



COUPA for Suppliers

Coupa Supplier Portal (CSP) – PO's Processing

Covered Topics

- [Configure the PO Delivery Method](#)
- [View and Manage Notifications](#)
- [View and Manage POs](#)
- [View PO Lines](#)
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Why must a PO be created before the invoice is received?

- **Compliance:** The purpose of the purchase order is to ensure that IQVIA has placed an order for goods or services before those were delivered.
- The supplier can't submit an **electronic*** invoice into Coupa without a PO, so it will delay the payment if IQVIA haven't created a PO first.

Coupa Icons

Icon	Action/Function
	Transaction Hyperlinks take you to the View page of the transaction
	Edit
	Save
	Print View of the PO in liquid HTML format
	Send PO to supplier via method defined in the record
	Copy Requisition for future uses
	Void (Receipt/Invoice)
	Receive
	Create invoice against the PO
	Create credit note against the PO

Icon	Action/Function
	Soft Close
	Fully Close
	Delete
	Export report
	Detailed Receipt
	Add (ie: comment, alerts)
	Expand Table
	Assign email address to Supplier
	To be performed by an Automation Robot

Configure the PO Delivery Method

Configure the PO Delivery Method

You can configure how you receive POs from IQVIA.

1. On the **Purchase Orders** or **Purchase Order Lines** page, select the IQVIA whose settings you want to modify and click on the **Configure PO Delivery** button.
2. In the appearing window, **select your PO delivery method (cXML or Email)** and provide the necessary information.

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

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	
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	

Configure PO Delivery for IQVIA

You can let your customers know how you can receive purchase orders. Your customers will be able to select from these options to send you purchase orders. When you fill out these fields, they will be sent to your customer.

Purchase Order Method: Email

PO Email: poemail@iqvia.com

CXML URL:

CXML Domain:

CXML Identity:

CXML Supplier Domain:

CXML Supplier Identity:

CXML Secret:

CXML Protocol:

Cancel OK

If you select email delivery method, Coupa automatically emails purchase order notifications to the specific email address you enter .

PO delivery settings

Column	Description
Purchase Order Method	Choose how to receive POs from IQVIA : <ul style="list-style-type: none">• Email: Coupa automatically emails POs to the email address you enter.• cXML: Coupa sends the PO via cXML. You have to enter the cXML settings to use this option.
PO Email	This field is required for receiving POs via email. Coupa sends POs to this email address. To specify multiple addresses, separate them with a comma.
cXML URL	The full PO routing URL to receive POs.
cXML Domain	Part of the From section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it's usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
cXML Identity	Your customer's <code>DUNS</code> or <code>NetworkID</code> .
cXML Supplier Domain	Part of the To section of the header in the <code>OrderRequest</code> cXML. It can be anything you define, but it's usually <code>DUNS</code> or <code>NetworkID</code> , depending on the corresponding identity value.
cXML Supplier Identity	Your <code>DUNS</code> or <code>NetworkID</code> .
cXML Secret	A password that you and the customer agreed upon. If no shared password is specified, Coupa automatically passes <code>none</code> .
cXML Protocol	This field should always be <code>cxml</code> .



Example of PO notification received via email

After PO is created and fully approved, you will receive email notification with PO details.

When you click on **View Order** button, it will directly transfer you on your Coupa Supplier Portal to log in and have full visibility of PO to be able to **Create invoice** in Coupa.

The screenshot shows an email from IQVIA titled "New PO" with the subject "Purchase Order #963". The email content includes:

- Hi ABHAY,
- This is PO #963
- Submitted By: Zuzana Tokolyiova
- On Behalf Of: Zuzana Tokolyiova
- Supplier: ABHAY LADDU
- Total: 750.00 USD
- Items: Test supplier 1 (5 @ 150.00 = 750.00 USD)

A red box highlights the "View Order" button at the bottom of the email content.

More Detail

PO ID 963	Department None
Status Issued - Sent via Email	Last Opened None
Order Date 07/30/19	Acknowledged At None
Revision Date 07/30/19	Payment Term ZB05_N5
Req # 2122	Shipping None

Supplier

ABHAY LADDU 735 HARVEST LANE
ST LOUIS, Missouri 63132
United States COUPAtestABHAY@gmail.com

Shipping

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

Lines

5 x Test supplier 1 for 750.00 USD
Supplier: ABHAY LADDU - Need By 08/06/19 - Commodity Office Furniture - Account QUB05-54450-162-683-923220
Total 750.00 USD

The screenshot shows the Coupa Supplier Portal interface for Purchase Order #963. The status is "Issued - Sent via Email".

