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Coupa for Suppliers

Coupa Supplier Portal (CSP) – Invoice Processing

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Covered Topics

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

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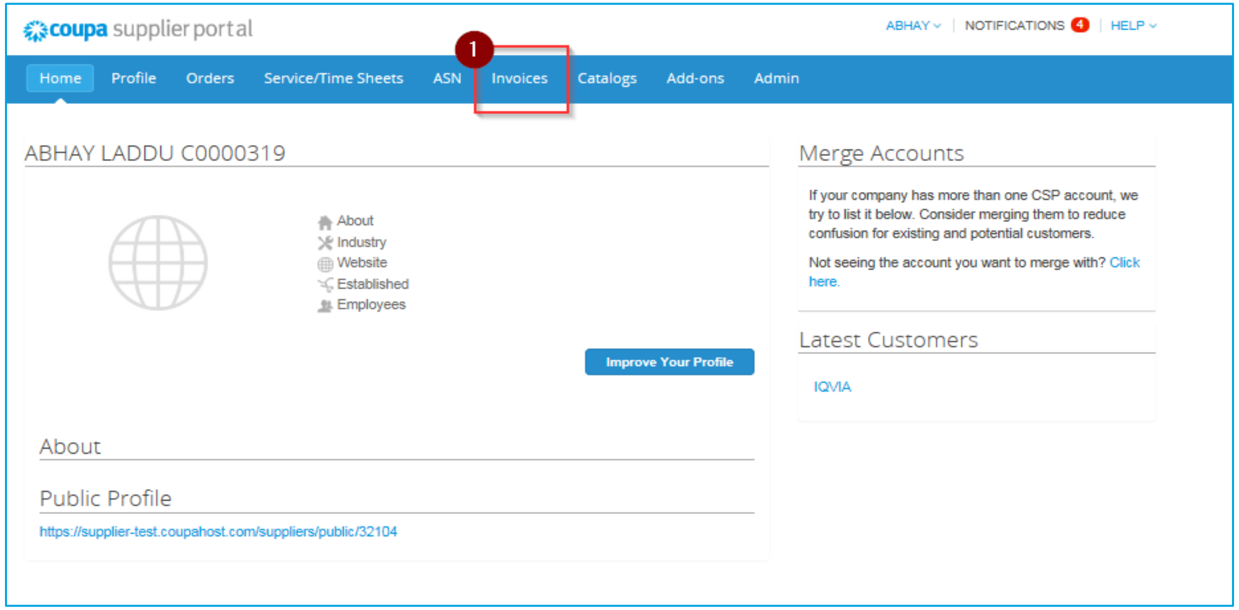
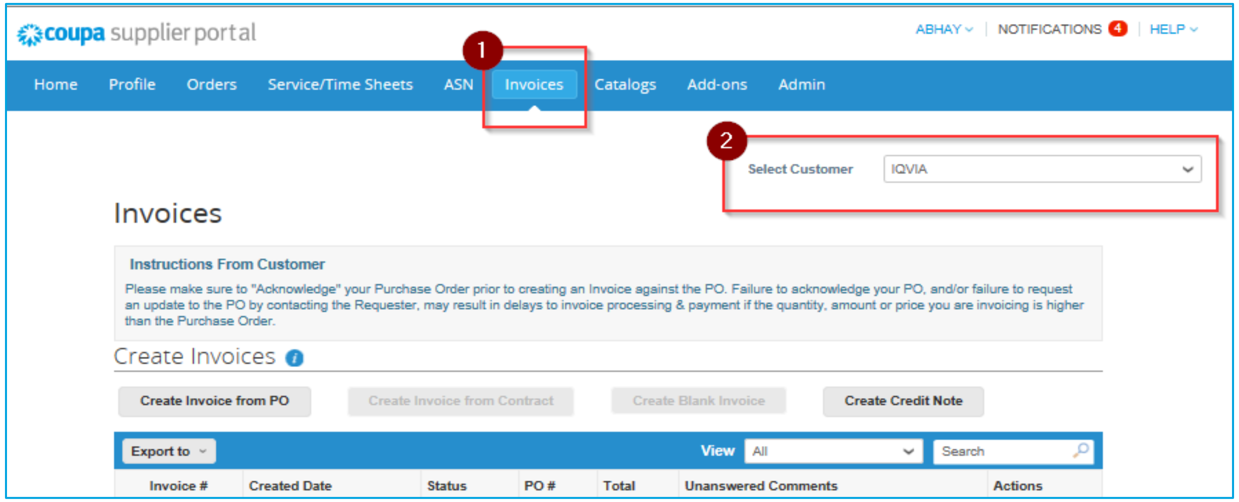
1. View and Manage Invoices

Invoices page

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



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



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

Invoice description

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

Invoices

Export to | View All | Search

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

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

Invoices status

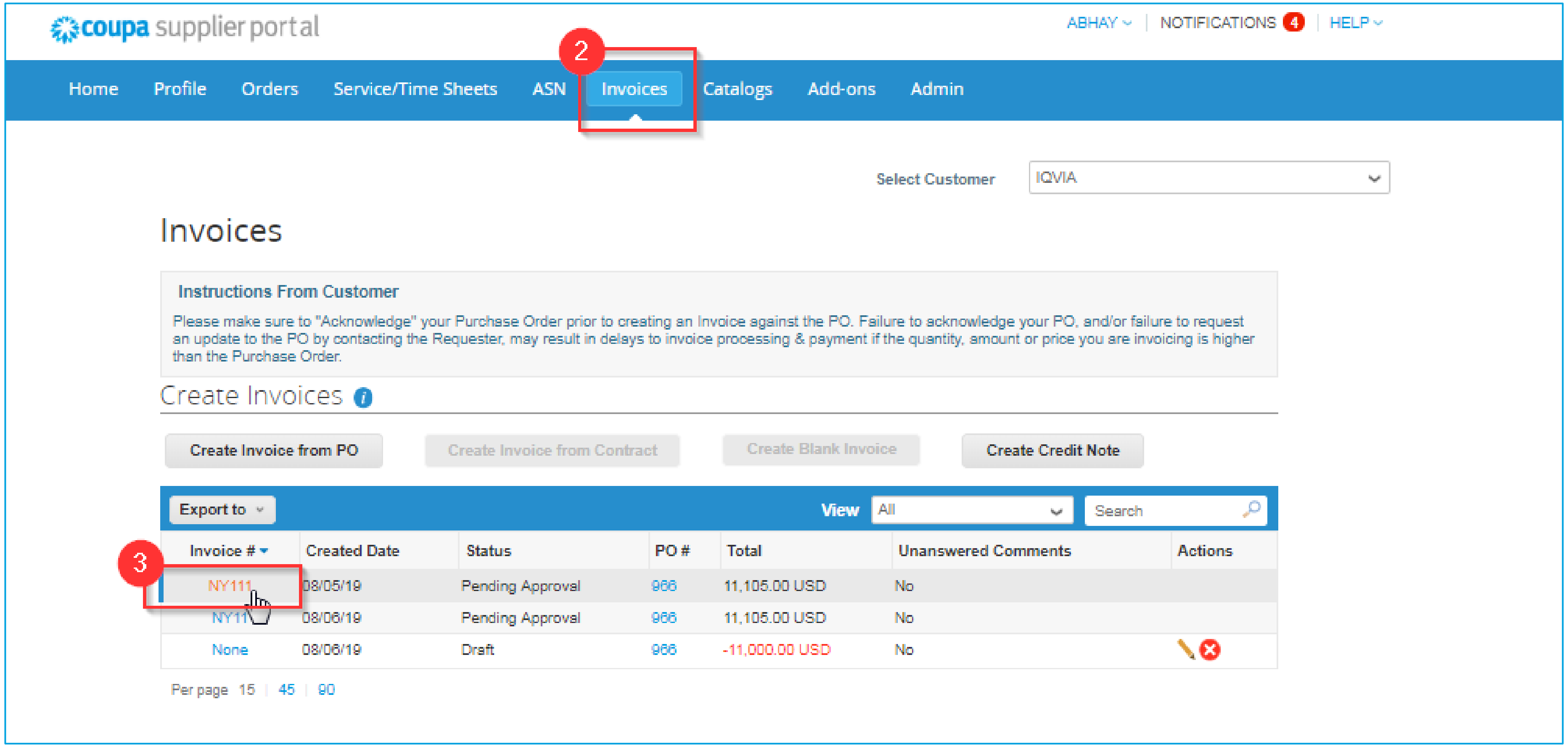
Invoices can have the following statuses:

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

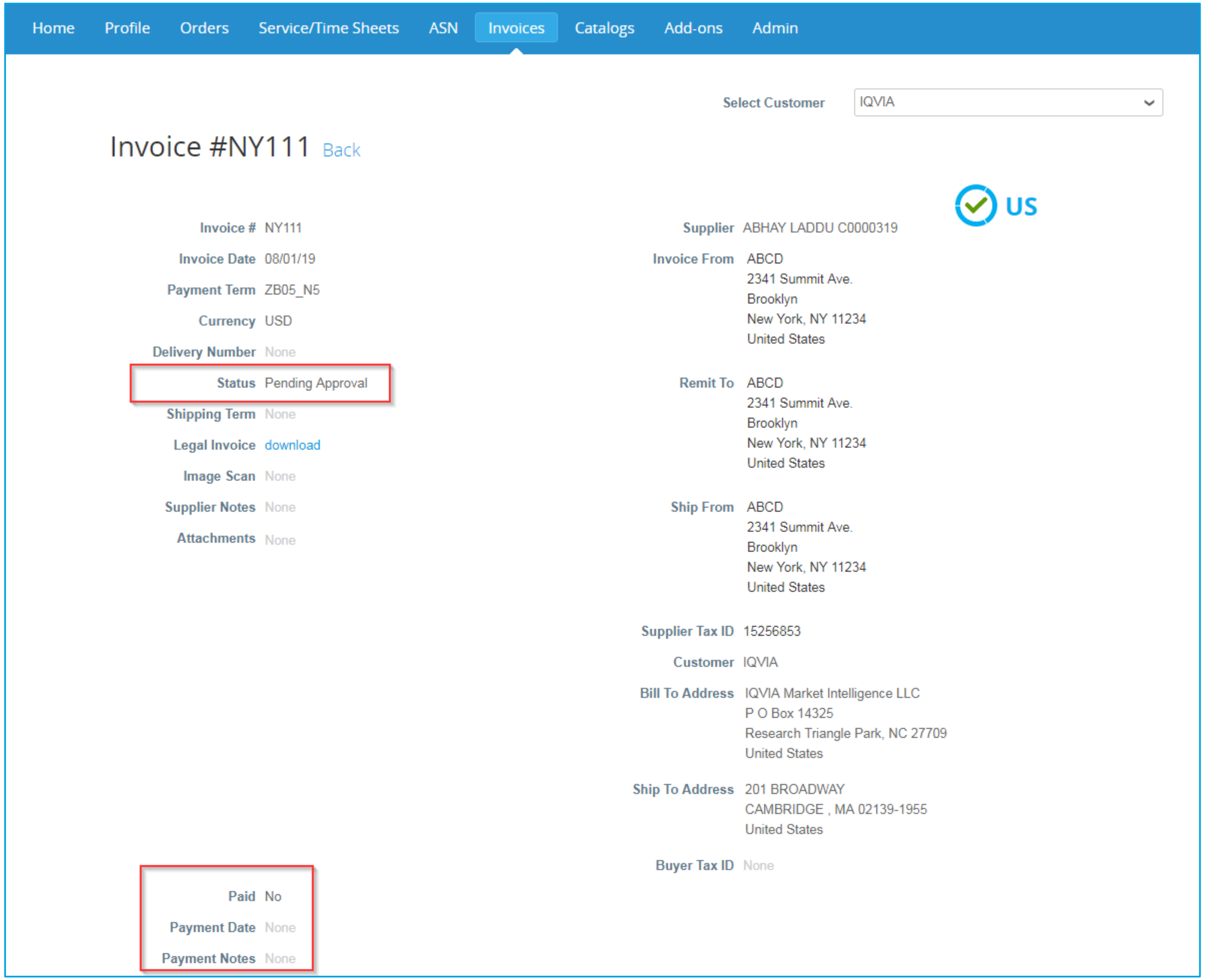
You can filter the table by columns, use the search bar to filter with a search term, or click on the **View** drop-down list to perform advanced filtering.

Verify payment status

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



4. Scroll to the payment section to verify payment status



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**

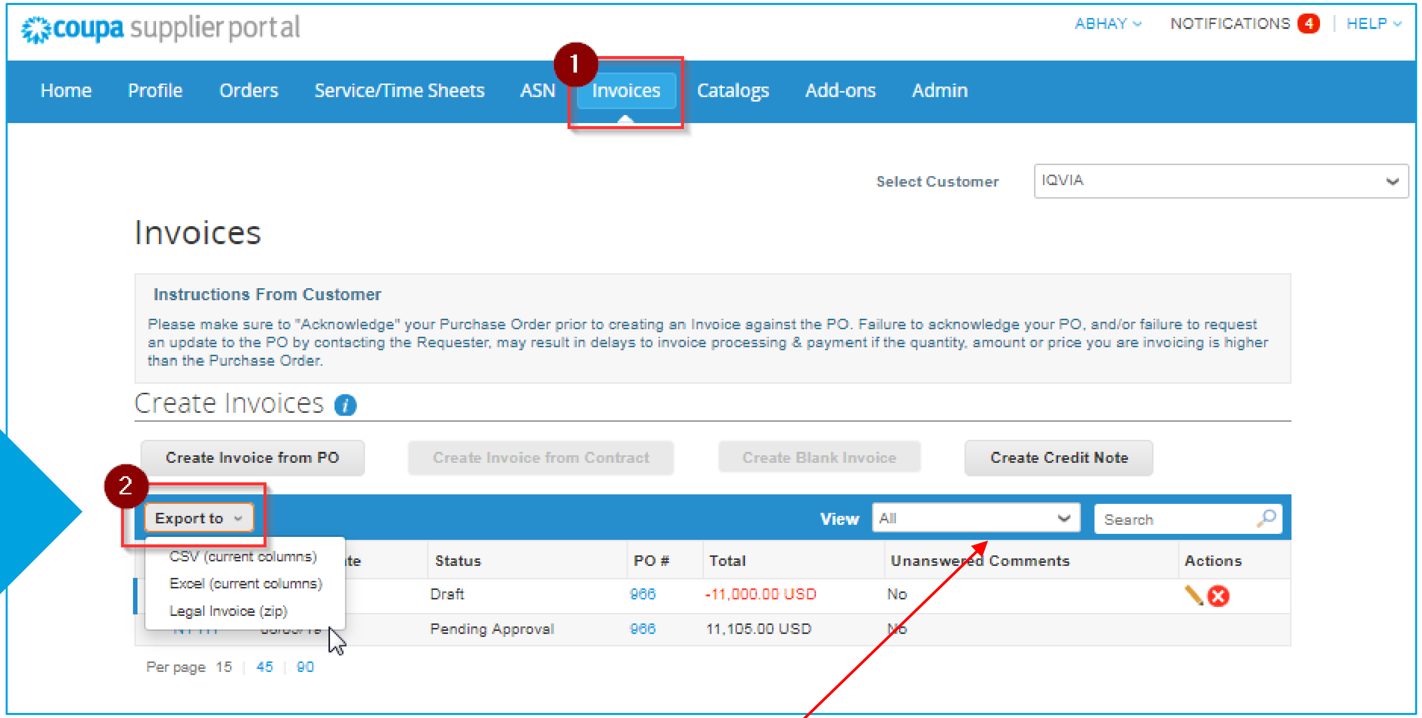
If an invoice has some incorrect information, correct it. When submitting a corrected invoice, you can use the same invoice number.

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.

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.

