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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

The screenshot shows the Coupa supplier portal homepage for user ABHAY LADDU C0000319. The top navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, **Invoices**, Catalogs, Add-ons, and Admin. The Invoices tab is highlighted with a red box and a circled '1'. On the left, there's a globe icon and a sidebar with About, Industry, Website, Established, and Employees links, along with an Improve Your Profile button. The main content area displays the user's public profile URL: <https://supplier-test.couphost.com/suppliers/public/32104>.

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

The screenshot shows the Invoices page with the Invoices tab selected. A red box with circled '1' highlights the Invoices tab in the top navigation. A red box with circled '2' highlights the 'Select Customer' dropdown menu, which contains the option 'IQVIA'.

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. The top navigation bar includes links for Home, Profile, Orders, Service/Time Sheets, ASN, **Invoices**, Catalogs, Add-ons, and Admin. A red circle with the number 2 is placed over the Invoices button. The main content area is titled "Invoices". It contains an "Instructions From Customer" box with a note about acknowledging purchase orders. Below this is a "Create Invoices" section with four buttons: Create Invoice from PO, Create Invoice from Contract, Create Blank Invoice, and Create Credit Note. A red circle with the number 3 is placed over the first row of the invoice table, specifically over the "Invoice #" column for the entry "NY111". The table has columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first two rows show invoices for PO 966 with a total of 11,105.00 USD, both in Pending Approval status. The third row shows a Draft invoice for PO 966 with a total of -11,000.00 USD. The bottom of the page shows pagination options: Per page: 15 | 45 | 90.

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	Supplier ABHAY LADDU C0000319
Invoice Date 08/01/19	Invoice From ABCD 2341 Summit Ave. Brooklyn New York, NY 11234 United States
Payment Term ZB05_N5	Remit To ABCD 2341 Summit Ave. Brooklyn New York, NY 11234 United States
Currency USD	Ship From ABCD 2341 Summit Ave. Brooklyn New York, NY 11234 United States
Delivery Number None	Supplier Tax ID 15256853
Status Pending Approval	Customer IQVIA
Shipping Term None	Bill To Address IQVIA Market Intelligence LLC P O Box 14325 Research Triangle Park, NC 27709 United States
Legal Invoice download	Ship To Address 201 BROADWAY CAMBRIDGE , MA 02139-1955 United States
Image Scan None	Buyer Tax ID None
Supplier Notes None	
Attachments 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 uses 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.

The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (which is highlighted with a red box and a red number 1), Catalogs, Add-ons, and Admin. Below the navigation bar, a dropdown menu titled "Select Customer" is open, showing "IQVIA". The main content area is titled "Invoices". It contains an "Instructions From Customer" section with a note about acknowledging purchase orders. Below this is a "Create Invoices" section with four buttons: "Create Invoice from PO", "Create Invoice from Contract", "Create Blank Invoice", and "Create Credit Note". A red box with a red number 2 surrounds the "Export to" button, which has a dropdown menu open. The dropdown menu lists three options: "CSV (current columns)", "Excel (current columns)", and "Legal Invoice (zip)". A red arrow points from the text "You can export the invoices table in CSV or Excel format." to the "Export to" button. To the right of the "Export to" button is a table showing two invoice entries. The first entry is "Draft" with a total of "-11,000.00 USD". The second entry is "Pending Approval" with a total of "11,105.00 USD". Both entries have an "Unanswered Comments" column showing "No". The bottom of the table has a "View" dropdown set to "All" and a "Search" field.

You can export the invoices table in CSV or Excel format.

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 links: Home, Profile, Orders (which is 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 name 'ABHAY LADDU C0000319' is displayed. To the right of the user's name is a 'Merge Accounts' section with a message about merging accounts and a link to 'Click here'. Further down is a 'Latest Customers' section showing 'IQVIA'. On the left side of the main content area, there is a 'About' section with links to About, Industry, Website, Established, and Employees, along with an 'Improve Your Profile' button. The central part of the screen displays the 'Public Profile' for ABHAY LADDU, including the URL <https://supplier-test.couphost.com/suppliers/public/32104>.

The screenshot shows the Coupa Supplier Portal interface on the 'Purchase Orders' page. The navigation bar at the top is identical to the previous screenshot. A red box with a circled '1' highlights the 'Orders' tab in the navigation bar. A red box with a circled '2' highlights the 'Select Customer' dropdown menu, which is open and shows the option 'IQVIA' selected. The main content area features a 'Purchase Orders' section with instructions for creating invoices from purchase orders. It includes a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. Two rows of data are shown in the table:

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	

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

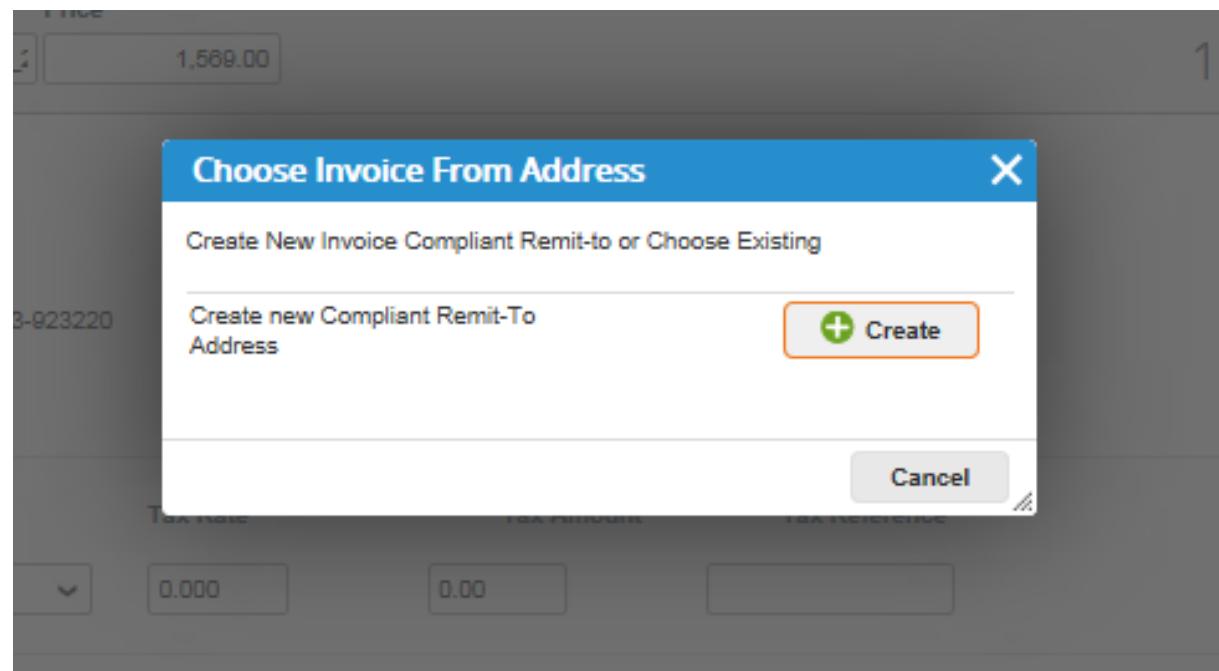
Click on the **Create Invoice** (coins) icon for the PO in the **Purchase Orders** table.

