# Reviewing invoices

Updated 8 March 2022

Invoices waiting to be processed by you can be found under **Invoices** in the blue menu bar or directly in the **To handle/Invoices** box.

You can review an invoice directly from the list view or in a more detailed invoice view.

Click the invoice to open a billing details line; if you need several lines, use the detailed invoice view (see **Open invoice details** below).

The invoice view displayed to the right can be enlarged and opened in a new window. If the invoice has several pages, you can browse between them.

At the far right of the billing details line, you will find different symbols depending on what happened to the invoice, e.g. a paperclip if something was appended to the invoice and a speech bubble if a comment was added.
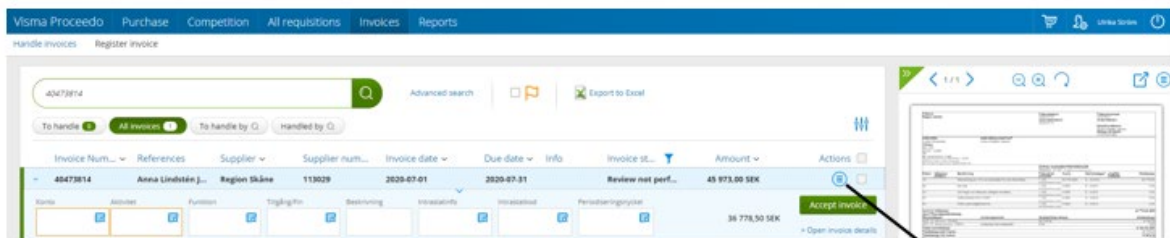
By clicking the action symbol, you can choose to forward the invoice if it is not yours by selecting **Choose another reviewer** and search to find the appropriate recipient of the invoice. You can read and write comments under **Show log & comments.**
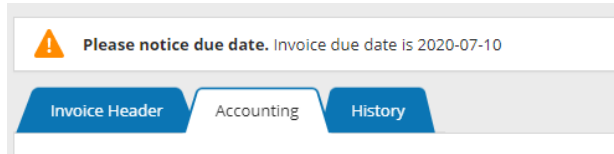**NB:** When you have added a new comment you must click **Save changes** to save the comment.

To open a more detailed view of the invoice, select **Open invoice details** from the action menu or double-click the invoice directly in the list.

Files can only be attached from the detailed view.

If the invoice is soon due, a message will appear in the top left-hand corner:

Under the **Invoice header** tab, you can check to make sure that the correct payment information etc. has been retrieved from the invoice.

Under the **Accounting** tab, the account and activity to be charged shall be stated. These fields are mandatory.
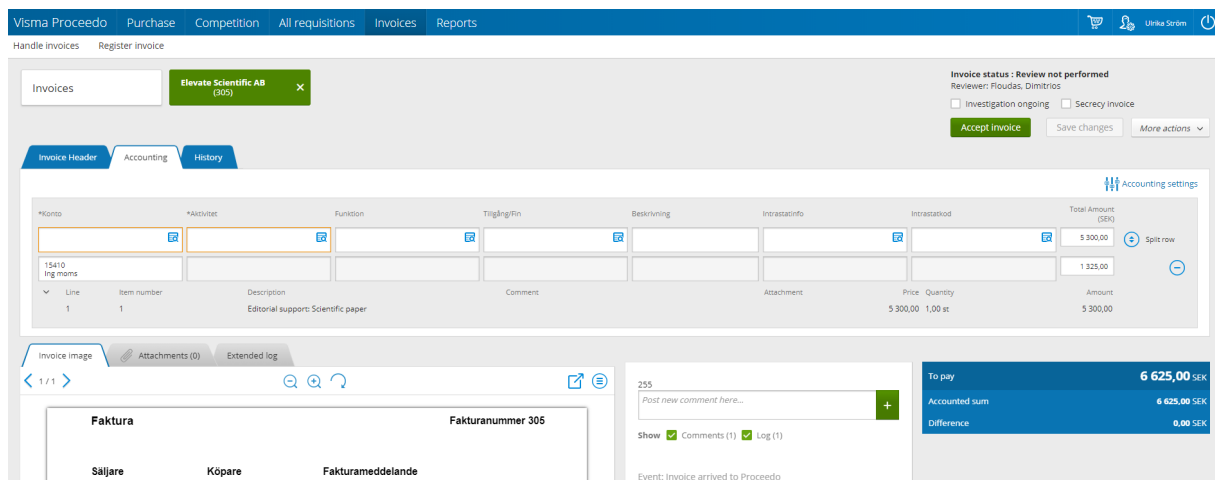
There is a guide for choosing an account available in the **Shortcuts** box on the home page.

Here you will also find a shortcut to the account code system on the Finance Pages.

If you have not done so already, make sure that in connection with account-assigning an invoice you select your favourites, i.e. the accounts and activities you use most. Make your selection when the search box for the respective accounting values is displayed. The values marked as favourites are displayed at the top of the selection list. Several values can be marked as **Favourite**, but only one value can be marked as **Default**. A default value can always be changed.

