Managing Your iSupplier Profile

E-Business Suite

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U.S. DEPARTMENT OF ENERGY

National Nuclear Security Administration

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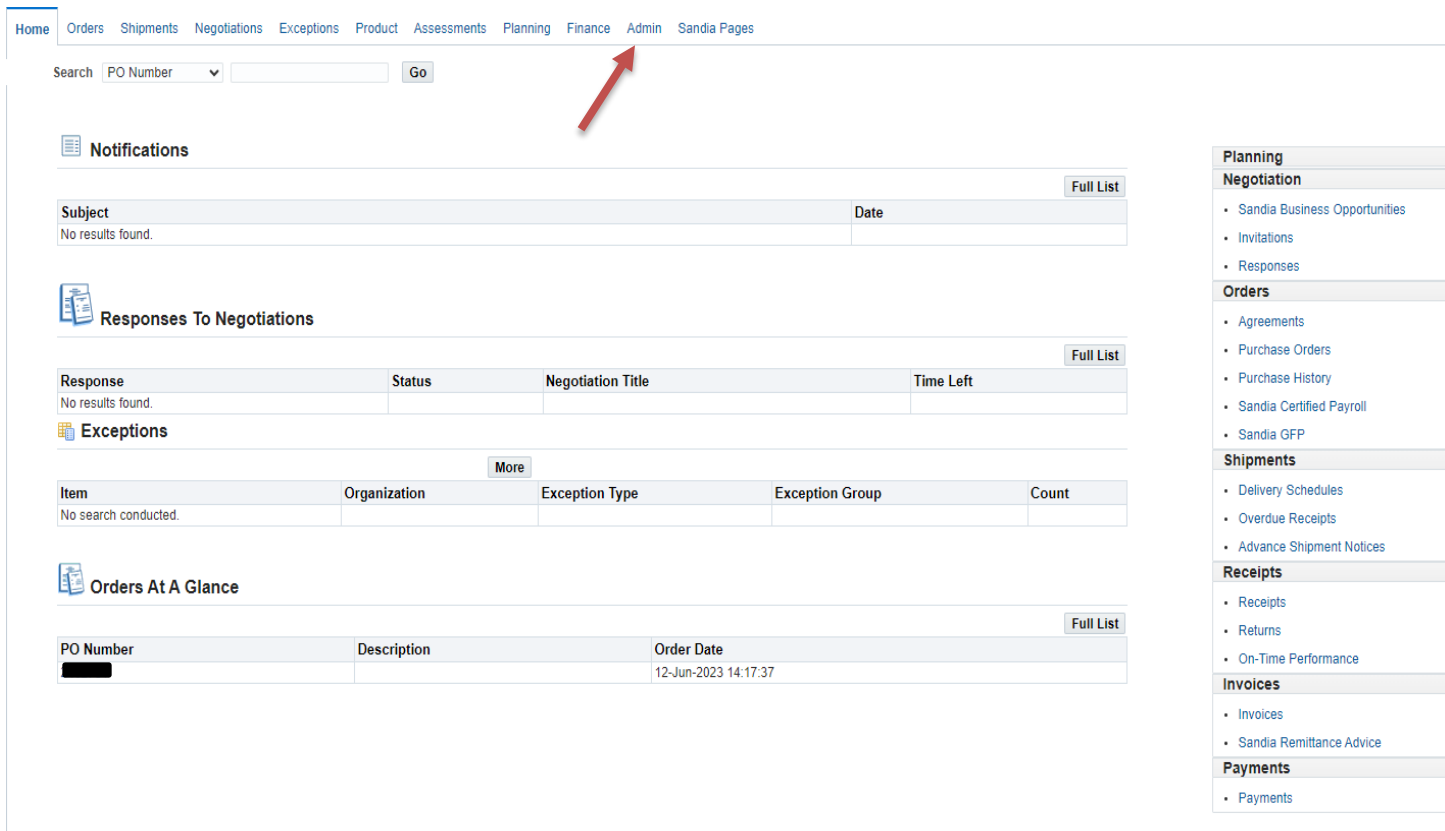
The rest of this job aid will describe how to manage the information in your company's profile.

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

Navigating to Your Profile

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

Figure A

Company Profile

Upon selecting the **Admin** tab, you will be directed to the first page of your profile: On the **Company Profile** page (Figure B) you can attach your W-9 or W8, EFT form, 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 /business name as it was recorded when you registered, along with your supplier number, your Tax ID number, etc.

