# Managing Your iSupplier Profile

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If you have any questions before accessing your iSupplier account for the first time, please contact the Supply Registration Help Desk. They will ask you for information including: company name, company tax identification number, contact information, etc. in order to assist you.

**Supplier Registration Help Desk:**
supreg@sandia.gov

**Summary of Your iSupplier Profile**

Once you have an iSupplier account and registered user for your company, you can create and maintain a profile describing your company. Your profile will consist of Business Classifications, Supplier Details, an Address Book, a 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 on solicitations or contract award.

**Accessing your Account for the First Time**

Once you have requested a registered user account, your information will be reviewed by an administrator. After it is approved, you will receive an email with a link to the iSupplier portal, your Username and a one-time password:

```
You have been registered at Sandia National Laboratories for access to their supplier collaboration network.
You can log on with the username SARAH@ACME.COM and the password Ab1+29645.

When you first log on, you will be required to change your password for security purposes. Contact administrator for additional information.

Thank you.
```

“Click” on the link titled log on in the email. You will be directed to a new page where you will be asked to enter your Username and Password. You will then be redirected to a page where you will be asked to
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change your password. Enter the Password from the email and then enter 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.

Navigating to Your Profile

Upon logging-in, your browser will be directed to the iSupplier home page (illustrated below). “Click” on the tab labeled Admin to navigate your profile.
Company Information (a.k.a. Company Profile)

Upon selecting the Admin tab, your browser will be automatically directed to the first page of your profile: the Company Profile page. On the Company Profile page you can attach 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. Sandia would specifically like to see your W-8, your W-9, links to your company’s home page and insurance information included. This page also displays your name as it is recorded in the iSupplier database, your Tax ID number, etc. To update this information, “click” on Organization under Company Profile. For a step by step guide to updating this information, please see the Organization section of this Job Aid.

To add a file/URL/text:

1. Under your company’s General information “Select” Add Attachments
2. Enter Title, Description, Select a Category, Select Attachment Type and Select Apply

3. Your newly uploaded attachment will be shown. Edit options include Update, Delete and Publish to Catalog. To delete an attachment, “click” the trashcan icon for that entry. To update an attachment “click” the pencil icon for that entry. PLEASE NOTE: DO NOT use the Publish to Catalog feature.

**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.
1. On the **Organization** page enter all required fields as well as any additional fields as desired and appropriate.

2. When you have entered all of your desired information “click” **Save**. This will update your information both under your company’s **Organization** information as well as your company’s **General** information.
Address Book

Your iSupplier Profile also gives you the functionality to maintain your address details online. You can create, modify and remove multiple addresses. Addresses can include sales offices in different locations, central pay locations, and/or distribution centers. Sandia defines these addresses as vendor sites and requires at least one address for purchase order award and payment purposes. After you enter your address book information, an administrator will be notified and will promptly review the information to decide how to use the details. This is not an automatic process and may take up to a few days for the administrator to approve.

To Manage Address Book Details:

1. On the Profile Management page, “click” Address Book. You can select from a list of current addresses if they exist in your company.

2. The Address Book page displays any current addresses you have defined. Edit options include Update and Remove. To remove any address, “click” the trashcan icon for that entry. To update an address “click” the pencil icon for that entry.
To Add a New Address:

1. “Click” Create

![Address Book](image1)

2. On the Create Address page, complete the required fields and any additional fields as appropriate. “Select” Save when finished.

![Create Address](image2)

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

![Confirmation](image3)
Contact Directory

From the Contract Directory page, you can create and modify the information about multiple contacts with your organization who could be dealing with Sandia. You should create contacts who you expect will be involved with selling the company’s goods and services. 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. Contacts that no longer represent your company can be removed.

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

To Add a New Contact

1. “Click” Create
2. On the **Create Contact** page, complete the required fields and any additional fields as appropriate, “select” **Save** when finished.

3. A **Confirmation** will show you that the contact has been added to your Contact Directory.

**To Update or Remove a Contact:**

You can update contacts as needed 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.
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To Associate an Address to a Contact:

1. On the **Contacts Directory** page, “click” the Addresses icon for the contact.

2. “Click” **Add Another Row**

3. “Click” the magnifying glass icon

4. You may search the address database by **Address Name** or **Address Details**. “Select” your search by preference from the drop down Search By menu. Enter either the name of the address you wish to find
or the details of the address you’d like to add. If you are unsure of the exact name, you can enter a “%” before and after your search terms to include all addresses that include your search term. “Click” Go.

5. “Select” the address that you would like to associate to the contact then “click” Select.

6. You will then see the address you just chose show up in the Address Associations for Contact page. “Click” Save.
7. 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 is not an automatic process and may take up to a few days for the administrator to approve the change.

![Contact Directory](image)

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

1. On the Contacts Directory page, “click” the icon under the addresses tab for the contact.

2. 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 under remove.

![Address Associations for Contact](image)

3. You will then see the address taken off of the **Address Associations for Contact**. “Click” **Save**.

![Address Associations for Contact](image)
4. 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 is not an automatic process and may take up to a few days for the administrator to approve the change.

![Contact Directory: Active Contacts](image)

**Business Classifications**

Sandia National Laboratories has a regulatory requirement to report accurate and current business status and socioeconomic data through Sandia’s annual contractor 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:**

1. From the left of any Profile Management page, “click” the Business Classifications link.
2. **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” arrows or drop down menu to navigate through all business classifications.

3. “Select” applicable classifications. Enter your Certificate Number, Certifying Agency and Expiration Date when applicable.
4. When finished, ensure that you have “checked” the box certifying that the information you entered is correct.

5. “Select” Save when all applicable classifications have been selected.

6. 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 adding to the products and services that your company offers.

To Select Products and Services:

1. On the Profile Management page, “click” Product and Services

2. To add a new product/service definition, “click” Add
3. On the Add Products and Services page, browse for a required product or service. Use the select arrows or the drop down menu to navigate through all products and services. “Select” your product/service.

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

![Profile Management](image)

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

![Confirmation](image)

7. You will return to the **Products and Services** page where you will see **Pending Approval** under the **Approval Status** tab. This is not an automatic process and may take up to a few days for the administrator to approve the change.

![Products and Services](image)
Payment & Invoicing

In this section of your Company Profile you have the ability to first, specify payment details for your addresses. You then have the ability to track all payments and invoices that your company is involved in as well as keep track of which of your addresses each payment is associated with.

To Search Addresses

1. You may search the address database by Address Name or Address Details. “Select” your search by preference from the drop down Search By menu. Enter either the name of the address you wish to find or the details of the address you’d like to add. If you are unsure of the exact name, you can enter a “%” before and after your search terms to include all addresses that include your search term. “Click” Go.

2. Once you find the desired address “select” a specific choice from each of the following dropdown menus:

   - **Payment Method**—this is your desired method of payment
   - **Payment Currency**—this is the currency that you wish to complete payments in. Normally you will choose USD.
   - **Invoice Currency**—this is the currency that you wish any invoices to be in.
   - **Notification Method**—this is the way that you desire to be notified of any payments or invoices.
Once you have selected a choice for each of the categories you have the option to “click” either Cancel or Save. “Click” Cancel if you wish to cancel your specified Payment and Invoicing Details. When you have finished entering in the correct Payment and Invoicing Details “click” Save.

3. Once you have successfully saved your Payment and Invoicing details you will receive a Confirmation.
Surveys

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

For Further Assistance

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