

# eSettlements – Enter a PO Invoice

This quick reference guide (QRG) provides an overview and steps for entering a purchase order (PO) invoice into the eSettlements supplier portal.

The target audience for this QRG is all external suppliers who participate in Harris Health System's eSettlements program who have access to enter invoices.

## Overview

eSettlements is a process that allows you to enter and monitor invoices on a daily basis through a portal, resulting in more timely payments when all information is entered correctly. You can view the payment status of each invoice online and you no longer have to submit invoices via US mail unless Harris Health System requests it.

## Enter a PO Invoice

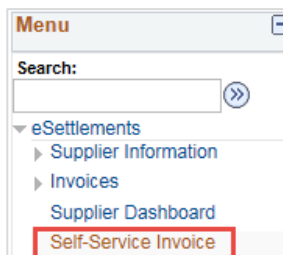
**Note:** Refer to *QRG – External Web Link* to access the eSettlements login page.

1. In the eSettlements login page, enter your **User ID** and **Password**, then click **Sign In**.



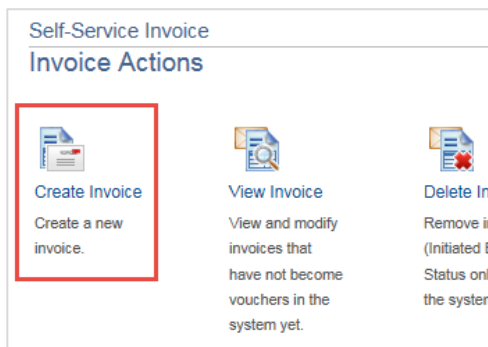
The screenshot shows the 'Login' section of the eSettlements portal. It includes a link for 'Already a Bidder or Supplier?', a prompt to 'Login here as an existing User.', input fields for 'User ID' and 'Password', a 'Sign In' button (highlighted with a red box), and a link for 'I forgot my password'.

2. In the eSettlements menu in the left pane, click **Self-Service Invoice**.  
**Note:** Click the **gray triangle** to the left of eSettlements to expand the menu, if needed.



The screenshot shows the 'Menu' section of the eSettlements portal. It features a search bar and a list of options: 'eSettlements' (expanded), 'Supplier Information', 'Invoices', 'Supplier Dashboard', and 'Self-Service Invoice' (highlighted with a red box).

3. On the Invoice Actions page, click **Create Invoice**.



The screenshot shows the 'Self-Service Invoice Invoice Actions' page. It features three main actions: 'Create Invoice' (highlighted with a red box), 'View Invoice', and 'Delete Invoice'. Each action includes a brief description of its function.

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4. In the **Buyer** field, enter **Harris** and press **Enter**.

5. Enter your company's **Invoice ID**.

6. Click **Copy from a Purchase Order**.

7. In the Look Up a Purchase Order page, enter **10000** for the **PO Unit**.

8. Enter or select the **PO Number**.

9. Click **Search**.

10. Check the **box** for the line with the purchase order.

11. Click **Copy to Invoice**.

12. In the Invoice Details section, confirm the populated line information and **Total Amount**.

13. Click **Save and Submit**.

**Note:** To save the invoice without submitting it, click **Save for Later**.

**Note:** Once submitted, you can view the invoice but cannot edit or delete it (see eSettlements QRG – Viewing PO Invoices.)

Invoice Header Information

\*Supplier SetID: SHARE

\*Supplier: YOUR COMPANY NAME

Location: 001

YOUR COMPANY ADDRESS

\*Invoice ID: [Red Box]

\*Invoice Date: 01/19/2018

VAT Treatment Group: [Red Box]

Voucher ID: NEXT

\*Buyer: [Red Box]

Currency: USD US Dollar

Requester: [Red Box]

Buttons: Add a New Invoice Line, Copy from a Purchase Order (Red Box), Copy from a Packing Slip

Create Invoice

Look Up A Purchase Order

Search Criteria

Buyer: 10000 Harris County Hospital Dist.

Supplier: 0000005389 PARTSSOURCE INC

PO Unit: 10000 [Red Box] Harris County Hospital Dist.

PO Number: 0001296110 [Red Box]

\*PO Date: [No Date]

PO Buyer: [Red Box]

Item ID: [Red Box]

Description: [Red Box]

Search Results Display: Header (Selected), Detail

Buttons: Search (Red Box), Clear

Search Results

Select	PO Business Unit	Purchase Order	PO Date	Supplier	Supplier Name	Gross
<input checked="" type="checkbox"/>	10000	0001198533	01/30/2017	0000005389	Your Company Name	

Buttons: Select All, Clear All, Copy To Invoice (Red Box)

Invoice Details

Invoice Lines

Item ID	Description	Quantity	UOM	Unit Price	*Merchandise Amt	Currency
	Tab Elect Adapter to Lead, pac	1.0000	PK	24.98000	24.98	USD

Settlement Information

Payment Terms: NET 30

Payment Method: System Check

Total Amount: 24.98 USD (Red Box)

Misc. Charge Amount: 0.00 USD

Gross Amount: 24.98 USD

Buttons: Save and Submit (Red Box), Save for Later, Attachments

**Note:** If you receive the error message below after clicking **Save and Submit**, your agreement does not allow standard vouchers (non-PO invoices). Return to step 6 and select a valid PO.

Message

Standard vouchers are not allowed; therefore matching is required: no purchase order ID exists. (18052,172)

The agreement does not support standard vouchers so all invoices being uploaded require a purchase order.

Button: OK