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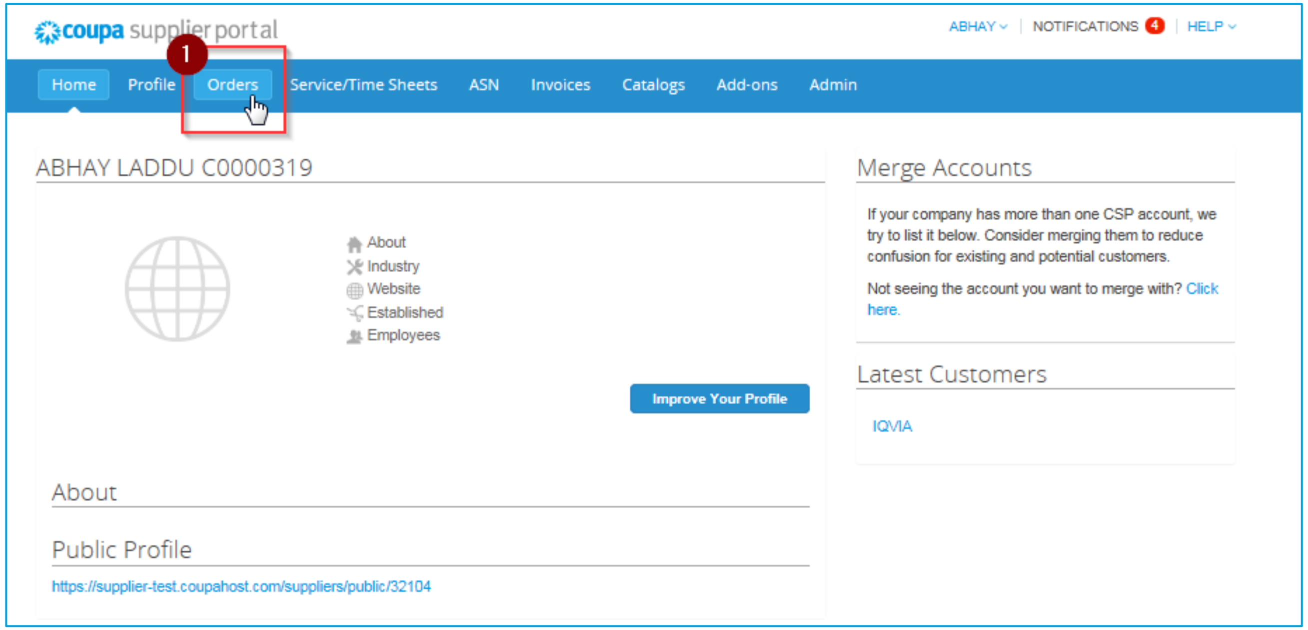
2. Create an Invoice from a PO

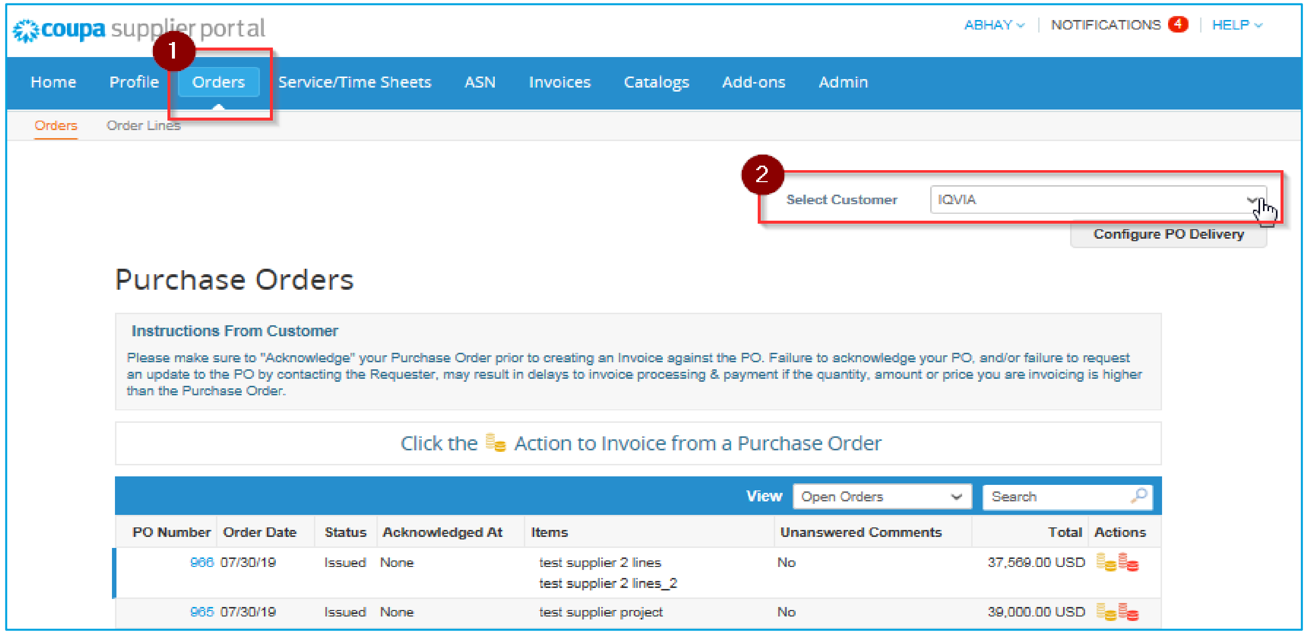
How do I create an invoice?

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.

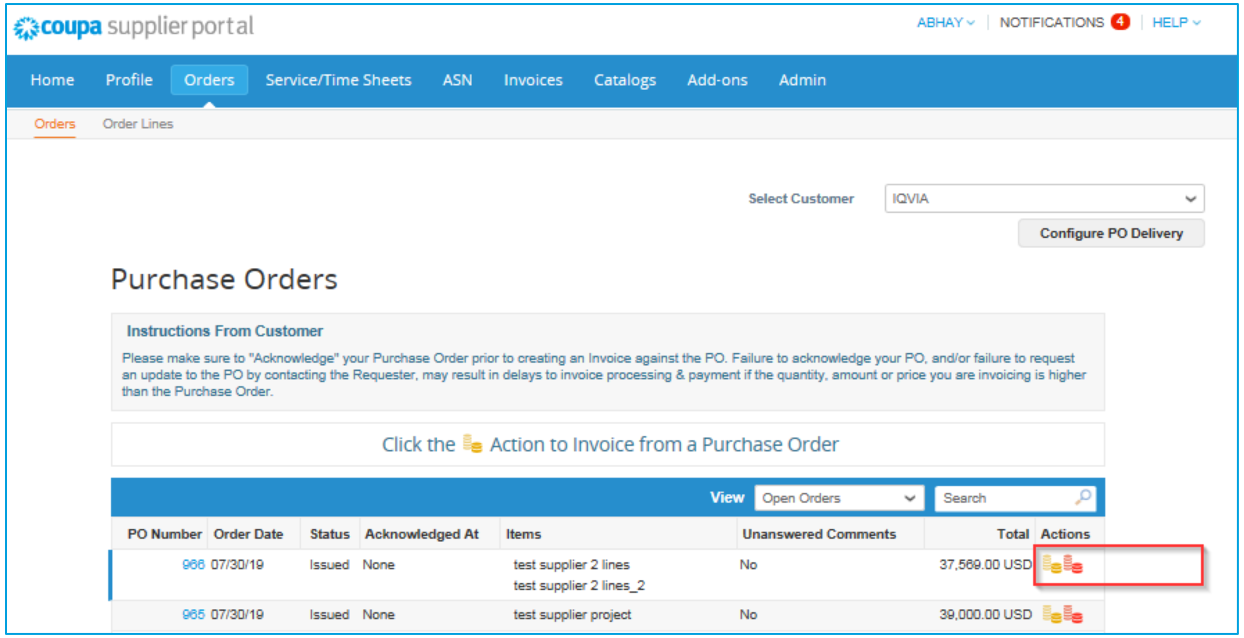
Please note that before creation first invoice, there needs to be set-up E-invoicing which includes set-up **Remit-To Address with your banking information.**



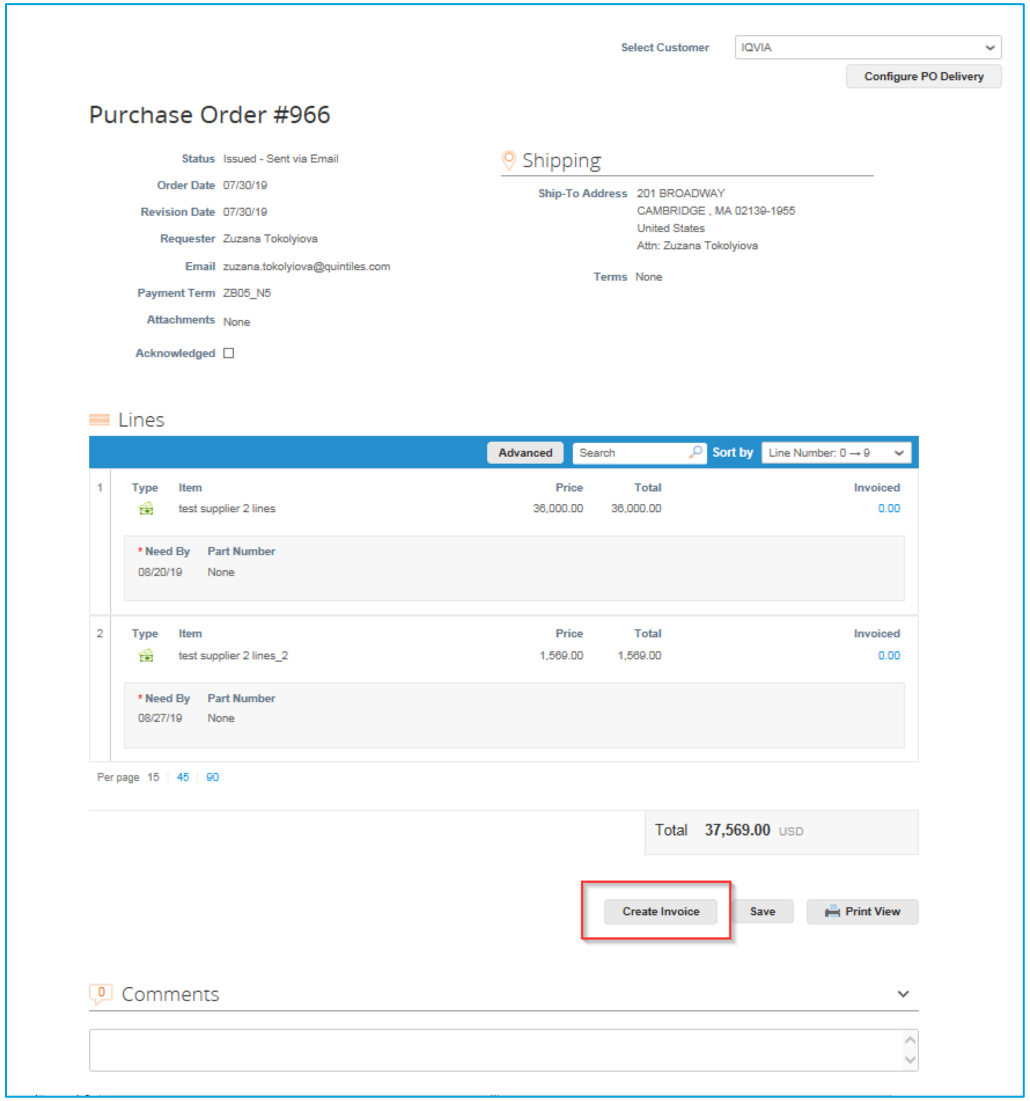


To flip a PO into an invoice, do one of the following:

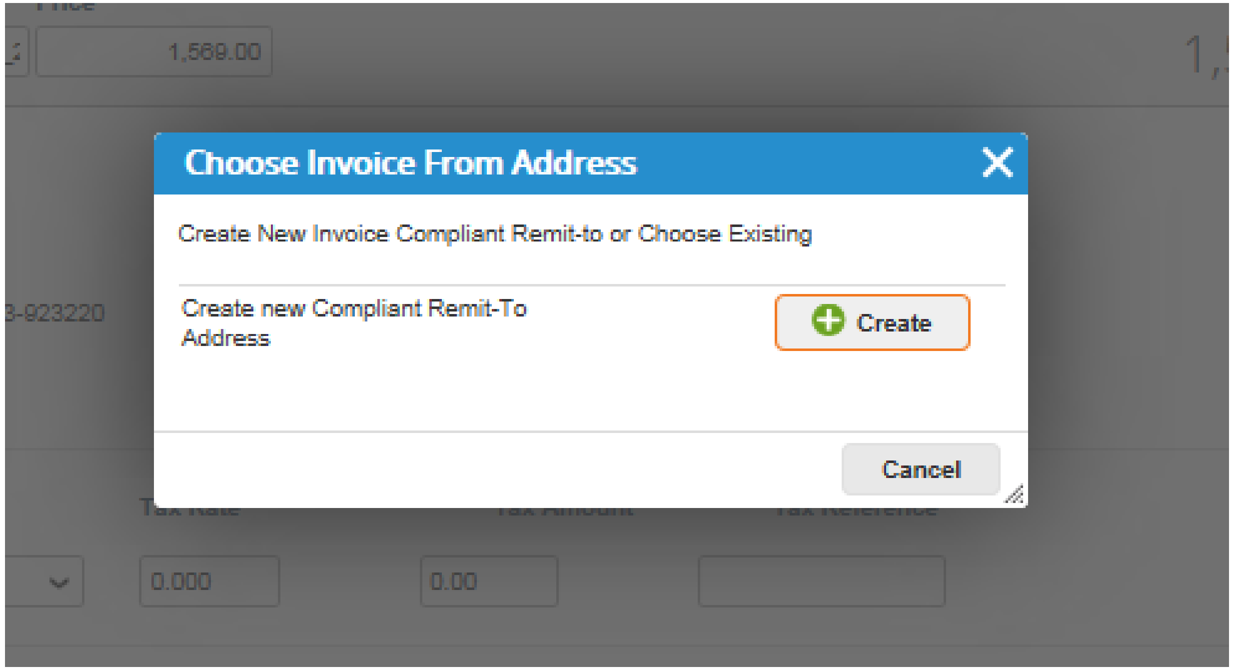
Click on the **Create Invoice** ( ) icon for the PO in the **Purchase Orders** table.



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



- 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:

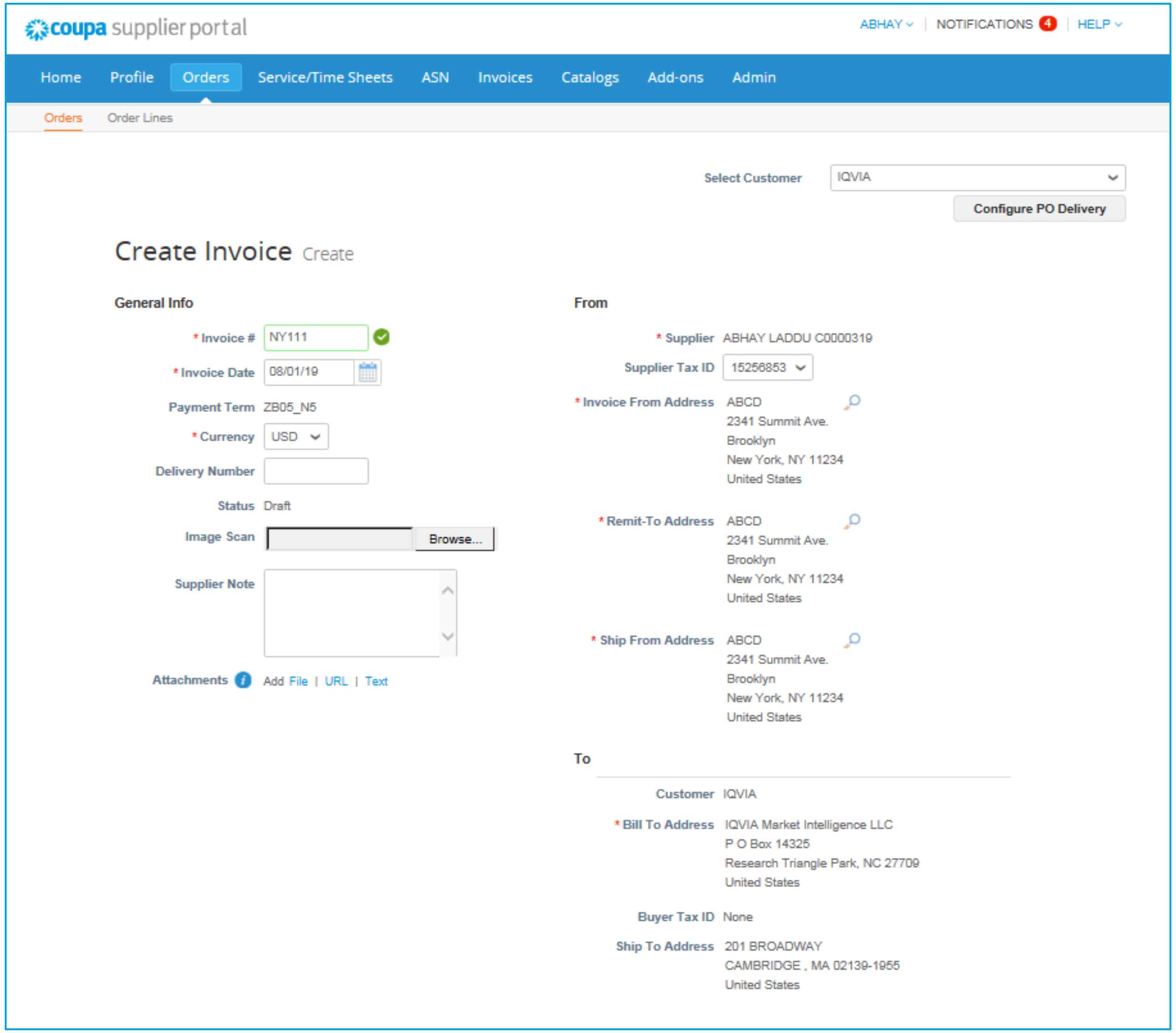


Create invoice page

Fill in at least the mandatory fields (marked with a red asterisk *).

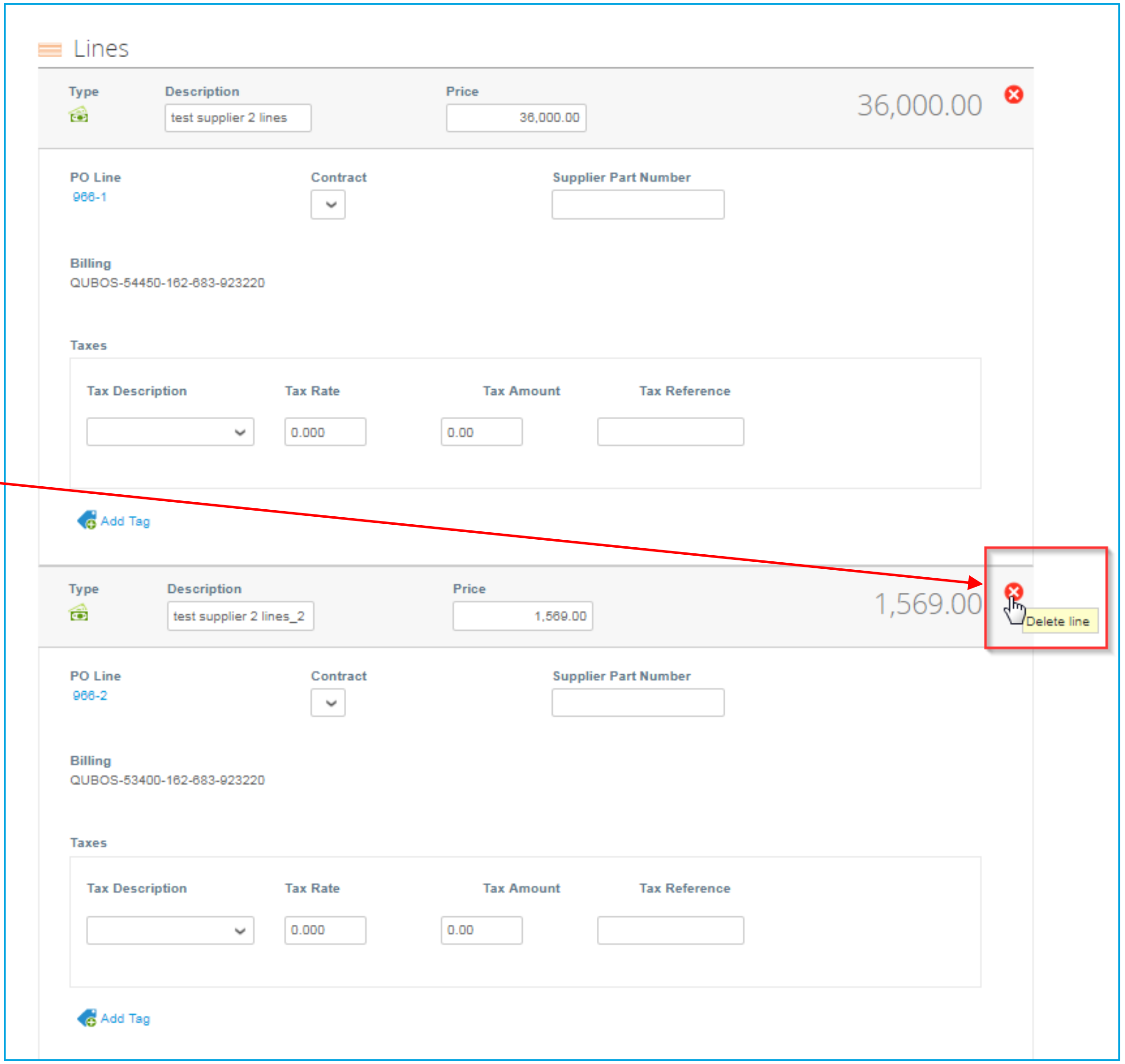
- **Invoice #** - enter your specific invoice number
- **Invoice Date** – enter the date from the invoice. Invoice date cannot exceed 10 days. Coupa calculates the Payment date based on the Payment terms.
  Example: Invoice date 15th Jan.2020 + PT 30 days Payment date will be 14th Feb 2020.
- **Payment 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.