The screenshot shows the Coupa supplier portal interface. At the top, there's a navigation bar with links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The Orders tab is selected. Below the navigation is a search bar labeled "Select Customer" with "IQVIA" typed in. A "Configure PO Delivery" button is also present. The main area is titled "Purchase Orders". Underneath, there's a section titled "Instructions From Customer" with a note about acknowledging the purchase order before creating an invoice. Below this is a button labeled "Click the Action to Invoice from a Purchase Order". The main table has columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. Two rows are shown: one for PO 966 dated 07/30/19 with a total of 37,569.00 USD, and another for PO 965 dated 07/30/19 with a total of 39,000.00 USD. The "Actions" column for PO 966 contains a coin icon, which is highlighted with a red box.

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

This screenshot shows the details of Purchase Order #966. At the top, it says "Purchase Order #966" and shows the status as "Issued - Sent via Email". It lists the order date as 07/30/19, revision date as 07/30/19, requester as Zuzana Tokolyiova, and email as zuzana.tokolyiova@quintiles.com. Payment term is ZB05_N5 and attachments are none. There's an "Acknowledged" checkbox which is unchecked. The "Lines" section shows two items: "test supplier 2 lines" and "test supplier 2 lines_2", both with a price of 36,000.00 and a total of 36,000.00. Both items have a "Need By" date of 08/20/19 and a part number of None. The "Comments" section is empty. At the bottom, there are buttons for "Create Invoice", "Save", and "Print View". The "Create Invoice" button is highlighted with a red box.

- 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 Coupa supplier portal interface for creating an invoice. At the top, there's a navigation bar with links for Home, Profile, Orders (which is selected), Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. On the right side of the header, there are notifications (4) and help links. Below the header, the main content area has a title 'Create Invoice' with a 'Create' button. The page is divided into sections: 'General Info' (containing fields for Invoice #, Invoice Date, Payment Term, Currency, Delivery Number, Status, and Supplier Note), 'From' (listing 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, and Ship From Address ABCD 2341 Summit Ave., Brooklyn, New York, NY 11234, United States), and 'To' (listing 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 CAMBRIDGE , MA 02139-1955 United States). There are also sections for 'Attachments' (with options to add file, URL, or text) and a 'Select Customer' dropdown set to IQVIA with 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

Type	Description	Price	
test supplier 2 lines	36,000.00		
PO Line 986-1	Contract	Supplier Part Number	
Billing QUBOS-54450-162-683-923220			
Taxes			
Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	
Type	Description	Price	1,569.00
test supplier 2 lines_2			
PO Line 986-2	Contract	Supplier Part Number	
Billing QUBOS-53400-162-683-923220			
Taxes			
Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	

- 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	36,000.00												
PO Line 966-1	Contract	Supplier Part Number													
Billing QUBOS-54450-162-683-923220															
Taxes <table border="1"> <tr> <td>Tax Description</td> <td>Tax Rate</td> <td>Tax Amount</td> <td>Tax Reference</td> </tr> <tr> <td><input type="button" value="▼"/></td> <td>0.000</td> <td></td> <td></td> </tr> <tr> <td colspan="4"> US: 01 - Purchases/Svcs not subject to sales/u... - 0.0% US: 05 - Tax Return/Pay - Tax/License/Registration... - 0.0% US: 08 - Rental of Real Property US - 0.0% US: 09 - Purch of Food not immed cons/cloth/me... - 0.0% 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% US: U1 - A/P Use Tax, taxable, self assessed US - 0.0% </td> </tr> </table>				Tax Description	Tax Rate	Tax Amount	Tax Reference	<input type="button" value="▼"/>	0.000			US: 01 - Purchases/Svcs not subject to sales/u... - 0.0% US: 05 - Tax Return/Pay - Tax/License/Registration... - 0.0% US: 08 - Rental of Real Property US - 0.0% US: 09 - Purch of Food not immed cons/cloth/me... - 0.0% 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% US: U1 - A/P Use Tax, taxable, self assessed US - 0.0%			
Tax Description	Tax Rate	Tax Amount	Tax Reference												
<input type="button" value="▼"/>	0.000														
US: 01 - Purchases/Svcs not subject to sales/u... - 0.0% US: 05 - Tax Return/Pay - Tax/License/Registration... - 0.0% US: 08 - Rental of Real Property US - 0.0% US: 09 - Purch of Food not immed cons/cloth/me... - 0.0% 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% US: U1 - A/P Use Tax, taxable, self assessed US - 0.0%															
Totals & Taxes <table border="1"> <tr> <td>Lines Net Total</td> <td>36,000.00</td> </tr> <tr> <td>Lines Tax Totals</td> <td>0.00</td> </tr> </table>				Lines Net Total	36,000.00	Lines Tax Totals	0.00								
Lines Net Total	36,000.00														
Lines Tax Totals	0.00														

Lines

Type	Description	Price	36,000.00								
PO Line 966-1	Contract	Supplier Part Number									
Billing QUBOS-54450-162-683-923220											
Taxes <table border="1"> <tr> <td>Tax Description</td> <td>Tax Rate</td> <td>Tax Amount</td> <td>Tax Reference</td> </tr> <tr> <td><input type="button" value="▼"/></td> <td>10.000</td> <td>1,000.00</td> <td></td> </tr> </table>				Tax Description	Tax Rate	Tax Amount	Tax Reference	<input type="button" value="▼"/>	10.000	1,000.00	
Tax Description	Tax Rate	Tax Amount	Tax Reference								
<input type="button" value="▼"/>	10.000	1,000.00									
Totals & Taxes <table border="1"> <tr> <td>Lines Net Total</td> <td>36,000.00</td> </tr> <tr> <td>Lines Tax Totals</td> <td>1,000.00</td> </tr> </table>				Lines Net Total	36,000.00	Lines Tax Totals	1,000.00				
Lines Net Total	36,000.00										
Lines Tax Totals	1,000.00										

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).

