Supplier’s Quick Guide to Sandia Electronic Invoicing (E-invoice)
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Access to iSupplier & Other Information:

✓ Suppliers need to have an iSupplier portal username and password to submit invoices electronically.
  - If the supplier does not have a user account established, contact supreq@sandia.gov to create an iSupplier account or request a password reset. Multiple user accounts can be established for each supplier.

✓ Only one email address is allowed to be retained on the supplier’s account to receive payment remittances via email. We recommend establishing an entity account within your company to receive remittance information (such as accountsreceivable@supersupplier.net). This technique can reduce the amount of administration for you as you get new employees or others leave.

✓ Sandia's preferred payment mechanism is Electronic Funds Transfer (EFT). If not already signed up to receive EFT payments, submit an Electronic Funds Transfer Agreement.

✓ To avoid system errors, it is important that you do not use your Internet browser’s “Back” button to navigate between screens while in the iSupplier Portal. Also, during the process of creating your E-invoice, do not use the “Back” button within the iSupplier program without first clicking the ‘Save’ button in “Step 3 of 4” or in “Step 4 of 4”, otherwise you might get an error.

✓ Some search functions utilize popup windows, so please ensure your browser has popups enabled.

iSupplier portal Link

Contact einvoice@sandia.gov if you are receiving a specific error. Please include details and a screenshot of error, if possible.
E-Invoice Instructions

To create an invoice, click on the ‘Invoices’ link from the Home screen:
Click ‘Create Invoices’ on the next screen:

Click ‘GO’ next to the ‘Create Invoice’ (right side of screen):
Step 1 of 4 – **Purchase Orders** screen:

- **Enter Purchase Order Number only.** DO NOT input data in any other fields. Entering data in multiple fields may result in an error or ‘No results found’ message.
- After inputting the PO number, click ‘Go’. **You must click ‘Go’ to execute the PO search query.**

![Purchase Orders screen](image)

PO lines appear in table at the bottom of the screen. The max number of PO lines shown at a time is 10 lines. If your PO has more than 10 PO lines, click **Next 10** to reveal additional PO lines to select.

![Purchase Orders screen](image)
Compare 'Invoiced' and 'Ordered' quantities to determine which PO line has available unbilled quantities to bill against. If the ‘Invoiced’ and ‘Ordered’ quantities are the same, the PO line is fully billed and you will not be able to apply a billed quantity to it in Step 2 of 4.

Select Line(s) for billing by checking box to the left of the PO Line(s), then click Add to Invoice. The PO Line(s) added will display at the bottom of the screen. If you are not sure which Line to bill, contact your buyer.

To continue to Step 2 of 4, click ‘Next’ on the right side of the screen.
Step 2 of 4 – **Details** screen:

Enter the following fields in order. **DO NOT** input data in any other fields or you may get an error message.

### Table 1 – Invoice Details (see Invoice Details screenshot on page 12 for webpage reference)

<table>
<thead>
<tr>
<th>Supplier Section</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Remit To</strong></td>
<td>This value, known as the paysite, will pre-populate with the address associated with your PO. Please review and change the paysite if needed.</td>
</tr>
</tbody>
</table>

**Please ensure your browser has popups enabled**

To select a different paysite and address, delete the information in the Remit To field and input “%” and click on the magnifying glass for a list of paysites and addresses associated with your supplier record.

From the list of paysites, click the ‘Quick Select’ icon to select the correct remittance address. If your address is not listed and needs to be added, contact isupplier@sandia.gov for assistance.
Remit To Bank Account

**Please ensure your browser has popups enabled.**

Note: This field pertains to suppliers whose bank is located in the U.S. If your bank is located outside of the U.S., your E-invoice will be paid via Wire Transfer based on the banking information (e.g. SWIFT code, IBAN, bank account number, etc) provided on your invoice image you attach in section 6.

If the Remit To address selected in section 1 is setup for EFT payments in our system, you will need to populate the Remit To Bank Account field with your U.S. bank account number by searching for and selecting your bank account number that is on file.

To search for your bank account, click on the magnifying icon to display the Bank Account Number search screen.

When the search screen displays, click ‘Go’ to view the U.S. bank account associated with the Remit To address.

In the Results section, click the Quick Select icon to select the bank account.

If U.S. banking information is not found, then EFT banking information does not exist in our system for the Remit To address selected and you will receive a check payment. If you would like to associate EFT banking information to the Remit To address, please complete the EFT form and submit it to isupplier@sandia.gov.