Important To update your company name or tax id number you must contact your buyer.

To add an attachment, URL, text:

Under your company's General information select **Add Attachments**

Figure B

Enter the Title of the document, Description of the document then select Choose File, 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.

Title △	Type △	Description △	Category △	Last Updated By △	Last Updated △	Usage △	Update	Delete
W9	File	Tax form	From Supplier	ALBARRA@SANDIA.GOV	26-Oct-2017	One-Time	✏	🗑

Organization

On the Organization tab you can provide essential information about the structure of your company. This information is essential to Sandia.

On the **Organization** page (Figure C) enter all required fields as well as any additional fields as desired and are appropriate.

When you have entered the desired information click **Save**. This will update your information under your company's **Organization** and **General tabs.**

Figure C

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 (figure D) 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.

Figure D

Update Page displays address details (Figure E). Make updates as necessary on this page, Email address, Phone number etc. Notification will be sent to the email address listed on this page.
When you have entered the desired information click **Save**.

Figure E

To Add a New Address Click create

Page with blank fields will display (figure F). Complete all the fields with the asterisks with the new information. Add an email address which purchase order notifications should be emailed to.

Figure F

Select **SAVE** when finished.

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

Address Book

Create	•••					
Address Name ▲	Address Details	Country △	Status △	Update	Remove
NM-ALBUQUE-1	123 DEFG STREET ALBUQUERQUE, NM 87777	United States	New	✏	🗑
NM-SANTA F-1	123 ABC AVE ALBUQUERQUE, NM 12345	United States	New	✏	🗑

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 through your iSupplier profile under your company's General information and select Add Attachments (Instructions on hyperlink at the bottom of EFT form). Contact iSupplier with your Supplier number or TIN once it has been completed and added to your profile. 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.

On 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:**

Contact Directory : Active Contacts

First Name △	Last Name △	Phone Number △	Email △	Status △	User Account	Remove	Addresses	Update
Perla	Reyes	111-1111-1111		Current		🗑	🗐	✏
Supplier	Test		xyz@test.com	Current	✔	🗑	🗐	✏
Supplier	TestUser	111-111-1111	sandiatest@testingsandia.com	Current	✔	🗑	🗐	✏

▶ **Contact Directory : Inactive Contacts**

Page with blank fields will appear (Figure G). Complete the required fields and any additional fields as appropriate including contact purpose (figure H) & User Account (figure I).

Figure G

- **Contact Purpose**- Click on the Green Plus sign to add the contact purpose. A drop-down menu will appear. Select the purpose from the drop-down menu.

  Figure H

- **USER ACCOUNT**, Check the box if the person you are adding requires access to the profile.

  Figure I

Click **SAVE** when finished.

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

Figure I

Contact Directory : Active Contacts

First Name △	Last Name △	Phone Number △	Email △	Status △	User Account	Remove	Addresses
Perla	Reyes	111-1111-1111		Current		🗑	📋
Supplier	Test		xyz@test.com	Current	✔	🗑	📋
TEST	TEST	575-1234567	test@santest.com	Pending ←		🗑	📋
Supplier	TestUser	111-111-1111	sandiatest@testingsandia.com	Current	✔	🗑	📋

To Update or Remove a Contact:

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

Contact Directory : Active Contacts

First Name △	Last Name △	Phone Number △	Email △	Status △	User Account	Remove	Addresses	Update
Perla	Reyes	111-1111-1111		Current		🗑	📋	✏
Supplier	Test		xyz@test.com	Current	✔	🗑	📋	✏
Supplier	TestUser	111-111-1111	sandiatest@testingsandia.com	Current	✔	🗑	📋	✏

▸ **Contact Directory : Inactive Contacts**

To Associate an Address to a Contact

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

Contact Directory : Active Contacts

First Name △	Last Name △	Phone Number △	Email △	Status △	User Account	Remove	Addresses	Update
Perla	Reyes	111-1111-1111		Current		🗑	📋	✏
Supplier	Test		xyz@test.com	Current	✔	🗑	📋	✏
Supplier	TestUser	111-111-1111	sandiatest@testingsandia.com	Current	✔	🗑	📋	✏

▸ **Contact Directory : Inactive Contacts**

Click on the green plus sign and click on the magnifying glass.