Lines

Type	Description	Price	36,000.00
test supplier 2 lines		10,000.00	<input type="button" value="Delete"/>
PO Line	Contract	Supplier Part Number	
988-1	<input type="button" value="▼"/>		
Billing QUBOS-54450-162-883-923220			
Taxes			
Tax Description	Tax Rate	Tax Amount	Tax Reference
<input type="button" value="▼"/>	10.000	1,000.00	<input type="button" value=""/>
<input type="button" value="Add Tag"/>			
Add Line			
Totals & Taxes			
Lines Net Total		36,000.00	
Lines Tax Totals		0.00	
Shipping			
Shipping		100	
Tax		<input type="button" value="▼"/> 5 %	<input type="button" value=""/>
Tax Reference		Enter a tax reason description.	
Misc			
Tax		<input type="button" value="▼"/> %	0.00
Tax Reference		Enter a tax reason description.	
Total Tax			
Total Tax		0.00	
Net Total			
Net Total		36,000.00	
Total			
Total		36,000.00	
<input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Save as Draft"/> <input type="button" value="Calculate"/> <input type="button" value="Submit"/>			

- 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	10,000.00
test supplier 2 lines		10,000.00	<input type="button" value="Delete"/>
PO Line	Contract	Supplier Part Number	
988-1	<input type="button" value="▼"/>		
Billing QUBOS-54450-162-883-923220			
Taxes			
Tax Description	Tax Rate	Tax Amount	Tax Reference
<input type="button" value="▼"/>	10.000	1,000.00	<input type="button" value=""/>
<input type="button" value="Add Tag"/>			
Add Line			
Totals & Taxes			
Lines Net Total		10,000.00	
Lines Tax Totals		1,000.00	
Shipping			
Shipping		100	
Tax		<input type="button" value="▼"/> 5 %	<input type="button" value="5.00"/>
Tax Reference		Enter a tax reason description.	
Misc			
Tax		<input type="button" value="▼"/> %	0.00
Tax Reference		Enter a tax reason description.	
Total Tax			
Total Tax		1,005.00	
Net Total			
Net Total		10,100.00	
Total			
Total		11,105.00	
<input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Save as Draft"/> <input type="button" value="Calculate"/> <input type="button" value="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
	10.000	1,000.00	

[Add Tag](#)

[+ Add Line](#)

Totals & Taxes

Lines Net Total	10,000.00
Lines Tax Totals	1,000.00
<hr/>	
Shipping	100
Tax	5 %
Tax Reference	Enter a tax reason description.
<hr/>	
Misc	0.00
Tax	% 0.00
Tax Reference	Enter a tax reason description.
<hr/>	
Total Tax	1,005.00
Net Total	10,100.00
Total 11,105.00	

Delete Cancel Save as Draft Calculate Submit

[Comments](#)

Add Comment

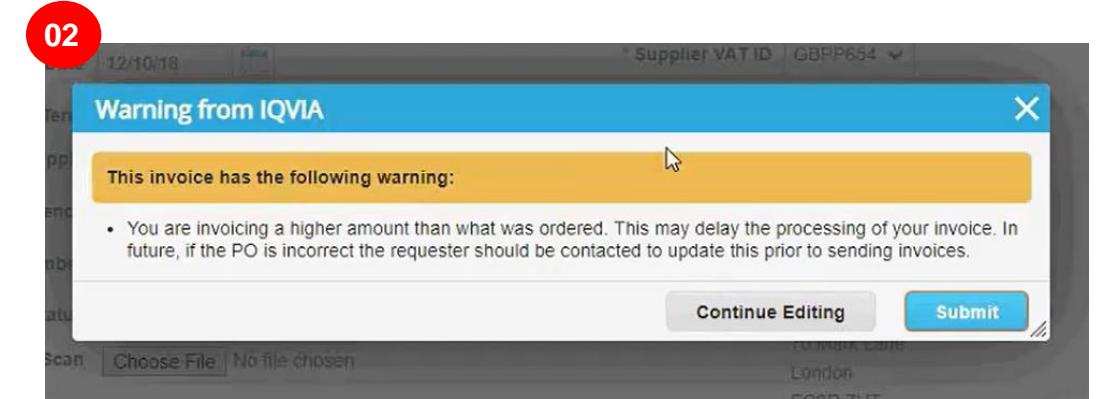
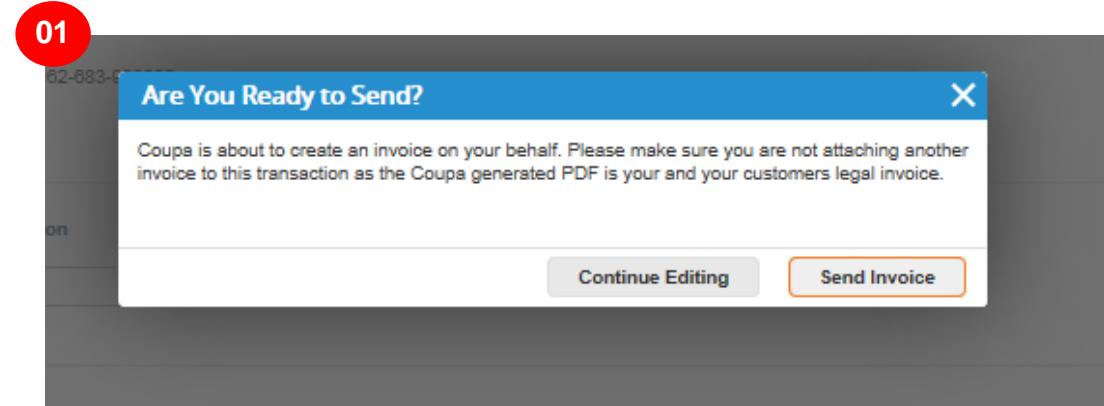
First you will get pop-up notification „if you are ready to send your invoice“. There are following options:

- **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 Coupa Invoices interface. At the top, there is a dropdown menu labeled "Select Customer" with "IQVIA" selected, and a button labeled "Configure PO Delivery". Below this, the word "Invoices" is displayed. A green banner at the top of the main content area says "ABHAY LADDU C0000319 invoice #NY11 is processing" with a close button "X". Underneath, a section titled "Instructions From Customer" contains a message about acknowledging purchase orders. Below this is a "Create Invoices" button with an information icon. Underneath are four buttons: "Create Invoice from PO", "Create Invoice from Contract", "Create Blank Invoice", and "Create Credit Note". The main area features a table with the following data:

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
NY11	08/06/19	Processing	986	11,105.00 USD	No	
None	08/06/19	Draft	986	37,569.00 USD	No	
None	08/06/19	Draft	986	-11,000.00 USD	No	
NY111	08/05/19	Pending Approval	986	11,105.00 USD	No	

At the bottom left, it says "Per page 15 | 45 | 90". A red arrow points to the "Processing" status of the first invoice in the table.