<table>
<thead>
<tr>
<th>Invoice Section</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>3</strong> Invoice Number</td>
</tr>
<tr>
<td>Enter your invoice number (usually created from your accounting system).</td>
</tr>
<tr>
<td><strong>4</strong> Invoice Type</td>
</tr>
<tr>
<td>This value will default to “Invoice”. For credit memo invoices, please select the “Credit Memo” option from the dropdown and enter negative quantity values on the PO lines in section 8.</td>
</tr>
<tr>
<td><strong>5</strong> Invoice Description</td>
</tr>
<tr>
<td>Optional field but recommended. This information will be reflected on your payment remittance advice.</td>
</tr>
</tbody>
</table>
Oracle will allow attachment of most major file types. To upload a copy of the invoice document you would otherwise have mailed to Sandia, click the plus (+) icon to navigate to the ‘Add Attachment’ screen.

On the ‘Add Attachment’ screen, add a title and description, if needed. Then click ‘Browse’ to find and select the file on your computer. Then click ‘Apply’ to return to the ‘Details’ screen; or click ‘Add Another’ to upload the attachment and to add any additional attachments.

**Customer Section**

**Customer Tax Payer ID**

This field will be auto-populated with data that displays “SYS11976”. **DO NOT change the data in this field** The data pertains to Sandia National Laboratories.

**Items Section**

**Quantity**

Enter Quantity for each PO line.

- If the amount in the “Available Quantity” field represents a dollar value, then input the dollar value of the invoice in the “Quantity“ field.

- If the amount in the “Available Quantity” field represents a unit value (e.g 1 unit “Available Quantity“ at a “Unit Price“ of 50000), then input the unit value of the invoice in the “Quantity“ field and the dollar amount will automatically calculate in the “Amount” column.

  You may need to enter a fractional unit value if you plan to incrementally bill a PO line that is setup as a unit value; or contact your Buyer and request the PO line setup be changed to “dollar value“ instead of “unit value“.
- If the field in the Available Quantity is blank and does not contain an amount, then it indicates the PO line is already fully billed.

<table>
<thead>
<tr>
<th>Invoice Payment Terms Section</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Available Invoice Terms</strong> (Optional)</td>
</tr>
</tbody>
</table>

Suppliers have the option to receive early payment by selecting available discounts that display in this section. Only discounts with early payment terms that are more favorable than the PO's negotiated payment terms will be available for selection.

The supplier can select the radio button of each of the available terms to view the Estimated Discount and Estimated Payment to aide in determining which discount is preferred. The supplier also has the option to select 'Use Current PO Terms', which is the defaulted selection. If nothing is selected in this section, the defaulted PO terms will be used.
Details Verification – After inputting required information on the Details screen, verify information is complete and correct. Make necessary corrections on this page before continuing. Click ‘Next’ to continue to ‘Step 3 of 4’.

![Invoice Details Screen]

When an optional discount term is selected, the estimated discount and payment amounts are calculated and the disclaimer at the bottom of the page will display.
Step 3 of 4 – *Manage Tax* screen:

No input is required on this screen. Click ‘Next’ to continue or ‘Save’ to save inputs for later submission. **Note:** Clicking ‘Save’ will automatically navigate you back to the Create Invoice search screen and a confirmation notice will display at the top of the screen confirming your invoice has been saved. To retrieve your saved invoice to complete the submission process, see page 19.
Step 4 of 4 – *Review and Submit* screen:

**Final Verification** - This is your final opportunity to verify all information is correct. If information is correct click ‘Submit’.

If changes are required before submission, you must first save your inputs before clicking the ‘Back’ button otherwise you might get an error message. To save your inputs, click ‘Save’ and you will automatically be navigated back to the Create Invoice search screen and a confirmation notice will display at the top of the screen confirming your invoice has been saved. To retrieve your saved invoice to complete the submission process, see page 19.

Once submitted you will receive a confirmation page. *If you do not receive this page, your invoice has not been submitted.*

Once submitted, the E-invoice details, other than uploaded attachments, cannot be revised.
Adding/Editing Attachments after E-invoice has been submitted
You can add, view, update or delete attachments after an E-invoice has been successfully submitted.

From the initial ‘Create Invoices’ screen, search for your E-invoice # you recently created and click ‘Go’ to execute the search. Do not confuse this step with creating a new E-invoice which requires you to click the ‘Go’ button on far-right side of the screen. Instead, you’ll be searching for your existing E-invoice on the initial ‘Create Invoices’ webpage.