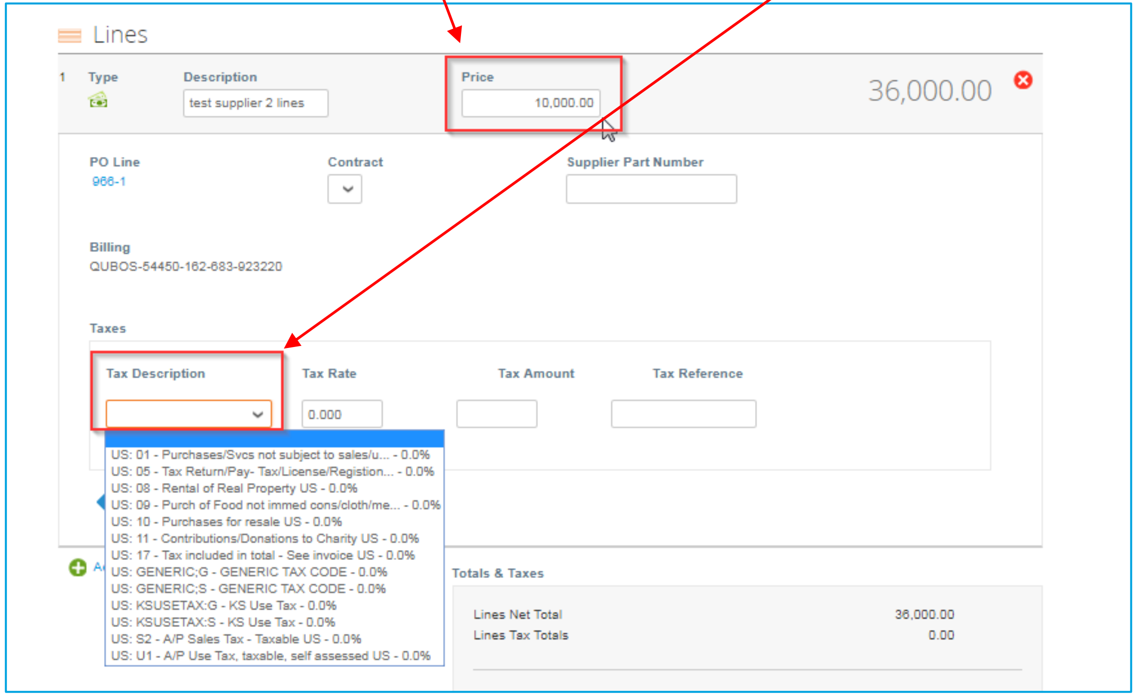


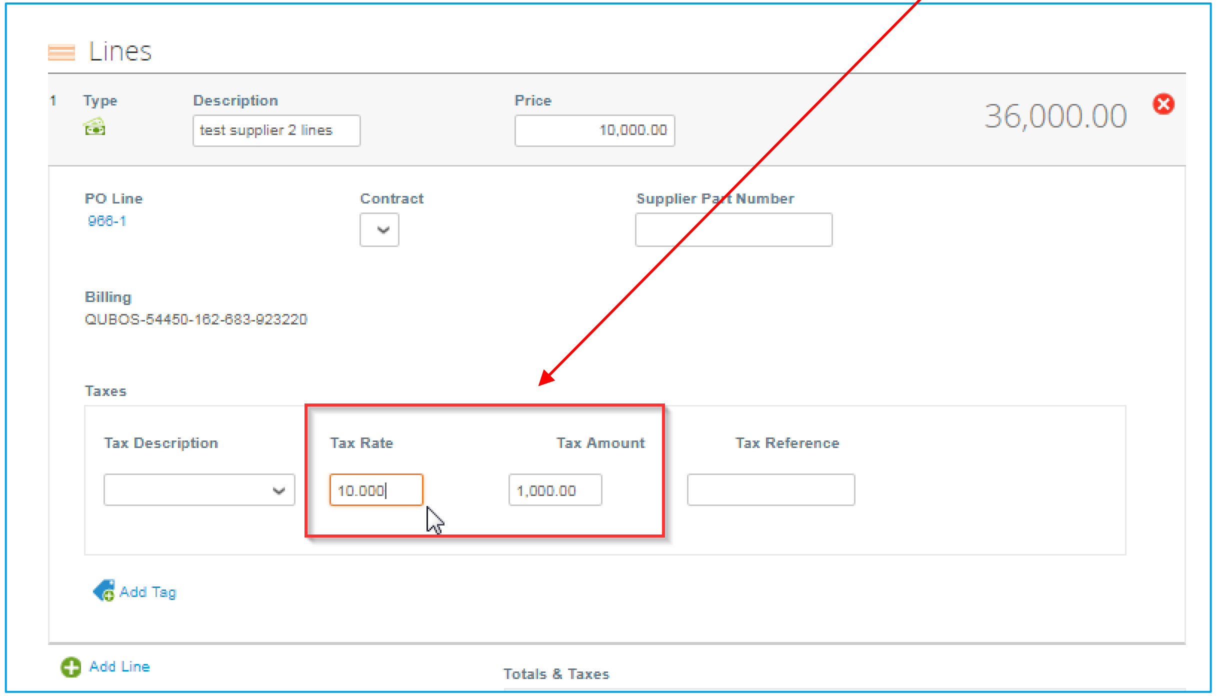
PO with multiple lines – How to raise an invoice against just one line

- 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



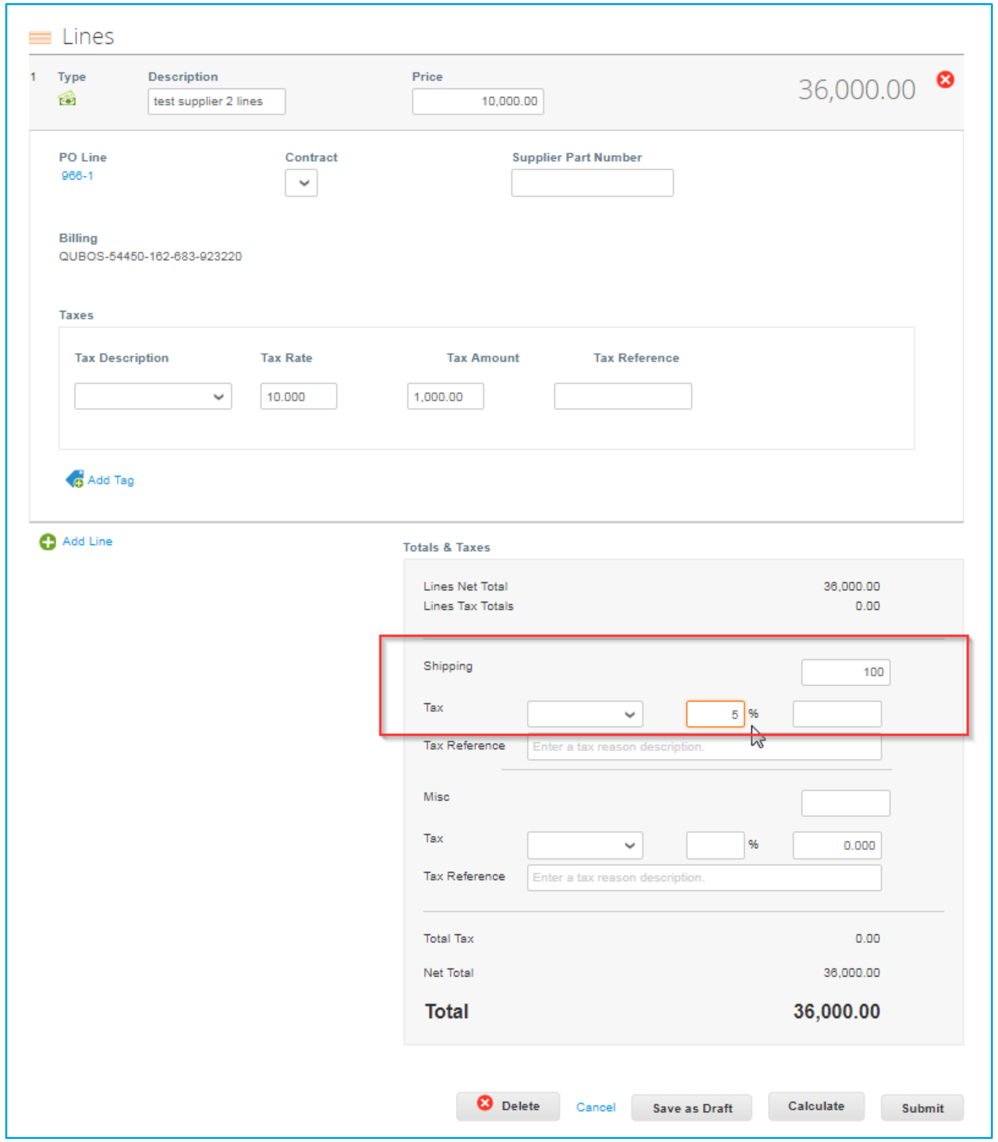
- Change the **Price** box of the line if needed
- Setup the tax rate by selecting it from the **Tax Description** sheet or typing Tax Rate manually in the **Tax rate box** - then the amount in the Tax amount box will be recalculated from the total amount





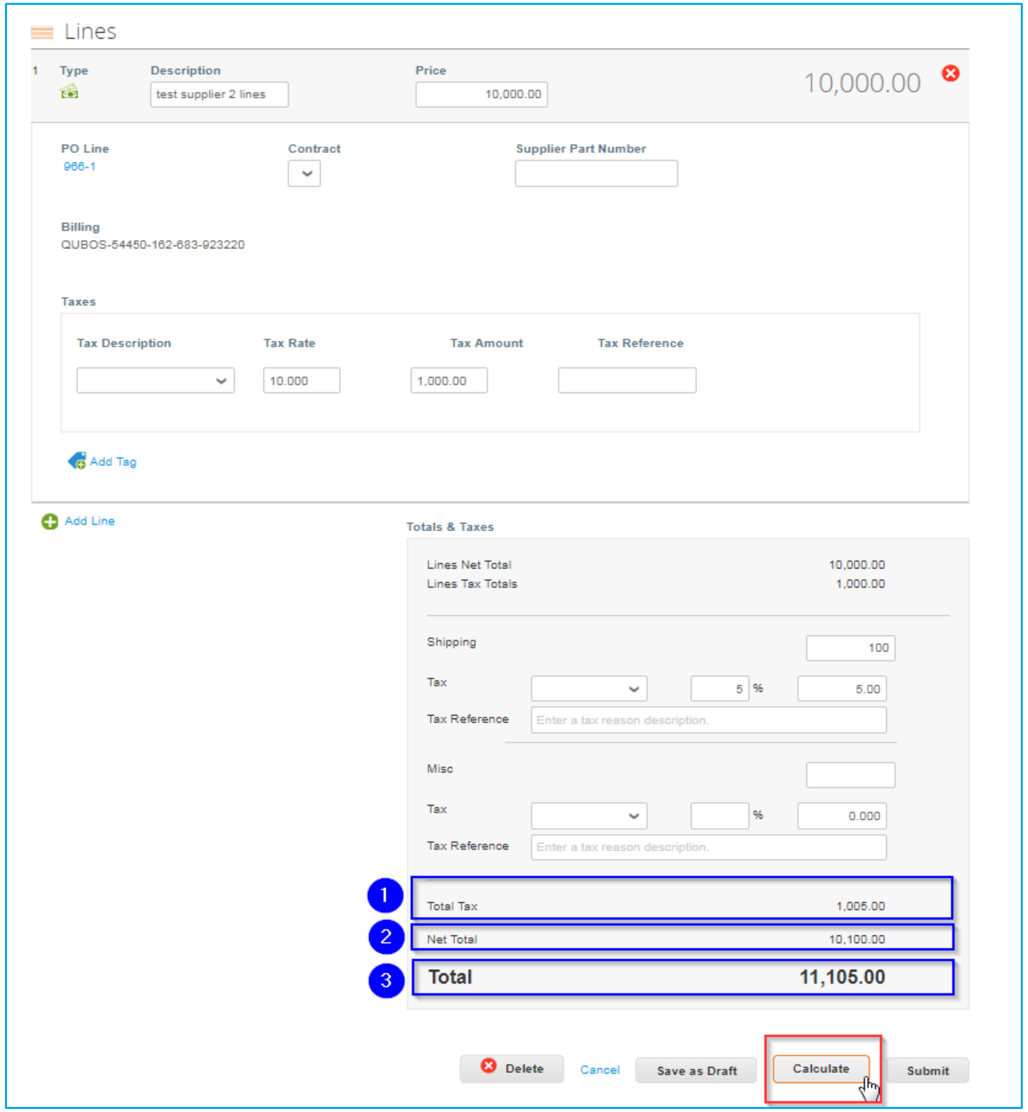
Please note, that the price should be always created with positive value, not negative. For negative, create **Credit note**.

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

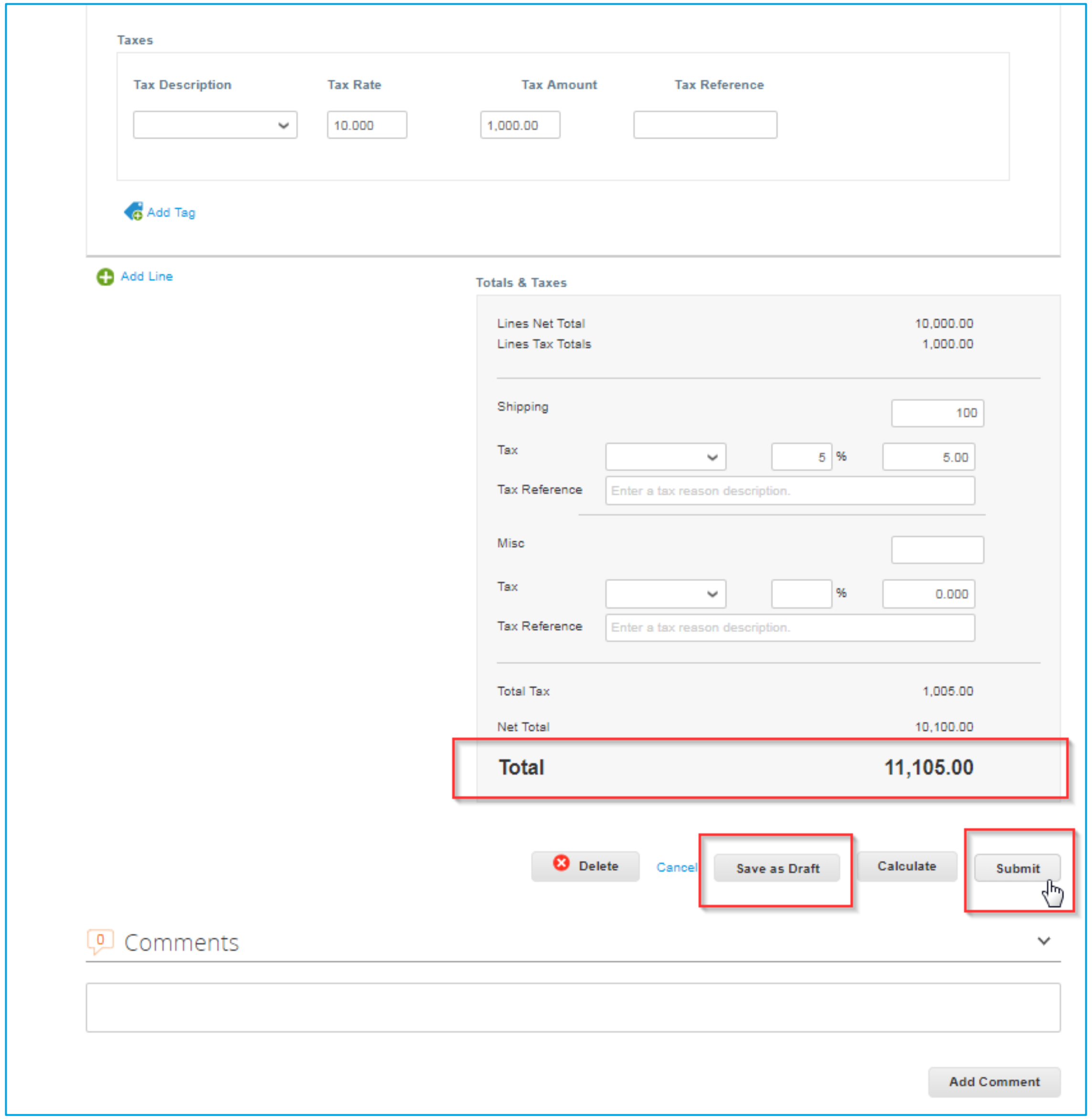


- Clicking **Calculate** will give you the gross total amount considering the tax values.

