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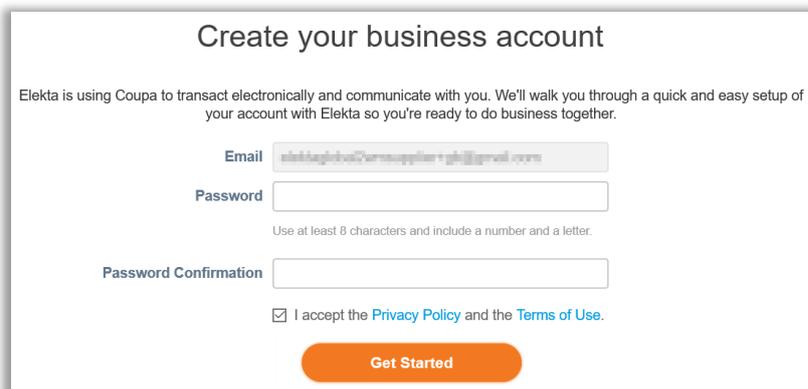
The Helpfile should be used in conjunction with the email invitation to the CSP from Elekta (email may reach your SPAM folder). If Elekta (Dawid.Smietanski@elekta.com) confirms that the invitation was sent but you didn't receive it, please contact your IT team to whitelist the email do_not_reply@supplier.coupahost.com

STEPS

1. Open the invitation email sent from do_not_reply@supplier.coupahost.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.
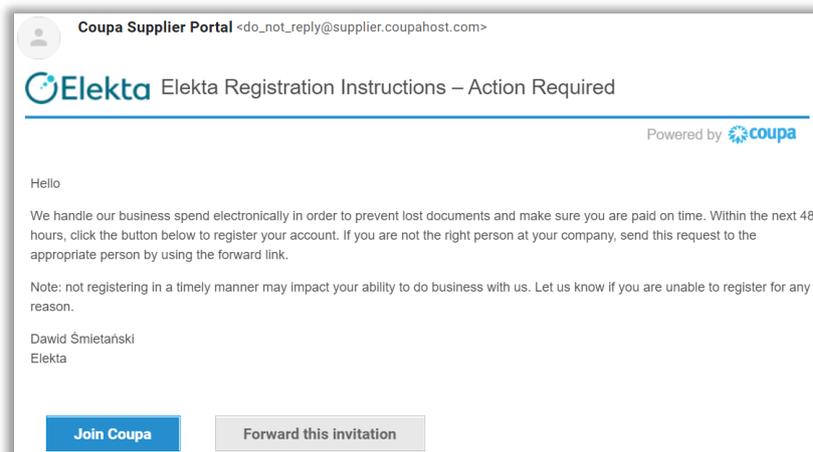
2. Please note that the steps below may differ depending on your country.
   Create a password for your account. Please note that Elekta does not store or reset your password. In case you forget your password, follow this link.
   To continue, accept the Privacy Policy and Terms of Use, and then press the **Get Started** button.

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

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

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

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

* Legal Entity Name	UK MasterTech	
Country/Region	United Kingdom ⌄	
* Type of Company	Limited Company	*i*
Board of Directors	Mark Winston	*i*

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

Cancel   **Save & Continue**

c) Fill below fields (fields marked with * are mandatory. For more information, hover a mouse over *i*):
   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

REQUIRED FOR INVOICING

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

☑ **Use this address for Remit-To** *i*

☑ **Use this for Ship From address** *i*

What is your Tax ID?

Country/Region	United Kingdom ⌄ ✕
* VAT ID	

☐ I don't have a VAT/GST Number

Add additional Tax ID

4 Miscellaneous

Invoice From Code	*i*
Preferred Language	English (UK) ⌄

Cancel | **Save & Continue**

---

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 Address ⌄

What is your Remit-To Address?

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

Cancel | **Save & Continue**

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.** ⓘ
• 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.