



IMS Health & Quintiles are now



Coupa for Suppliers

Coupa Supplier Portal (CSP) – Invoice Processing

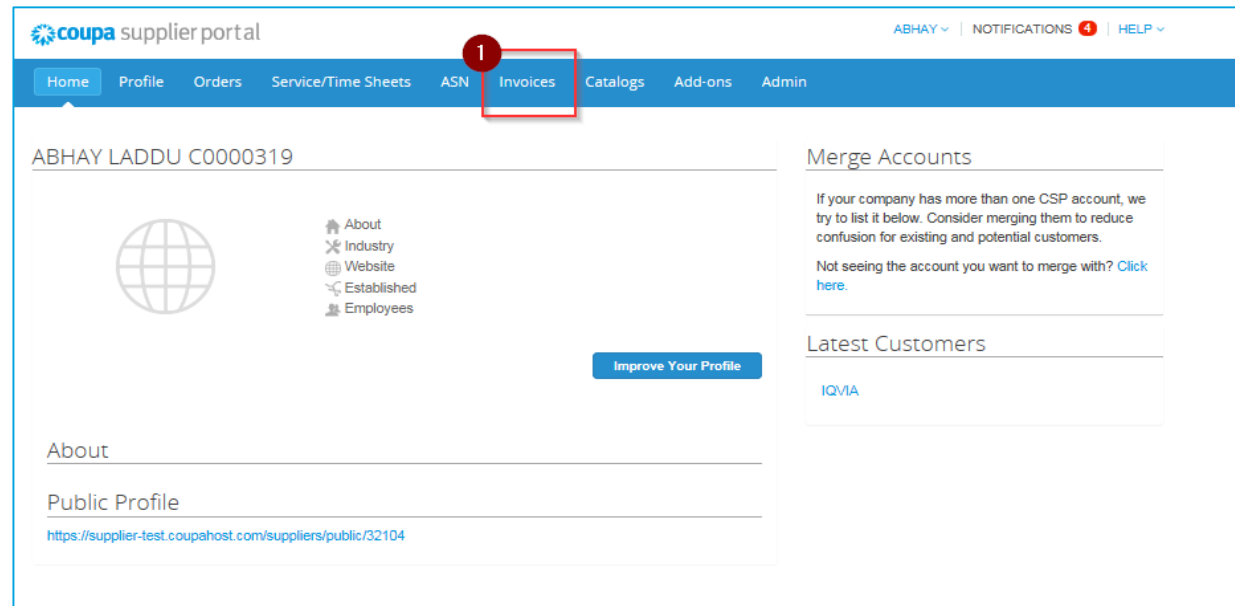
Covered Topics

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

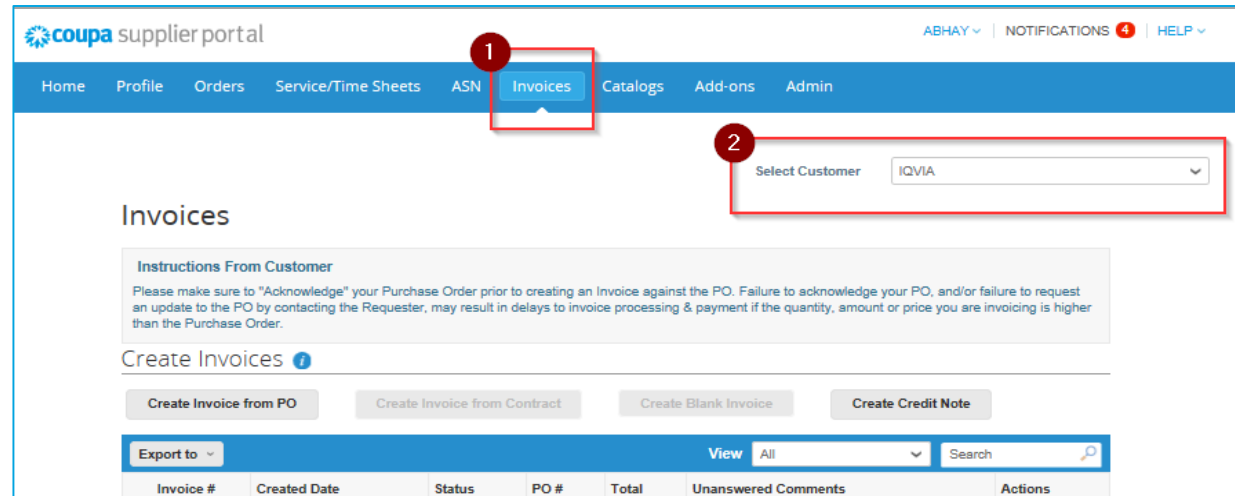
1. View and Manage Invoices

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

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

Verify payment status

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

The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as ABHAY, with 4 notifications and a help menu. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (highlighted), Catalogs, Add-ons, and Admin. Below the navigation bar, there is a 'Select Customer' dropdown menu set to IQVIA. The main heading is 'Invoices'. A section titled 'Instructions From Customer' provides guidance on acknowledging Purchase Orders. Below this, there are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table lists invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, and Actions. The first row, with invoice number NY111, is highlighted with a red box and a '3' in a red circle. The table also includes an 'Export to' dropdown, a 'View' dropdown set to 'All', and a search bar. At the bottom, it shows '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
Invoice Date 08/01/19
Payment Term ZB05_N5
Currency USD
Delivery Number None
Status Pending Approval
Shipping Term None
Legal Invoice [download](#)
Image Scan None
Supplier Notes None
Attachments None

Supplier ABHAY LADDU C0000319 

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

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

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

Supplier Tax ID 15256853
Customer IQVIA

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

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

Buyer Tax ID None

Paid No
Payment Date None
Payment Notes None

Disputed Invoice

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

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

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

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

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

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

1

Country compliant e-invoice

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

- **Cancel Invoice**

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

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

Warning: The corrected invoice must have a new number.