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



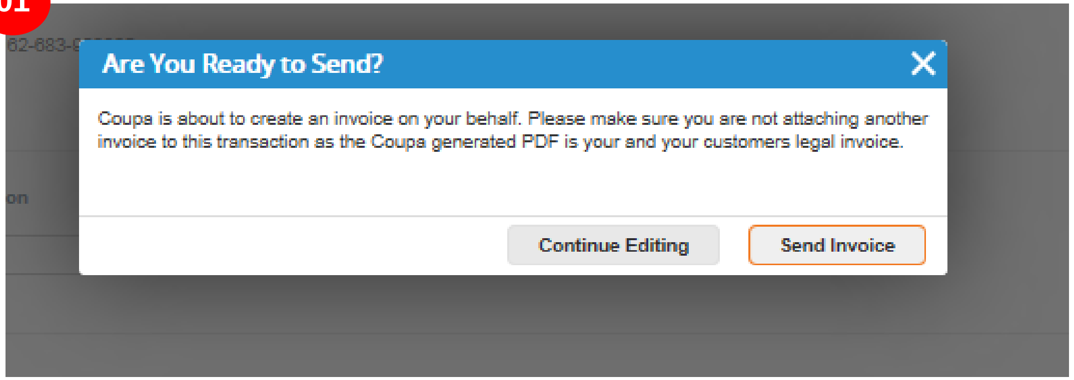
- If everything fits as you want click **Submit** the invoice or **Save** it as a draft to submit it later.
- You can also add comments for IQVIA.



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**

01

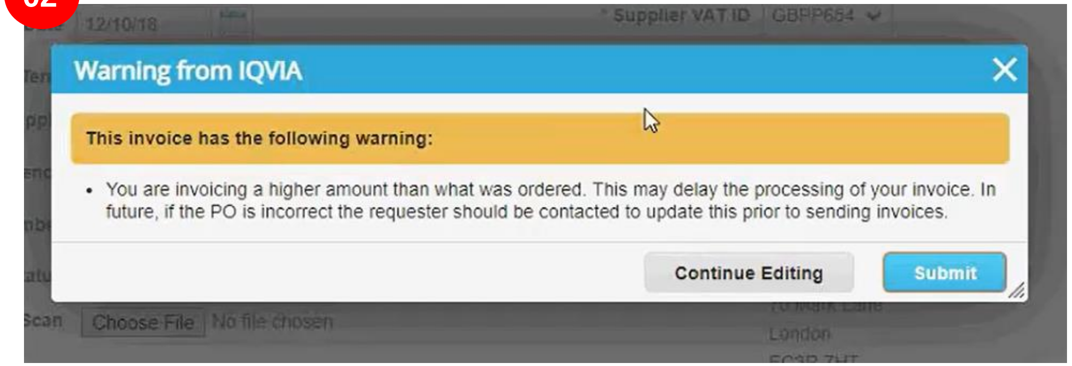


Then another pop-up warning can shows. Warning says IQVIA assumes your quantity or amount is higher or your tax is different than what IQVIA expects.

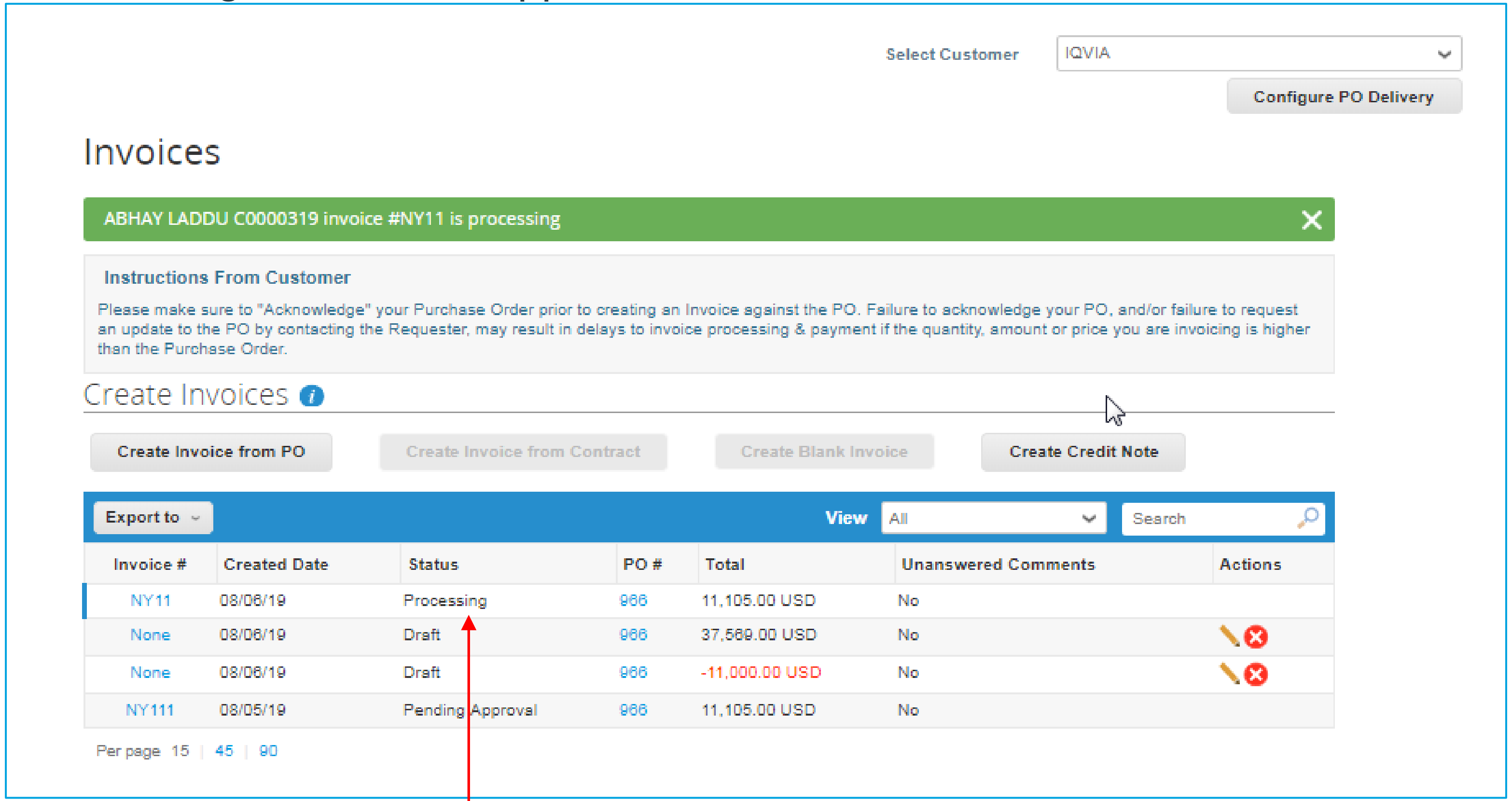
Again there are 2 options:

- **Continue Editing**
- **Submit**

02



After submitting all notifications, green line will appear.



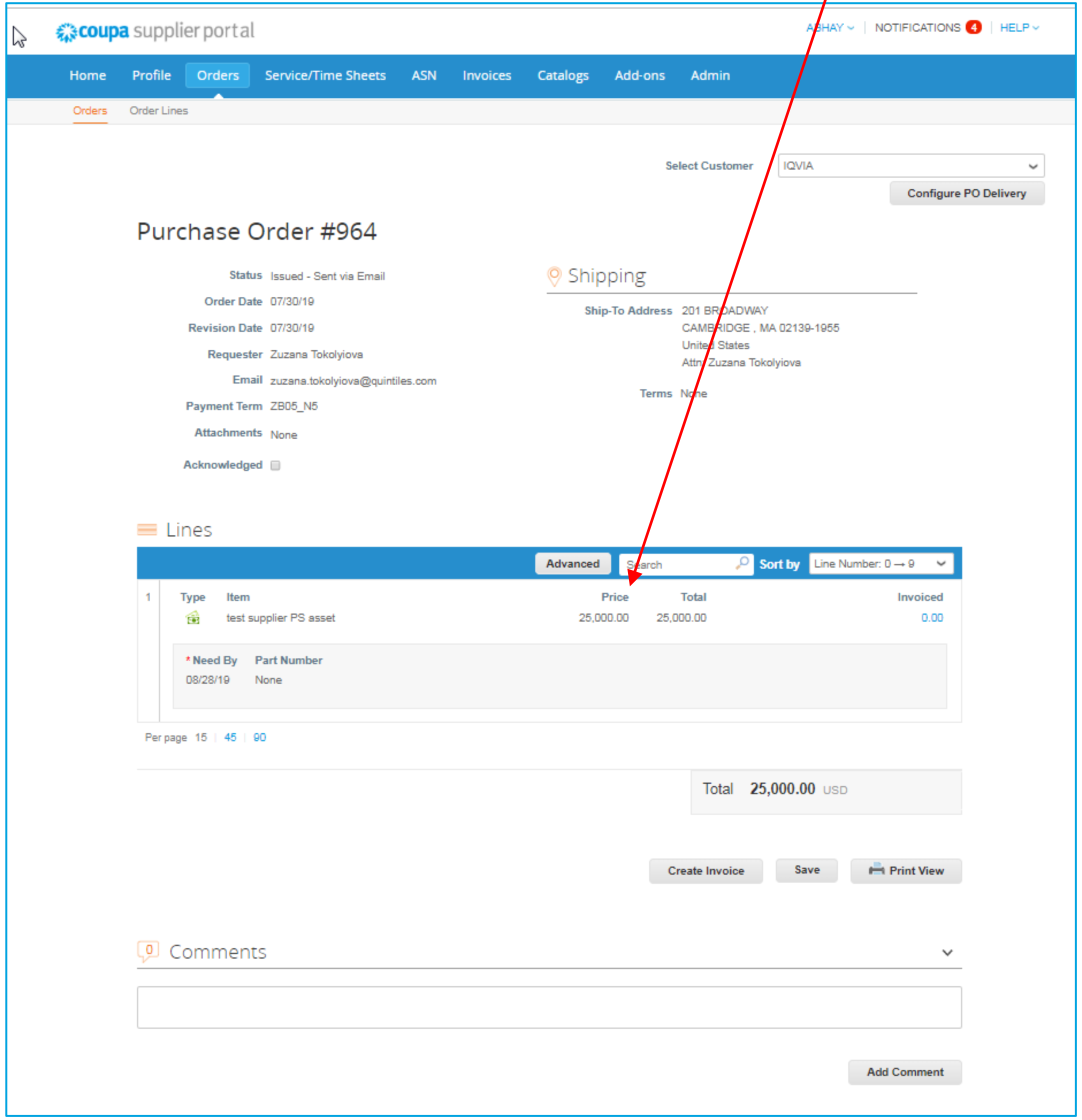
Before submitting the invoice, you can cancel or delete it. You can delete only draft invoices.

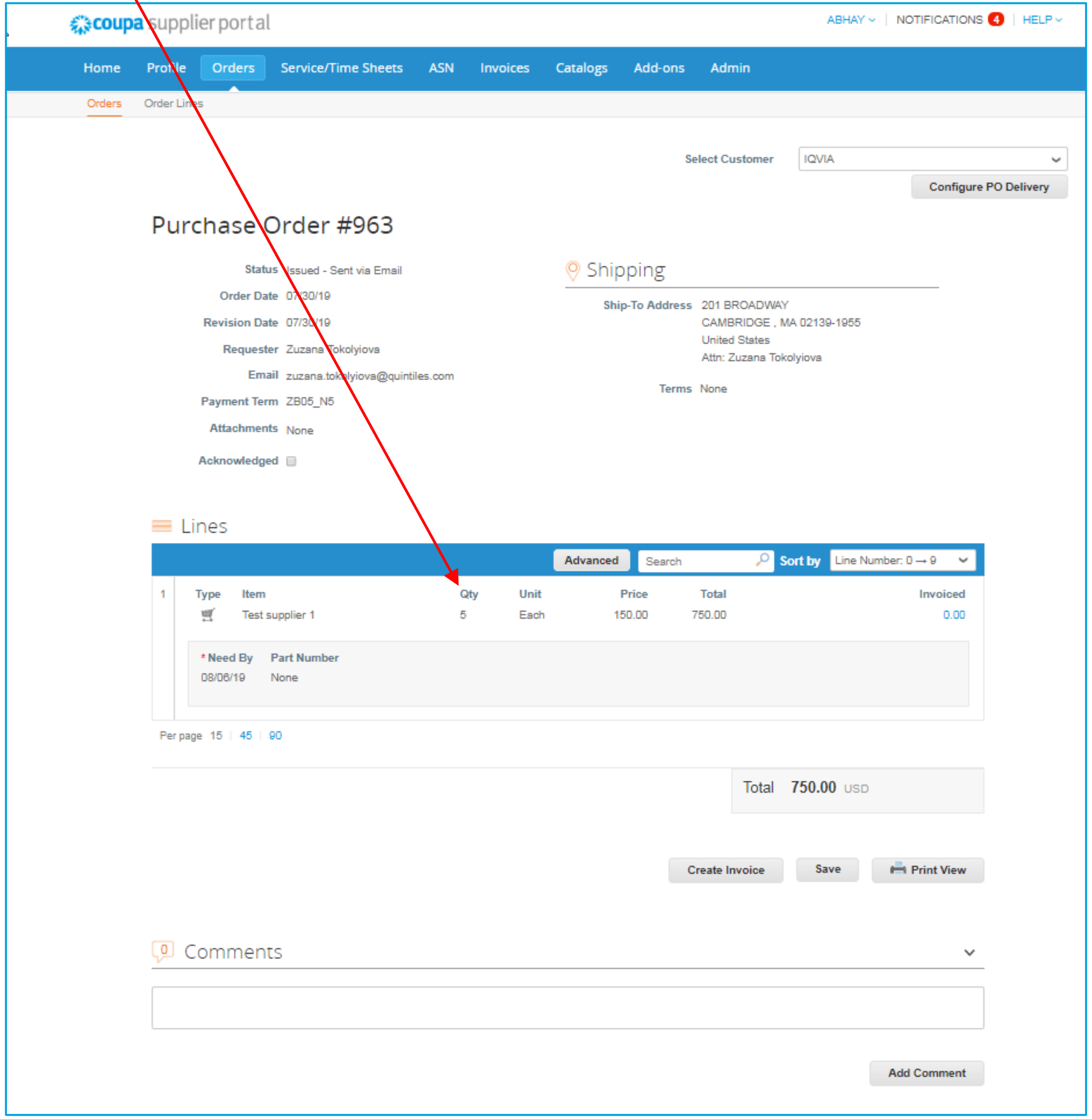
As you can see your invoice have status „**Processing**“. You can open your invoice again and take a look what you submitted.

After you submit your Coupa invoices, invoices will be routed to the AP Team for review and approval. During this time all invoices are visible just for AP team. It is all that needs to be done. Based on agreed payment terms, you will receive payments subsequently. If there will be some issue with submitted invoice, you will receive notification saying your invoice was rejected because of some reason.

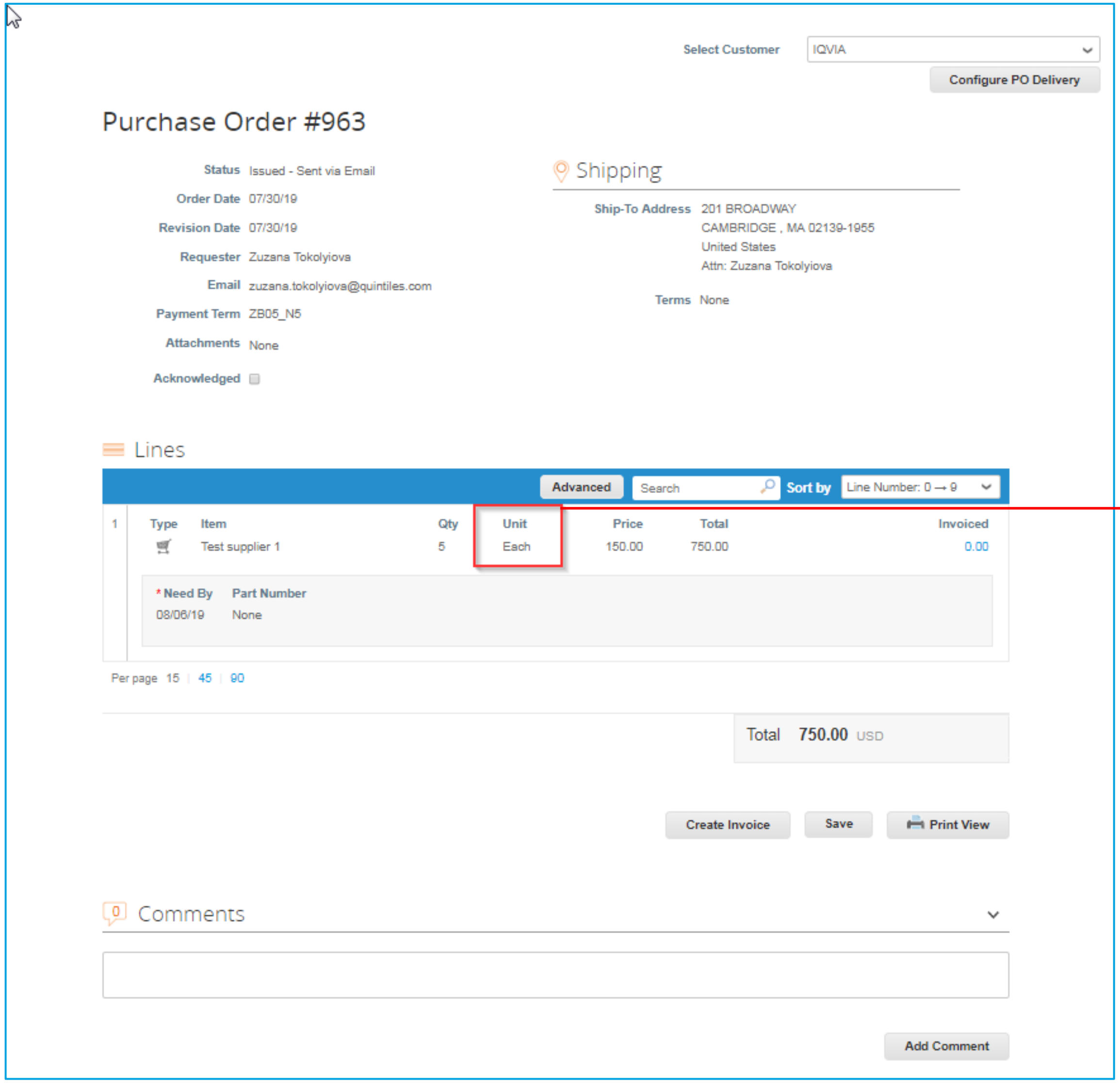
Types of purchase order

In Coupa you can receive
Amount(Services) or **Quantity(Goods)** based PO.