Order Details:

- Order Date: 07/30/19
- Revision Date: 07/30/19
- Requester: Zuzana Tokolyiova
- Email: zuzana.tokolyiova@quintiles.com
- Payment Term: ZB05_N5
- Attachments: None
- Acknowledged:

Shipping:

Ship-To Address: 201 BROADWAY, CAMBRIDGE, MA 02139-1955, United States, Attn: Zuzana Tokolyiova- Terms: None

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	Test supplier 1	5	Each	150.00	750.00	0.00

Per page: 15 | 45 | 90

Total: 750.00 USD

Buttons: Create Invoice, Save, Print View

View and Manage Notifications

2. View and Manage Notifications

Hover your cursor over the **Notifications** link to see your unread system notifications.

To view details of your notifications and to manage them, click on the **Notifications** link.

The image shows a screenshot of the Coupa Supplier Portal interface. The top navigation bar includes the Coupa logo, the text 'coupa supplier portal', and user information 'ABHAY' with a dropdown arrow, 'NOTIFICATIONS 4' with a red notification badge, and 'HELP' with a dropdown arrow. Below this is a secondary navigation bar with links: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is divided into sections: 'ABHAY LADDU C0000319' with a globe icon and links for About, Industry, Website, Established, and Employees; 'Merge Accounts' with a paragraph of text and a 'Click here' link; 'Latest Customers' with a list item 'IQVIA'; and an 'Improve Your Profile' button. A red box highlights the 'NOTIFICATIONS 4' link in the top navigation bar. A red arrow points from this box to a zoomed-in view of the dropdown menu. The dropdown menu shows three notifications: 'A new order is received' for PO 966 (\$37,569.00), PO 965 (\$39,000.00), and PO 964 (\$25,000.00), all issued by IQVIA. Each notification has a close icon (⊗) and a 'See All Notifications' link at the bottom. The date and time '07/30/19 03:33 PM' are displayed at the bottom of the dropdown.

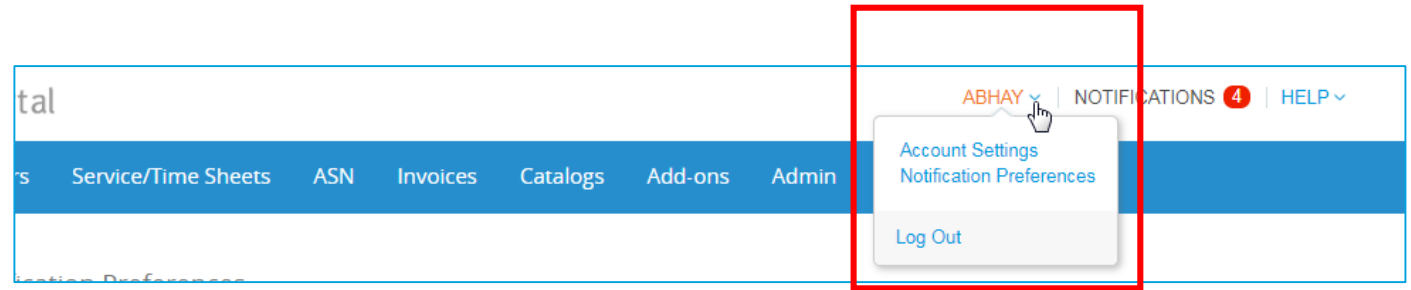
On the **My Notifications** page, you can view all your (read and unread) notifications, or you can filter by category (FYI, Todo, or Unread). You can select and delete them all or one-by-one.