- **Adjust**

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

2

Standard e-invoice

- **Void**

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

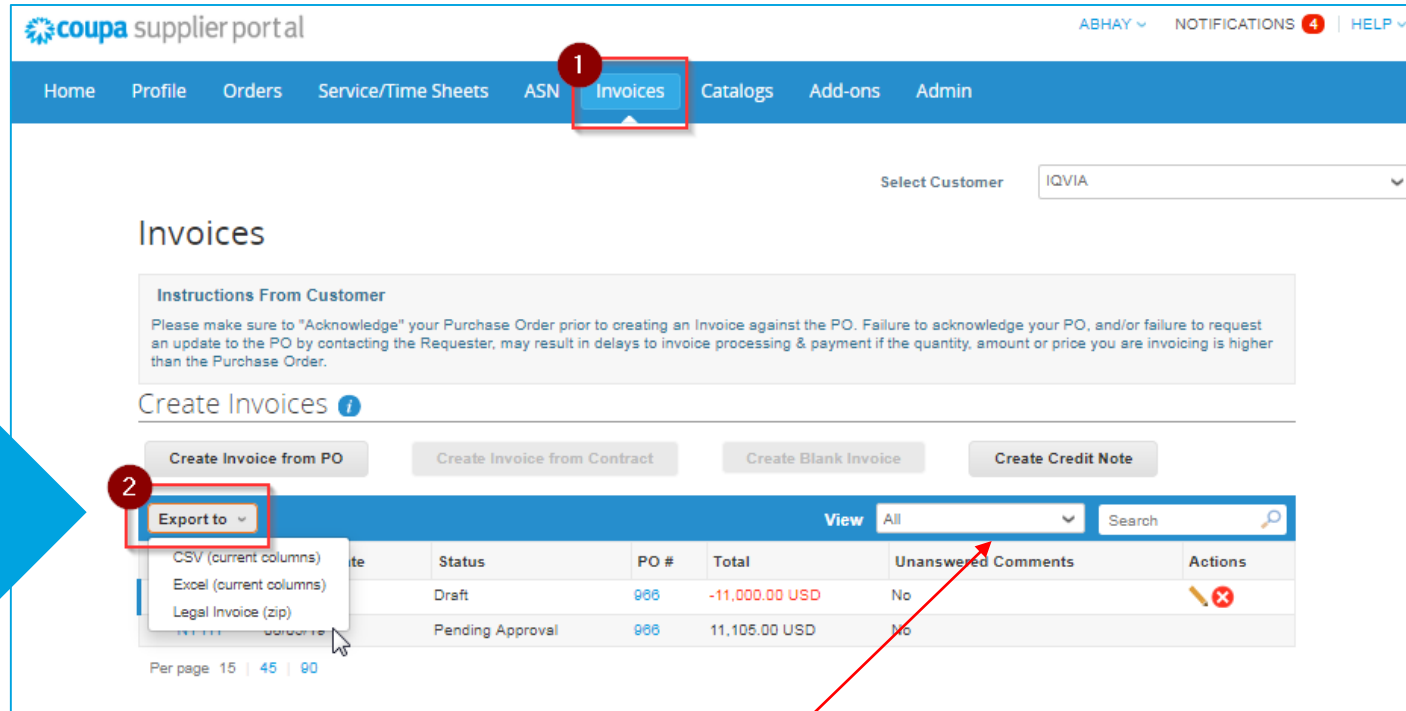
- **Correct Invoice**

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

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

Export the invoices

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



1

2



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

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. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Orders' tab is selected and highlighted with a red box and a circled '1'. Below the navigation bar, the user's name 'ABHAY LADDU C000319' is displayed. The main content area features a globe icon, a list of links (About, Industry, Website, Established, Employees), and an 'Improve Your Profile' button. On the right side, there are sections for 'Merge Accounts' and 'Latest Customers', with 'IQVIA' listed under the latter.

The screenshot shows the 'Purchase Orders' page in the Coupa Supplier Portal. The 'Orders' tab is selected and highlighted with a red box and a circled '1'. A 'Select Customer' dropdown menu is highlighted with a red box and a circled '2', showing 'IQVIA' selected. Below the dropdown is a 'Configure PO Delivery' button. The main content area shows 'Purchase Orders' with instructions from the customer and a table of open orders.

Instructions From Customer
Please make sure to "Acknowledge" your Purchase Order prior to creating an Invoice against the PO. Failure to acknowledge your PO, and/or failure to request an update to the PO by contacting the Requester, may result in delays to invoice processing & payment if the quantity, amount or price you are invoicing is higher than the Purchase Order.



Click the Action to Invoice from a Purchase Order

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

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

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

The screenshot shows the Coupa Supplier Portal interface. The 'Purchase Orders' table is displayed with the following data:

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. The 'Create Invoice' button is highlighted in a red box.

