E-Settlement – Create a Self Service Invoice copy from PO.
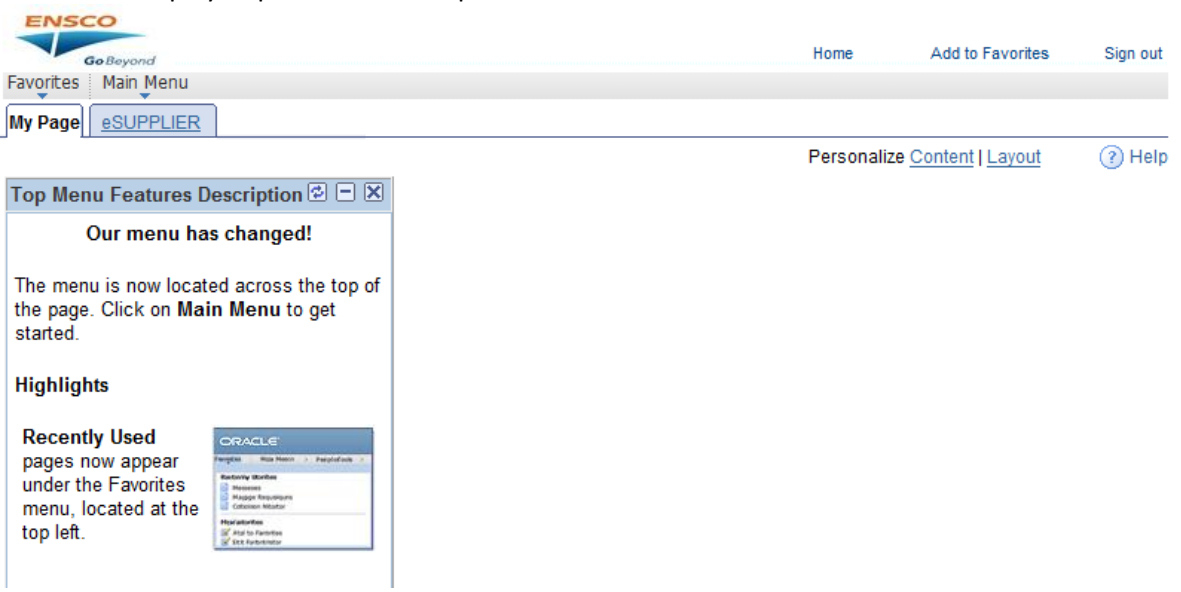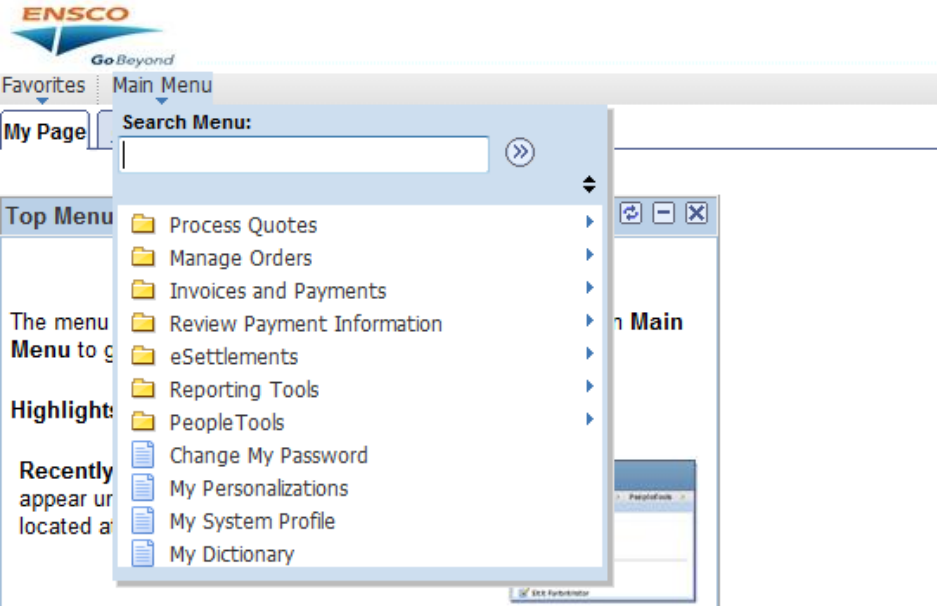
1.	Enter the desired information into the User ID field. Enter a valid value e.g. "**35461janedoe**".
2.	Enter the desired information into the Password field. Enter a valid value e.g. "**123456**".
3.	Click Sign In Sign In
4.	Screen will display as per Screen Set-Up Instructions
5.	Click the Main Menu tab