The screenshot displays the 'My Notifications' page in the Coupa Supplier Portal. The page header includes the Coupa logo and 'supplier portal' text. The user's name 'ABHAY' and a 'NOTIFICATIONS 4' link are visible in the top right. A navigation bar contains links for Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area is titled 'My Notifications' and includes a 'Notification Preferences' button. A dropdown menu is open, showing options: All, FYI, Todo, Unread, and Announcements. The dropdown menu is highlighted with a red box and a red circle containing the number '2'. The main content area shows a list of notifications with columns for 'Message' and 'Received'. The notifications are: 'New PO 966 for \$37,569.00 issued by IQVIA.' (Received: 07/30/19 03:33 PM), 'New PO 965 for \$39,000.00 issued by IQVIA.' (Received: 07/30/19 03:25 PM), 'New PO 964 for \$25,000.00 issued by IQVIA.' (Received: 07/30/19 03:24 PM), and 'New PO 963 for \$750.00 issued by IQVIA.' (Received: 07/30/19 03:21 PM). At the bottom of the list are 'Delete' and 'Mark as Read' buttons. A red box and a red circle containing the number '1' highlight the 'NOTIFICATIONS 4' link in the top right corner.

Message	Received
New PO 966 for \$37,569.00 issued by IQVIA.	07/30/19 03:33 PM
New PO 965 for \$39,000.00 issued by IQVIA.	07/30/19 03:25 PM
New PO 964 for \$25,000.00 issued by IQVIA.	07/30/19 03:24 PM
New PO 963 for \$750.00 issued by IQVIA.	07/30/19 03:21 PM

To change your notification preferences:

- click on your name link in the top right corner.
- click on the **Notification Preferences** link

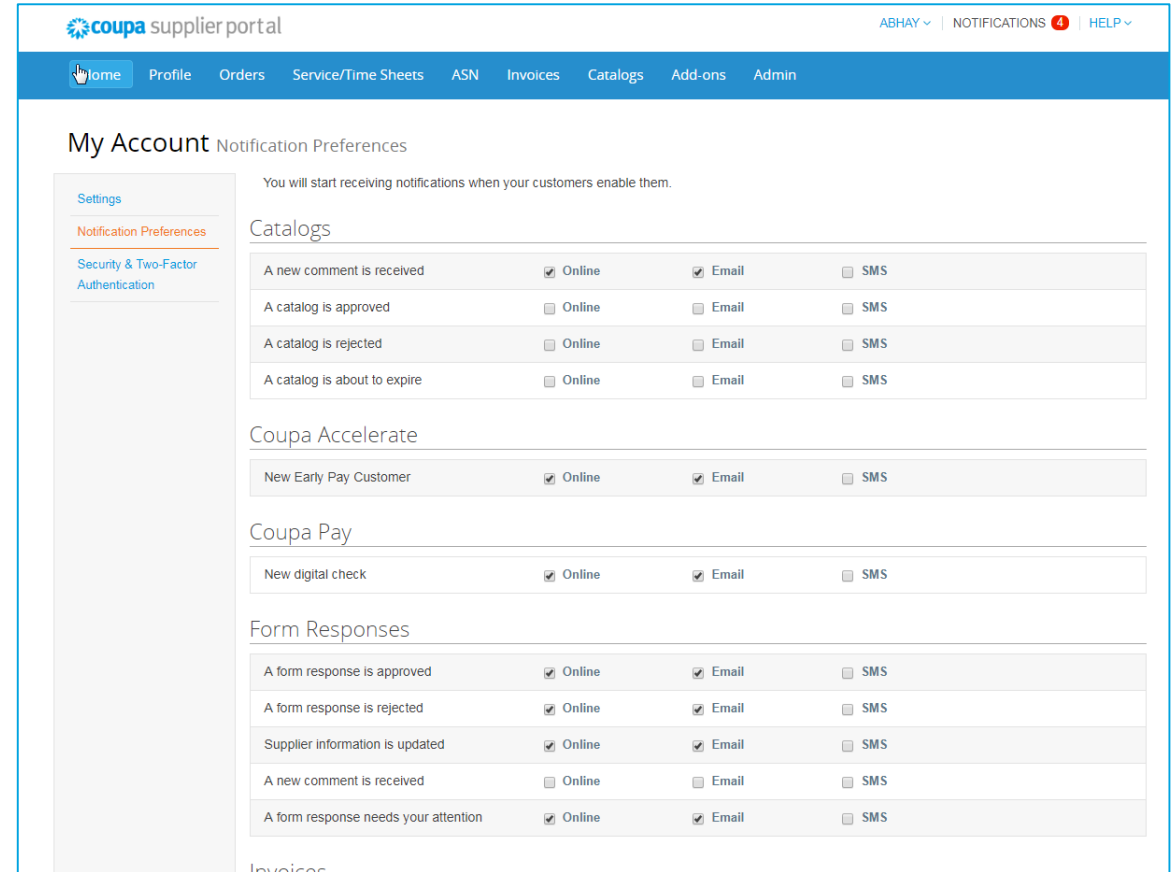


On the appearing **My Account Notification Preferences** page, select the radio buttons for the items that you want to receive any or all of the notification types:

- online (to do list)
- Email
- SMS (short text message)

If you change your notification preferences, remember to save them!