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.

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

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

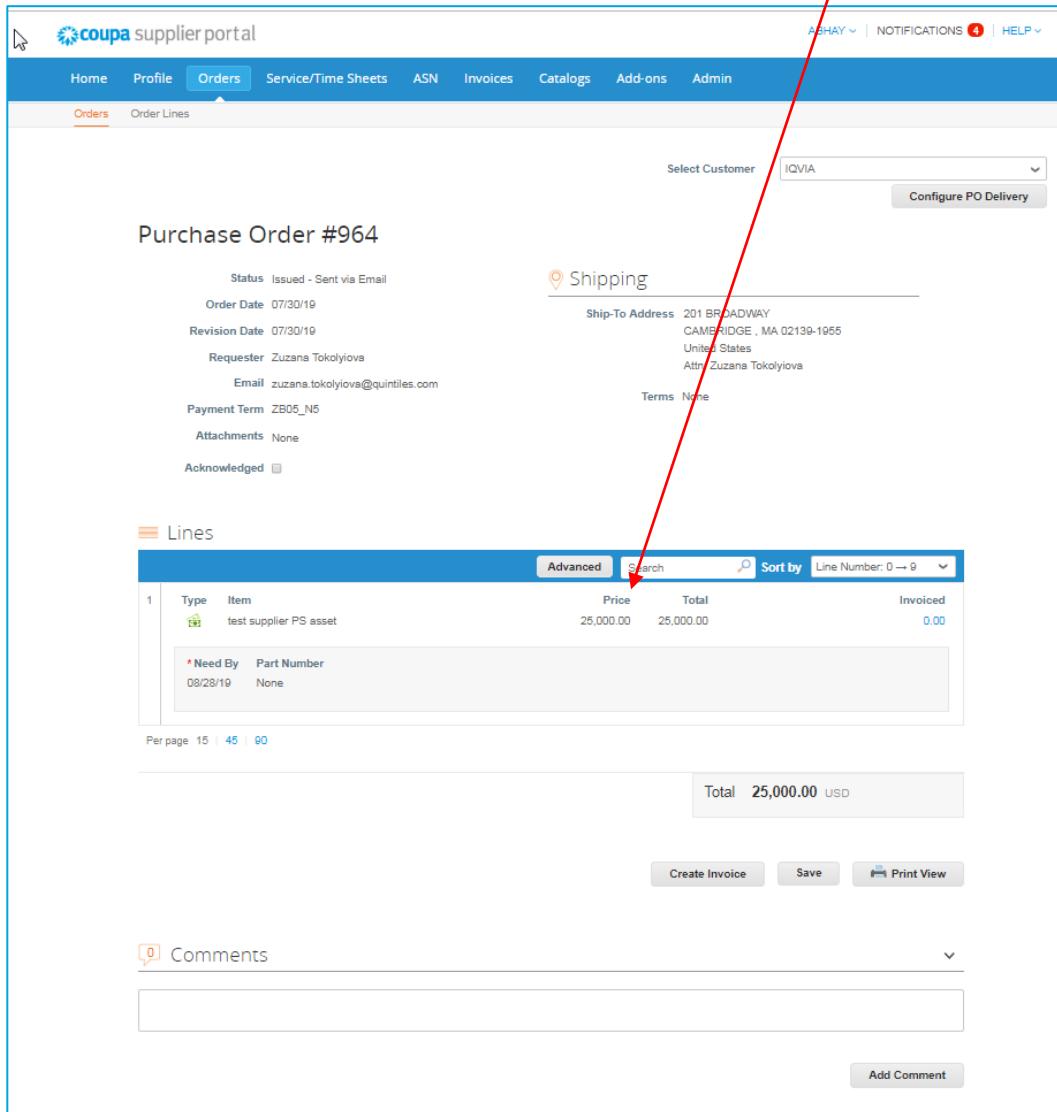
Lines

Advanced	Search	Sort by	Line Number: 0 → 9
1	Type Item test supplier PS asset	Price 25,000.00	Total 25,000.00 Invoiced 0.00
* Need By Part Number 08/28/19 None			