Purchase Order #966

Status: Issued - Sent via Email

Order Date: 07/30/19

Revision Date: 07/30/19

Requester: Zuzana Tokolyiova

Email: zuzana.tokolyiova@quintiles.com

Payment Term: ZB05_N5

Attachments: None

Acknowledged:

Shipping

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

Terms: None

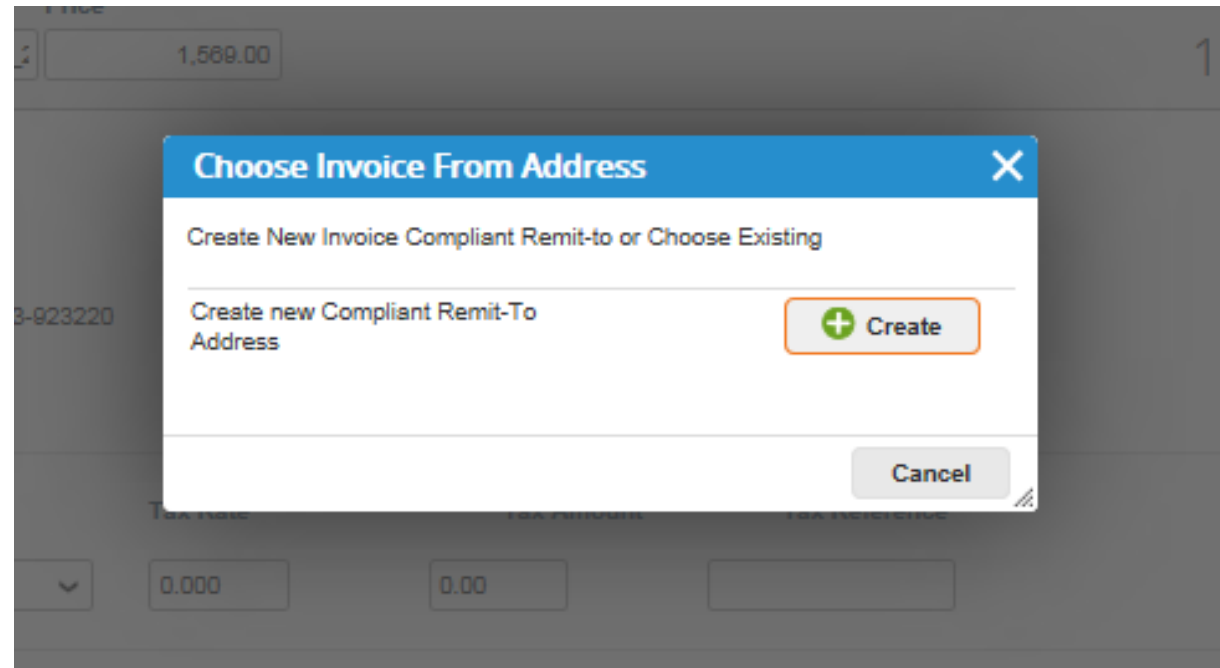
Lines

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** – cannot exceed 60 days
- **Payment Terms** - depending on what you have agreed with the customer
- **Currency** – uneditable – if displayed currency is not correct, please contact requester directly as it is automatically created based on purchase order

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

The screenshot shows the 'Create Invoice' page in the Coupa Supplier Portal. The page is titled 'Create Invoice' and has a 'Create' button. The 'General Info' section includes fields for 'Invoice #' (NY111), 'Invoice Date' (08/01/19), 'Payment Term' (ZB05_N5), 'Currency' (USD), 'Delivery Number', 'Status' (Draft), 'Image Scan' (with a 'Browse...' button), and 'Supplier Note'. The 'From' section includes 'Supplier' (ABHAY LADDU C0000319), 'Supplier Tax ID' (15258853), and three address fields: 'Invoice From Address', 'Remit-To Address', and 'Ship From Address', each with a search icon. The 'To' section includes 'Customer' (IQVIA), 'Bill To Address', 'Buyer Tax ID' (None), and 'Ship To Address'. The page also has a 'Select Customer' dropdown (IQVIA) and 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' section of a software interface. It contains two line items:

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

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

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

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

- Line 1:** Type: test supplier 2 lines, Description: test supplier 2 lines, Price: 10,000.00, Total: 36,000.00.
- PO Line:** 966-1
- Billing:** QUBOS-54450-162-683-923220
- Taxes:** A table with columns: Tax Description, Tax Rate, Tax Amount, Tax Reference. The Tax Rate is currently 0.000.
- Totals & Taxes:** Lines Net Total: 36,000.00, Lines Tax Totals: 0.00.

A red box highlights the 'Price' input field, and another red box highlights the 'Tax Description' dropdown menu, which is open to show a list of tax codes.

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

- Line 1:** Type: test supplier 2 lines, Description: test supplier 2 lines, Price: 10,000.00, Total: 36,000.00.
- PO Line:** 966-1
- Billing:** QUBOS-54450-162-683-923220
- Taxes:** A table with columns: Tax Description, Tax Rate, Tax Amount, Tax Reference. The Tax Rate is now 10.000 and the Tax Amount is 1,000.00.
- Totals & Taxes:** (Labels are present but values are not visible in this view).