SMS notifications are turned off by default. Your SMS notification selections are deleted if you disable mobile phone verification. For more information, see [Enable or Disable Two-Factor Authentication](#).



View and Manage POs

View and Manage POs

Click on the **Orders** tab on the CSP homepage. The **Purchase Orders** page appears.

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Orders' (highlighted with a red box and '1'), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. Below the navigation bar, there is a 'Select Customer' dropdown menu (highlighted with a red box and '2') showing 'IQVIA' and a 'Configure PO Delivery' button. Below this, there is a 'Purchase Orders' section with 'Instructions From Customer' and a table of Purchase Orders. The table has columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The table is filtered by 'View' (highlighted with a red box and '3') set to 'All'. The table contains four rows of data.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
986	07/30/19	Issued	None	test supplier 2 lines test supplier 2 lines_2	No	37,569.00 USD	
985	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	
983	07/30/19	Issued	None	5 Each of Test supplier 1	No	750.00 USD	





2. From the **Select Customer** drop-down list in the top right corner, select IQVIA.
3. 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.

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

Purchase Orders table







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

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
966	07/30/19	Issued	None	test supplier 2 lines test supplier 2 lines_2	No	37,569.00 USD	

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

Purchase order details

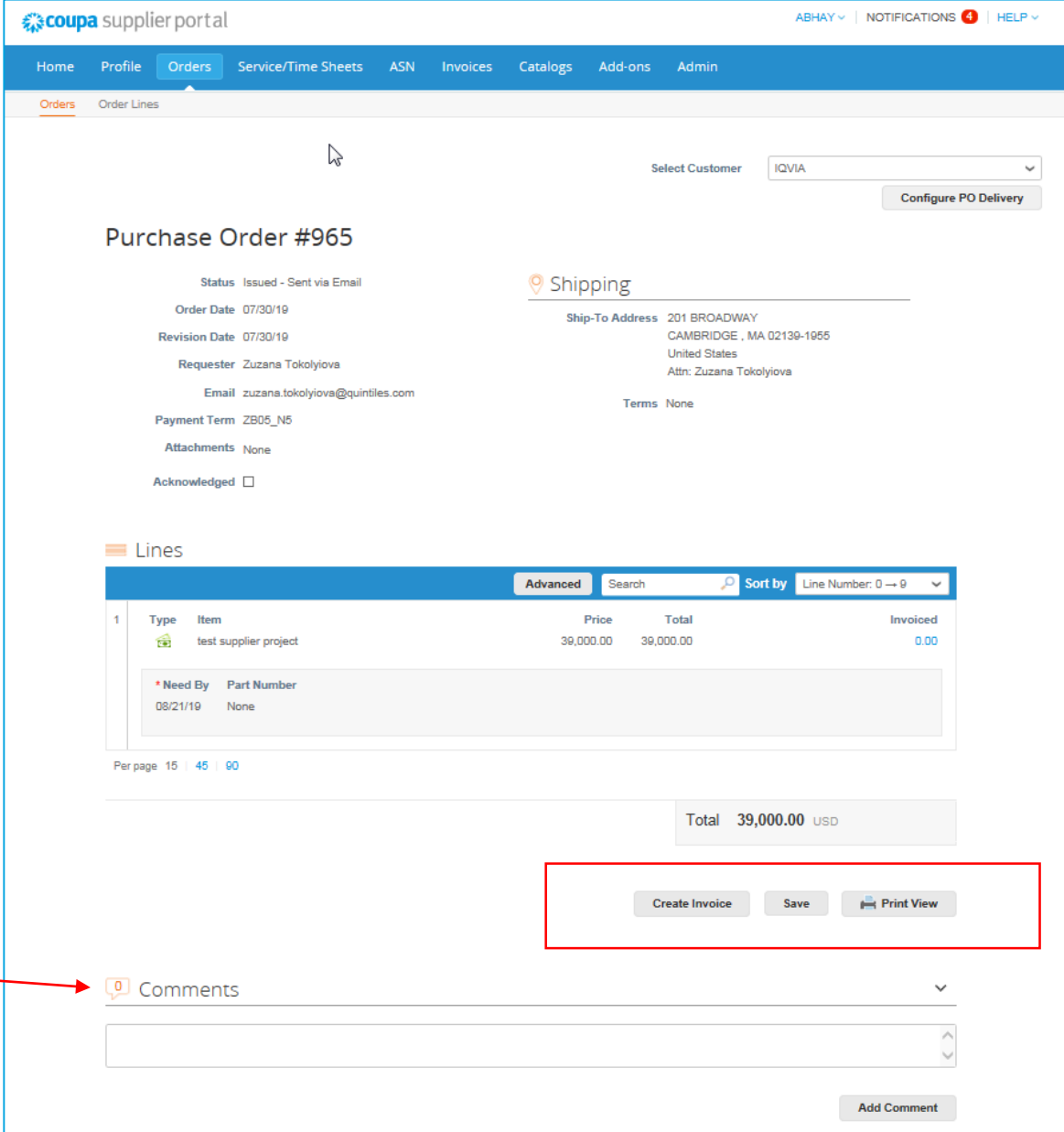
For more details click on the **PO Number** link to open the PO.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
966	07/30/19	Issued	None	test supplier 2 lines test supplier 2 lines_2	No	37,500.00 USD	  
966	07/30/19	Issued	None	test supplier project	No	39,000.00 USD	  