Per page: 15 45 90
Total 25,000.00 USD

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

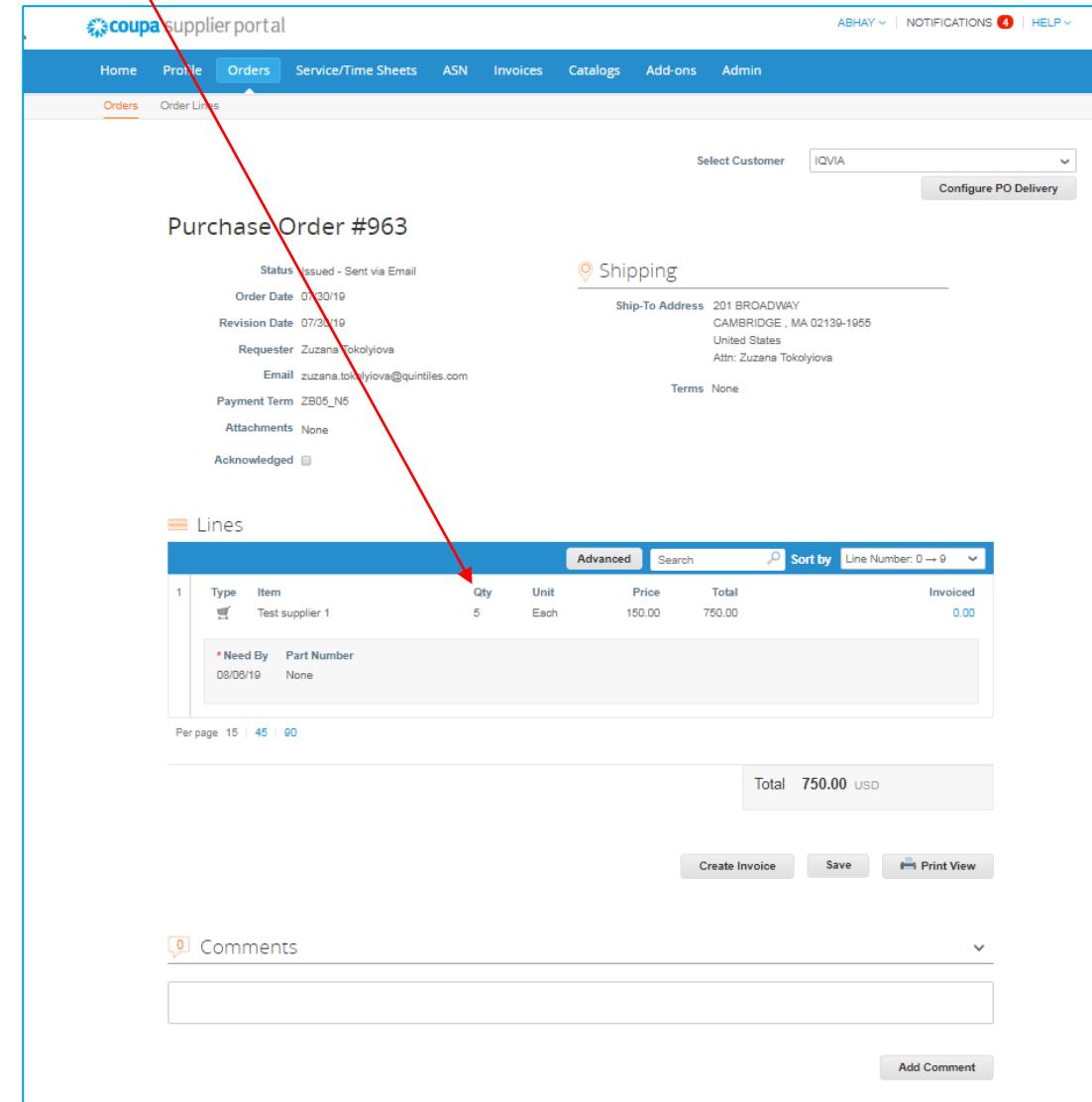
Lines

Advanced	Search	Sort by	Line Number: 0 → 9
1	Type Item Test supplier 1	Qty 5	Unit Each Price 150.00 Total 750.00 Invoiced 0.00
* Need By Part Number 08/06/19 None			

Per page: 15 45 90
Total 750.00 USD

Create Invoice Save Print View

Comments
Add Comment



UNIT OF MEASURE codes

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

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Test supplier 1	5	Each	150.00	750.00	0.00
* Need By Part Number 08/06/19 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	Rream
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

Type	Item	Price	Total	Invoiced
[+]	Test item 0	0.000.00	0.000.00	400.00

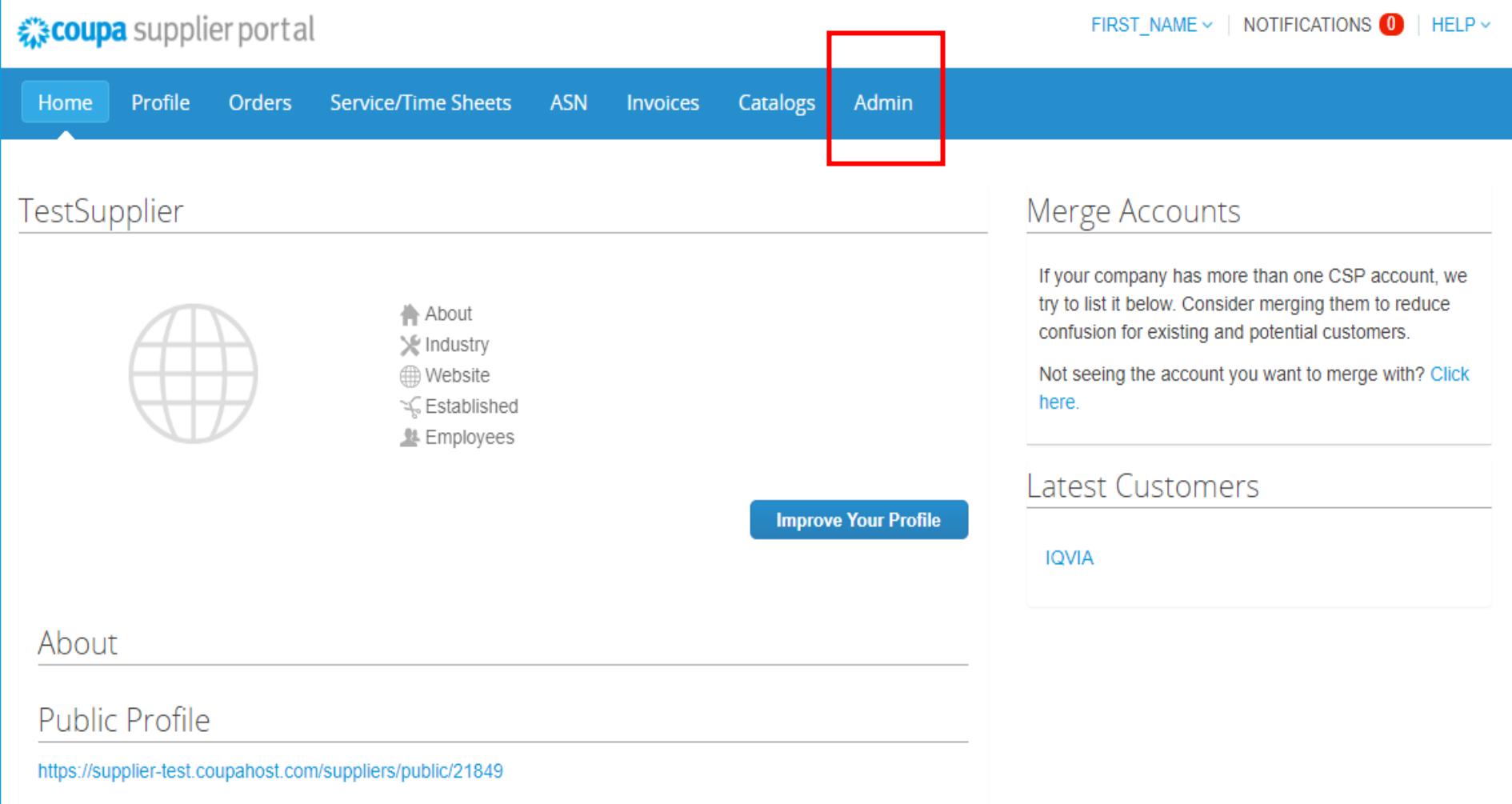
* Need By: 01/30/19 Part Number: None Tax Amount: None



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, there's a navigation bar with links: Home (highlighted in blue), Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, and Admin (which is highlighted with a red box). To the right of the Admin link, there are user profile and notification icons. Below the navigation bar, the page title is "TestSupplier". On the left side, there's a large globe icon and a sidebar with links: About, Industry, Website, Established, Employees, and an "Improve Your Profile" button. On the right side, there are two sections: "Merge Accounts" (with a note about merging multiple accounts) and "Latest Customers" (listing "IQVIA").

FIRST_NAME | NOTIFICATIONS 0 | HELP

coupa supplier portal

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Admin

TestSupplier

About Industry Website Established Employees Improve Your Profile

Merge Accounts

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.

