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IQVIA®

❀ coupa

Coupa for Suppliers

Coupa Supplier Portal (CSP) –
Create an Invoice from a PO

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:
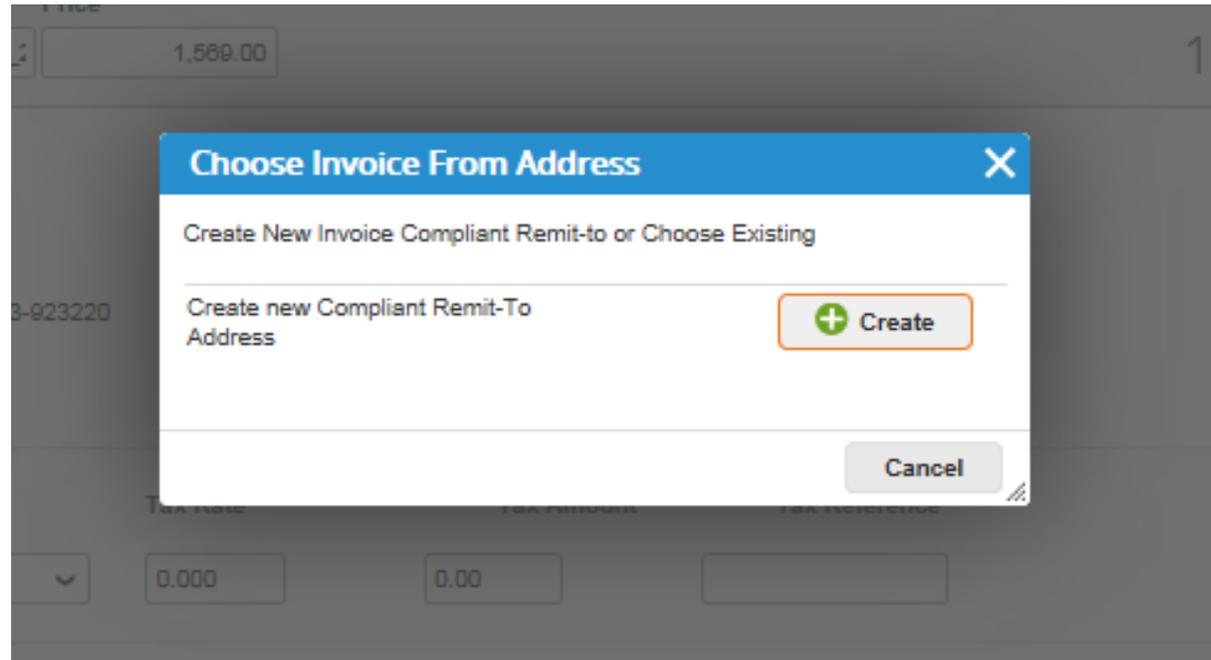
Create invoice page

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.
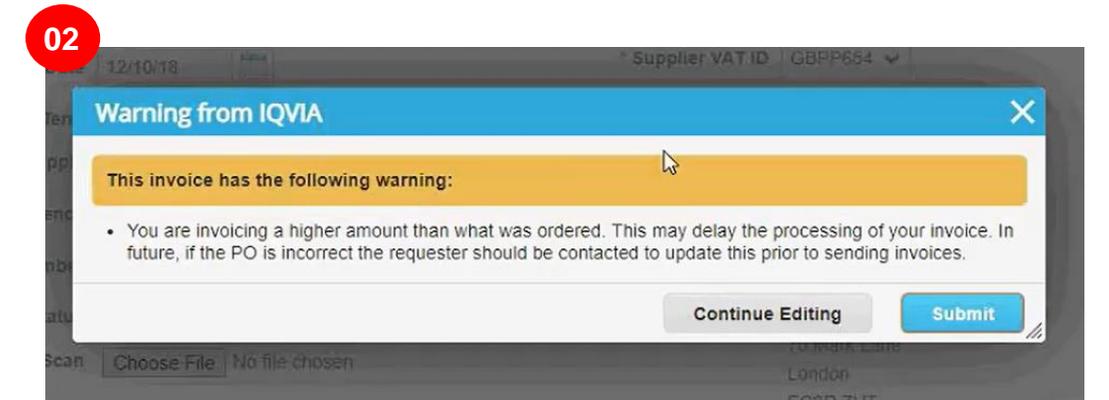- You can also add comments for IQVIA.

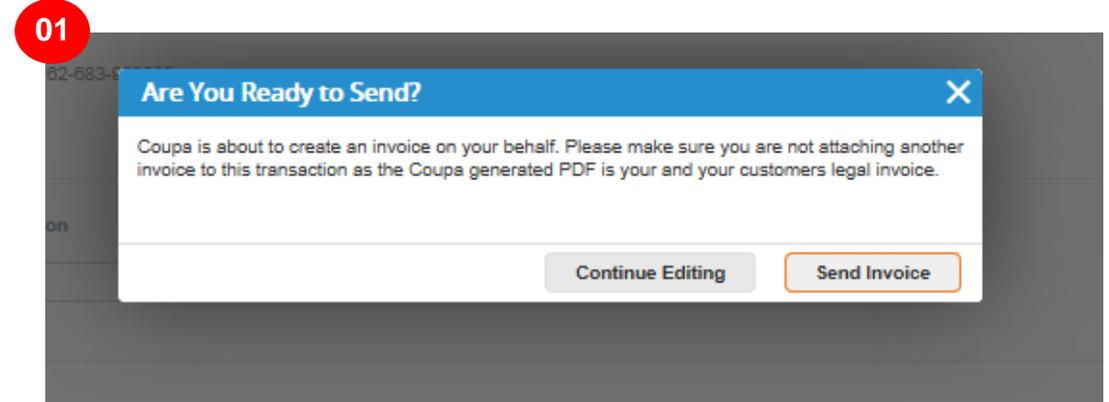First you will get pop-up notification „ if you are ready to send your invoice". There are following options:

- **Continue Editing** – if you forgot to change anything, you can go back
- **Send Invoice**

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.

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.