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

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

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



The screenshot displays the Coupa Supplier Portal interface for Purchase Order #965. The page includes a navigation bar with options like Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The main content area shows the PO details, including 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), and shipping information (Ship-To Address: 201 BROADWAY, CAMBRIDGE, MA 02139-1955, United States, Attn: Zuzana Tokolyiova). The 'Lines' section shows a single line item for 'test supplier project' with a price of 39,000.00 USD and a total of 39,000.00 USD. At the bottom, there are three buttons: 'Create Invoice', 'Save', and 'Print View'. A red box highlights these buttons. Below them is a 'Comments' section with a text input field and an 'Add Comment' button. A red arrow points from the text in the previous block to the 'Comments' section.

POs can have the following statuses

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

Under what circumstances Coupa could close the PO

Manually

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

Automatically

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



View PO Lines

View PO Lines

Click on the [Order Lines tab](#) to see information on the PO lines for each PO.

From the [Select Customer](#) drop-down list in the top right corner, select IQVIA whose PO lines you want to see.

The screenshot shows the Coupa Supplier Portal interface. The navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Add-ons', and 'Admin'. The 'Orders' tab is selected, and the 'Order Lines' sub-tab is active. The 'Select Customer' dropdown menu is set to 'IQVIA'. The 'Purchase Order Lines' table is displayed with the following data:

Line	Order Status (Header)	Item	Total Item Quantity	Line Total
2	Issued	test supplier 2 lines_2	None	1569.00
986 1	Issued	test supplier 2 lines	None	36000.00
985 1	Issued	test supplier project	None	39000.00
984 1	Issued	test supplier PS asset	None	25000.00
983 1	Issued	5 Each of Test supplier 1	5	750.00

You can export the PO lines table in CSV or Excel format by clicking on **Export to** option in left corner.

Purchase Order Line table

The **Purchase Order Lines** table shows the following information for all the PO lines:

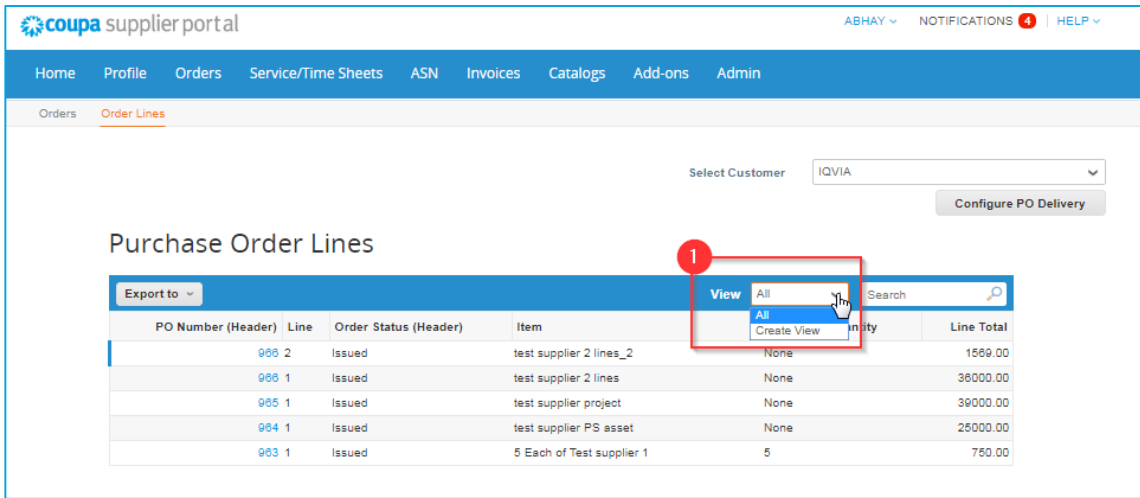
Purchase Order Lines

PO Number (Header)	Line	Order Status (Header)	Item	Total Item Quantity	Line Total
966	2	Issued	test supplier 2 lines_2	None	1569.00
966	1	Issued	test supplier 2 lines	None	36000.00
965	1	Issued	test supplier project	None	39000.00

Column	Description
PO Number (Header)	PO number generated by Coupa. Click on it to see the PO line.
Line	PO line number.
Order Status (Header)	Current status of the PO. For more information, see the PO status list above.
Item	List of items on each PO line.
Total Item Quantity	Total quantity of the PO line.
Line Total	Total amount of the PO line.

Create new PO data table view

For your own preferences and visibility you can create your own view by selecting **Create View** from list of views.