Not seeing the account you want to merge with? [Click here.](#)

Latest Customers

IQVIA

About

Public Profile

<https://supplier-test.couphost.com/suppliers/public/21849>

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.

The screenshot shows the Coupa supplier portal interface. At the top, there's a header with the Coupa logo, user name 'ABHAY', notifications (4), and help options. Below the header is a blue navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The Admin link is currently selected. Under the Admin link, the 'E-Invoicing Setup' option is highlighted with a red box and a red number '1'. To its right, the 'Legal Entity' tab is active, showing a list of legal entities. In the top right corner of the main content area, there's a button labeled 'Add Legal Entity' with a red box around it and a red number '2' above it.

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)

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

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 Supplier UK

Country United Kingdom

* Type of Company Ltd

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**

The screenshot shows a modal window titled "Tell your customers about your organization". At the top, there are four numbered tabs (1, 2, 3, 4). Below the tabs, a question asks "Which customers do you want to see this?". Two checkboxes are present: "All" (checked) and "IQVIA" (checked). A red arrow points from this section to a callout box. The next section asks "What address do you invoice from?". It contains fields for "Address Line 1" through "Postal Code", all marked with a red asterisk (*). A "Country" dropdown is set to "United Kingdom". Below these fields is a "REQUIRED FOR INVOICING" note: "Enter the registered address of your legal entity. This is the same location where you receive government documents." A red arrow points from this section to another callout box. At the bottom of the window, there are two checkboxes: "Use this address for Remit-To" and "Use this for Ship From address", both preceded by a blue information icon.

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: United Kingdom

Bank Account Currency:

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number: Sort Code

Account Number:

Account Number Confirm:

IBAN:

SWIFT/BIC Code:

Bank Account Type: Business

RECOMMENDED

Note: Banking info added here is NOT automatically sent to your customer(s). If they don't have it already - please use their payment info change process (which may be outside of Coupa for some buying organizations).

Bank address

Address Line 1:

Address Line 2:

City:

State:

Postal Code:

What is your Tax ID?

Country: United Kingdom

* VAT ID:

I don't have a VAT/GST Number

Add additional Tax ID

Miscellaneous

Invoice From Code:

Preferred Language: English (UK)

Cancel Save & Continue

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** form 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.

I don't have a VAT/GST Number

* Local Tax ID:

Add additional 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?

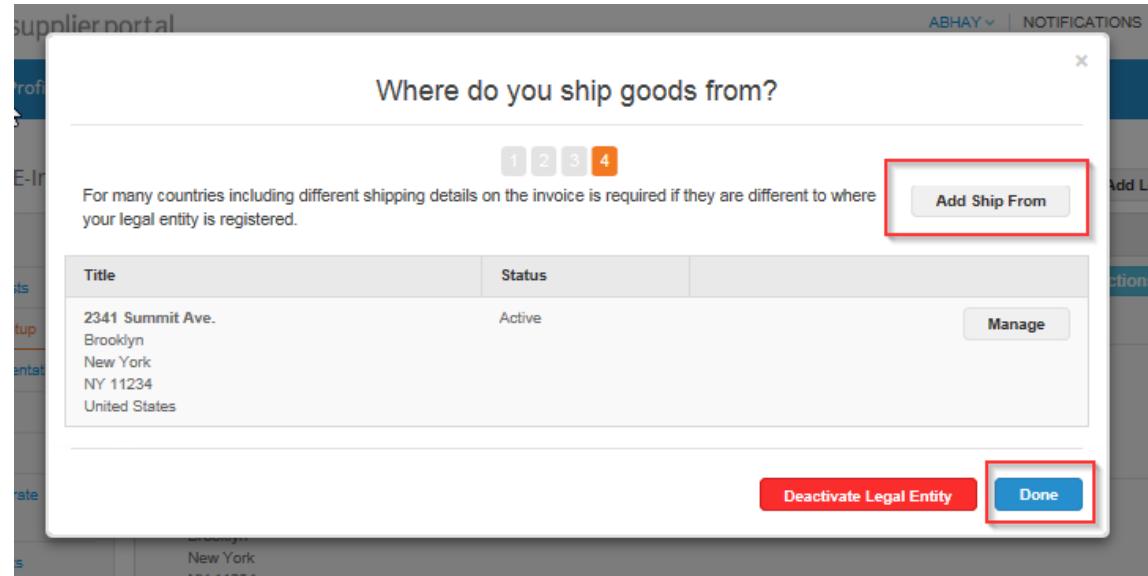
1 2 3 4

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

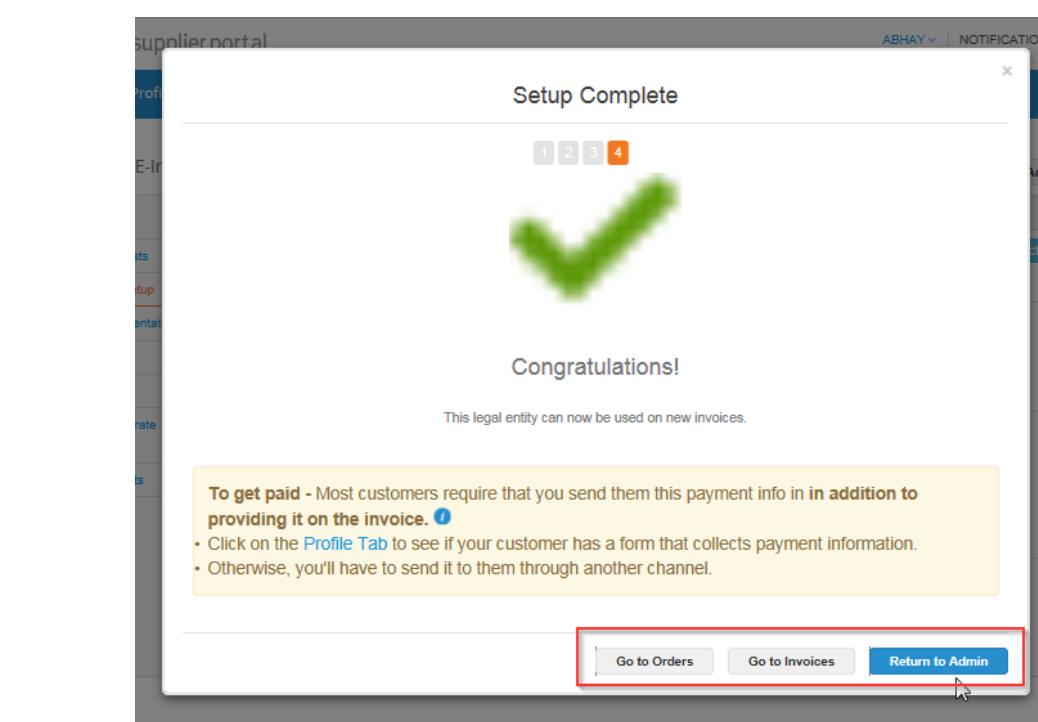
Remit-To	Banking information	Status	
1510 Valley Center Parkway Bethlehem PA 18017 United States	Wells Fargo LHB LLC *****9123 123456789	Active	Manage

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 consists of two screenshots of the Coupa supplier portal interface, illustrating the steps to deactivate a legal entity.