UNIT OF MEASURE codes

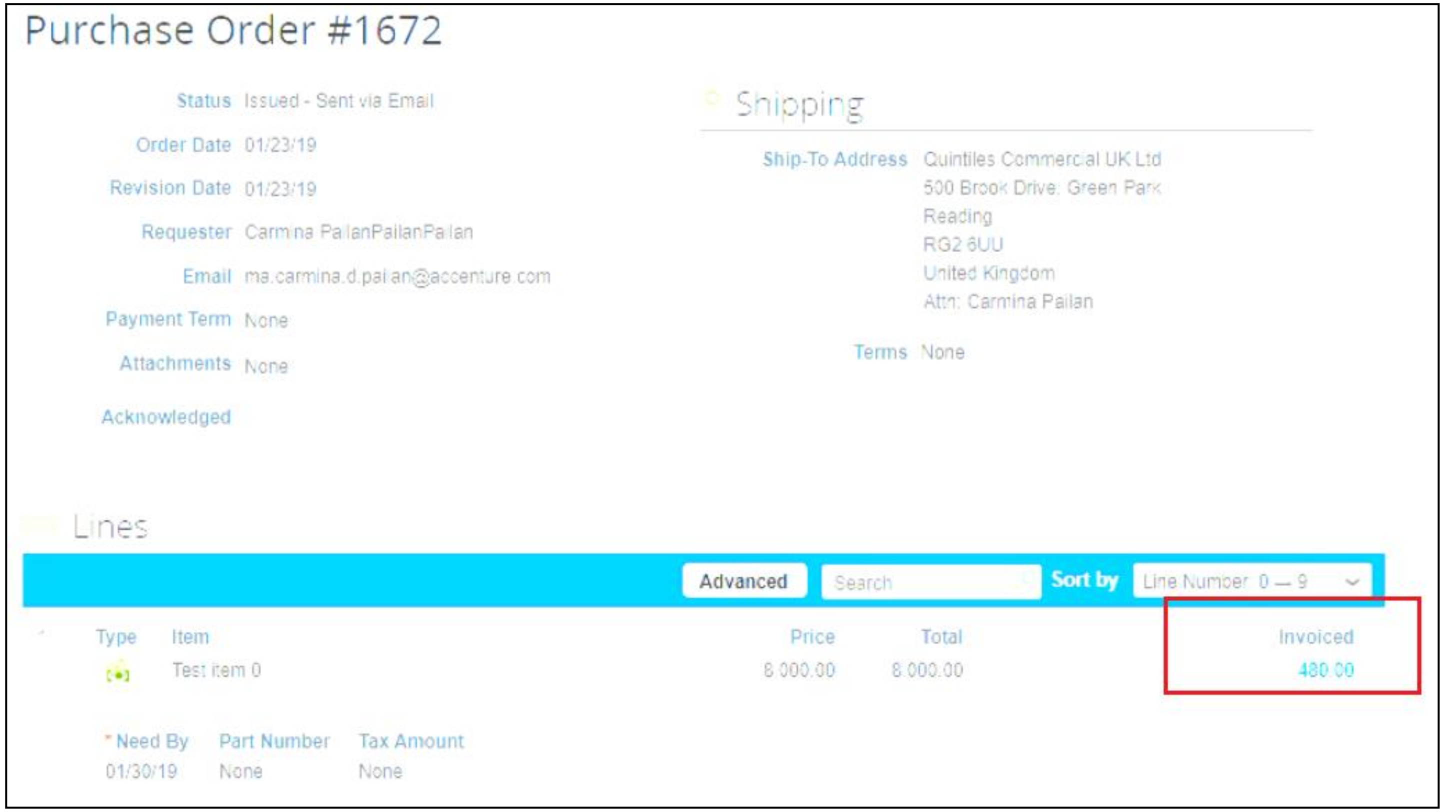


Code	Name
EA	Each
BX	Box
DZ	Dozen
CS	Case
PK	Cello Pack
HRS	Hours
CT	Carton
KT	Kit
PD	Pad
PR	Pair
RM	Ream
MHR	Work Hour
UNT	Units (Generic)
SLV	Sleeve
ST	Short Tons
SH	Sheet
SET	Set
RL	Roll
RK	Rack
LBS	Pounds
PC	Piece

Code	Name
THO	Per Thousand
PL	Pallet
ML	Milliliters
MG	Milligrams
M	Meters
LOT	Lot,Batch
LT	Long Tons
L	Liters
KG	Kilograms
JB	Job
HUN	Hundreds
G	Grams
GAL	Gallon - Liquid Measure
BDL	Bundle
BLK	Bulk
BBL	Barrel - Liquid Measure
BG	Bag
PCK	Pack
GS	Gross
BT	Bottle

Available funds on the PO

When you click on the PO, you can see what has already been invoiced. You can see available funds on the PO only after the invoice has been approved by AP team.



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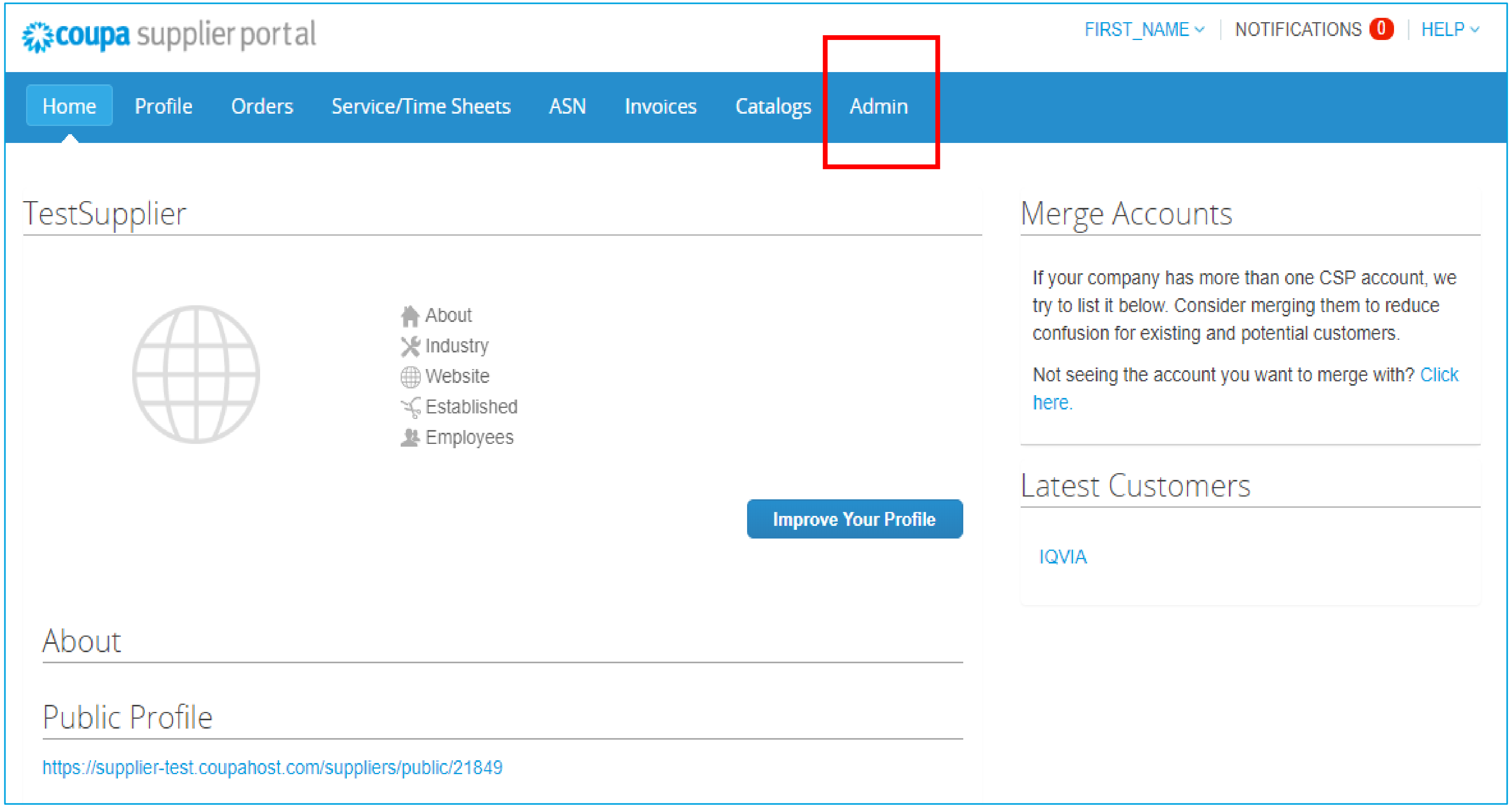
3. Set up E-invoicing

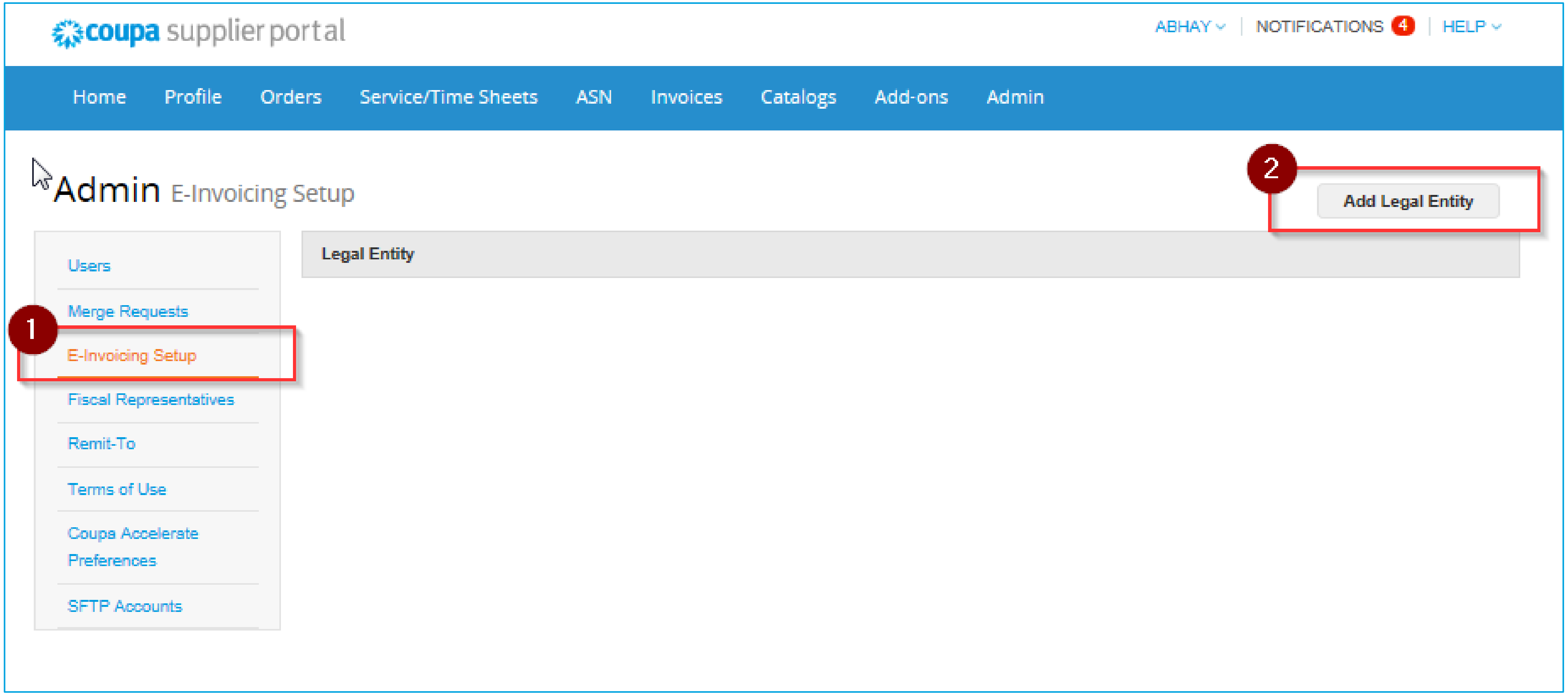
Set up your account to create electronic invoices

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



Add Legal Entity

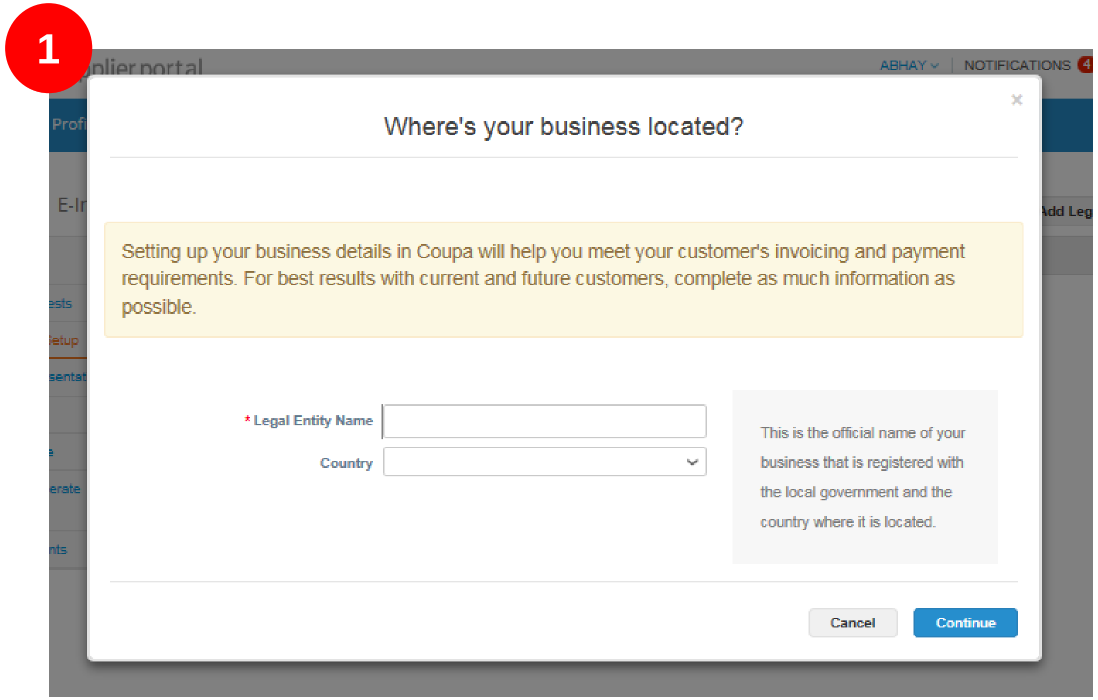
1. click on the **E-Invoicing Setup** link on the left of the **Admin** page. The **Legal Entity** page appears. You can add new legal entities or manage or deactivate existing ones.

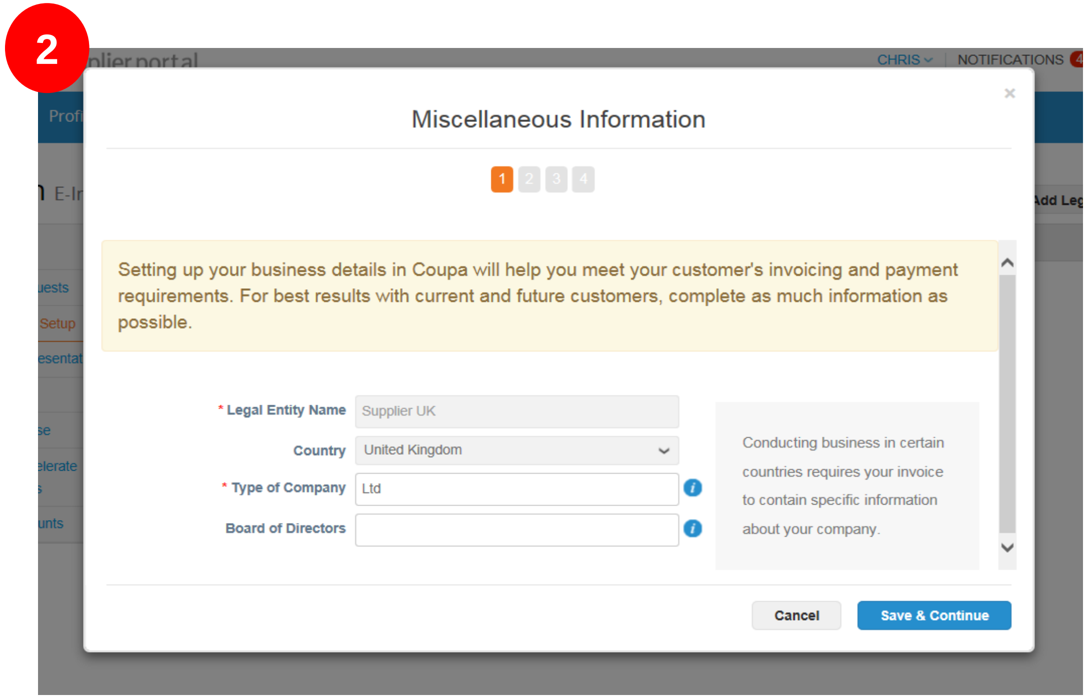


2. To add a legal entity, click on the **Add Legal Entity** button in the top right corner

- 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

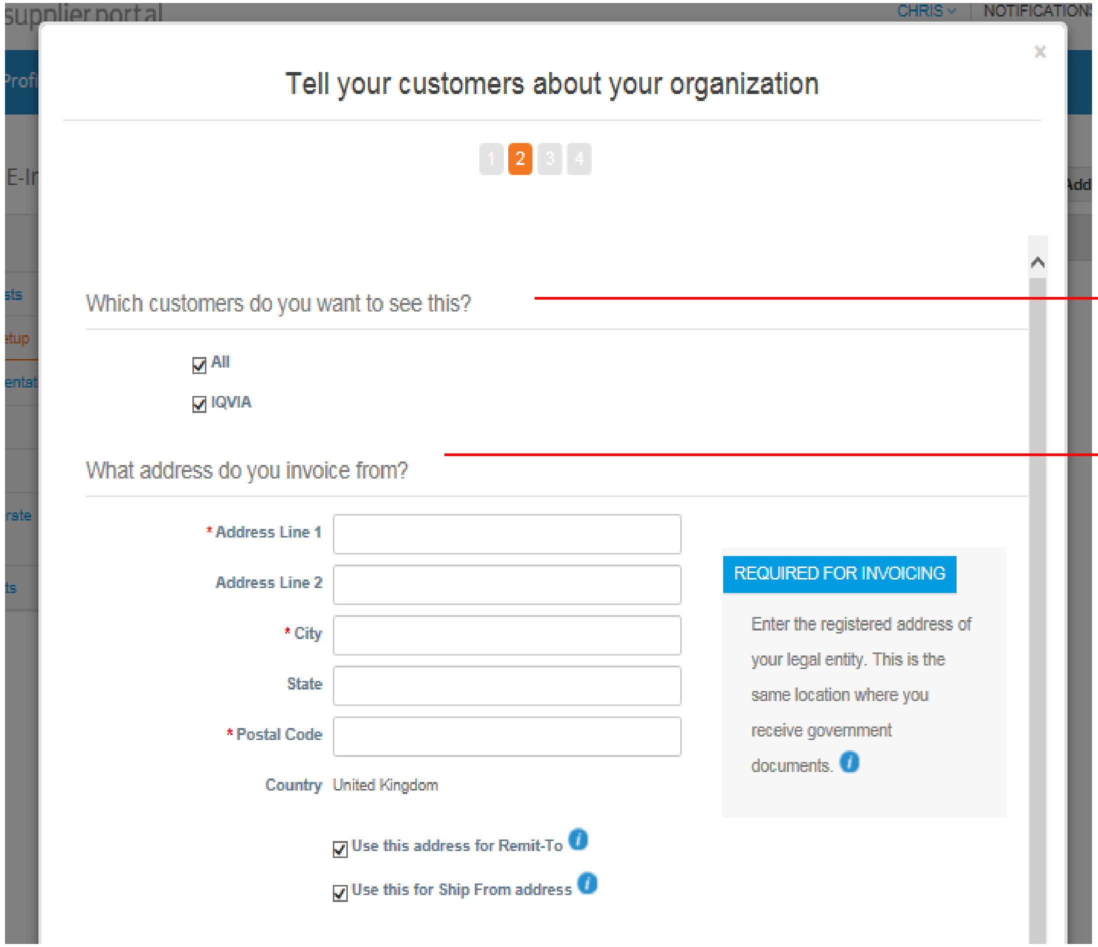
(Depending on the country, another window(2) may appears with additional location information)