Address Associations for Contact

The addresses associated with the contact can be maintained in this page.

Address Name

Click GO

Search and Select: Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Address Name ⌄   Go

Results

Select	Quick Select	Address Name	Address Details
	No search conducted.		

"Quick select" the address you want associated to the contact.

Search and Select: Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Address Name ⌄   Go

Results

Select	Quick Select	Address Name ▲	Address Details
○	📇	NM-ALBUQUE-1	123 DEFG STREET, ALBUQUERQUE, BERNALILLO, NM, US
○	📇	NM-SANTA F-1	123 ABC AVE, ALBUQUERQUE, BERNALILLO, NM, US

You will then see the address you chose show up in the **Address Associations for Contact** page. Click **Save**.

Admin: Profile Management: Contact Directory >

Address Associations for Contact

Cancel Save

The addresses associated with the contact can be maintained in this page.

Address Name	Address Details	Remove
NM-ALBUQUE-1	123 DEFG STREET, ALBUQUERQUE, BERNALILLO, NM, US	🗑

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.

Contact Directory : Active Contacts

Create | •••

First Name △	Last Name △	Phone Number △	Email △	Status △	User Account
Perla	Reyes	111-1111-1111		Change Pending	
Supplier	Test		xyz@test.com	Current	✔

REMOVING A CONTACT FROM AN ADDRESS

Click the icon under the addresses tab for the contact.

Contact Directory : Active Contacts

Create | •••

First Name △	Last Name △	Phone Number △	Email △	Status △	User Account	Remove	Addresses	Update
Perla	Reyes	111-1111-1111		Current		🗑	📇	✏
Supplier	Test		xyz@test.com	Current	✔	🗑	📇	✏
Supplier	TestUser	111-111-1111	sandiatest@testingsandia.com	Current	✔	🗑	📇	✏

▸ **Contact Directory : Inactive Contacts**

Look under Address Associations for Contact (Figure J**)**. If there is an address that you no longer wish to be

associated with the contact, click the trashcan icon.

Figure J

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 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:

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.

| Home | Orders | Shipments | Negotiations | Exceptions | Product | Assessments | Planning | Finance | Admin | Sandia Pages |

Profile Management

General

General

	Organization Name	Supplier Test
Company Profile	Supplier Number	89737
Organization	Alias	
	Parent Supplier Name	
Address Book	Parent Supplier Number	

Contact Directory

Attachments

Business Classifications

Search

Product & Services

Note that the search is case insensitive

Payment & Invoicing

Title [_____] [Go]

Surveys

▶ Show More Search Options

[Add Attachment]

Seq	Title	Type	Description
No results found.			

On the Business Classifications page click the applicable box to enable that classification. Select arrow for Next page of business classifications.

Select applicable classifications. Enter your Certificate Number, Certifying Agency, and ExpirationDate when applicable.

Last Certified   By

☑TIP Date format example: 19-Oct-2023
☑TIP At least one entry is required.

◀ Previous 1 - 15 ▾ Next 15 ▶

Classification ▲	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Large Business	☐				
Small Business	☐				
8(a) - SBA Certified (Enter Cert Agency and Exp Date)	☐				
Small Disadv. Bus.- SBA Certified (Enter Cert Agncy & Exp Date)	☐				
Small Disadvantaged Business - Derived Alaskan Native/Indian Co.	☐				
Small Disadvantaged Business - Self Certified	☐				
HUB Zone (Enter Cert Agency & Cert Date)	☐				
Economically Disadvantaged Woman Owned Small (EDWOSB)	☐				
Woman Owned Small Business (WOSB)	☐				
Veteran Owned Small Business (VOSB)	☐				
Service Disabled Vet Owned Small Business (SDVOSB) (Enter Cert Date)	☐				
Alaskan Native Corporation (ANC)	☐				
Indian Tribe Corporation	☐				
Educational Institution	☐				
Educational Hispanic American Colleges & Universities (HACU)	☐				

◀ Previous 1 - 15 ▾ Next 15 ▶

[Cancel] [Save]

Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				

When finished, ensure that you have checked the certify box confirming the information was entered correctly.

