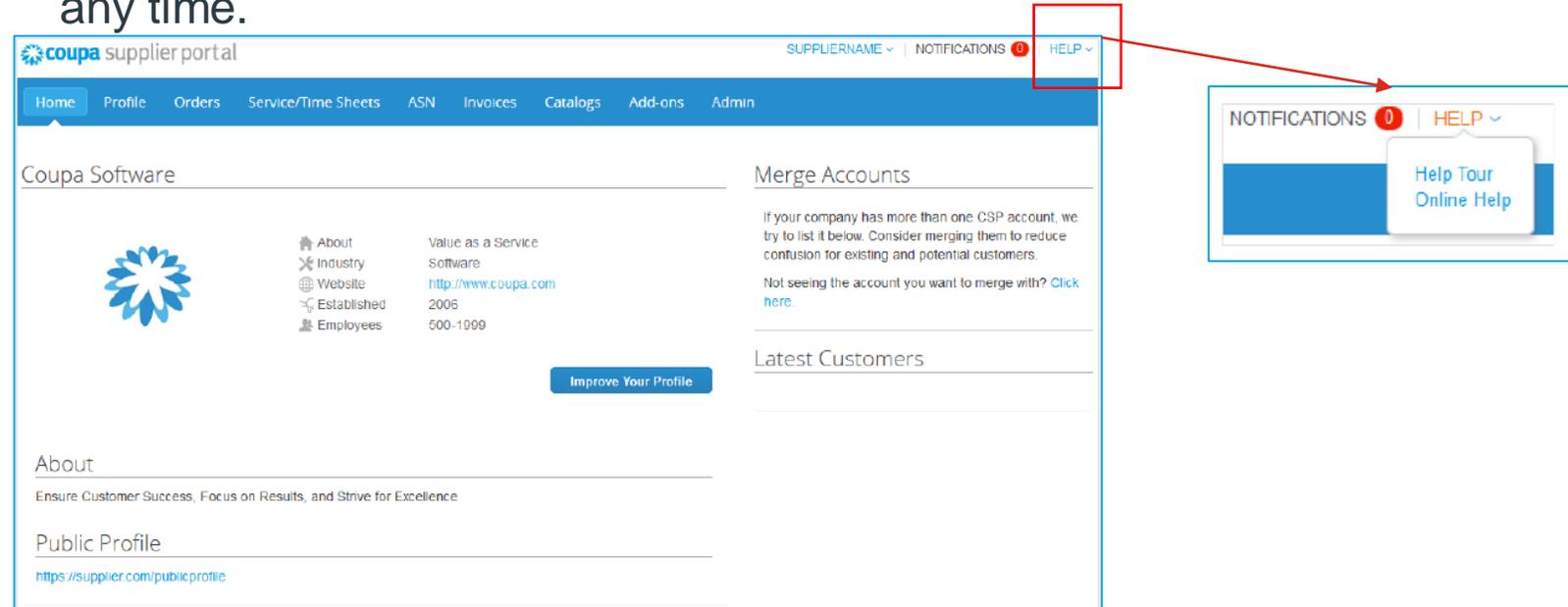
For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so.

What if I have an invoice that has not been paid?

For questions regarding payment information, contact IQVIA directly on supplier.queries@iqvia.com (legacy Q) or [GFSS AP SAP External Inquiries@iqvia.com](mailto: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.

Support

- ❖ When you log in for the first time, you are greeted by the **Help Tour** ([welcome tour](#)) on the **Home** screen.
- ❖ You can click on CSP Online **Help** – in the top right corner of the page to access the Online Help or to view the Help Tour any time.



- ❖ [Coupa Success Portal for Suppliers](#)
- ❖ For further inquiries, you may contact IQVIA Procurement Team at procurement@iqvia.com