- 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**



1. Which customers do you want to see this?

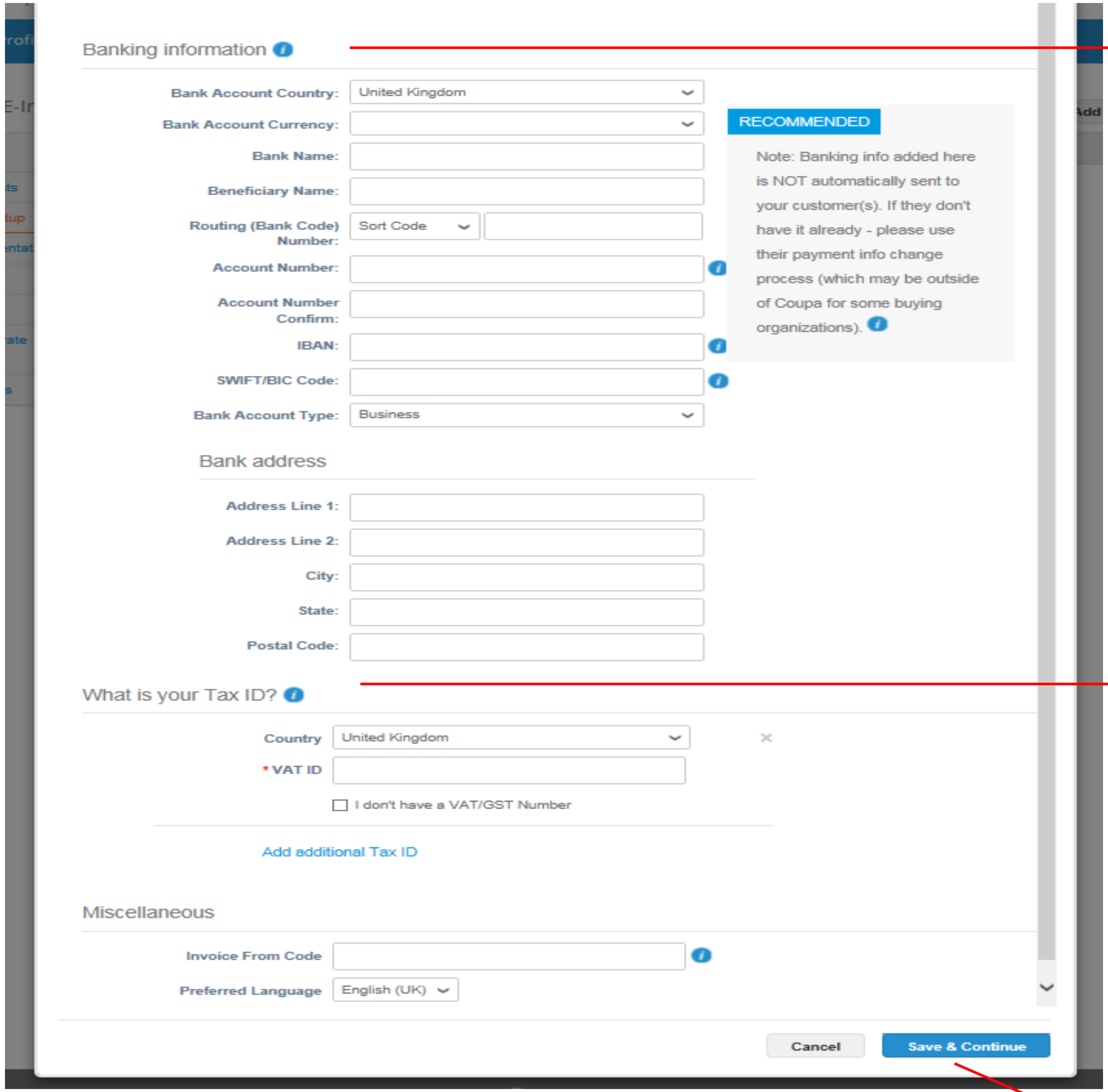
Select all or the specific customer(s) that you want to see your legal entity information.

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.



3. Banking information (mandatory*)

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

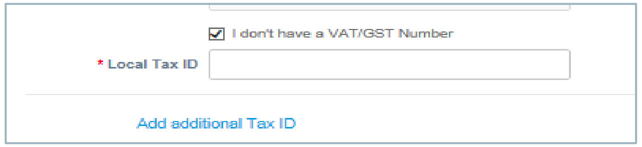
4. What is your Tax ID?

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

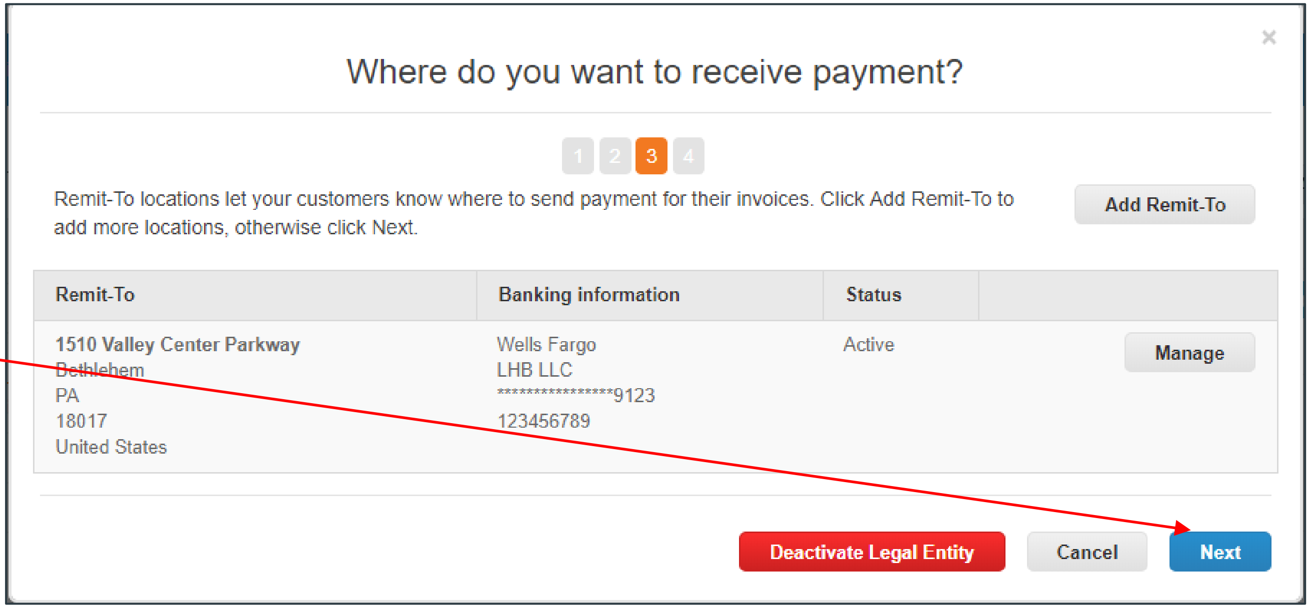
- **"I do not have a VAT/GST Number"**

And enter your Local Tax ID.



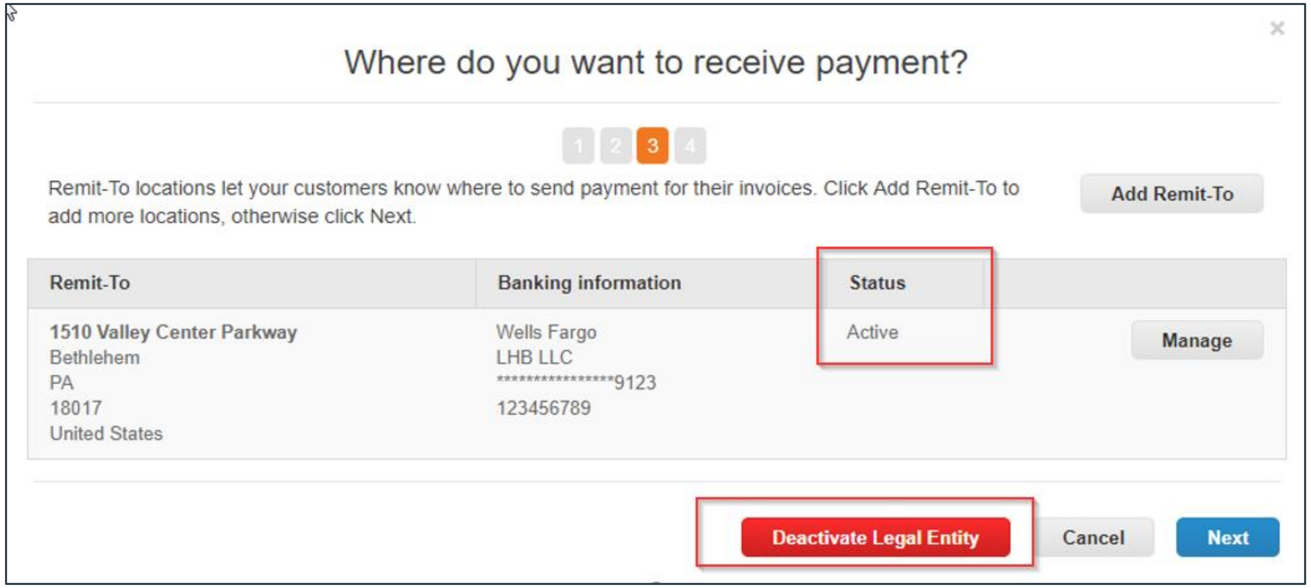
5. Click **Save & Continue**

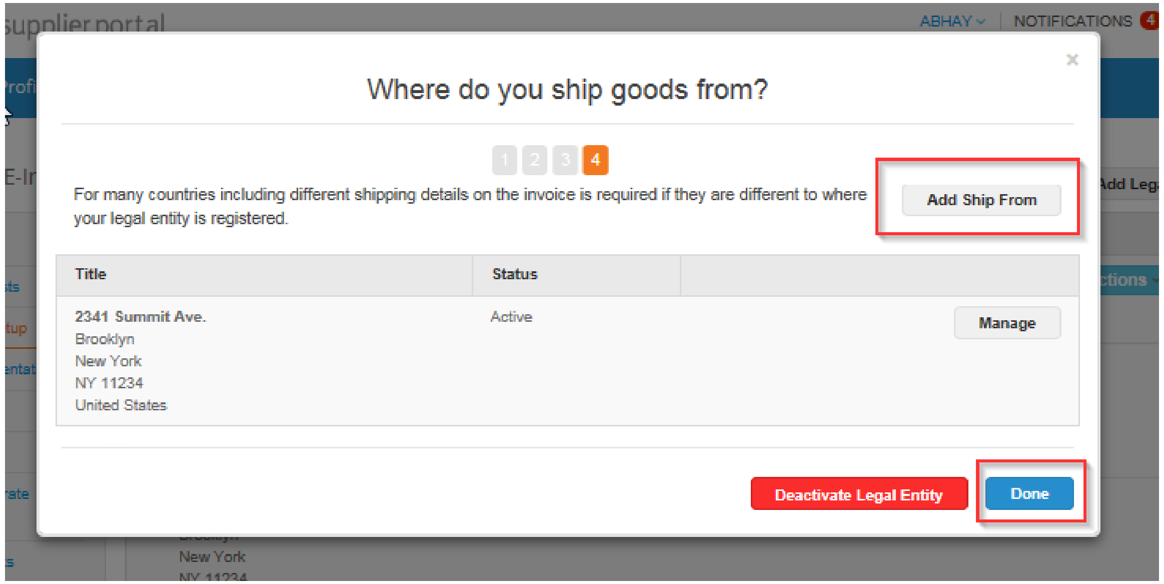
- In the appearing **Where do you want to receive payment** window, verify the information on this screen and if everything looks ok, click **Next.**



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

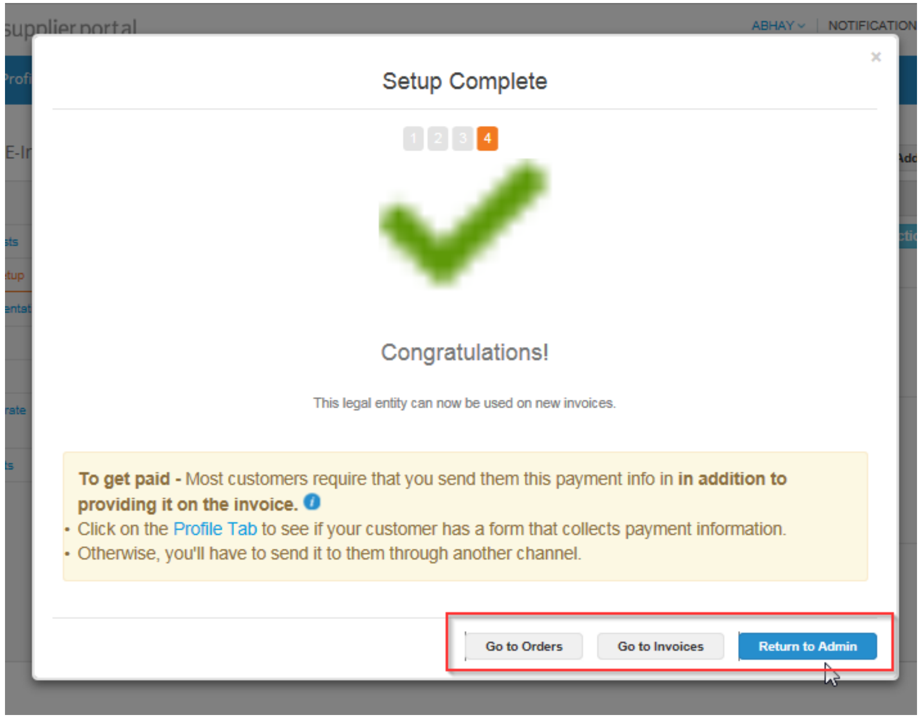
Please note that there needs to be always at least one Remit-To address active for using this legal entity.





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.



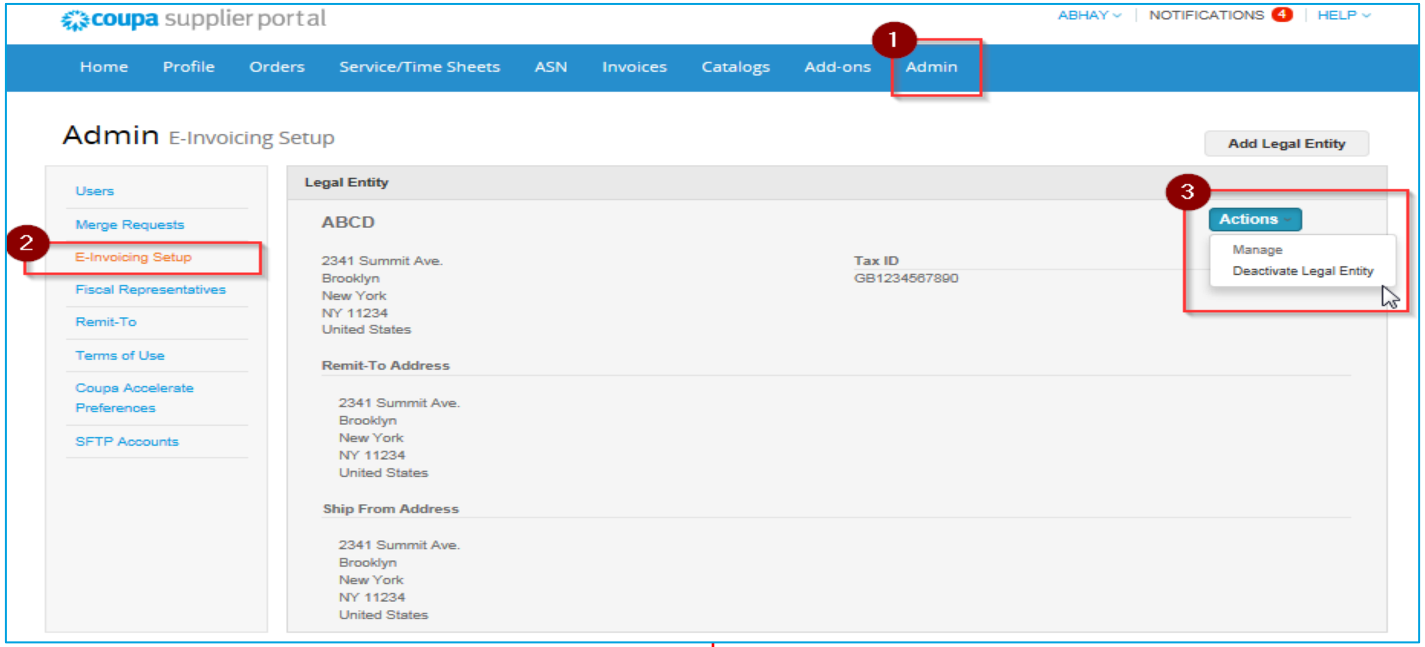
After completing the e-invoicing setup by clicking **Done**, that is, after adding a legal entity, you can use it on new invoices.