A red box highlights the 'Tax Rate' input field, which now contains the value '10.000'. A red arrow points from the 'Price' box in the first screenshot to this 'Tax Rate' box.

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

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

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

The screenshot shows a 'Lines' form with one line item. The 'Price' field is set to 36,000.00. In the 'Totals & Taxes' section, the 'Shipping' amount is 100 and the 'Tax' rate for shipping is 5%. A red box highlights the shipping amount and the 5% tax rate. The 'Calculate' button is highlighted at the bottom.

Lines Net Total	36,000.00
Lines Tax Totals	0.00
Shipping	100
Tax	5 %
Total Tax	0.00
Net Total	36,000.00
Total	36,000.00

The screenshot shows the same 'Lines' form but with a 'Price' of 10,000.00. The 'Shipping' amount is 100 and the 'Tax' rate for shipping is 5%. The 'Calculate' button is highlighted with a red box. Three numbered blue boxes highlight the 'Total Tax', 'Net Total', and 'Total' values in the summary table.

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

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

Taxes

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

[Add Tag](#)

[+ Add Line](#)

Totals & Taxes

Lines Net Total	10,000.00
Lines Tax Totals	1,000.00
Shipping	
<input type="text"/>	100
Tax	<input type="text"/> 5 % 5.00
Tax Reference	<input type="text"/>
Misc	
<input type="text"/>	
Tax	<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](#)

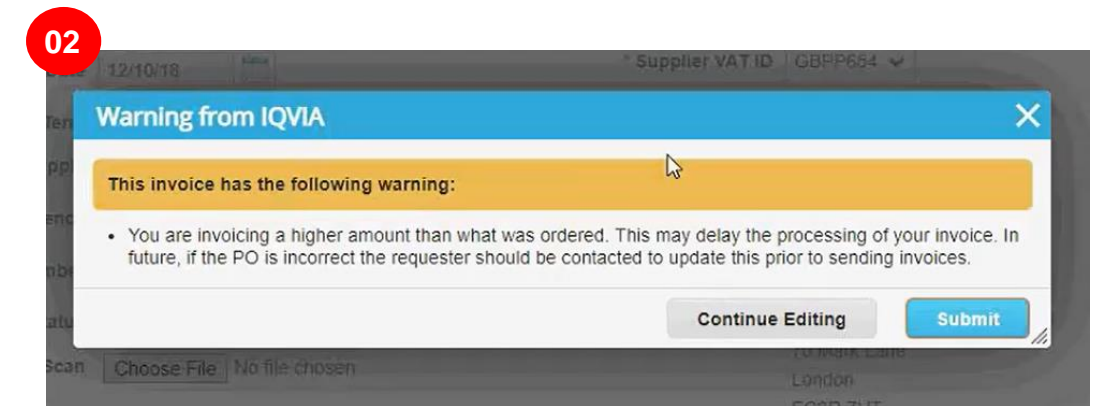
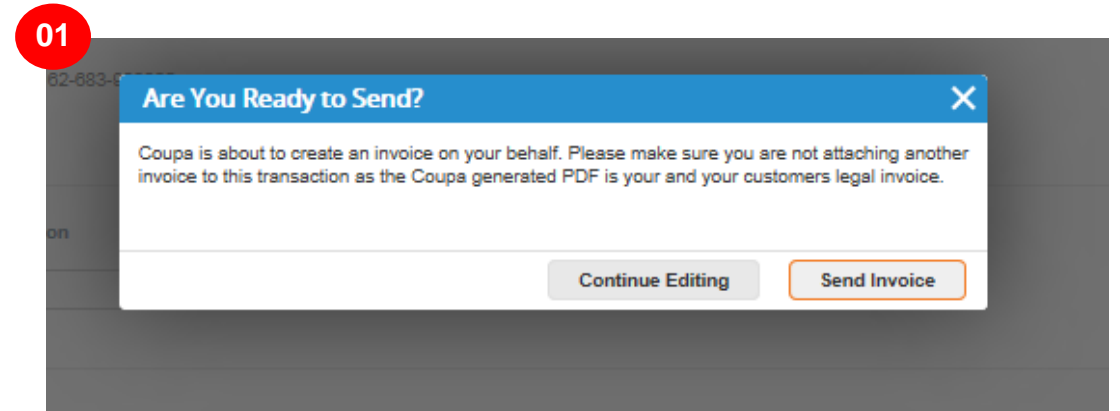
First you will get pop-up notification „ if you are ready to send your invoice“. There are following options:

- **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.

Select Customer IQVIA

Configure PO Delivery

Invoices

ABHAY LADDU C0000319 invoice #NY11 is processing

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

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	

Per page 15 | 45 | 90

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.

