

## **Invoice Creation**

1. Sign in to the eSupplier Home Page using your credentials once the request is approved

| Pruit | tt Health        | ✓ Supplier Public Home Page                    | ሴ | :   |
|-------|------------------|--|---|-----|
|       | Sign In          | PruittHealth Supplier Portal User Registration |   | Ĭ   |
|       | -                | Sign In ×<br>User ID userid0001                |   |     |
|       |                  | Password View Registration Options.            |   |     |
|       |                  | Enable Screen Reader Mode                      |   |     |
|       | Announcements    | F Sign In                                      |   |     |
|       |                  | Forgot Password?                               |   |     |
|       | 01 Announcements | Get helpful information here.                  |   |     |
|       |                  | •  | ( | C , |

2. Select Supplier Secure Home Page as shown in the image below

| Pruitt-Health |                              | ✓ Supplier Public Hom                | e Page          |                               | ଜ : |
|---------------|------------------------------|--------------------------------------|-----------------|-------------------------------|-----|
|               | PruittHealth Supplier Portal | User Regis Supplier Public Home Page | e ncements      | FAQs   Contact Us             |     |
|               |                              | View Registration Options.           | 0 Announcements | Get helpful information here. |     |
|               |                              |                                      |                 |                               |     |
|               |                              |                                      |                 |                               |     |
|               |                              |                                      |                 |                               |     |
|               |                              |                                      |                 |                               |     |
|               |                              |                                      |                 |                               |     |
|               |                              |                                      |                 |                               |     |
|               |                              |                                      |                 |                               |     |





3. Select Invoices and Payments > Self Service Invoice

|                             |                            | ✓ Supplier Secure Home Page   |   | ŵ          | 1 : |
|-----------------------------|----------------------------|---|---|------------|-----|
|                             | Bidding Opportunities      | Manage Profile  | Manage Services   |            |     |
|                             | <b>*</b> •                 |   |   |            |     |
|                             | 0 Events                   | Update your Registration and Profile                                  | View and Manage Services                                      |            |     |
|                             | Quotes and POs             | Invoices and Payments   | Awarded Events  |            |     |
|                             |                            |   | <b>*</b> *  |            |     |
|                             | View Quotes and PO's       |   | 0 Award(s) in 90 days<br>0 Non Award in 90 days               |            |     |
|                             | Manage Contracts Documents |   |   |            |     |
|                             | <b>1</b>                   |   |   |            |     |
|                             | 0 Pending Review/Signature |   |   |            |     |
|                             |                            |   |   |            | _   |
|                             |                            |   |   |            | _   |
| Supplier Secure Home Page   |                            | Invoices and Payments   | _   | م          | 9 : |
|                             | Self Service Invoice       | Invoices and Payments   | Payment Inquiry   | ۵<br>ا     | 9 : |
| Suppler Secure Home Page    | Self Service Invoice       | Invoices and Payments<br>Invoice Inquiry                              | Payment Inquiry   | G          | 9 : |
| ✓ Suppler Secure Home Page  | Self Service Invoice       | Invoices and Payments<br>Invoice Inquiry                              | Payment Inquiry   | ۵<br> <br> | 9 : |
| ✓ Suppler Secure Home Page  | Setf Service Invoice       | Invoices and Payments Invoice Inguiry Upload Invoices                 | Payment Inquiry   | ۵<br>ا     | ) : |
|                             | Self Service Invoice       | Invoices and Payments Invoice Inguiry                                 | Payment Inquiry<br>ESS<br>Messages                            | ۵<br> <br> | 9 : |
| ✓ Suppler Secure Home Päge  | Self Service Invoice       | Invoices and Payments Invoice Inquiry                                 | Payment Inquiry   | ۵<br> <br> | 9 : |
| ✓ Suppler Secure Home Page  | Self Service Invoice       | Invoices and Payments Invoice Inquiry Upload Invoices Upload Invoices | Payment Inquiry<br>EEEE<br>Messages<br>Messages to Review     | ۵<br>      | 9 : |
| ✓ Suppler Secure Home Plage | Self Service Invoice       | Invoices and Payments Invoice Inquiry Upload Invoices                 | Payment Inquiry   | G          | 9 : |
| Suppler Secure Home Page    | Self Service Invoice       | Invoices and Payments Invoice Ingular Upload Invoices Upload Invoices | Payment Inquiry<br>Messages<br>Messages<br>Messages to Review | ۵<br>      | 9 : |

4. Click the plus (+) button to add a new invoice

| ✓ Invoices and Payments             | My Invoices |
|-------------------------------------|-------------|
| + 1                                 |             |
| There is no Invoice to display.     |             |
| Refine filters or add a new Invoice |             |
|                                     |             |
|                                     |             |
|                                     |             |
|                                     |             |

- 5. Step 1 of 3:
  - Summary page will be displayed
  - Supplier and Location are defaulted based on User's details
  - Invoice Date is defaulted to Current date
  - Invoice ID is required