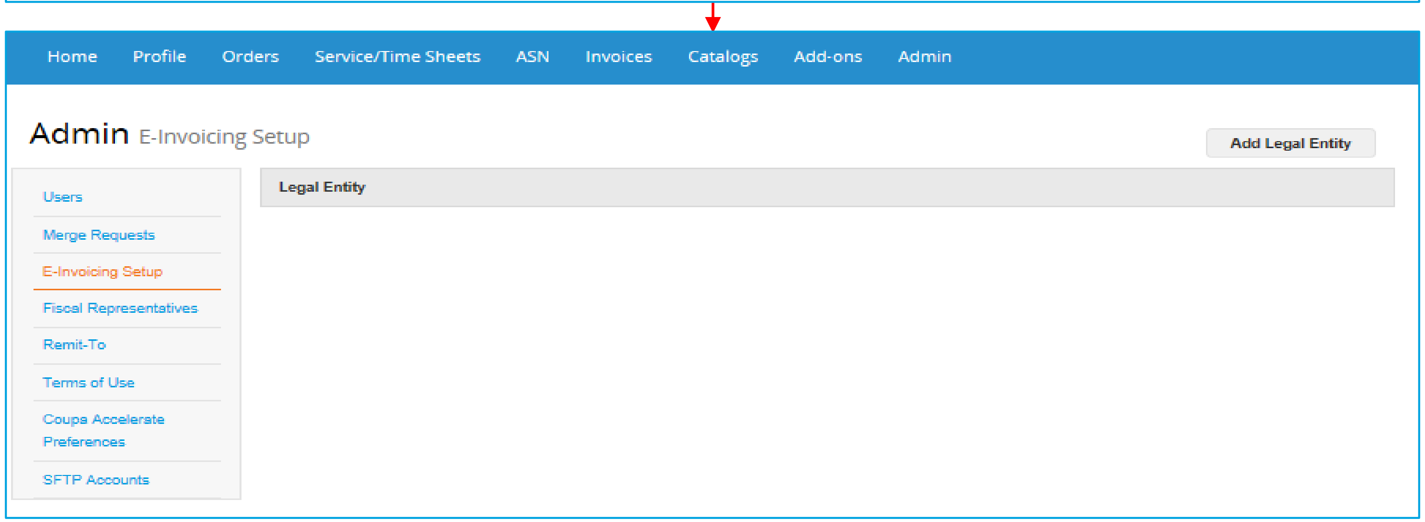
From the **Setup Complete** page you can choose to

- **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.





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4. Create or Edit Credit Note

Create a Credit Note

You can issue a credit note to:

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

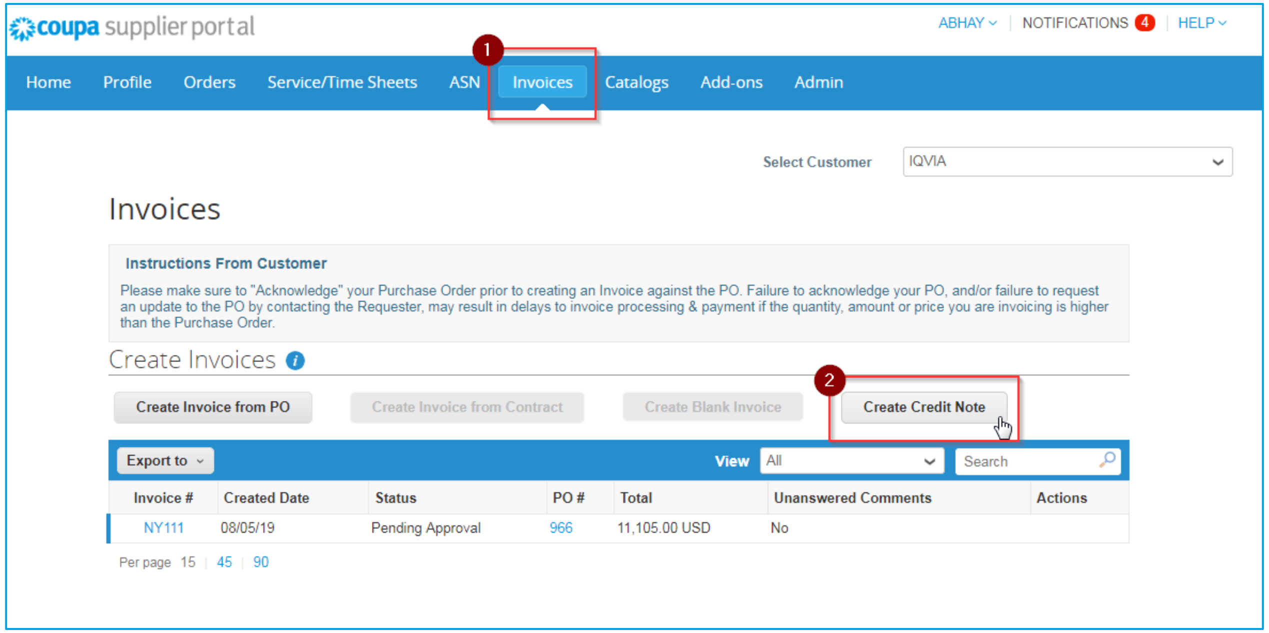
Credit notes can be issued against invoices only, not POs

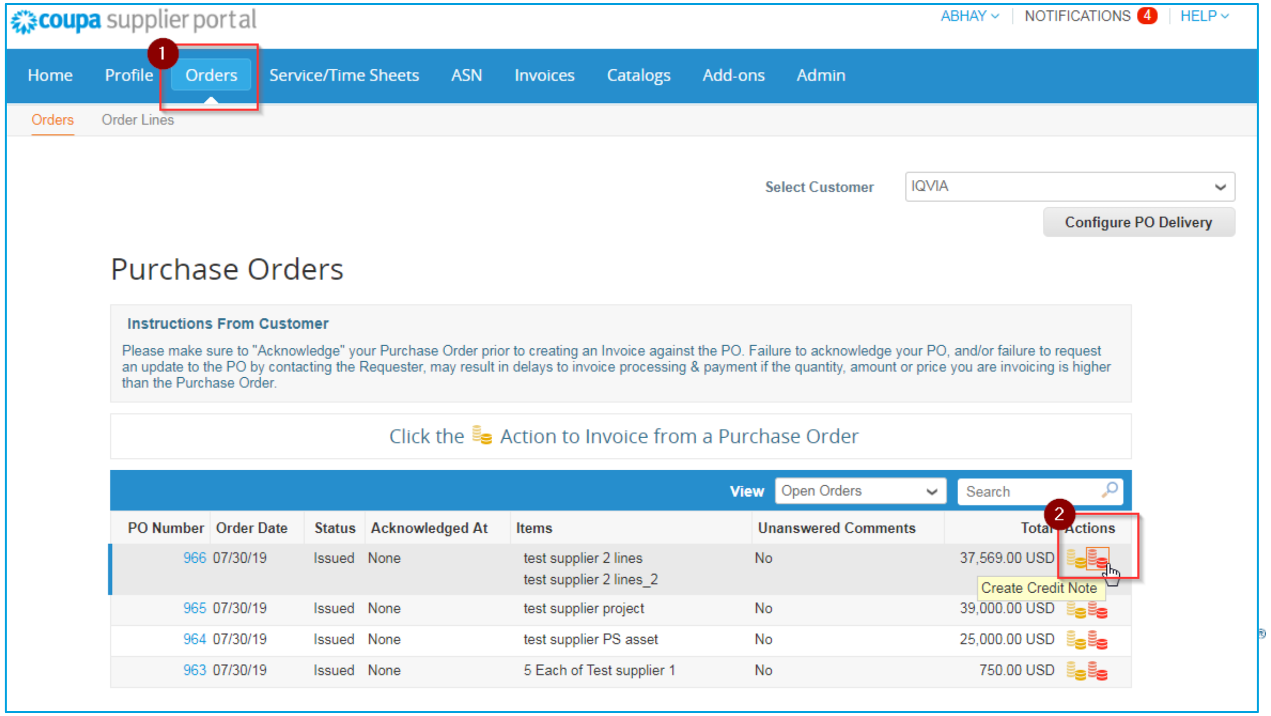
To create a credit note there are 2 options:

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

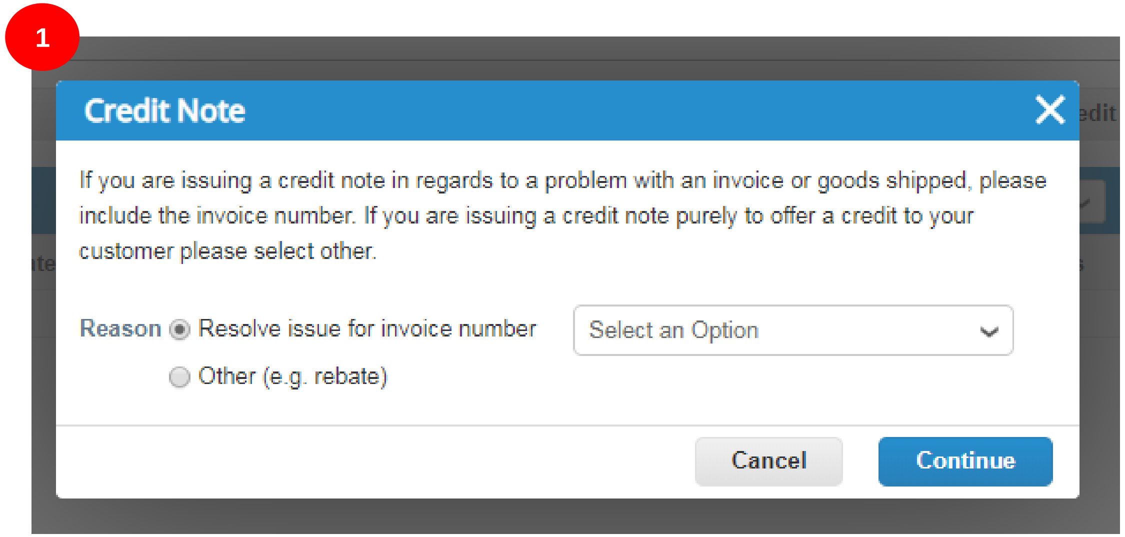
OR

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



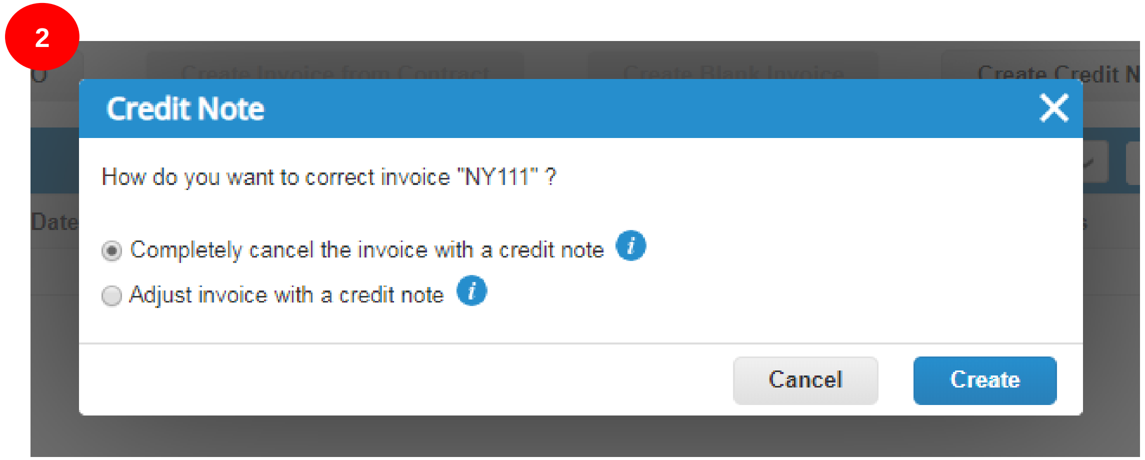


In the appearing **Credit Note** popup, select the reason for your credit note.



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

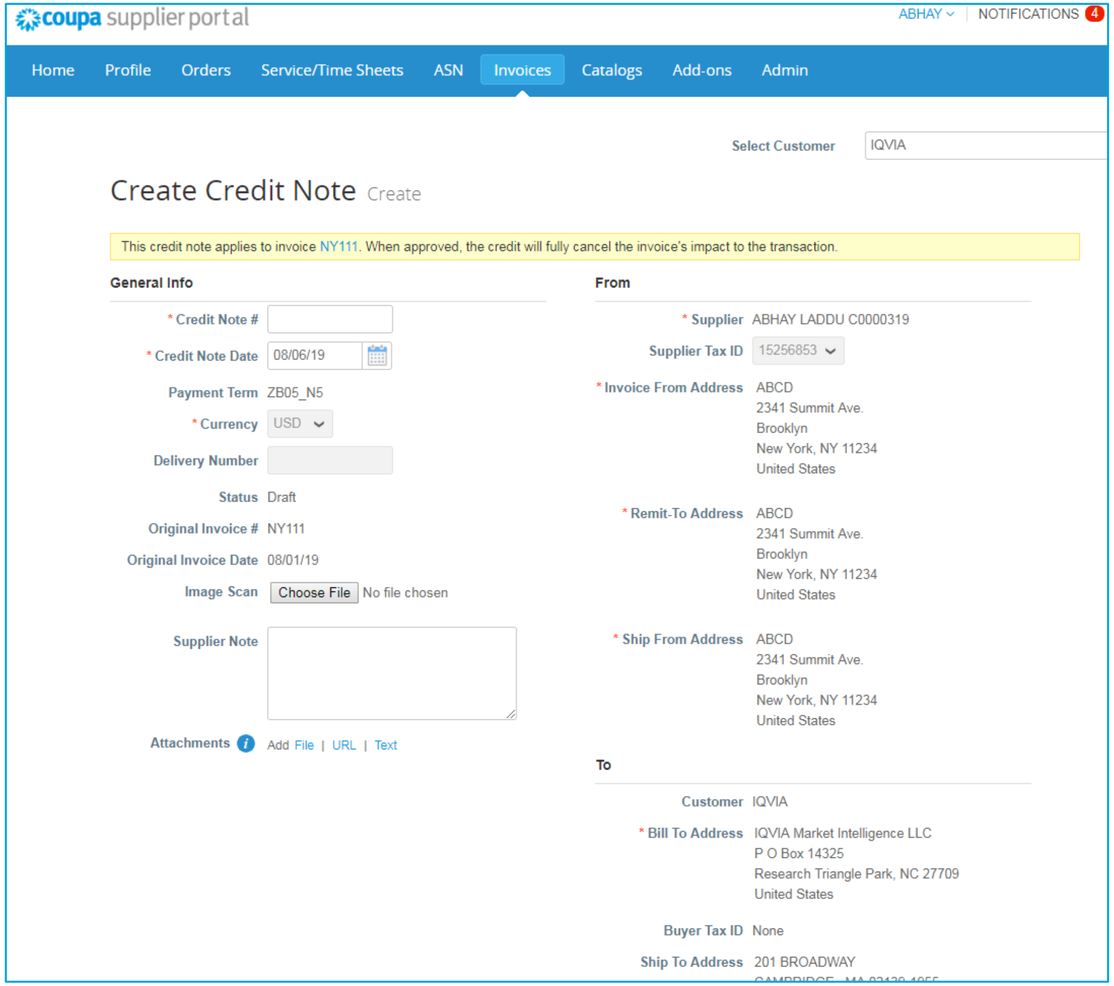
b) to adjust invoice with a credit note

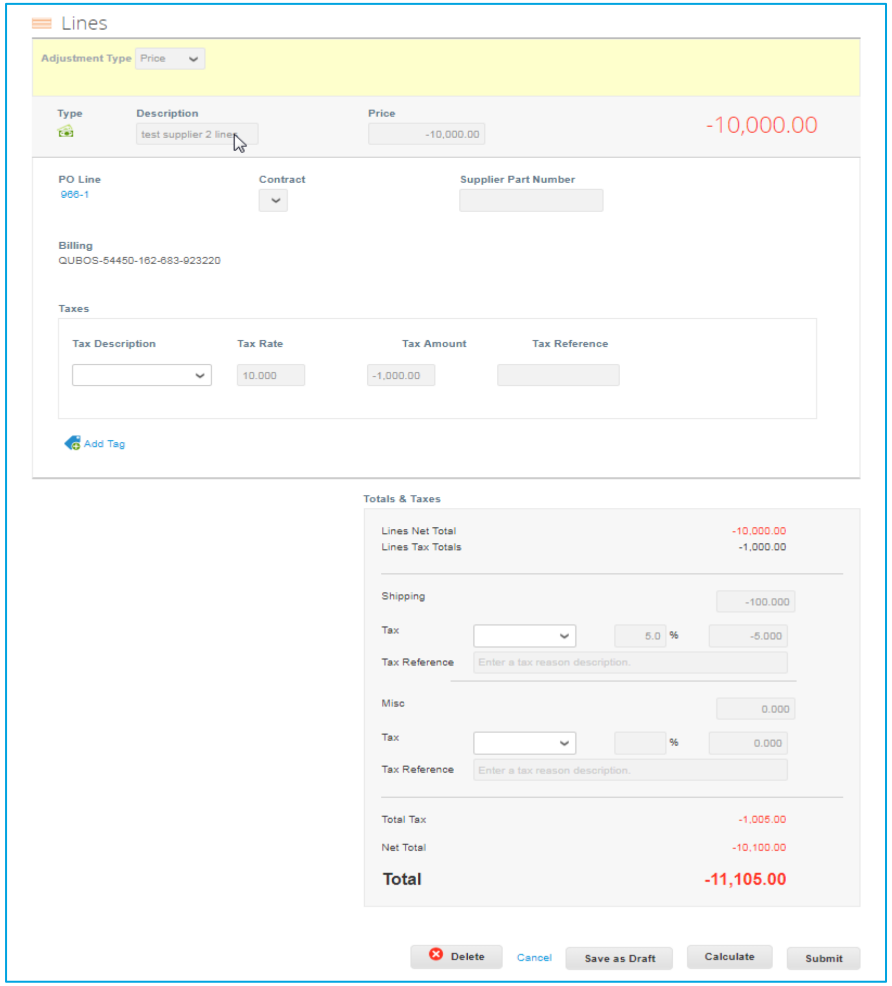
Cancel the invoice with a credit note

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.