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

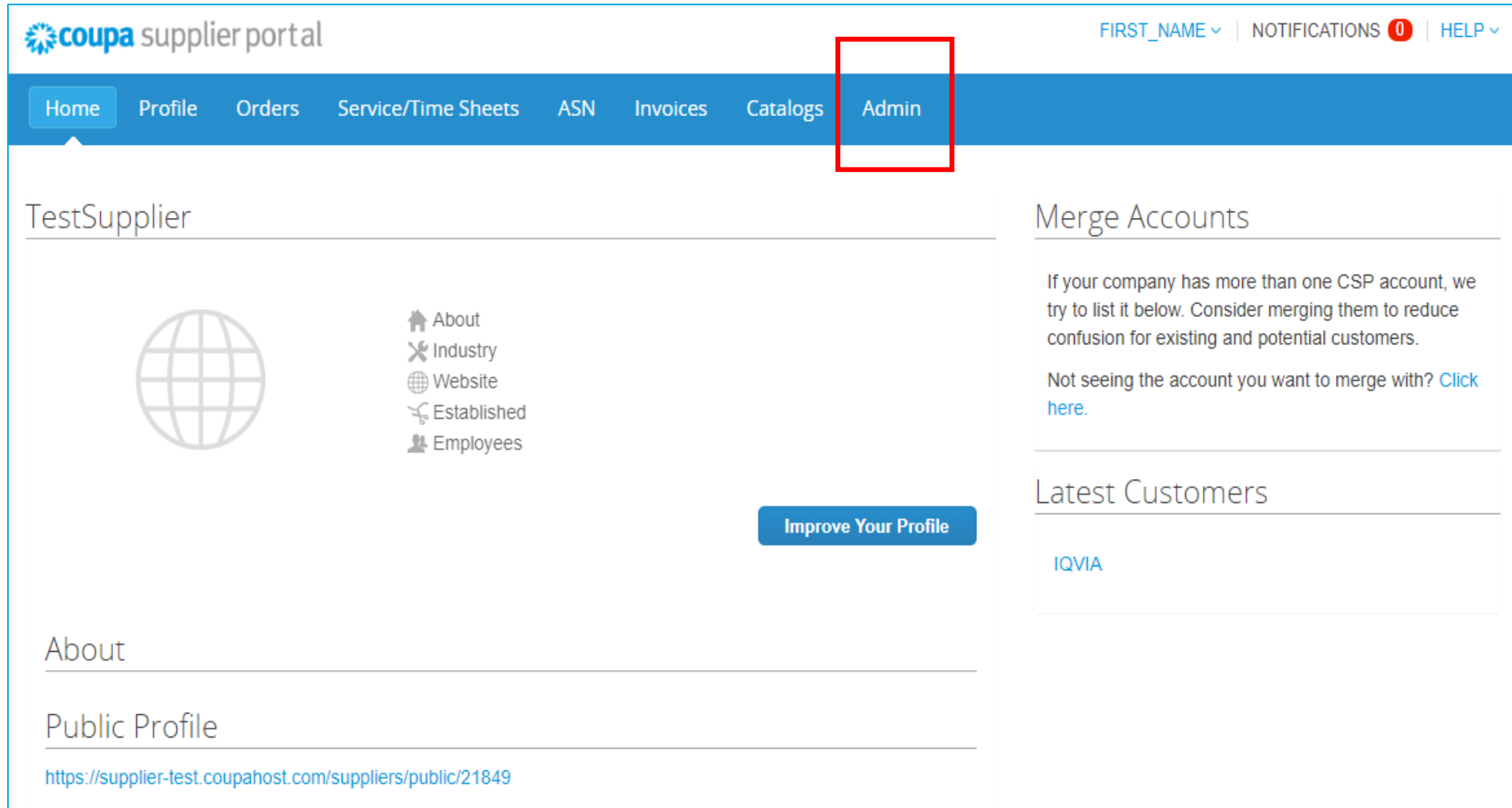
Type	Item	Price	Total	Invoiced
	Test item 0	8,000.00	8,000.00	400.00

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

3. Set up E-invoicing

Set up your account to create electronic invoices

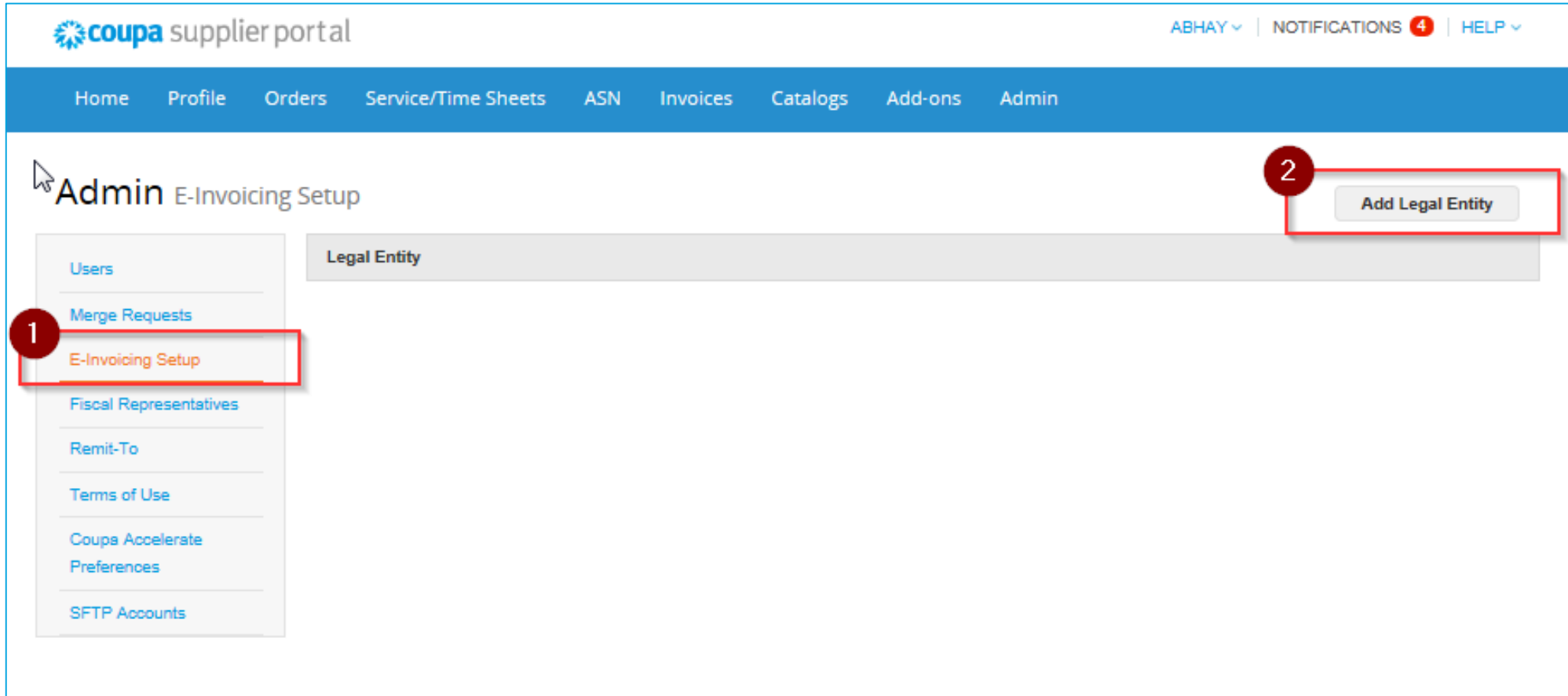
- click on **Admin** tab on the main menu