6.	Click **Invoices and Payments** link then click **Self-Service Invoice**.

7.	Click the **Create Invoice** button.
	Create Invoice
	Create a new invoice.
	Now the Create Invoice / Invoice Entry Page will show:

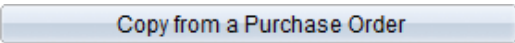| 8.	The following fields should be defaulted in; you can use the drop down icon [▾] or the search icon 🔍 to make a different selection. Supplier Location Invoice Date (Default to current date) Currency (Default to USD) **Please Note: If you have more than one location, you must select the Location first (use the drop down) to display the location you want to invoice.**
9.	Enter the Invoice information into the ***Invoice ID** field, example "**MAR3012**". This would be your invoice number. *Invoice ID: [ ] **NOTE: This number must be unique with <u>no use of special characters or spaces.</u>**
10.	Make any changes to the **Invoice Date;** system will default to current date. *Invoice Date: 06/19/2014 📅
11.	Click the [**Copy from a Purchase Order**] button. **Please Note**: if you have more than one location, you must select the Location first (use the drop down) to display the location you want to invoice or the above [Copy from a Purchase Order] button will not be active. Then the Look up Purchase Order page will appear: **Create Invoice** **Look Up A Purchase Order** **Search Criteria** Buyer: Supplier: 0000035461 VALUED SUPPLIER PO Unit: [ ] 🔍 PO Number: [ ] 🔍 *PO Date: No Date ▾ [ ] PO Buyer: [ ] 🔍 Item ID: [ ] 🔍 PO Line Number From: [ ] Description: [ ] 🔍 PO Line Number To: [ ] Search Results Display: ○ Header ⦿ Detail [Search] [Clear] Return to Invoice Details

| 12. | Enter the information into the **PO Unit** and **PO Number** fields. The PO Number must include the leading zeros.

NOTE: The above data can be found on the purchase order. You can also use the search icon 🔍 next to the field to assist you with looking up this information if you do not know it.

Important: If you are not able to locate the PO Number you are trying to invoice, you must check internally with your sales team to ensure they have acknowledged/accepted the PO in our E-Supplier System. If a PO has not been acknowledged you will not be able to invoice.

Create Invoice
Look Up A Purchase Order

Search Criteria
Buyer:
Supplier: 0000035461 VALUED SUPPLIER
PO Unit: 10013 ENSCO Incorporated
PO Number: 0000326385
*PO Date: No Date
PO Buyer:
Item ID: PO Line Number From:
Description: PO Line Number To:
Search Results Display: ○ Header ● Detail
[Search] [Clear] |
|---|---|
| 13. | Click the [Search] button. |
| 14. | The Search Results will be displayed under the search criteria, select the PO line you want to invoice, or use the Select All link to select all the lines.

Purchase Order — First ◄ 1 of 1 ► Last
PO No: 0000326385 PO Date: 06/04/2014
PO Unit: 10013 PO Total: $2,007.00 USD
PO Buyer

PO Lines — Personalize | Find | 📄 | 🔢 First ◄ 1 of 1 ► Last

SI line No	Select	Item ID	Description	Unit Price	UOM	Quantity	Merchandise Amt	Curr	Sched	Line	PO Qty
1	☑	0000349	BAG-GAS,SHAFFER,0000349,VALVE-	334.50	EA	6.0000	2007.00	USD	1	1	6.0000

☑ Select All ☐ Clear All
[Copy To Invoice] |
| 14. | Click the [Copy To Invoice] button. |

15.	Now the Invoicing Details will appear. To review more information about the PO you can click the various tabs **Additional Information**, **PO Details**, **Receiver Details**, to see this information.