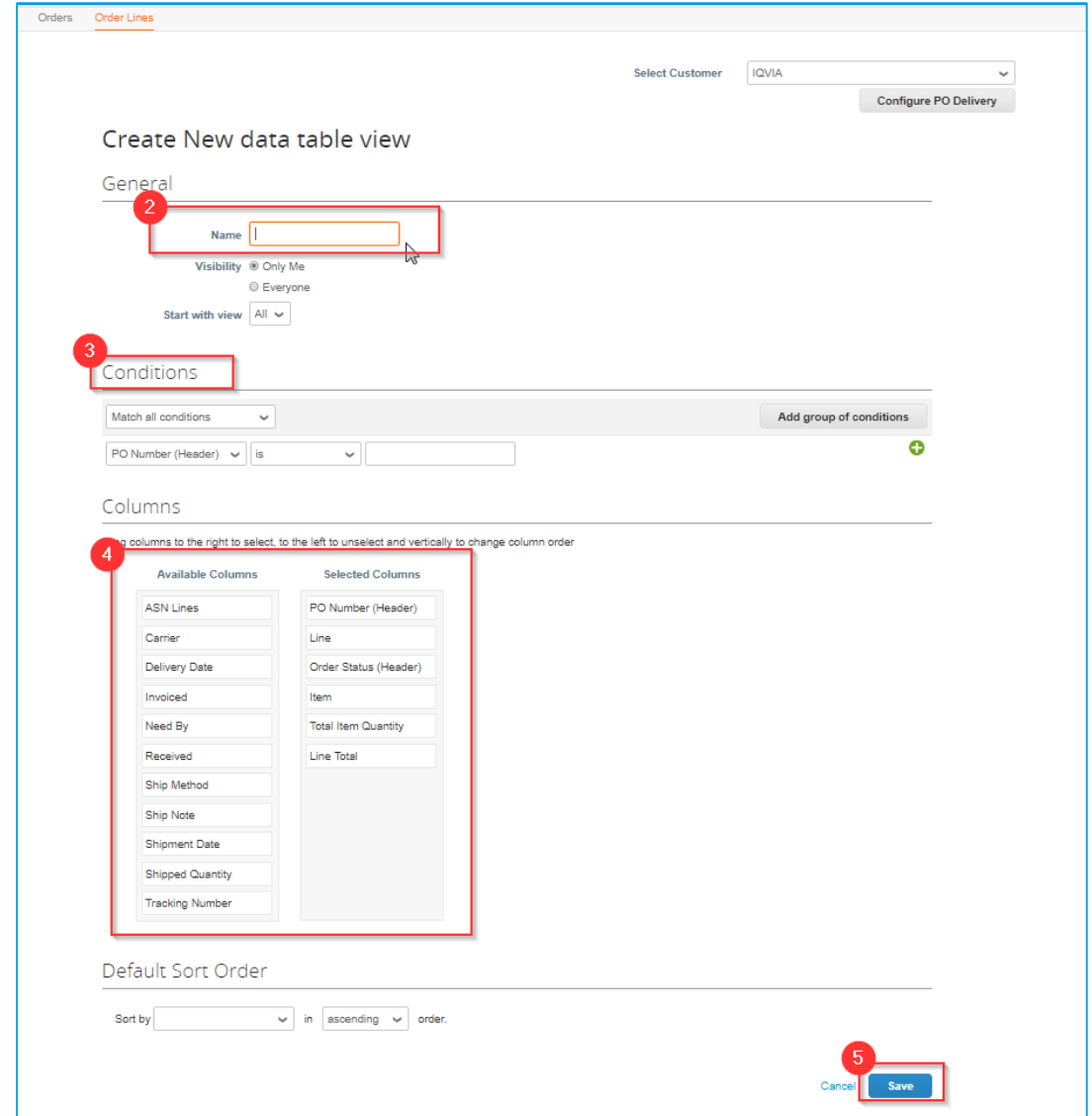


The screenshot shows the 'Purchase Order Lines' table in the Coupa Supplier Portal. A red box labeled '1' highlights the 'View' dropdown menu, which is open and showing 'All', 'All', and 'Create View' options.

PO Number (Header)	Line	Order Status (Header)	Item	Quantity	Line Total
988	2	Issued	test supplier 2 lines_2	None	1589.00
988	1	Issued	test supplier 2 lines	None	36000.00
985	1	Issued	test supplier project	None	39000.00
984	1	Issued	test supplier PS asset	None	25000.00
983	1	Issued	5 Each of Test supplier 1	5	750.00

On the appearing **Create New data table view** page:

2. Type the name of the view
3. Add specific conditions if required
4. Add additional columns to be visible or remove existing ones
5. Click **Save** button



The screenshot shows the 'Create New data table view' page. Red boxes labeled 2, 3, 4, and 5 highlight the 'Name' field, 'Conditions' section, 'Columns' section, and the 'Save' button respectively.

2 Name

Visibility Only Me Everyone

Start with view

3 Conditions

Match all conditions

4 Columns

Available Columns: ASN Lines, Carrier, Delivery Date, Invoiced, Need By, Received, Ship Method, Ship Note, Shipment Date, Shipped Quantity, Tracking Number

Selected Columns: PO Number (Header), Line, Order Status (Header), Item, Total Item Quantity, Line Total

Default Sort Order: Sort by in order.

5

Frequently Asked Questions

Frequently asked questions

How do I see my IQVIA's purchase orders?

On the main menu, click on the **Orders** tab. If you are connected to more than one Coupa customer, select IQVIA from the **Select Customer** dropdown menu.

How do I add a carriage to a purchase order?

You need to contact your IQVIA requestor directly for information about adding a carriage line.

How do I change a price on a purchase order?

You cannot change a price on a PO through the CSP. If you need a change order on a PO, talk to your requester.

How do I invoice a blanket purchase order?

You can invoice multiple times against a single PO. Just click the gold coin icon for the PO as you normally would, and enter the amount you'd like to appear on the invoice. The next time you want to invoice against the PO, just do the same thing.

What does "pending receipt" mean?

This status shows that IQVIA is in the process of receiving the goods/services into their system. Once IQVIA enters the receipt, the invoice is matched against it.

What is a soft closed PO?

A soft closed PO is a PO that IQVIA Procurement can reopen, for example, if an invoice or credit memo submission is needed, or if a PO is closed prematurely or by mistake. You cannot invoice against a soft closed PO.

How can I view historical (closed) purchase orders in IQVIA's instance?

IQVIA can provide you with information on closed purchase orders. Both suppliers and procurement can see the status of the PO including “Soft Closed” and “Closed” statuses. Below is a screenshot from the Coupa Supplier Portal.

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.