Screenshot 1 (Top): Shows the 'Admin E-Invoicing Setup' page. A red box labeled '1' highlights the 'Admin' button in the top navigation bar. A red box labeled '2' highlights the 'E-Invoicing Setup' link in the left sidebar. A red box labeled '3' highlights the 'Actions' dropdown menu, which contains 'Manage' and 'Deactivate Legal Entity' options. A red arrow points from the bottom screenshot up to this screen.

Screenshot 2 (Bottom): Shows the same 'Admin E-Invoicing Setup' page after the 'Deactivate Legal Entity' action has been performed. The legal entity information (ABCD, address, Tax ID) is now missing, leaving only the 'Add Legal Entity' button and the 'Remit-To' address listed.

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/cancellation of goods, price adjustments, rebates and refunds.

Credit notes can be issued against invoices only, not POs

To create a credit note there are 2 options:

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

OR

1. Click on the **Orders** tab on the main menu
2. Click on the **Create Credit Note** () icon for the PO in the **Actions** column of the **Purchase Orders** table

The screenshot shows the Coupa supplier portal interface. At the top, there is a navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (which has a red box around it and a red circle with '1' above it), Catalogs, Add-ons, and Admin. Below the navigation bar, there is a dropdown for 'Select Customer' set to 'IQVIA'. The main content area is titled 'Invoices'. It contains a 'Create Invoices' section with four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note' (which is highlighted with a red box and a red circle with '2' above it). Below this is a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. A single row is shown: NY111, 08/05/19, Pending Approval, 966, 11,105.00 USD, No. At the bottom of the table, there are links for 'Per page: 15 | 45 | 90'.

The screenshot shows the Coupa supplier portal interface. At the top, there is a navigation bar with links: Home, Profile, Orders (which has a red box around it and a red circle with '1' above it), Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. Below the navigation bar, there is a dropdown for 'Select Customer' set to 'IQVIA'. The main content area is titled 'Purchase Orders'. It contains an 'Instructions From Customer' section with a note about acknowledging the Purchase Order before creating an invoice. Below this is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, and Actions. A single row is shown: 966, 07/30/19, Issued, None, test supplier 2 lines, test supplier 2 lines_2, No, 37,569.00 USD. In the 'Actions' column for this row, there is a yellow 'Create Credit Note' button with a red box around it and a red circle with '2' above it. At the bottom of the table, there are links for 'View: Open Orders' and 'Search'.

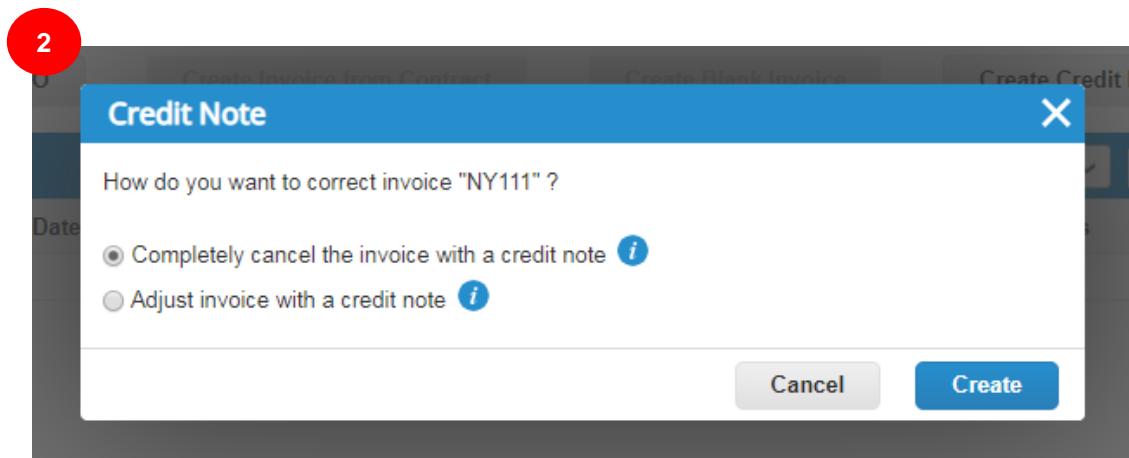
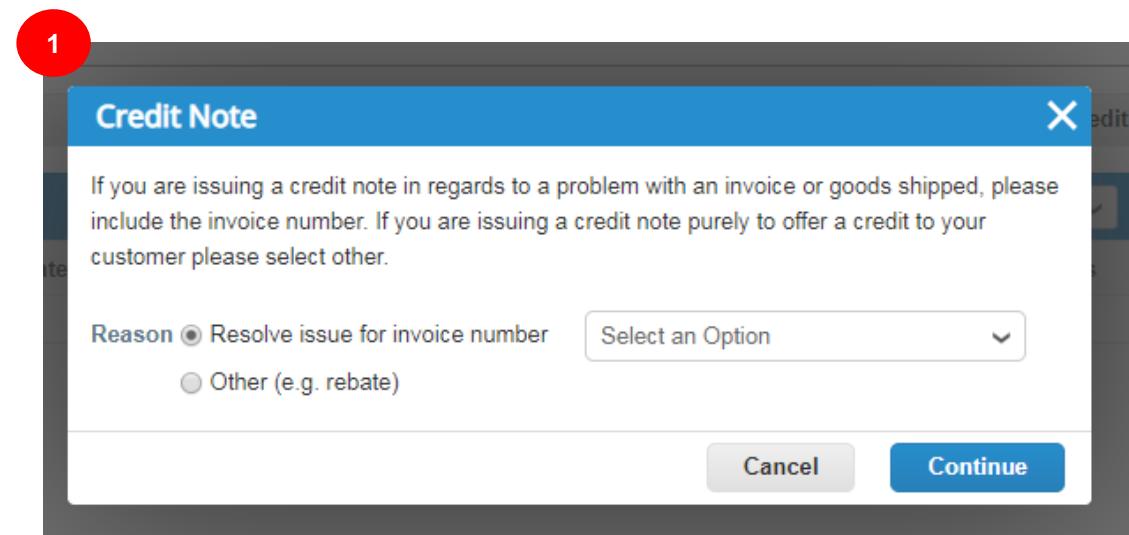
In the appearing **Credit Note** popup, select the reason for your credit note.