Business Classifications

Certification

NOTICE: UNDER U.S.C.645(D), ANY PERSON WHO MISREPRESENTS A FIRM'S STATUS AS A SMAL
TO OBTAIN A CONTRACT TO BE AWARDED UNDER THE PREFERENCE PROGRAM ESTABLISHED
THE FEDERAL LAW THAT SPECIFICALLY REFERENCES SECTION 8(D) FOR A DEFINITION OF PRO
TO ADMINISTRATIVE REMEDIES, INCLUDING SUSPENSION AND DEBARMENT; AND (III) INELIGIBL

☑ I certify that I have reviewed the classification below and they are current and accurate.

Last Certified   By

☑ TIP Date format example: 19-Oct-2023
☑ TIP At least one entry is required.

•••

Classification ▲	Appli
Large Business	☐
Small Business	☐
8(a) – SBA Certified (Enter Cert Agency and Exp Date)	☐

Select Savewhen all applicable classifications have been selected.

Cancel   Save

BZONE SMALL, SMALL DISADVANTAGED, OR WOMEN-OWNED SMALL BUSINESS CONCERN IN ORDER
UANT TO SECTION 8(A), 8(D), 9, OR 15 OF THE SMALL BUSINESS ACT OR ANY OTHER PROVISION OF
ELIGIBILITY, SHALL BE: (I) PUNISHED BY IMPOSITION OF FINE, IMPRISONMENT, OR BOTH; (II)SUBJECT
PARTICIPATION IN PROGRAMS CONDUCTED UNDER THE AUTHORITY OF THE ACT

◁ Previous 1 - 15 ⌄ Next 15 ▷

Minority Type	Certificate Number	Certifying Agency	Expiration Date

Once you have saved your classifications you will see a confirmation on the top of the page.

Confirmation

Your classifications have been saved.

Business Classifications

Certification

NOTICE: UNDER U.S.C.645(D), ANY PERSON WHO MISREPRESENTS A FIRM'S STATUS AS A SMALL, HUBZO
TO OBTAIN A CONTRACT TO BE AWARDED UNDER THE PREFERENCE PROGRAM ESTABLISHED PURSUAN
THE FEDERAL LAW THAT SPECIFICALLY REFERENCES SECTION 8(D) FOR A DEFINITION OF PROGRAM EL
TO ADMINISTRATIVE REMEDIES, INCLUDING SUSPENSION AND DEBARMENT; AND (III) INELIGIBLE FOR PA

☑ I certify that I have reviewed the classification below and they are current and accurate.

Last Certified   By

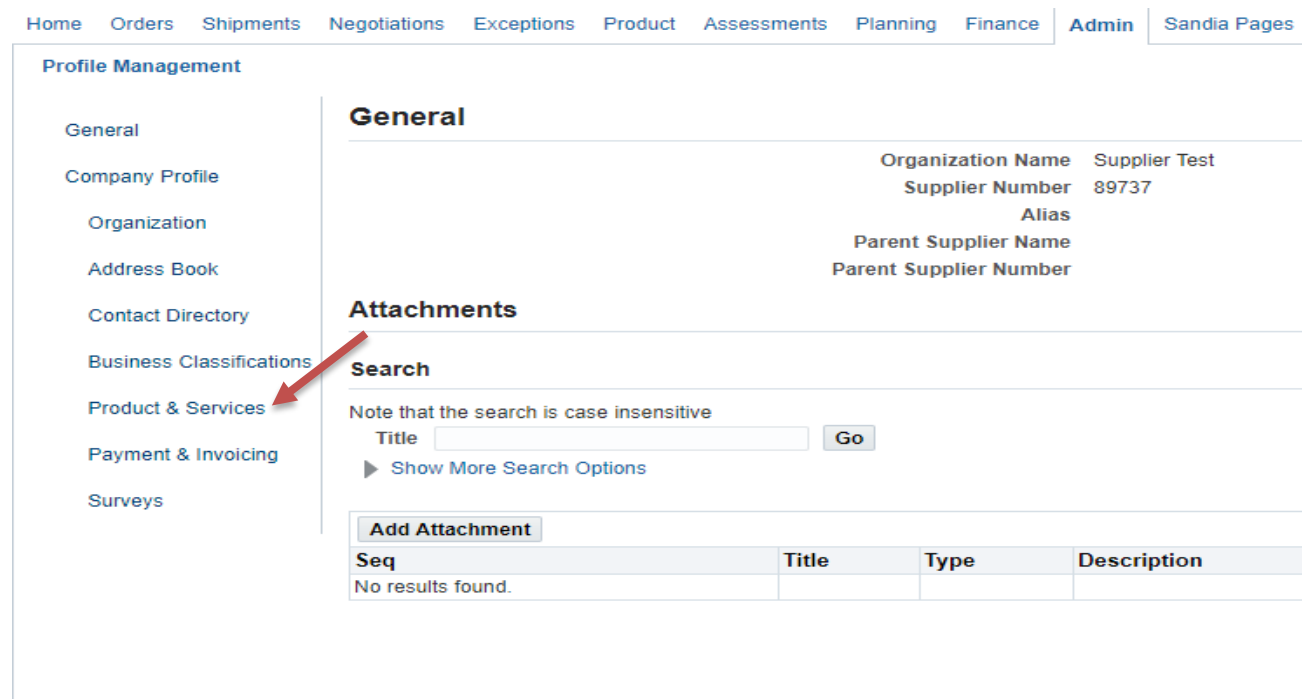☑TIP Date format example: 19-Oct-2023
☑TIP At least one entry is required.