View: All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
240	02/04/19	Cancelled	None	10 Each of 10ML EDTA CELL FREE DNA BCT TU	No	1,000.00 USD	
239	02/04/19	Issued	None	10 Each of 10ML EDTA CELL FREE DNA BCT TU	No	1,000.00 USD	
230	02/04/19	Issued	None	10 Each of 10ML EDTA CELL FREE DNA BCT TU	No	1,000.00 USD	
229	02/04/19	Closed	None	1 Each of 10ML EDTA CELL FREE DNA BCT TU	No	7,000.00 USD	
228	02/04/19	Soft Closed	None	10 Each of 10ML EDTA CELL FREE DNA BCT TU	No	1,000.00 USD	

You can [create your own view](#) with different types of statuses as shown below.

- Click on Orders tab
- On the appearing Orders window select IQVIA from customer drop-down list
- Select **Create view**
- in **Conditions** section create view with specific type of status

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

Select Customer: IQVIA Configure PO Delivery

Create New data table view

General

Name:

Visibility: Only Me Everyone

Start with view: All

Conditions

Match all conditions Add group of conditions

Status is Buyer Hold
Cancelled
Closed
Currency Hold

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order

Available Columns	Selected Columns
Comments	PO Number
PO ID	Order Date
	Status
	Acknowledged At
	Items
	Unanswered Comments
	Total
	Actions

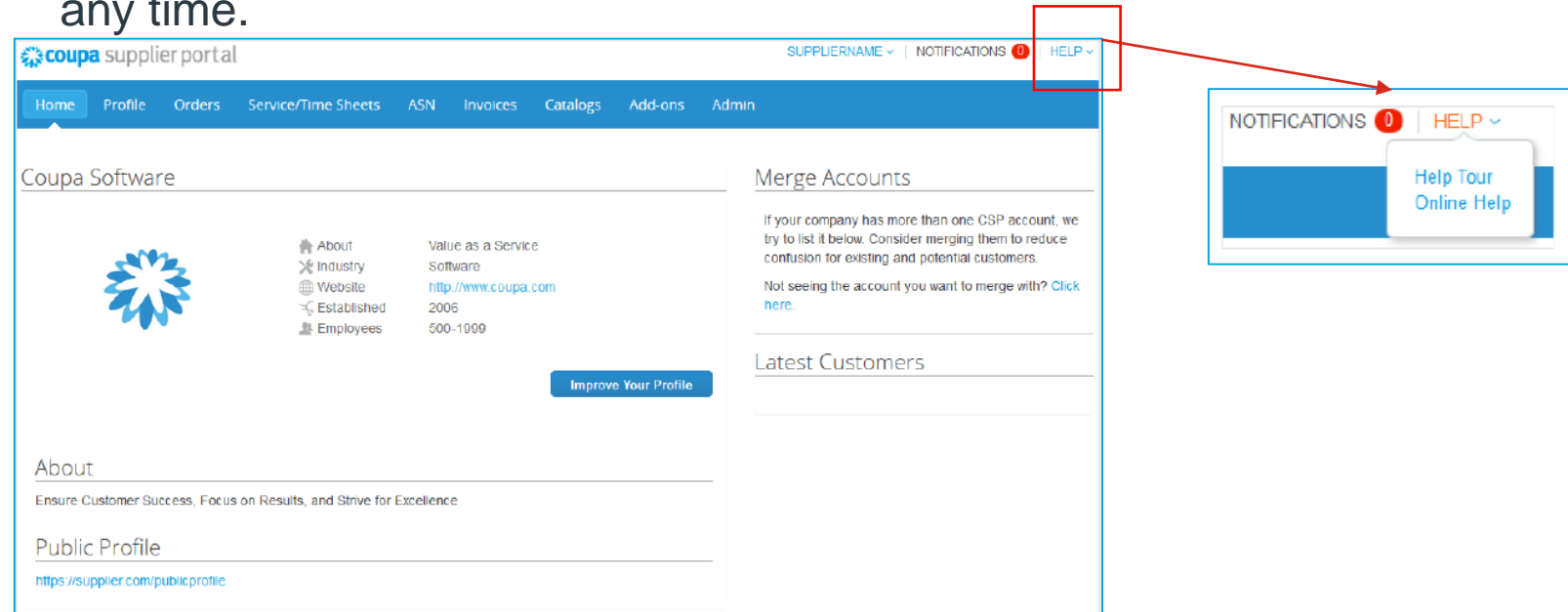
Default Sort Order

Sort by: in order.

Cancel Save

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