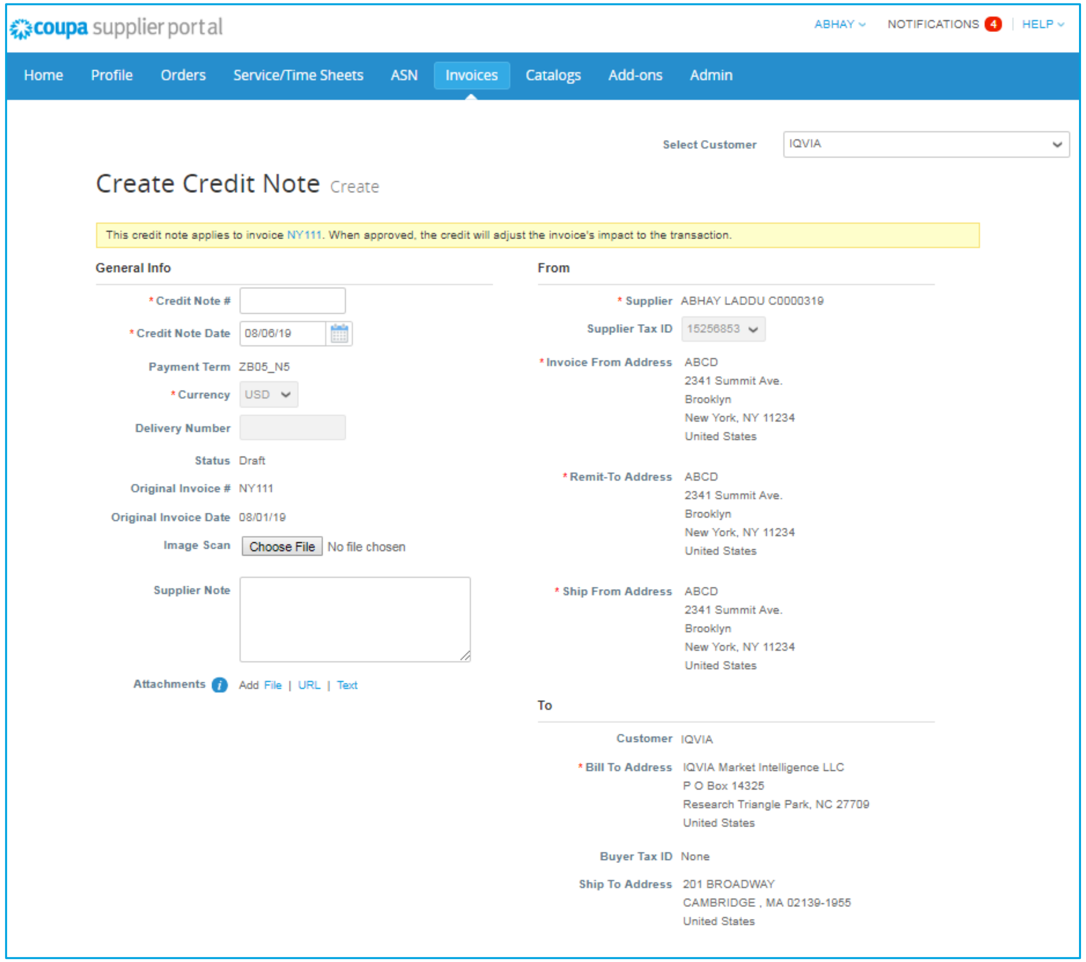


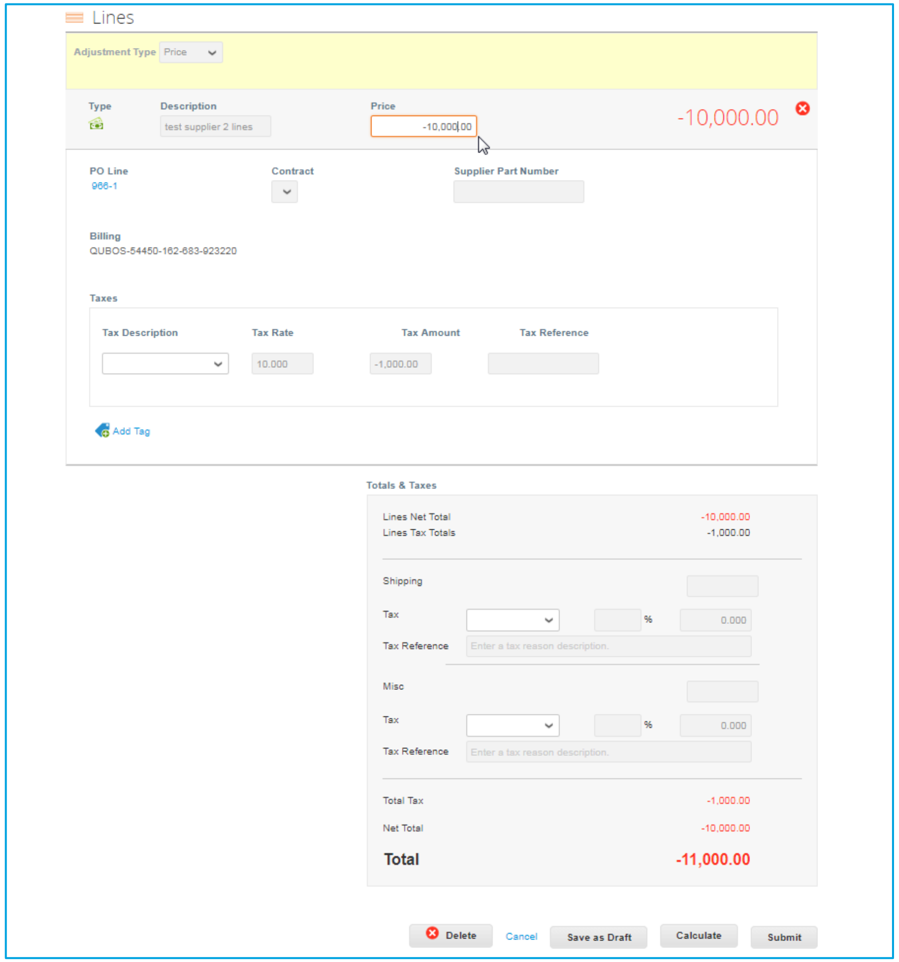


Adjust the information on invoice lines

Window with creating Credit Note will appear

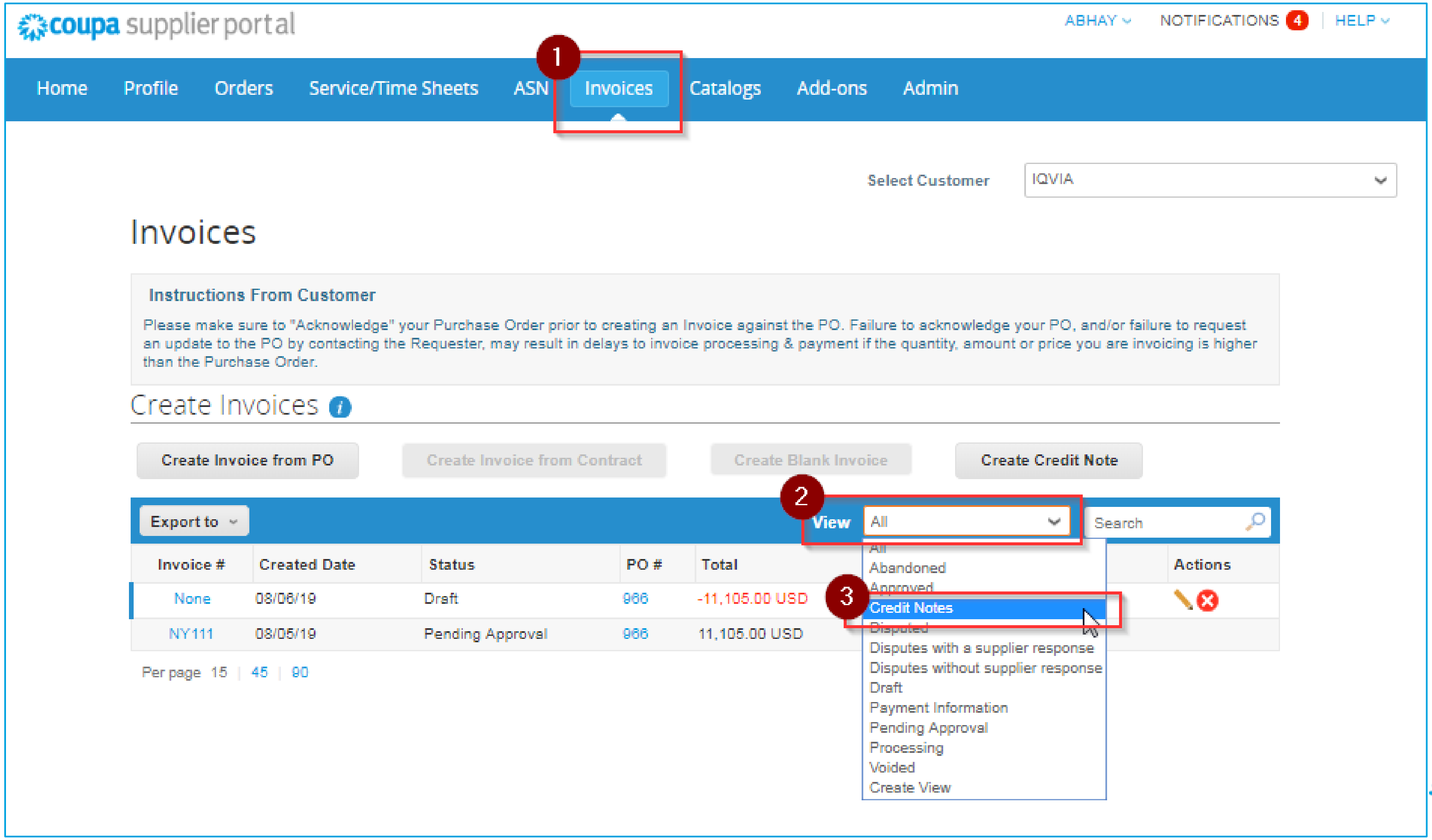
You can edit the following fields: **Credit Note #, Credit Note Date**, **Credit Reason**, and L**ine adjustment information** (for example, price and quantity). For invoices with multiple lines you can edit the price of each line separately. Line level taxes are carried over from the invoice and are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





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**“.



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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?

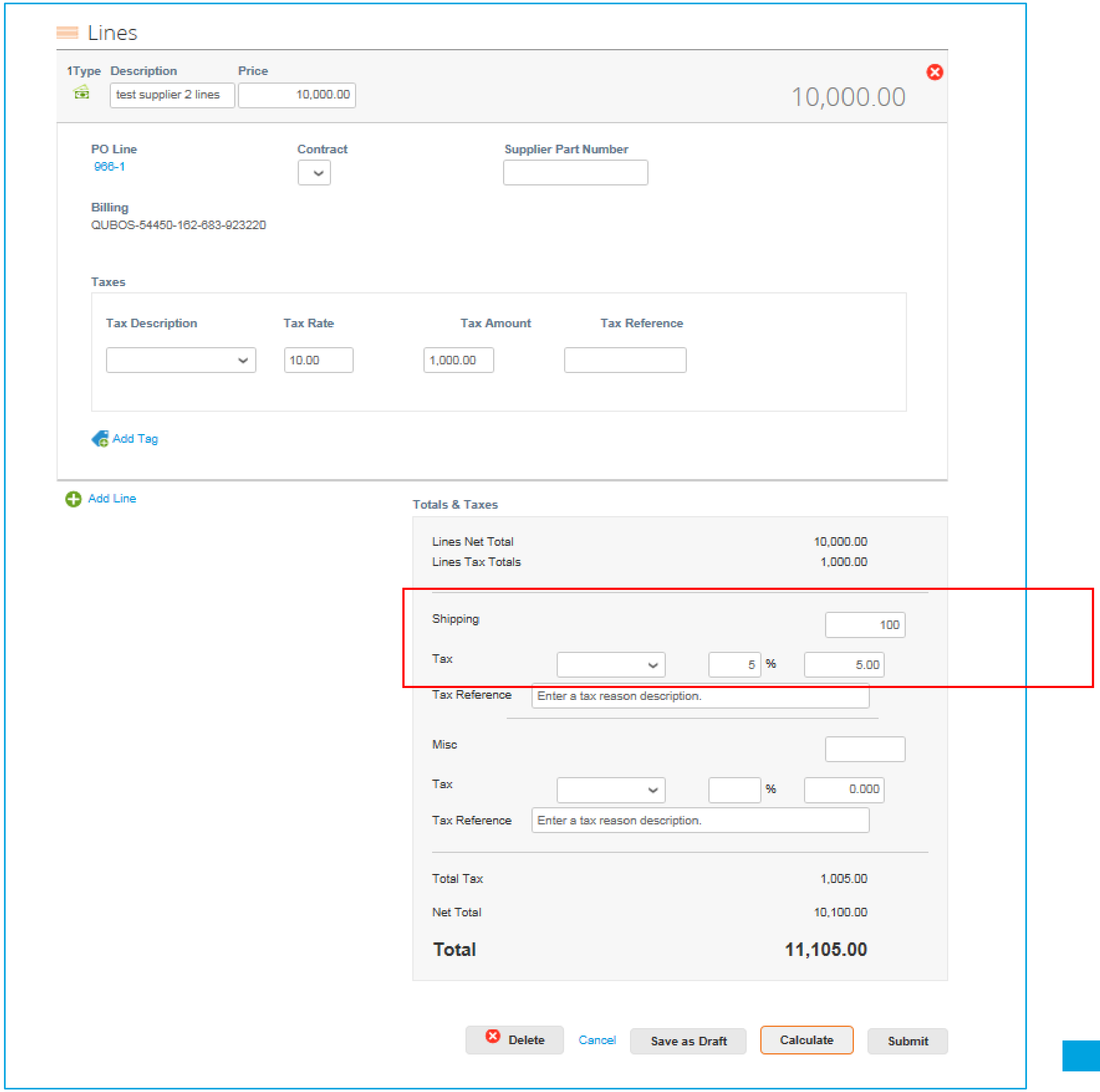
Check if you are using the supported protocols: TLS 1.1 or TLS 1.2. If you still have problems, contact supplier@coupa.com.

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.



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.

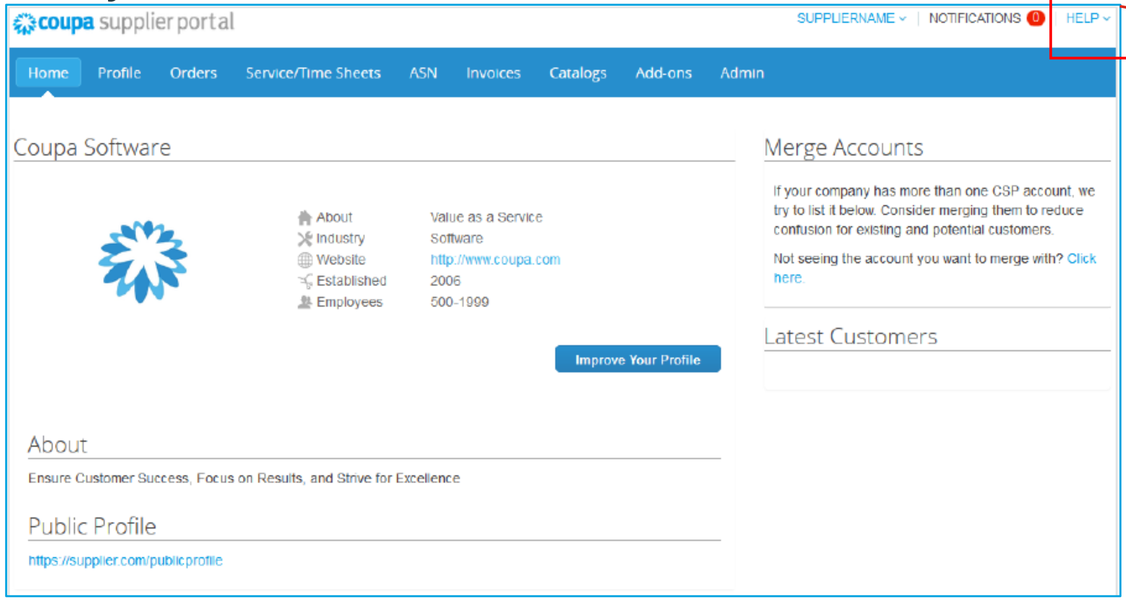
What if I have an invoice that has not been paid?

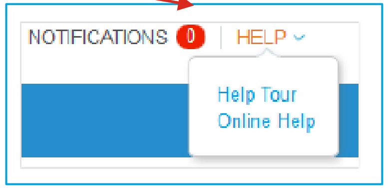
For questions regarding payment information, contact IQVIA directly on supplier.queries@iqvia.com (legacy Q) or GFSS_AP_SAP_External_Inquiries@iqvia.com (legacy I). Some payment details might be on the invoice document in Coupa. Also, in your notification settings you can choose to receive payment notifications 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