

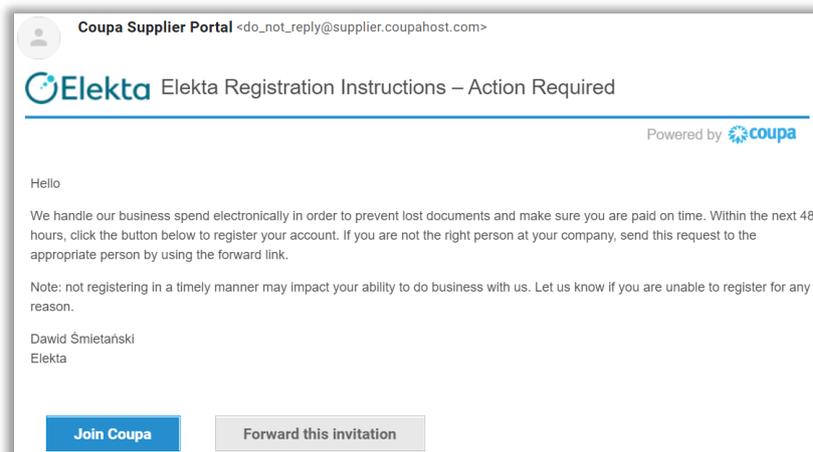
How to create an account in CSP

This document describes how to join and create an account on the Coupa Supplier Portal (CSP). CSP allows to view the received Purchase Orders (PO), issue invoices, check their status and much more.

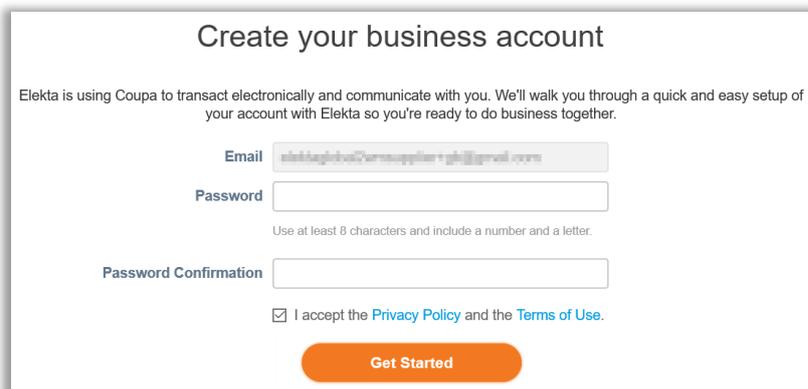
The Helpfile should be used in conjunction with the email invitation to the CSP from Elekta (email may reach your SPAM folder). If Elekta (Dawid.Smietanski@elekta.com) confirms that the invitation was sent but you didn't receive it, please contact your IT team to whitelist the email do_not_reply@supplier.coupa.com

STEPS

1. Open the invitation email sent from do_not_reply@supplier.coupa.com and click on the **Join Coupa** button. If you want to send an invitation to another employee in your company, click the **Forward this invitation** button.



2. Please note that the steps below may differ depending on your country. Create a password for your account. Please note that Elekta does not store or reset your password. In case you forget your password, [follow this link](#). To continue, accept the Privacy Policy and Terms of Use, and then press the **Get Started** button.



Create your business account

Elekta is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Elekta so you're ready to do business together.

Email

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation

I accept the [Privacy Policy](#) and the [Terms of Use](#).

[Get Started](#)

3. During the setup you will encounter this page. Please be aware that payment discounts are **NOT** used by Elekta.

Would you like to offer discounts to get paid faster? ⓘ

🏠 Payment Discount Preferences

Your default payment term	Automatically replace with this discount (you can change this later)
Net 30 ▶	None ▼
Net 45 ▶	None ▼
Net 60 ▶	None ▼
Net 75 ▶	None ▼
Net 90 ▶	None ▼
Net 120 ▶	None ▼

4. For your company to be able to issue electronic invoices, you must first provide company details. To do this, at the top of the screen navigate to **Setup > Legal Entity Setup > Add Legal Entity**

Important: All data submitted here will be included in the Legal Invoice and must be accurate

The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as JOHN. The main navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Sourcing. Below this, there are 'Add-ons' with 'Setup' highlighted and a notification badge '1'. The 'Admin' section is active, showing 'Customer Setup' and 'Legal Entity Setup' (highlighted with a '2'). A prominent 'Add Legal Entity' button (highlighted with a '3') is located in the top right corner of the main content area. The main content area contains the following text: 'Let's get your company setup for electronic invoicing! We'll walk you through what's needed & keep it as short as possible. The first thing you'll need to do is add a legal entity.'

- a) Create a **Legal Entity Name** (any name), select your **Country/Region** from the list and press **Continue**

* Legal Entity Name

Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

- b) Fill the **Type of Company** and members of the **Board of Directors** (optional)

* Legal Entity Name	<input type="text" value="UK MasterTech"/>	
Country/Region	<input type="text" value="United Kingdom"/>	
* Type of Company	<input type="text" value="Limited Company"/>	
Board of Directors	<input type="text" value="Mark Winston"/>	

Conducting business in certain countries/regions requires your invoice to contain specific information about your company.

- c) Fill below fields (fields marked with * are mandatory. For more information, hover a mouse over ):
- 1) Decide if this setup will be used for Elekta only or for all your client using Coupa
 - 2) Fill the **Invoicing**, **Remit-To** and **Ship From** addresses
 - 3) Fill the **Tax ID** of your company (please include the prefix to the number e.g. GB1234567890. Enter your local tax ID if you are not registered for VAT or GST in some countries/regions).
Important: The VAT/GST code submitted here will be included in the Legal Invoice and must be accurate.
 - 4) Optionally, you can fill **Miscellaneous** information

1 Which customers do you want to see this?

All
 Elekta

2 What address do you invoice from?

* Address Line 1
Address Line 2
* City
State
* Postal Code
Country/Region United Kingdom

Use this address for Remit-To *i*
 Use this for Ship From address *i*

What is your Tax ID?

Country/Region
* VAT ID
 I don't have a VAT/GST Number

[Add additional Tax ID](#)

4 Miscellaneous

Invoice From Code *i*
Preferred Language

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. *i*

d) **IMPORTANT:** Do NOT add any **Bank Information** in the CSP under **Payment Type**. This information is held by Elekta in their ERP system, not in Coupa. Please contact Elekta directly for any changes to your Bank details. Review the address you set up and press **Save & Continue**

* Payment Type

What is your Remit-To Address?

Address Line 1 Stenton 5
Address Line 2
City London
State
Postal Code NW1
Country/Region United Kingdom

e) Review the Legal Entity Information you have created. If necessary, correct it or add a new Remit-to address. Click **Next** to continue the setup.

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 Account	Remit-To Address	Status	
Address	Stenton 5 London NW1 United Kingdom	Active	Manage

[Deactivate Legal Entity](#)
[Cancel](#)
[Next](#)

f) If necessary, add a new Ship-to address. Click **Done** to complete the setup.

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered.

[Add Ship From](#)

Title	Status	
Stenton 5 London NW1 United Kingdom	Active	Manage

[Deactivate Legal Entity](#)
[Done](#)

5. Elekta requires yours Remit-to address. Press the **Add Now** button to start using it now as a default address.

Setup Complete

1 2 3 4

Do you want to Add Remit-To Address to the invoice now?

To get paid - Most customers require that you send them this payment info in **in addition to providing it on the invoice.** [i](#)

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

[Add Later](#)
[Add Now](#)

6. Your CSP account is now ready to be used and you can see any purchase order from Elekta and issue invoices against those purchase orders.