•••

Classification △	Applicable	M
Large Business	☑	
TR Airport Authority	☑	
Small Business	☐	

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**

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

On the **Add Products and Services** page (Figure K), browse for a required product or service. Use the navigation arrows to scroll through all products and services. Select your product/service by checking an **APPLICABLE** box on the right.

Figure K

Add Products and Services: : (Supplier Test)   Cancel   Apply

● Browse All Products & Services
○ Search for Specific Product & Service

•••   ◁ Previous 1 - 10 ∨ Next 10 ▷

Code	Products and Services △	View Sub-Categories	Applicable
AEROSPACE	AEROSPACE	⛕	☐ Applicable
AUTOMOTIVE	AUTOMOTIVE	⛕	☐ Applicable
BUILDING	BUILDING	⛕	☐ Applicable
CHEMICALS	CHEMICALS	⛕	☐ Applicable
COMPUTER	COMPUTER	⛕	☐ Applicable
CONCURRENT DESIGN & MFG	CONCURRENT DESIGN & MANUFACTURING	⛕	☐ Applicable
CONSTRUCTION	CONSTRUCTION	⛕	☐ Applicable
CONSTRUCTION MATERIALS	CONSTRUCTION MATERIALS	⛕	☐ Applicable
CONSULTANT	CONSULTANT	⛕	☐ Applicable
COPIER	COPIER	⛕	☐ Applicable

◁ Previous 1 - 10 ∨ Next 10 ▷

Select **View Subcategories** for the Product/Service that has been selected.

Admin: Profile Management: Product & Services >
Add Products and Services: : (Supplier Test)   Cancel   Apply

● Browse All Products & Services
○ Search for Specific Product & Service

•••   ◁ Previous 10 21 - 30 ∨ Next 10 ▷

Code	Products and Services △	View Sub-Categories	Applicable
GOVERNMENT	GOVERNMENT	⛕	☑ Applicable
GREASES/LUBRICANT/SOLVENT	GREASES/LUBRICANT/SOLVENT	⛕	☐ Applicable
HARDWARE	HARDWARE	⛕	☐ Applicable
IT HARDWARE	IT HARDWARE	⛕	☐ Applicable
IT OUTSIDE SERVICES	IT OUTSIDE SERVICES	⛕	☑ Applicable
IT SOFTWARE	IT SOFTWARE	⛕	☐ Applicable
IT TELECOMMUNICATIONS	IT TELECOMMUNICATIONS	⛕	☐ Applicable
JANITORIAL SUPPLIES	JANITORIAL SUPPLIES	⛕	☐ Applicable
LABORATORY SUPPLIES	LABORATORY SUPPLIES	⛕	☐ Applicable
LUBRICANTS/OILS/GREASES		⛕	☐ Applicable

◁ Previous 10 21 - 30 ∨ Next 10 ▷

On the **Add Products and Services** subcategory page, browse for a required subcategory. Use the navigation arrows to scroll 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 suppliers. 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 Supplier Registration Help Desk:

Supplier Registration Help Desk: supreg@sandia.gov

Below are email addresses of individual departments and categories of circumstances they handle.

supreg@sandia.gov – login assistance & login troubleshooting/ new user set up.

Einvoice@sandia.gov – Invoice questions & invoice submittal trouble shooting.

APhelp@sandia.gov – Payment status.

isupplier@sandia.gov – Electronic Funds transfer Requests (EFT's).