The screenshot displays the Coupa Supplier Portal interface. At the top left, the logo reads "coupa supplier portal". On the right side of the header, there are links for "FIRST_NAME" with a dropdown arrow, "NOTIFICATIONS" with a red circle containing the number "0", and "HELP" with a dropdown arrow. Below the header is a blue navigation bar with several tabs: "Home", "Profile", "Orders", "Service/Time Sheets", "ASN", "Invoices", "Catalogs", and "Admin". The "Admin" tab is highlighted with a red rectangular box. The main content area is divided into two columns. The left column is titled "TestSupplier" and features a globe icon, a list of links: "About", "Industry", "Website", "Established", and "Employees", and a blue button labeled "Improve Your Profile". Below this, there are sections for "About" and "Public Profile" with a URL: "https://supplier-test.coupahost.com/suppliers/public/21849". The right column contains a "Merge Accounts" section with explanatory text and a link, and a "Latest Customers" section listing "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

1 2 3 4

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: United Kingdom

Bank Account Currency:

Bank Name:

Beneficiary Name:

Routing (Bank Code) Number:

Account Number:

Account Number Confirm:

IBAN:

SWIFT/BIC Code:

Bank Account Type: Business

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)

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.

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?

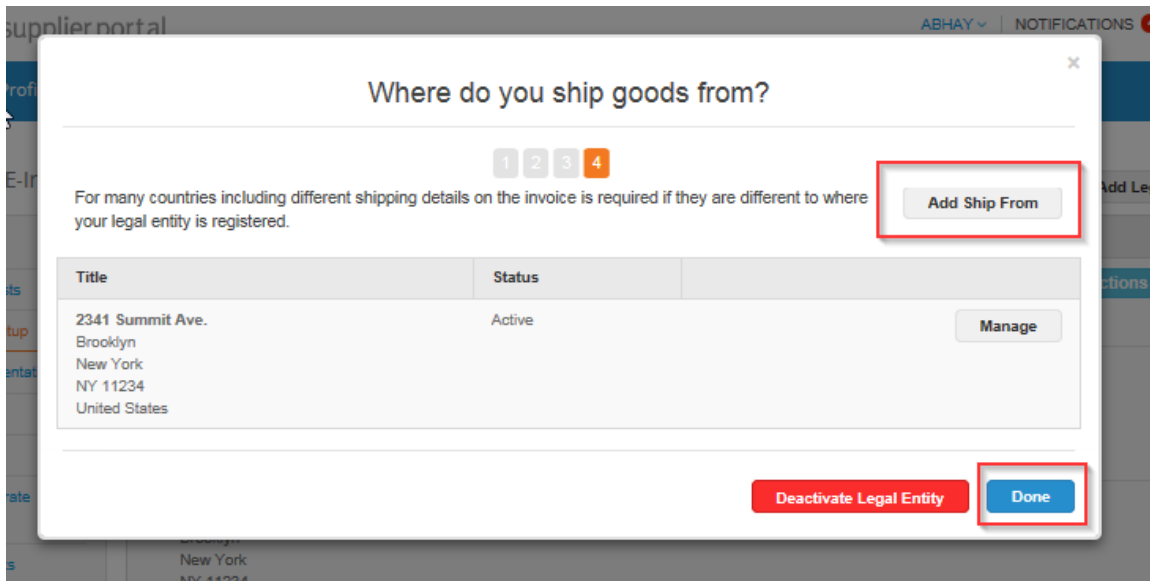
1 2 3 4

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



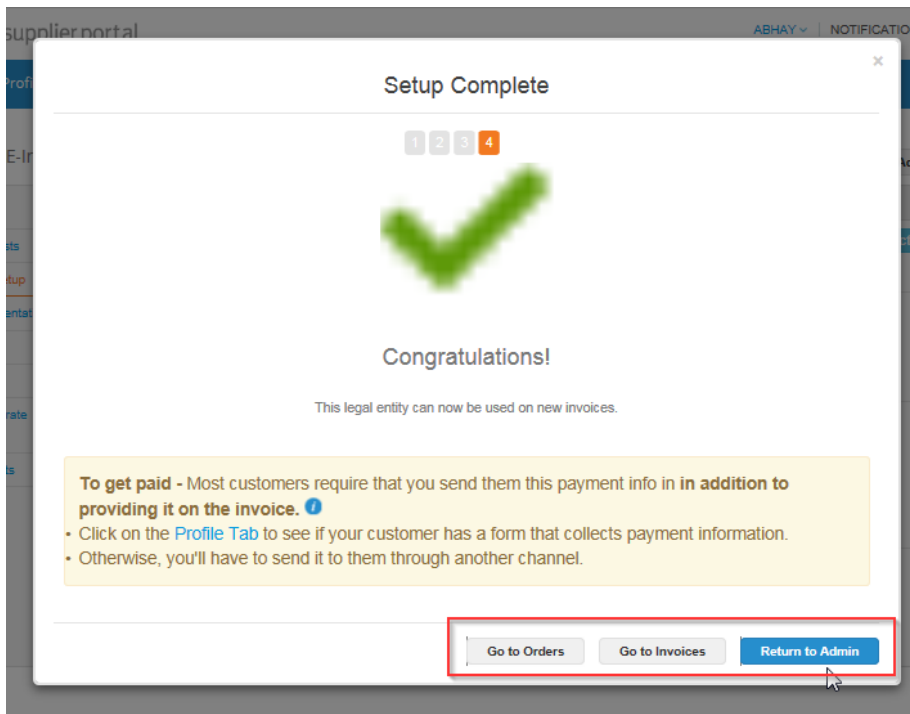
In the appearing **Where do you ship goods from?** window, manage or add another ship from address and after click **Done**.

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 screenshot shows the Coupa Supplier Portal Admin page. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Admin' menu item is highlighted with a red box and a '1'. The left sidebar contains 'Users', 'Merge Requests', 'E-Invoicing Setup', 'Fiscal Representatives', 'Remit-To', 'Terms of Use', 'Coupa Accelerate Preferences', and 'SFTP Accounts'. The 'E-Invoicing Setup' menu item is highlighted with a red box and a '2'. The main content area shows the 'Legal Entity' section for 'ABCD' with a 'Tax ID' of 'GB1234567890'. The 'Actions' button is highlighted with a red box and a '3', and the 'Deactivate Legal Entity' option is selected from the dropdown menu.

The screenshot shows the Coupa Supplier Portal Admin page after the legal entity has been deactivated. The 'Legal Entity' section is empty, and the 'Add Legal Entity' button is visible. The navigation bar and sidebar are the same as in the previous screenshot.

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.

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

