Reviewing Invoices in Lupin Proceedo

Contents

What does reviewing an invoice entail? 1
Reviewing invoices 2
Assign an account code to your invoice 3
Add a comment 4
Add an attachment 4
More actions 4
  Choose another reviewer 5
  Send for extra check 5
  Not my invoice 5
Investigation ongoing 5
When will my invoice be paid? 5
Confidentiality, Secrecy invoice 6
Support 6

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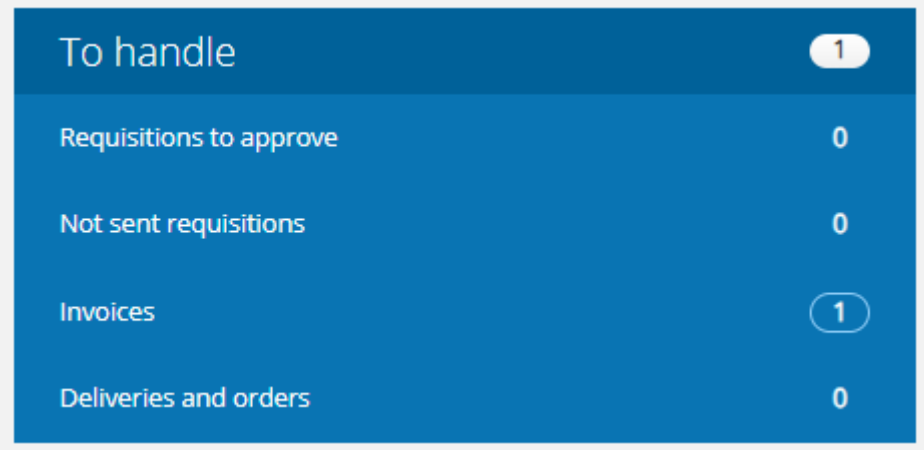
What does reviewing an invoice entail?

The reviewer of an invoice certifies that the amount invoiced matches the goods or services supplied, that prices and conditions are in accordance with the contract or agreement, and that the supplier, amount and method of payment are correct.

You will receive an email when you have an invoice to review.

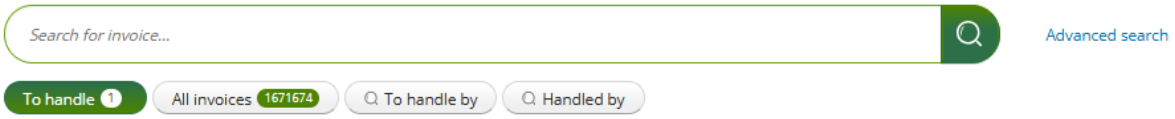
Reviewing invoices

When you log in, there are two ways to access your unprocessed invoices: on the home page in the left-hand column under **“To handle”**, or via the main menu at the top under **“Invoices”**. If you have invoices for processing, the number of invoices is shown under “To handle”.

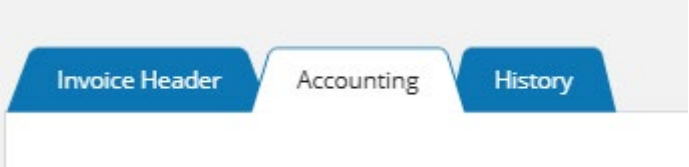


In the invoice view, you can search for invoices received in Lupin/Proceedo. The list can be sorted by column using the arrows next to the column name.

To handle includes invoices that you are expected to process.



When you open the invoice, you will see a menu with **Invoice header**, **Accounting** and **History**.



The **Invoice header** tab contains details of the invoice, supplier, payment method and payment terms.

Under the **Accounting** tab, you enter your account code. Fill in the mandatory accounting values for account and activity, see heading **Assign an account code to your invoice**.

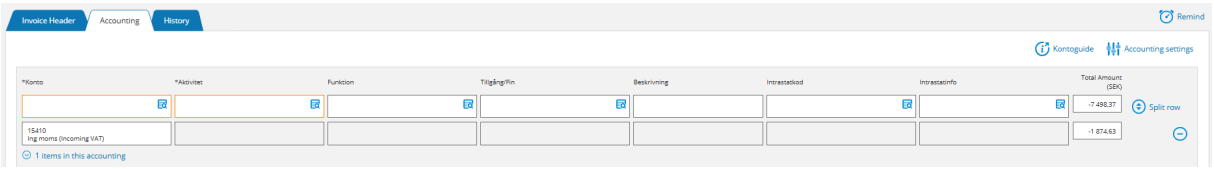
History gives you an overview of what has happened on the invoice.

Assign an account code to your invoice

As the person reviewing the invoice, you must always specify the account and activity.

Tip:
You can search for values using both text and numbers.

If you have not done so already, select your favourites – the accounts and activities you use most. Options marked as favourites are displayed at the top of the selection list. If you have marked a value as default, this is entered automatically. You can only have one default value. This is recommended if you always use the same account code. It is possible, however, to have several favourites.



Konto (Account)
Specify what the purchase is for.

Aktivitet (Activity)
Specify which activity will bear the cost.

Beskrivning (Description)
Specify what the purchase is for. The text is included as a verification text in our financial system and helps our accountants understand what the purchase is for.