Also, review and confirm the Quality information is correct. You can invoice partial quantity.

Invoice Details		Personalize | Find | View All | 🔲 | 🎞	First ◀ 1 of 1 ▶ Last

| Invoice Lines | Additional Information | PO Details | Receiver Details |

Item ID	PO Unit	Description	Quantity	UOM	Unit Price	*Merchandise Amt	PO Number	Curr	
0000349 🔍	10013	BAG-GAS,SHAFFER,000 🔍	6.0000	EA 🔍	334.50000	2,007.00	0000326385	USD	➖

16.	At the bottom of the page there is a button called [Attachments]. Here you can go in and add an attachment such as a hard copy of your invoice.

Invoice Details		Personalize | Find | View All | 🔲 | 🎞	First ◀ 1 of 1 ▶ Last

| Invoice Lines | Additional Information | PO Details | Receiver Details |

Item ID	PO Unit	Description	Quantity	UOM	Unit Price	*Merchandise Amt	PO Number	Curr	
0000349 🔍	10013	BAG-GAS,SHAFFER,000 🔍	6.0000	EA 🔍	334.50000	2,007.00	0000326385	USD	➖

Settlement Information

Payment Terms:	NET 60 DAYS	Total Amount:	2,007.00 USD ♻
Payment Method:	Automated Clearing House	Sales Tax Amount:	0.00 USD
			USD
		Misc. Charge Amount:	0.00 USD 📲
		Gross Amount:	2,007.00 USD

[Save and Submit]   [**Attachments**]
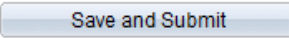
Once you click the button this page will pull up:

Self Service Invoice Attachment

Business Unit	10013	Voucher ID

Details					Personalize | Find | View All | 🔲 | 🎞 First ◀ 1 of 1 ▶ Last
File Name	Description	User	Name		Date/Time Stamp
View					➖

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

[**Add Attachment**]

[**OK**] [Cancel]

Click the **Add Attachment** button and add you attachment. Then click the **OK** button.

17.	Check to make sure everything is correct on the Invoice then press the [Save and Submit] button.

Invoice Header Information

*Supplier:	VALUED SUPPLIER	Voucher ID:	NEXT
Location:	HOUSTON	*Buyer:	ENSCO Incorporated
	5847 SAN FELIPE ST STE 3800 HOUSTON, TX 77057 USA		P.O. Box 570788 HOUSTON, TX 77257-0788 USA
*Invoice ID:	MAR3012	Currency:	USD US Dollar
*Invoice Date:	06/19/2014	Requester:	

[Add a New Invoice Line] [Copy from a Purchase Order]

Invoice Details

Personalize | Find | View All | First 1 of 1 Last

Invoice Lines | Additional Information | PO Details | Receiver Details

Item ID	PO Unit	Description	Quantity	UOM	Unit Price	*Merchandise Amt	PO Number	Curr	
0000349	10013	BAG-GAS,SHAFFER,000(	6.0000	EA	334.50000	2,007.00	0000326385	USD	−

Settlement Information

Payment Terms:	NET 60 DAYS	Total Amount:	2,007.00	USD
Payment Method:	Automated Clearing House	Sales Tax Amount:	0.00	USD
				USD
		Misc. Charge Amount:	0.00	USD
		Gross Amount:	2,007.00	USD

[Save and Submit]   [Attachments]

18.	Review the message; select the **OK** button when you are done.

Message

Selecting OK will Submit the invoice to the Buyer. Cancel will cancel submission to the Buyer. (18052,744)

Clicking on the Save and Submit button will edit and save the invoice. If the invoice passes all the edits and saves successfully, the invoice can no longer be modified, but it can be viewed.

Only a Buyer who can review Self-service invoices can modify the invoice.

[OK]   [Cancel]

16.	**End of Procedure** you have successfully created a Self Service Invoice copied from a PO.