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](#)



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.

coupa supplier portal ABHAY | NOTIFICATIONS 4

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

Select Customer IQVIA

Create Credit Note Create

This credit note applies to invoice NY111. When approved, the credit will fully cancel the invoice's impact to the transaction.

General Info

* 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 No file chosen

Supplier Note

Attachments

From

* 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

To

Customer IQVIA

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

Buyer Tax ID None

Ship To Address 201 BROADWAY
CAMBRIDGE, MA 02128-1625

Lines

Adjustment Type Price

Type	Description	Price
Line	test supplier 2 line	-10,000.00

PO Line 988-1 Contract Supplier Part Number

Billing QUBOS-54450-182-683-023220

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
	10.00%	-1,000.00	

Add Tag

Totals & Taxes

Lines Net Total	-10,000.00	
Lines Tax Totals	-1,000.00	
Shipping	-100.00	
Tax	5.0 %	-5.00
Tax Reference	Enter a tax reason description.	
Misc	0.00	
Tax	%	0.00
Tax Reference	Enter a tax reason description.	
Total Tax	-1,005.00	
Net Total	-10,100.00	
Total	-11,105.00	

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.

coupa supplier portal ABHAY NOTIFICATIONS 4 HELP

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

Select Customer IQVIA

Create Credit Note Create

This credit note applies to invoice NY111. When approved, the credit will adjust the invoice's impact to the transaction.

General Info

* 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 No file chosen

Supplier Note

Attachments

From

* 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

To

Customer IQVIA

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

Buyer Tax ID None

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

Lines

Adjustment Type Price

Type	Description	Price
PO Line	test supplier 2 lines	-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
	10.000	-1,000.00	

Add Tag

Totals & Taxes

Lines Net Total	-10,000.00
Lines Tax Totals	-1,000.00
Shipping	
Tax	
Tax Reference	Enter a tax reason description.
Misc	
Tax	
Tax Reference	Enter a tax reason description.
Total Tax	-1,000.00
Net Total	-10,000.00
Total	-11,000.00

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. Step 1 highlights the 'Invoices' button in the top navigation bar. Step 2 highlights the 'View' dropdown menu above a table of invoices. Step 3 highlights the 'Credit Notes' option in the dropdown menu.

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 *i*

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
None	08/06/19	Draft	966	-11,105.00 USD
NY111	08/05/19	Pending Approval	966	11,105.00 USD

Per page 15 | 45 | 90

Actions

View All
Abandoned
Approved
Credit Notes
Disputed
Disputes with a supplier response
Disputes without supplier response
Draft
Payment Information
Pending Approval
Processing
Voided
Create View

IQVIA®

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

Type	Description	Price
test supplier 2 lines		10,000.00

10,000.00 X

PO Line
988-1 Contract

Billing
QUBOS-54450-182-683-023220 Supplier Part Number

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
	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"/> Enter a tax reason description.
Misc	<input type="text"/>
Tax	<input type="text"/> 0.00 % <input type="text" value="0.00"/>
Tax Reference	<input type="text"/> Enter a tax reason description.
Total Tax	1,005.00
Net Total	10,100.00
Total	11,105.00

X 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 (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?

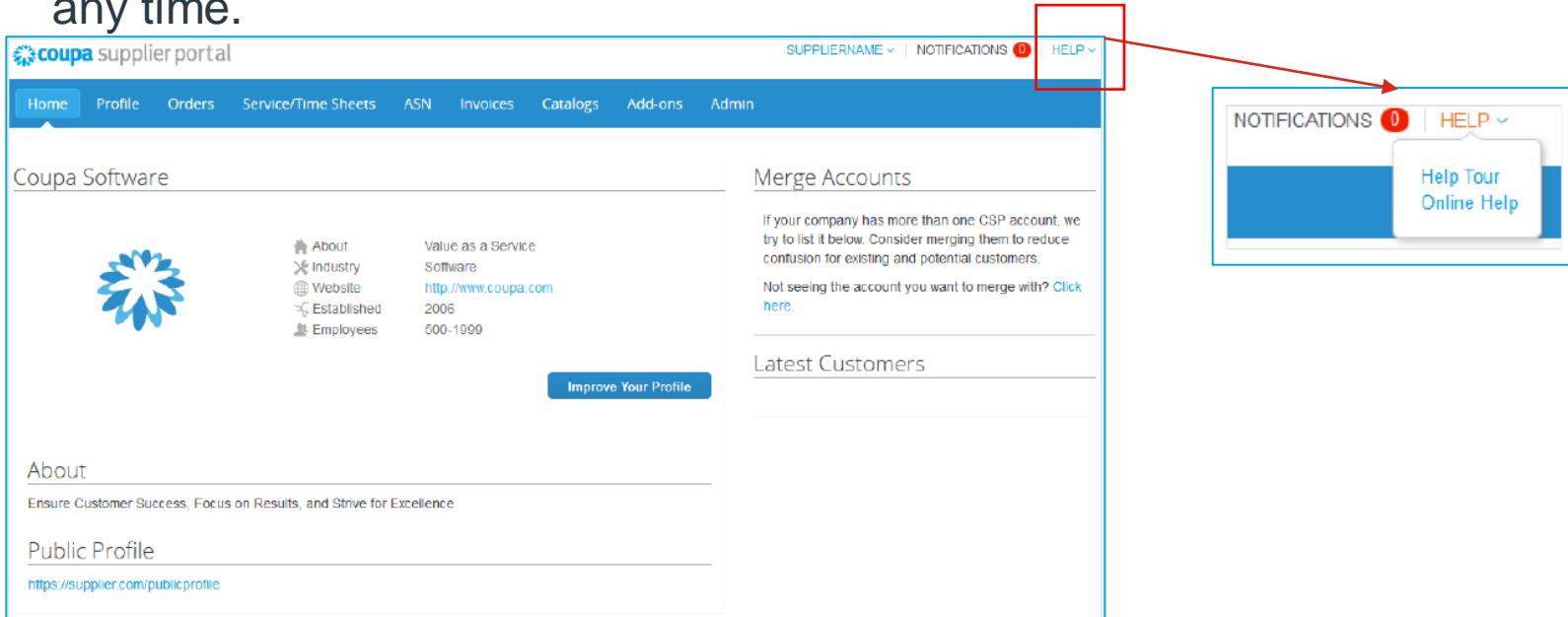
For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so.

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 (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