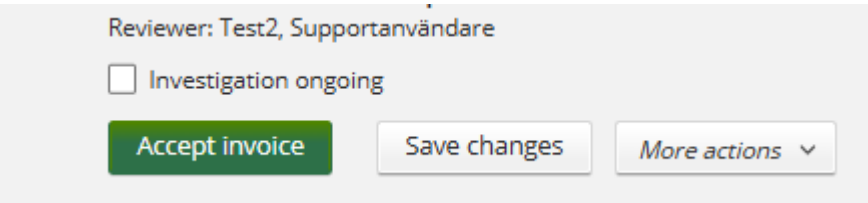
Optional fields are used as follows:
Funktion (Function)
To divide costs into more levels than just activity.

Tillgång/Fin (Asset)
If the purchase refers to an asset prone to theft that is to be listed in the holding register, select value 999. Only to be used in combination with account 63* or 64*.

Make sure that the correct VAT is specified based on the invoice and on applicable VAT rules.

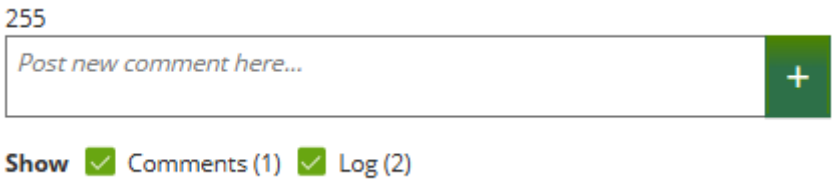
You can add more account-assigning lines through **Split row**; the amount can also be distributed by percentage.

When account details have been set, select **Accept invoice** in the top-right corner. If you only want to save your changes and return to the invoice later, click on **Save changes**.



Add a comment

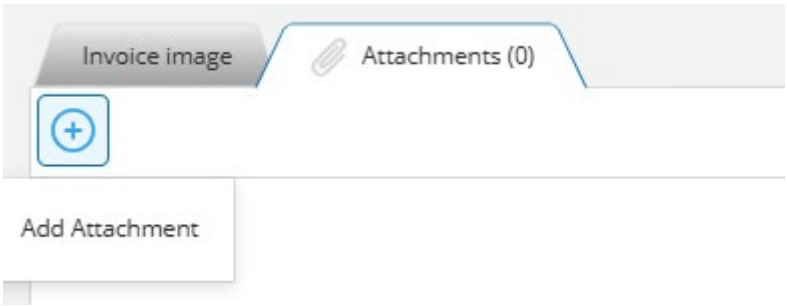
A comment can be entered for several reasons, for example to provide information to the approving officer or to indicate participants in the event of entertainment. To save a comment, press Enter and then select **Save changes** or **Accept invoice**.



Add an attachment

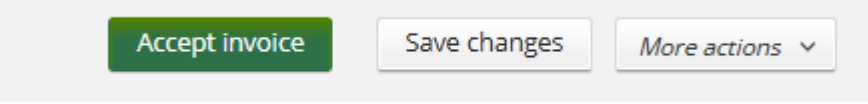
Some purchases require a document to be attached to your invoice, for example when travelling.

To add an attachment, select the **Attachments** tab next to the invoice image.



More actions

Under More actions at the top right of the screen, you will find Send for extra check or Choose another reviewer, among other options.



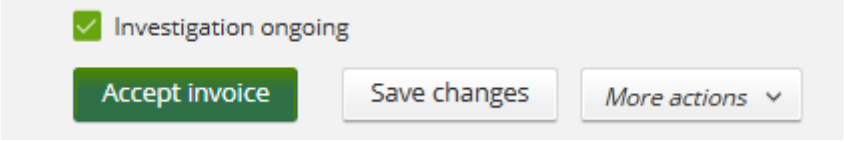
Choose another reviewer
If you need to send the invoice to another reviewer, select More actions followed by Choose another reviewer. Search for your colleague in the list.

Send for extra check
This option can be used if you need to obtain information from a person other than the approving officer(s). Find the person you want to send the invoice to. 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, provided that the invoice has been assigned an accounting code. In the comments box, specify what you want to be checked.

Not my invoice
If it is not your invoice, select **More actions** in the top-right corner and then **Not my invoice**. Don't forget to add a comment on why the invoice is not yours.

Investigation ongoing

If the invoice is not correct, you can mark it as **Investigation ongoing.** Contact the supplier for possible credit. It is important that the **Investigation ongoing** function is used together with a comment about the error and what measures have been taken.



When will my invoice be paid?

For an invoice to be paid, it must be finalised and have the status "Ready".

Remember not to wait until the due date to process your invoices – they need time to be reviewed and approved.

When the invoice is paid, a EURO symbol will appear in the information column. Hover over the symbol to see the invoice payment date.

The Division of Finances will send a file to the bank, normally on Mondays, Wednesdays and Fridays.
The bank monitors and makes the payment on the due date.

The return and payment marking are retrieved from the bank the day after the payment date and payment marking is then done in the financial system. The next day, the payment marking will be shown on the invoice in Lupin/Proceedo.

Confidentiality, Secrecy invoice

Confidentiality marking is used when an invoice, including any attachments, contains sensitive information or personal data that needs to be hidden. Remember never to 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/**Secrecy invoice,** contact the Division of Finances via the support form.

Support

If you have questions about invoices, please contact the Division of Finances via the support form.