• \*\*All fields can be updated/edited\*\*

| X Exit                                  | Self Service Invoice    |                                      |       |           |  |
|---|-------------------------|--------------------------------------|-------|-----------|--|
| 1<br>Summary                            | Ir                      | 2 3<br>nvoice Details Settlement Inf | ō     | Next >    |  |
| Step 1 of 3: Summary<br>Attachments (0) | ,                       |                                      |       |           |  |
| *Supplier                               | CREATIVE MULTICARE, I Q | *Buying Organization                 | ۹     | ]         |  |
| Location                                | H01 🗸                   | Currency                             | USD Q | US Dollar |  |
|   | PO BOX 1147             | Requester                            | ٩     |           |  |
|   | JONESBORO, GA 30237 USA |                                      |       | ,         |  |
| *Invoice ID                             |                         |                                      |       |           |  |
| Invoice Date                            | 08/19/2021              |                                      |       |           |  |
|   |                         |                                      |       |           |  |
|   |                         |                                      |       |           |  |
|   |                         |                                      |       |           |  |
|   |                         |                                      |       |           |  |
|   |                         |                                      |       |           |  |

a. Populate the **Buying Organization**. Click the magnifying glass icon for **Buying Organization** field

| X Exit  | Self Service Invoice   |   |       |           |
|---|--|---|-------|-----------|
| 1<br>Summary  | 2<br>Invoice Details   | 3<br>Settlement In                            | fo    | Next >    |
| Step 1 of 3: Summary<br>Attachments (0)<br>"Supplier<br>Location<br>"Invoice ID<br>Invoice Date | CREATIVE MULTICARE, I Q<br>HO1 V<br>PO BOX 1147<br>JONESBORO, GA 30237 USA | *Buying Organization<br>Currency<br>Requester | USD Q | US Dollar |

b. From the Buying Organization Lookup page, click Search Criteria to show other options

## eSupplier Guide *How to Enter an Invoice*

| X Exit              | Cancel                           | Lookup                                       | :         |
|---------------------|----------------------------------|--|-----------|
| (1)—                | Search for: *Buying Organization |  |           |
| Summary             | Search Criteria                  |  |           |
|                     | ✓ Search Results                 |  | Next >    |
|                     |                                  | Only the first 300 results can be displayed. |           |
| Step 1 of 3: Summar |                                  | 300 rows                                     |           |
| Attachments (0)     | Buyer ID 🛇                       | Buyer Name 🛇                                 |           |
| *Supplier           | CC449                            | Crossroads                                   |           |
| Location            | CM042                            | PruittHealth Community Service               | US Dollar |
|                     | HC060                            | PH @ Home - Blue Ridge                       |           |
| *Invoice ID         | HC066                            | PH @ Home - Griffin                          |           |
| Invoice Date        | HC067                            | PH @ Home - Warm Springs                     |           |
|                     | HC069                            | PH @ Home - Atlanta                          |           |
|                     | HC070                            | PH @ Home - Home Office                      |           |
|                     | HC081                            | PH @ Home - Monroe                           |           |
|                     | HC083                            | UHC of Cobb                                  |           |
|                     |                                  |  |           |

- c. In the **Buyer Name** field, input the buyer's name.
  - If unsure of the exact **Buyer Name**, use the % sign to perform wildcard search.
  - See sample below in searching for buyer with "Union" as the keyword.

| X Exit          | Cancel   | Lookup                  |                | :         |
|-----------------|--|-------------------------|----------------|-----------|
| 1<br>Summary    | Search for: *Buying Organization               |                         | Show Operators |           |
|                 | Supplier SetID<br>(begins with)<br>Supplier ID | SHARE                   |                | Next >    |
| Attachments (0) | (begins with)<br>Buyer ID<br>(begins with)     |                         | 1              |           |
| *Supplier       | (begins with)                                  | %Union%<br>Search Clear |                | US Dollar |
| Location        | ✓ Search Results                               |                         |                |           |
| *Invoice ID     |  |                         |                |           |
| Invoice Date    |  |                         |                |           |
|                 |  |                         |                |           |
|                 |  |                         |                |           |
|                 |  |                         |                |           |

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d. List of buyers based on the keyword will be displayed

| X Exit              | Cancel  | Lookup                       | 2      | :         |
|---------------------|---|------------------------------|--------|-----------|
| 1<br>Summary        | Search for: *Buying Organiza<br>> Search Criteria<br>- Search Results | tion                         |        | Next >    |
| Step 1 of 3: Summar | Buyer ID 🗘  | Buyer Name 🛇                 | 6 rows |           |
| Attachments (0)     | PP157   | Heritage Properties Union Co |        |           |
| *Supplier           | HC085   | PH @ Home - Union City       |        |           |
| Location            | SO304   | PH Home First Union City     |        | US Dollar |
|                     | HS302   | PH Hospice Union City        |        |           |
| *Invoice ID         | SN368   | PruittHealth - Union Pointe  |        |           |
| Invoice Date        | PP230   | Union County Retirement Comm |        |           |
|                     |   |                              |        |           |

e. Select the Buyer ID to populate the **Buying Organization**. User will be directed back to **Step 1 of 3 Summary** page.