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

coupa supplier portal

ABHAY | NOTIFICATIONS 4 | HELP

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

Orders Order Lines

Select Customer IQVIA

Configure PO Delivery

Purchase Orders

Instructions From Customer
Please make sure to "Acknowledge" your Purchase Order prior to creating an Invoice against the PO. Failure to acknowledge your PO, and/or failure to request an update to the PO by contacting the Requester, may result in delays to invoice processing & payment if the quantity, amount or price you are invoicing is higher than the Purchase Order.

Click the 📄 Action to Invoice from a Purchase Order

View Open Orders Search

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	Create Credit Note
965	07/30/19	Issued	None	test supplier project	No	39,000.00 USD	
964	07/30/19	Issued	None	test supplier PS asset	No	25,000.00 USD	
963	07/30/19	Issued	None	5 Each of Test supplier 1	No	750.00 USD	

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)

Cancel Continue

2

Credit Note X

How do you want to correct invoice "NY111" ?

Completely cancel the invoice with a credit note Adjust invoice with a credit note

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 'Create' button. A yellow banner at the top states: '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 '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). The 'To' section includes '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 02139-1055).

The screenshot shows the 'Lines' section of the Credit Note form. The 'Adjustment Type' is set to 'Price'. The 'Type' is 'test supplier 2 line' and the 'Price' is '-10,000.00'. The 'PO Line' is '906-1', the 'Contract' is a dropdown menu, and the 'Supplier Part Number' is a text field. The 'Billing' information is 'QUBOS-64450-162-683-623220'. The 'Taxes' section includes a table with columns for 'Tax Description', 'Tax Rate', 'Tax Amount', and 'Tax Reference'. The table has one row with a tax rate of '10.000' and a tax amount of '-1,000.00'. The 'Totals & Taxes' section shows 'Lines Net Total' as '-10,000.00', 'Lines Tax Totals' as '-1,000.00', 'Shipping' as '-100.000', 'Tax' as '5.0 %' with a tax amount of '-5,000', 'Misc' as '0.000', and 'Total Tax' as '-1,005.00'. The 'Net Total' is '-10,105.00' and the 'Total' is '-11,105.00'. The form includes 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). 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', 'From', and 'To'. The 'General Info' section 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'. The 'From' section 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 address), and 'Ship From Address' (same as invoice from address). The 'To' section 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 02138-1955). There are also 'Attachments' and 'Add File | URL | Text' options at the bottom.