To Add attachment: From your search results, click the ‘plus’ sign in the View Attachments column.
The Add Attachment window will display for you to upload your attachment. When done, click ‘Apply’ to save your changes and be directed back to the Invoice Actions Search page.

The ‘paperclip’ icon in the View Attachments column indicates your attachment was uploaded successfully.

**To View, Update or Delete attachment:** Click the ‘paperclip’ icon to be directed to the Add Attachment window.
When done viewing or updating your attachment, click ‘Return to Invoice Actions’ link to navigate back to the Invoice Actions Search page.

<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>Test</td>
<td></td>
<td></td>
<td>From Supplier</td>
<td></td>
<td>25-Feb-2019</td>
<td>One-Time</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click link in Title column to view your attachment

Return to Invoice Actions
Retrieving an Unfinished Saved E-Invoice

To retrieve a saved E-invoice that has not yet been submitted, click on the ‘Home’ tab and then click ‘Invoices’ to navigate to the Invoice Search screen.
On the Invoice Search screen, click ‘Create Invoices’ to search for unsubmitted invoices; do **not** select ‘View Invoices’.

In the Search section, search for your invoice using any of the search option fields and select ‘Go’. **NOTE:** Searching by invoice number is case sensitive and must be in the same format as originally entered when you saved your invoice.

Locate your unfinished saved invoice and select ‘Update’ (or ‘Cancel’ if the unsubmitted invoice is no longer needed).
When you click ‘Update’, you will be navigated to the Details screen which will display the information you previously entered. From this screen you can make necessary revisions and proceed with submitting your invoice.

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Line</th>
<th>Shipment</th>
<th>Item Number</th>
<th>Item Description</th>
<th>Supplier Item Number</th>
<th>Ship To</th>
<th>Available Quantity</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>UOM</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008033</td>
<td>1</td>
<td>1</td>
<td></td>
<td>WINGS</td>
<td></td>
<td>SANDIA LABS - ABQ</td>
<td>2500</td>
<td></td>
<td>125.45</td>
<td>U3 DOLLAR</td>
<td>125.45</td>
</tr>
<tr>
<td>2008033</td>
<td>2</td>
<td>1</td>
<td></td>
<td>BURGERS</td>
<td></td>
<td>SANDIA LABS - ABQ</td>
<td>1</td>
<td>0.05</td>
<td>5000</td>
<td>EACH</td>
<td>250</td>
</tr>
</tbody>
</table>

**Invoice Payment Terms**

Interested in an early payment? Select one of the discounted payment terms below.

- **Current PO Terms:** NET 30 - NET DUE IN 30 DAYS
- **Available Invoice Terms (Optional):**
  - 3%/5 NET 30 - 3% DISCOUNT IF PAID IN 5 DAYS NET DUE IN 30 DAYS
  - 2%/10 NET 30 - 2% DISCOUNT IF PAID IN 10 DAYS NET DUE IN 30 DAYS
  - 1.5%/15 NET 30 - 1.5% DISCOUNT IF PAID IN 15 DAYS NET DUE IN 30 DAYS
  - 1%/20 NET 30 - 1% DISCOUNT IF PAID IN 20 DAYS NET DUE IN 30 DAYS
  - .5%/25 NET 30 - 5% DISCOUNT IF PAID IN 25 DAYS NET DUE IN 30 DAYS
  - Use Current PO Terms

- **Estimated Discount:** $11.29
- **Estimated Payment:** $364.19

☑️ By selecting a discounted term, I acknowledge I am knowingly applying a discounted term against this invoice.

Additionally, I allow Sandia National Laboratories to recognize the discount upon payment of the invoice.
**View Status of Submitted Invoices**

To view status of submitted invoices, click on the ‘Home’ tab and then click ‘Invoices’. 

![Image of the Supplier Collaboration interface showing the 'Home' tab and 'Invoices' section]
This will bring you to the View Invoices screen. In the Search section, search for your invoice using any of the search option fields and select ‘Go’. **NOTE:** Searching by invoice number is case sensitive and must be in the same format as originally entered when you submitted your invoice.

The invoice that you searched for will display. You can click on the Invoice link to receive additional information.

**Support**

Contact eInvoice@sandia.gov
If you are receiving a specific error, please include details and a screenshot if possible.