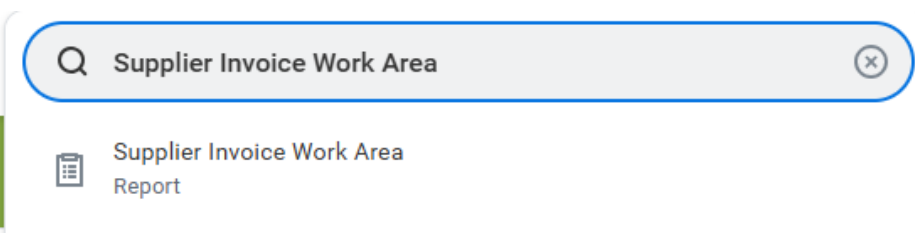
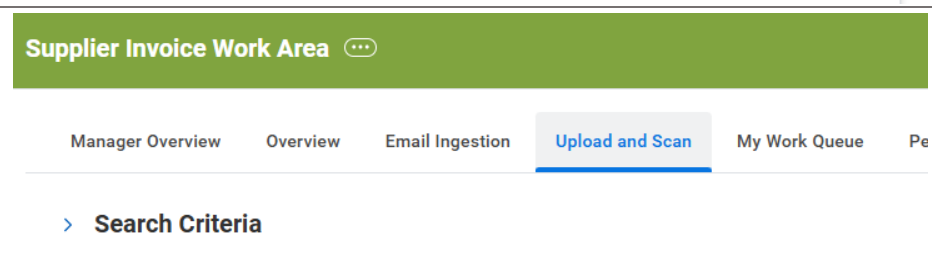
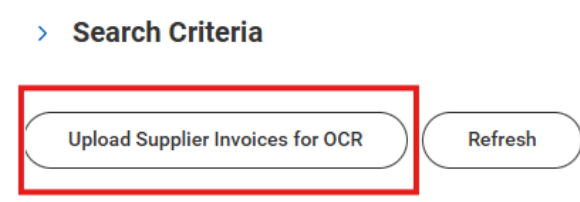


Audience / Role	Accounts Payable Data Entry Specialist Department Accountant (Unconstrained)
Description	This job aid provides instructions to create a supplier invoice using OCR and Invoice Scanning and with and without a Purchase Order (PO)
Before You Start	Make sure you are using OCR (Supplier Invoice Work Area to process Supplier invoices)

Create Supplier Invoice with OCR

Use for **Stand Alone Invoices** (519 Statutory Payments), **Invoices related to Purchase Orders**, or **Invoices Related to Contracts**. **OCR must be used for all Supplier Invoices**, and only **ONE vendor invoice** can be uploaded into a Kern360 Supplier Invoice.

1	In the Search bar, enter Supplier Invoice Work Area. Select the Supplier Invoice Work Area report from the search results.	
2	From the Supplier Invoice Work Area, navigate to the Upload and Scan tab.	
3	Select Upload Supplier Invoices for OCR.	
4	Complete the following fields: • Invoice Received Date – Enter date the invoice was received. • Company – Select Kern. • Assignee – Enter the person designated to process the invoice(s). This is usually the person uploading the invoice(s). • Apply to All Uploaded Invoices – Select this button if the entered information applies to all invoices being uploaded. If you do not select the Apply to all uploaded invoices, you will need to complete enter received dates, companies, and assignees for each invoice individually. Add Attachments by dragging and dropping files on the form or by clicking Select Files to search for and upload attachments on your computer. Select OK after adding attachments.	

> Search Criteria

Upload Supplier Invoices for OCR

Refresh

1 item

☐	Uploaded Invoice Status	Failure Reason	Progress	OCR Exceptions	Created by	Creation
☐	In Progress				Joseph Rosales	06/20/2

After uploading your invoice, you will see a screen like the image above.

NOTE: Uploads have a 50-attachment limit. Each attachment must be 15 pages or fewer, or the upload will fail.

Click **Refresh** until you no longer see the invoice in the Upload and Scan screen.

> Search Criteria

Upload Supplier Invoices for OCR

Refresh

To access a current invoice, select the **My Work Queue** tab then click **Search**.

Manager Overview Overview Email Ingestion Upload and Scan **My Work Queue**

Search

Refresh

Enter the name of the invoice assignee into the search filters. You can add more information to refine your search even more if you'd like.

5

After selecting **Search**, you should see search settings similar to the ones pictured right.

Click **Ok** after entering your search information.

Click on the button text below to navigate to the appropriate section for invoice type-specific instructions:

6A
[Stand Alone Invoice](#)

6B
[Invoice Against a Purchase Order](#)

6C
[Invoice Against a Contract](#)

Search Draft Supplier Invoices

Reset Search Criteria

Include Unassigned Invoices

Created by

Assignee

Supplier

Company

Work Queue Tags

Invoice Number

Supplier's Invoice Number

Purchase Order

External PO Number

Supplier Contract

Spend Category

Invoice Date On or After

Invoice Date On or Before

Invoice Due Date On or After

Cancel

OK

Stand Alone Invoice (519 Statutory Payments)

Click **edit** and complete all the necessary fields on the invoice form.