| X Exit  | Self Service Invoice   |  |           |  |  |
|---|--|--|-----------|--|--|
| 1<br>Summary  | 2<br>Invoice Details Settlement In   | fo   | Next >    |  |  |
| Step 1 of 3: Summary<br>Attachments (0)<br>"Supplier<br>Location<br>"Invoice ID<br>Invoice Date | CREATIVE MULTICARE, I Q     "Buying Organization       H01 ~     PO BOX 1147       JONESBORO, GA 30237 USA     Currency       TEST_INVOICE_01     Requester       08/19/2021     Image: Contemport | Heritage Properties Union Q<br>1626 JEURGENS CT.<br>NORCROSS, GA 30093 USA<br>USD Q<br>Q | US Dollar |  |  |

f. Once all required fields (\*), including the attachments, are populated, click **Next** button to go to **Invoice Details** 



6. Step 2 of 3: Invoice Details. Click on Add Line to add Invoice Details

| X Exit Self Service In  | voice  |                      | :        |
|---|--|----------------------|----------|
| 1<br>Summary  | 2<br>Invoice Details                                 | 3<br>Settlement Info |          |
|   |  |                      | Previous |
| Step 2 of 3: Invoice D<br>There are no Invoice Lines t<br>Add Line Copy Pur | Details<br>o Display.<br>chase Order Copy Packing SI | ip                   |          |

- a. Quantity by default is 1 if not populated
- b. **Unit Price** (Mandatory) = Amount per unit
- c. Line Amount (Auto Calculated) = Quantity x Unit Price

d. Populate all fields needed in this page. After populating these fields, click **Done**. Note that multiple lines can be added by clicking the **Add Line** button again.

| Cancel       | Update    | Line Done |
|--------------|-----------|-----------|
| Line         | 1         |           |
| Item ID      | ۹         |           |
| Description  | ٩         |           |
| Quantity     |           |           |
| UOM          | ٩         |           |
| *Unit Price  | 100.00000 |           |
| *Line Amount | U         | D         |
| Comments     |           |           |



e. Once **Invoice Details** are input, click the **Next** button to proceed with **Step 3: Settlement Info** 

| X Exit   | Self Service Invoice |                                     |                      |             |                 |  |  |  |
|--|----------------------|-------------------------------------|----------------------|-------------|-----------------|--|--|--|
| 1<br>Summary                                   |                      | 2<br>Invoice Details                | 3<br>Settlement Info | _           |                 |  |  |  |
|  |                      |                                     |                      | <           | Previous Next > |  |  |  |
| Step 2 of 3: Invoice                           | Details              |                                     |                      |             |                 |  |  |  |
| Add Line Copy Purchase Order Copy Packing Slip |                      |                                     |                      |             |                 |  |  |  |
| Invoice Lines                                  |                      |                                     |                      |             | 2 rows          |  |  |  |
| Edit   |                      |                                     |                      |             |                 |  |  |  |
| Line $\diamond$ Item $\diamond$                | Description 🗘        | Quantity $\diamond$ Unit $\diamond$ | Unit Price 🗘         | Amount 🗧 Cu | rrency ≎        |  |  |  |
| 1  |                      | 1.0000                              | 100.00000            | 100.00 US   | D >             |  |  |  |
| 2  |                      | 1.0000                              | 123.00000            | 123.00 US   | D >             |  |  |  |
|  |                      |                                     |                      |             |                 |  |  |  |

7. **Step 3 of 3**: **Settlement Info**. Populate necessary values on this page. Click **Submit** once completed then **OK** when a pop-up appears.

| X Exit   | Self   | f Service Invoice    | :                   |  |  |  |  |
|--|--|----------------------|---------------------|--|--|--|--|
| 1<br><u>Summary</u>  | 2<br>Invoice Details   | 3<br>Settlement Info |                     |  |  |  |  |
|  |  |                      | Previous     Submit |  |  |  |  |
| Step 3 of 3: Settlement Info   |  |                      |                     |  |  |  |  |
| Payment Terms  | NET60  |                      |                     |  |  |  |  |
| Payment Method   | System Check   |                      |                     |  |  |  |  |
| Total Amount   | 223.000  | USD                  |                     |  |  |  |  |
| Shipping Amount  |  | USD                  |                     |  |  |  |  |
| Miscellaneous Charges  | 0.00 USD   |                      |                     |  |  |  |  |
| Gross Amount   | 223.00 USD   |                      |                     |  |  |  |  |
|  |  |                      |                     |  |  |  |  |
|  |  |                      |                     |  |  |  |  |
| Selecting OK will Submit the invoice. Cancel will cancel submission                |  |                      |                     |  |  |  |  |
| Once the invoice is submitted, it can no longer be modified, but it can be viewed. |  |                      |                     |  |  |  |  |
| Only a Buyer Use   | Only a Buyer User who can review Self-service invoices can modify the invoice. |                      |                     |  |  |  |  |
|  | ОК   | Cancel               |                     |  |  |  |  |

8. Once submitted, a notification will appear stating that the invoice has submitted successfully.