# Managing Your iSupplier Profile

## Table of Contents

- Supplier Registration Help Desk ................................................................. 2
- Summary of Your iSupplier Profile ............................................................... 2
- Accessing your Account for the First Time .................................................. 2
- Navigating to Your Profile .......................................................................... 3
- Organization .................................................................................................. 5
- Address Book ............................................................................................... 6
  - To Manage Address Book Details ................................................................. 6
  - To Add a New Address ................................................................................ 9
- Contact Directory ........................................................................................ 10
  - To Add a New Contact ............................................................................. 10
  - To Update or Remove a Contact ............................................................... 11
  - To Associate an Address to a Contact: ..................................................... 11
  - To Remove a Contact from an Address: ................................................... 14
- Business Classifications ............................................................................. 15
- Products and Services ................................................................................. 19
  - To Select Products and Services: ............................................................... 19
- Surveys ......................................................................................................... 22
If you have any questions before accessing your iSupplier account for the first time, please contact the Supplier Registration Help Desk and provide your company name and tax id number:

Supplier Registration Help Desk: supreg@sandia.gov

Summary of Your iSupplier Profile

Once you have an iSupplier account for your company, you can create and maintain a profile describing your company. Your profile will consist of Business Classifications, Supplier Details, Address Book, Contact Directory and Products and Services.

The rest of this job aid will describe how to manage the information in your company’s profile.

NOTE: Registration with Sandia National Laboratories and use of the iSupplier portal does not guarantee placement of solicitations or subcontract award.

Accessing your Account for the First Time

Once you have requested and registered a user account, your information will be reviewed by an administrator. After it is approved you will receive an email (Figure A) with: A link to the iSupplier portal, user name, temporary password:

After receiving your password, the password must be protected to prevent unauthorized access to Sandia’s iSupplier Portal.

Click on the log on link in the email. You will be directed to a new page where you will be asked to enter your username and temporary password. (Internet Explorer or Firefox web browsers are preferred.) You will then be redirected to a page where you will be asked to change your password. Enter the password from the email then choose a new password. Confirm your new password by re-entering it into the next field below. Click Apply.

NOTE: This password must be 8 characters long. It must also contain at least 1 letter and 1 number.
*Important* If you do not use your password within 12 months, it will expire. Contact the helpdesk at supreg@sandia.gov to have it reset.

**Navigating to Your Profile**

Upon logging in, you will be directed to the iSupplier home page (Figure C). When the page loads, click on the **Admin** tab:

![Figure C](image-url)
Company Profile

Upon selecting the Admin tab, you will be directed to the first page of your profile: On the Company Profile page (Figure D) you can attach your W-9 or W8, a file, URL or text that Sandia would find to be useful when looking for a supply base for a particular product or service type. This page also displays your name as it is recorded in the iSupplier database, your Tax ID number, etc.

*Important* To update your company name or tax id number you must contact your Subcontract Professional.

To add an attachment, URL, text:

Under your company’s General information select Add Attachments

Figure D
Enter Title, Description then select Browse, Apply:

Your newly uploaded attachment will be shown. Edit options include Update and Delete. To delete an attachment, click the trashcan icon for that entry. To update an attachment, click the pencil icon for that entry.

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Description</th>
<th>Category</th>
<th>Last Updated By</th>
<th>Last Updated</th>
<th>Usage</th>
<th>Update</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>V6</td>
<td>File</td>
<td>File Format</td>
<td>From Supplier</td>
<td><a href="mailto:ABARR@SANDIA.GOV">ABARR@SANDIA.GOV</a></td>
<td>28 Oct 2017</td>
<td>One-Time</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Organization**

From the Organization tab you have the ability to provide essential information about the structure of your company. This information is essential to Sandia.

On the **Organization** page enter all required fields as well as any additional fields as desired and appropriate.
When you have entered your desired information click **Save**. This will update your information both under your company's **Organization** and **General** tabs.

**Address Book**

It is crucial to maintain a current address so purchase orders and payments can be issued appropriately. You can create, and remove multiple addresses i.e., Remit To (payment) sites, sales and offices in different locations and/or distribution centers. Sandia defines these addresses as vendor **sites**.

*Note: Old addresses must be **inactivated** first before a new address can be created.*

**To Manage Address Book Details:**

On the Profile Management page, click **Address Book**:
The **Address Book** page displays any current addresses you have defined. To update details for an address such as an email or phone number click the pencil icon for that entry. To **inactive** an address, click the trashcan icon for that entry.

**Note:** Once you inactivate an address you will no longer be able to submit an invoice to that address. Please be careful to not remove an address that has a pending invoice.

You can verify pending invoices by going to the **Home** tab then **Invoices**.
On Payment Status choose Not Paid then click Go.

You will see unpaid invoices. To see what address was used for the invoice, click on the invoice number.

You will see the address used to pay this invoice.
To Add a New Address:

Click **create** then complete the fields including + 4 zip code. Do not include dashes on the telephone number. Add an email address which purchase order notifications should be emailed to. Select **apply** when finished.