Required fields include:

- Supplier
- Remit To Connection (if the supplier is set up with any)
- Invoice Date
- Control Total Amount (your control total and invoice total must match to submit the invoice)
- Payment Term (should populate from the supplier record)
- Supplier Invoice Number - make sure the invoice number (from the supplier/vendor) is included in this section as this will appear on the check stub/ACH remittance sent to the vendor. The information entered in the "Memo" section will also appear on the check stub/ACH remittance.
- Statutory Invoice - Type on all Stand-Alone invoices (519 codes)
- Invoice Line Details:
 - Item Description
 - Spend Category
 - Ship to Address
 - Quantity
 - Unit of Measure
 - Unit Cost
 - Project Task when a trackable spend category is used.
 - Cost Center
- Attachment

To Be Processed Queue 2 items

☐	Edit	Override PO	Override Contract	Inbound Invoice Details	Supplier Invoice	Invoice Type	External Source	Invoice Number
☐		Override	Override	...		Supplier Invoice		SI2503865

Click **Submit**.

Invoice Against a Purchase Order – Eventually the OCR will learn to read the purchase order numbers from the invoices.

Click **Override PO**.

In the **Purchase Order** search box, you can search POs by supplier or by purchase order number. To verify you are selecting the correct purchase order, click the related actions box.

After selecting the correct purchase order, select **Search**.

The purchase order lines will come up and you can select the lines you are invoicing for, then click **Ok**.

Complete all the necessary fields. Because this is PO-related, a lot of the data entry will be done for you, and you will only need to

To Be Processed Queue 2 items

☐	Edit	Override PO	Override Contract	Inbound Invoice Details	Supplier Invoice	Invoice Type
☐		Override	Override	...		Supplier Invoice

Purchase Order

X 2512390 ...

Order Override

a purchase order from the list of suggestions

Supplier Invoice: SI2503865

Purchase Order Supplier

Search Results	Related Actions
PO2500905	...
2512390	...
2512372	...
2512310	...
2512250	...
2512249	...

Purchase Order

2512372

Status Issued
 Company Kern County
 Document Date 06/01/2025
 Purchase Order Type Conversion
 External PO Number 2512372
 Supplier Stinson Stationers
 Buyer Nicole Rosales
 Payment Terms (empty)
 Shipping Terms Destination
 Currency USD
 Supplier Contract (empty)
 Total Amount 13,068.68

Purchase Order Lines 1 item

Line	Description	Spend Category	Extended Amount
1	This purchase order does not alter the...more	10895C - Office Automation	13,068.68

confirm the data matches the invoice.

Required Fields Include:

- Supplier
- Remit To Connection if the supplier is set up with any
- Invoice Data
- Control Total Amount (your control total and invoice total have to match in order to submit the invoice)
- Payment Terms (should populate from the supplier record)
- Supplier Invoice Number - make sure the invoice number (from the supplier/vendor) is included in this section as this will appear on the check stub/ACH remittance sent to the vendor. The information entered in the "Memo" section will also appear on the check stub/ACH remittance.
- Invoice Line Details – make sure this matches the invoice as it will default from the PO
 - Item Description
 - Spend Category
 - Ship To Address
 - Quantity
 - Unit of Measure
 - Unit Cost
 - Project Task when a trackable spend category is used.
 - Cost Center
- Attachment

Click **Submit**.

Select Purchase Order Lines to be added

Total Line Count

Sum of Amount to Invoice for Selected Lines

Purchase Order Lines 1 item | 1 selected

☐	Purchase Order
☒	Company Kern County

Invoice Against a Contract – *The OCR does not currently learn to read contract number from the invoice.*

Click **Override Contract**.

Enter either the Contract number or the supplier name in the search box.

Select the correct contract number and click **Search**.

To Be Processed Queue 2 items

	Edit	Override PO	Override Contract	Inbound Invoice Details	Supplier Invoice	Invoice Type
☐		Override	Override	...	Q	Supplier Invoice

Supplier Contract

×
SC2500458 : 1120SC-STINSON STATIONERS
...
⋮

Search

6C

NOTE: To see more details for the contract, you can go to the related actions of the contract and right click.

The contract lines will come up and you can select the lines you are invoicing for.

Click **Ok**.

Complete all the necessary fields. Because this is contract related, a lot of the data entry will be done for you, and you are just confirming it matches the invoice.

Required fields include.

- Supplier
- Remit To Connection if the supplier is set up with any.
- Invoice Date
- Control Total Amount (your control total and invoice total have to match in order to submit the invoice)
- Payment Terms (should populate from the supplier record)
- Supplier Invoice Number- make sure the invoice number (from the supplier/vendor) is included in this section as this will appear on the check stub/ACH remittance sent to the vendor. The information entered in the "Memo" section will also appear on the check stub/ACH remittance.
- Invoice Line Details – make sure this matches the invoice as it will default from the PO
 - Item Description
 - Spend Category
 - Ship to Address
 - Quantity
 - Unit of Measure
 - Unit Cost
 - Project Task when a trackable spend category is used.
 - Cost Center
- Attachment

Click **Submit**.

Supplier Invoice Document for Edit Supplier Invoice: SI2503865

Supplier Contract

Search

Search Results

- ☐ SC2500458 : 1120SC-STINSON STATIONERS
- ☐ SC2500433 : 1146SC-STINSON STATIONERS-1108 Baker
- ☐ SC2500016 : PA-0536

Related Actions

Supplier Contract

SC2500458 : 1120SC-STINSON STATIONERS

Contract Number SC2500458

Created On 06/11/2025 01:24:38.895 PM

Status Approved

Version 0

Select Supplier Contract Lines to be added

Total Line Count 0

Sum of Amount to Invoice for Selected Lines

Select Supplier Contract Lines to be added

Total Line Count

Sum of Amount to Invoice for Selected Lines

1 item | 1 selected

☐ Supplier Contract

☒ Company Kern County

Supplier Contract SC2500458 (Line 1)