The screenshot shows the 'Lines' section of the Credit Note form. It features a table with columns for 'Type', 'Description', 'Price', and 'Quantity'. The 'Price' field is highlighted with a red box and contains the value '-10,000.00'. The 'Quantity' field is also highlighted with a red box and contains the value '-10,000.00'. Below the table, there are fields for 'PO Line' (905-1), 'Contract', and 'Supplier Part Number'. The 'Billing' section includes 'QUBOS-54450-162-893-923220'. The 'Taxes' section includes a table with columns for 'Tax Description', 'Tax Rate', 'Tax Amount', and 'Tax Reference'. The 'Tax Rate' is 10.000 and the 'Tax Amount' is -1,000.00. The 'Totals & Taxes' section includes 'Lines Net Total' (-10,000.00), 'Lines Tax Totals' (-1,000.00), 'Shipping', 'Tax', 'Tax Reference', 'Misc', and 'Total' (-11,000.00). There are also 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit' buttons at the bottom.

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 is a 'Create Invoices' section with 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: Invoice #, Created Date, Status, PO #, Total, and Actions. The 'View' dropdown menu is open, showing a list of status options, with 'Credit Notes' highlighted in blue and a red box and a circled '3' around it. A circled '2' is also present near the 'View' dropdown. The table shows two invoices: one with status 'Draft' and total '-11,105.00 USD', and another with status 'Pending Approval' and total '11,105.00 USD'. The page footer includes the IQVIA logo and the number 37.

coupa supplierportal 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	Actions
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

View All

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

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: 996-1 Contract: Supplier Part Number:

Billing: QUBOS-54450-162-683-923220

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 AccountsPayable@quintiles.com for EMEA group or on ap@quintiles.com for AMERICA 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?

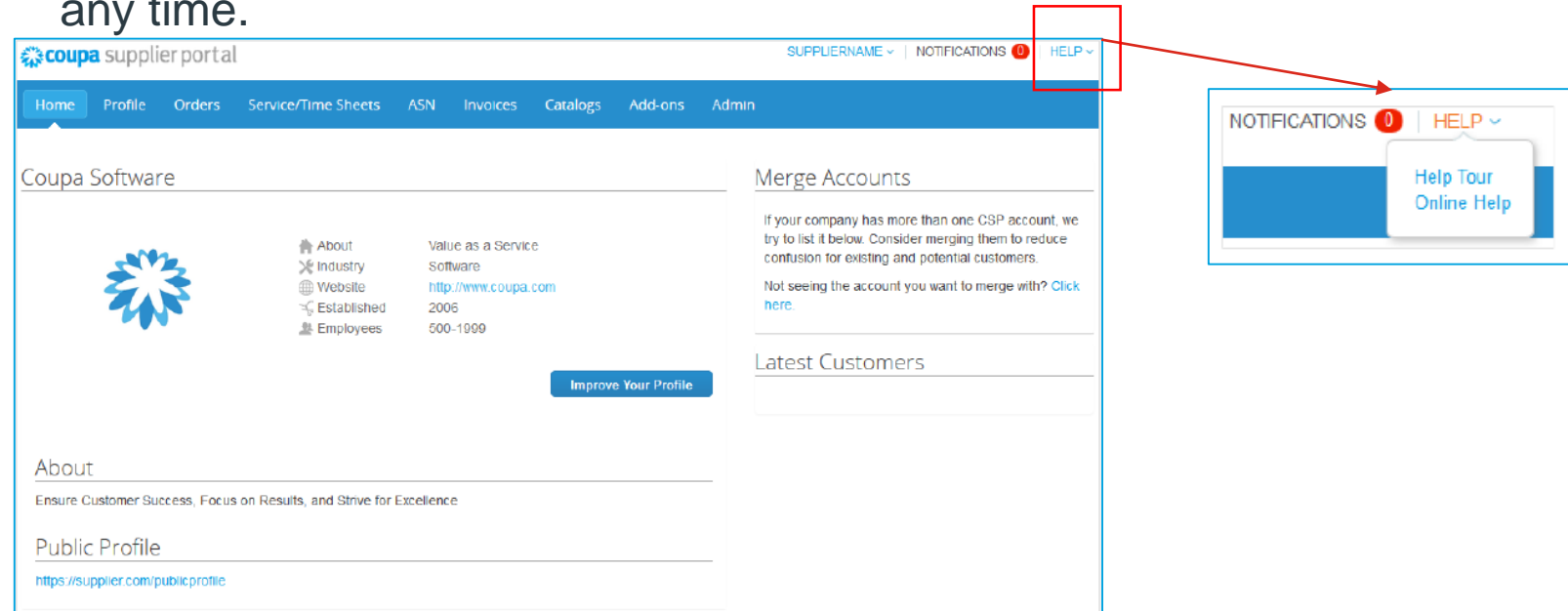
For invoice image scans, attachments must be of the following types: PNG, GIF, JPG, JPEG, PJPEG, TIFF, or PDF. One attachment can be up to 100 MB, but for performance reasons, consider limiting the attachment size to 16 MB or so.

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

For questions regarding payment information, contact IQVIA directly on AccountsPayable@quintiles.com for EMEA or on ap@quintiles.com for AMERICA. 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