How to create an invoice in CSP

This document describes how to create an Invoice in the Coupa Supplier Portal (CSP)

**STEPS**

1. Log in to Coupa Supplier Portal (CSP). Go to the navigation bar at the top and click on **Orders**.

2. After opening **Orders**, you can see all the orders sent to your company. Ensure that Elekta is a selected customer.

Purchase orders can be found in the **PO Number** column (1) or by searching for the order number using the **search bar** (2). After finding the purchase order for which you want to create an invoice, click on (3) in the **Action** column to start creating an invoice (is used for credit note creation).

Note: If you see the below window, you need to set up your legal entity and Remit-to address. In such case, please follow the instruction on how to set up your account in the Coupa Supplier Portal.
3. The invoice creation has started. In this page:
   a) As a minimum, complete the mandatory fields marked with a red asterisk*:
      1) **Invoice #** - a unique invoice number issued by your company to Elekta
      2) **Invoice Date**
      3) **Currency**
      4) **Image Scan** – **IMPORTANT**: Do NOT attach any invoice copy as a legal PDF invoice will be generated in Coupa after you click ‘Submit’. This PDF invoice will be the legal invoice.
      5) **Cash Accounting Scheme & Margin Scheme** - These fields are not used by Elekta
      6) **Exchange Rate** – the field will appear if the invoice is in a currency other than PO. In this case, enter the exchange rate
      7) **Supplier VAT ID, Invoice/Remit-to/Ship From** addresses are taken from the company information you provided to the system. The magnifying glass icon (🔍) allows you to change the information.

   ![Invoice Creation Interface](image)

   b) It is required to fill in the **Buyer VAT ID** field (Elekta’s VAT ID) from the drop-down list. The **Buyer VAT ID** must indicate the country of delivery.

   ![Invoice Information](image)

   c) Below you can find all purchase order lines that can be invoiced. Review which lines you want to invoice and delete unnecessary lines by pressing **❌**.
   You can adjust:
      1) **Qty** – The number of items you want to invoice (some POs may not have this field present)
      2) (Net) **Price** - **Important**: It is extremely important to check the price/quantity to ensure you are invoicing the correct amount. You can partially invoice by editing these values.
      3) **Total net line price** – calculated based on **Qty** (if present) and **Price** fields. The value updates after pressing the **Calculate** button at the bottom of the screen
      4) **Taxes (VAT Rate)** – select the Tax Rate here
d) Below all cost lines, you can find buttons for allowing you to add new lines (e.g. miscellaneous cost).

![Add Line and Pick lines from PO]


e) At the bottom of the screen you can find the summary of the entire invoice cost, with place to include **Shipping Cost** and **Tax Rate for Shipping Cost**. Once you have finished creating the invoice, click **Send** to send the invoice to Elekta.

![Invoice Summary]

f) The system requires confirmation of the invoice creation. To confirm this action, press the **Send Invoice** button. The invoice is now in the Elekta overview and its status can be checked at the top in the **Invoices** section.

![Confirm Invoice Creation]

4. To write or review invoice comments, scroll down to the Comment section. Supplier should only write messages to the Elekta Accounts Payable team. To tag the Accounts Payable team, write "@" + **Accounts Payable** and select a group from the drop-down list. Please note that we only allow tagging of Accounts Payable members/groups. Other users/teams should not be contacted through CSP.

Depending on your region, you should contact the correct team:
- **Accounts Payable EBS** – suppliers from all countries except China, Japan, and Korea
- **Accounts Payable CN** – Chinese suppliers (depending on the Company you are invoicing)
- **Accounts Payable JP155** – Japanese suppliers
- **Accounts Payable KR485** – Korean suppliers