The **Funktion** (Function), **Tillgång/Fin** (Asset) and **Beskrivning** (Description) fields are optional and used as follows:

Funktion – to divide costs into more levels than just activity

Tillgång/Fin – if the purchase refers to an asset prone to theft that is to be listed in the holding register, select value 999, only in combination with account number 63* or 64*

Beskrivning – provide brief information about the content of the invoice, the text will be visible in financial system follow-ups.

If VAT is stated on the invoice, it has already been charged. Make sure that the correct amount is specified based on the invoice and on applicable VAT rules.

You can add more account-assigning lines through **Split row**; the amount can also be distributed by percentage.

To add an attachment, select the **Attachments** tab with a paperclip, remember that the information should limited and leave out any unnecessary details.

When account details have been set, select **Accept invoice**. If you only want to save your registrations and return to the invoice later, click **Save changes**.

If the invoice is not correct you can place it under review; contact the supplier for any billing details. It is important that the **Investigation ongoing** function is used together with a comment about the error and what measures have been taken.
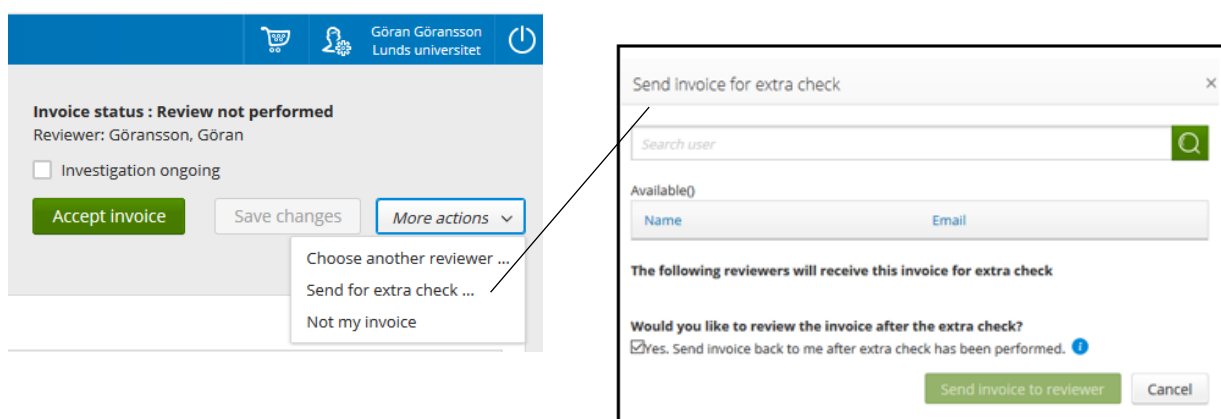
Under **More actions** you will find **Send for extra check,** among other options. This option can be used if you need to obtain information from a person other than the approving officer/s. Find the person to whom you want to send the invoice. If you want the invoice returned to you after being checked again, leave the relevant box ticked; if you untick the box the invoice will go directly to the approving officer after a second check. In the comments box, specify what you want checked.

The person who performs an additional check can only enter a comment, attach any supporting documents, place the invoice under review and mark the invoice as checked.
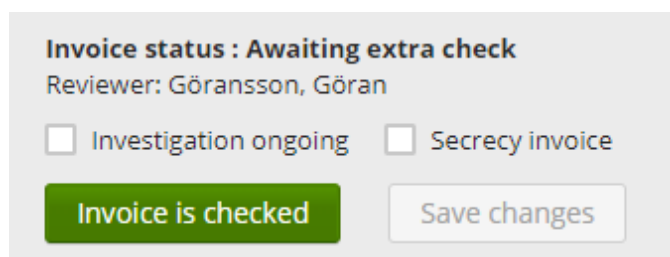
Invoices for items that you have ordered via Lupin will be matched against the order and your approved delivery confirmation. If everything is correct, the invoice does not need to be handled but will automatically receive the status **Ready** and is displayed under **All invoices**. An invoice that is marked **Ready** is sent to the bank for payment on the due date.

When the invoice is paid, the paid invoice symbol will appear in the information column.

Hover over the symbol and the invoice payment date will be displayed.

If an invoice deviates from the items/amount on the delivery receipt or if an extra cost has been added, you will receive the invoice for review with the status of **Review not performed (order match)**; the invoice will be available under **To handle**.

Example of when an order is not yet confirmed as delivered and the supplier has overcharged you:

First you have to confirm the delivery and then an inquiry should be made about the discrepancy. You may need to contact the supplier and ask why they invoiced another amount than was stated at the time of order.

In order for the invoice to be paid, the entire amount must be accounted, after which the invoice must be approved. If the invoice contains errors, the supplier must be contacted and credit the amount.

When should the confidentiality marking be used?

Confidentiality marking is used when an invoice, including any attachments, contains sensitive information or personal data that needs to be hidden. Remember to never use sensitive information in the description text on an invoice, as this information is not hidden in the financial system. To mark an invoice as confidential, contact the Division of Finances via https://forms.eken.lu.se/.

Contact

Division of Finance:

Support form: https://forms.eken.lu.se/?Sprak=e