A confirmation screen will show that your address has been added to your Address Book.

When you are finished, an administrator will be notified to review and if information is entered correctly will approve the information within 24 – 48 hours.

*Important* If you are adding a Remit To (payment) site, submit the following form for electronic payment method: **Electronic Funds Transfer Agreement**. Submit the form to the email address on the form. It will be processed and a confirmation email will be sent to the sender.
Contact Directory

From the Contact Directory page, you can create and modify the information about multiple contacts with your organization who are authorized to work with Sandia. You should create contacts who you expect will be involved with selling the company’s goods and services, accounts receivable and an administrator who will maintain the profile current. After entering the contact details, you can associate the contact to the appropriate address. Contacts can be linked to as many addresses as relevant. Each contact must be unique, based on the combination of their first name, last name and phone number. You are responsible for inactivating contacts that no longer represent your company.

From the left side of the Profile Management page, click Contact Directory. The Contact Directory page displays your company’s list of contacts.

To Add a New Contact:

On the Contact Directory page, click Create:
Complete the required fields and any additional fields as appropriate, select **Apply** when finished.

![Create Contact](image)

**A Confirmation** will show pending status in your Contact Directory. This means an administrator must review and approve the change before it is finalized. This process usually takes 24 – 48 hours to complete.

![Confirmation](image)

**To Update or Remove a Contact:**

You can update information for a contact such as an email address or telephone number by clicking on the pencil icon. You can remove any obsolete contacts by clicking the trashcan icon. You can view addresses associated with the contact by clicking on the blue square icon.

**To Associate an Address to a Contact:**

![Create](image)
On the **Contacts Directory** page, click the Addresses icon for the contact.

Click **Add Another Row**

Click the magnifying glass icon
Click **Go**. You can also enter the symbol % then click **Go**.

Select the address that you would like to associate to the contact then click **Select**.
You will then see the address you chose show up in the **Address Associations for Contact** page. Click **Save**.

You will then be directed back to the **Contact Directory**. Note that the status of the Contact that was just associated with the address is now listed as **Change Pending**. This means an administrator must review and approve the change before it is finalized. This process usually takes 24 – 48 hours to complete.

**To Remove a Contact from an Address:**

Click the icon under the addresses tab for the contact.

Look under **Address Associations for Contact**. If there is an address that you no longer wish to be associated with the contact click the trashcan icon.
You will then see the address removed from **Address Associations for Contact**. Click **Save**.

You will then be directed back to the **Contact Directory**. Note that the status of the Contact that was just associated with the address is now listed as **Change Pending**. This means an administrator must review and approve the change before it is finalized. This process usually takes 24 – 48 hours to complete.

---

**Business Classifications**

Sandia National Laboratories has a regulatory requirement to report accurate and current business status and socioeconomic data through Sandia’s annual subcontractor recertification process. That means that on an annual basis, you will need to navigate to the business classifications page on your profile and recertify your business classifications.

**To Select Business Classifications:**

From the left of any Profile Management page, click the **Business Classifications** link.

Note: Please read and check the certification statement prior to completing this section.
On the Business Classifications page click the applicable box to enable that classification. Select drop down menu to navigate through all business classifications.
Select applicable classifications. Enter your Certificate Number, Certifying Agency and Expiration Date when applicable.

When finished, ensure that you have checked the box certifying that the information you entered is correct.
Select **Save** when all applicable classifications have been selected.

Once you have saved your classifications, under the certification *notice* you will see both the date that your company was last certified as well as the user who certified your company.
**Products and Services**

Sandia National Laboratories has a list of categories and subcategories that are used to categorize the products and services that are acquired. This information may be used for source selection and reporting purposes. You can increase your company’s visibility by filling out the products and services section.

**To Select Products and Services:**

On the **Profile Management** page, click **Product and Services**

![Profile Management Page](image)

To add a new product/service definition, click **Add**

![Add Product and Services](image)
On the **Add Products and Services** page, browse for a required product or service. Use the drop down menu to navigate through all products and services. Select your product/service.

Select **View Sub Categories** for the Product/Service that has been selected.
On the **Add Products and Services** subcategory page, browse for a required subcategory. Use the drop down menu to navigate through the subcategories. Select the product/service subcategory and click **Apply**.

A **Confirmation** screen will show you the Product and Service categories that have been added to your profile. Select **Return to Products and Services** to view your Products and Services.

You will return to the **Products and Services** page where you will see **Pending Approval** under the **Approval Status** tab. This process usually takes 24 – 48 hours to complete.
**Surveys**

Sandia National Laboratories may at certain times wish to send a survey to its subcontractors. If you receive an email stating that you have a survey, you will find it under **Surveys** in your **Company** Profile.

You have completed the Managing Your iSupplier Profile informational job aid. You now have the tools and knowledge to effectively manage your iSupplier Profile. Should you run into any problems or if you have any questions, please feel free to contact the Supply Chain Help Desk:

**Supplier Registration Help Desk:**

supreg@sandia.gov