myILMS

logistics for diplomacy

Vendor Training

Order Delivery and Invoice Submission

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Introduction

Introduction
SYSTEM OVERVIEW

1

Order Created and Approved by Post

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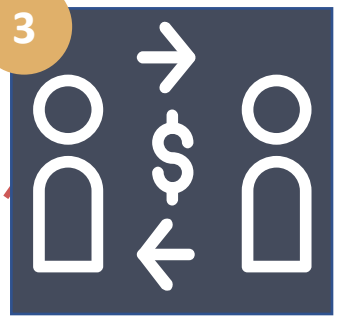
Invoice Created and Submitted by Vendor

3



myILMS portal invoice data sent to Post to process payment

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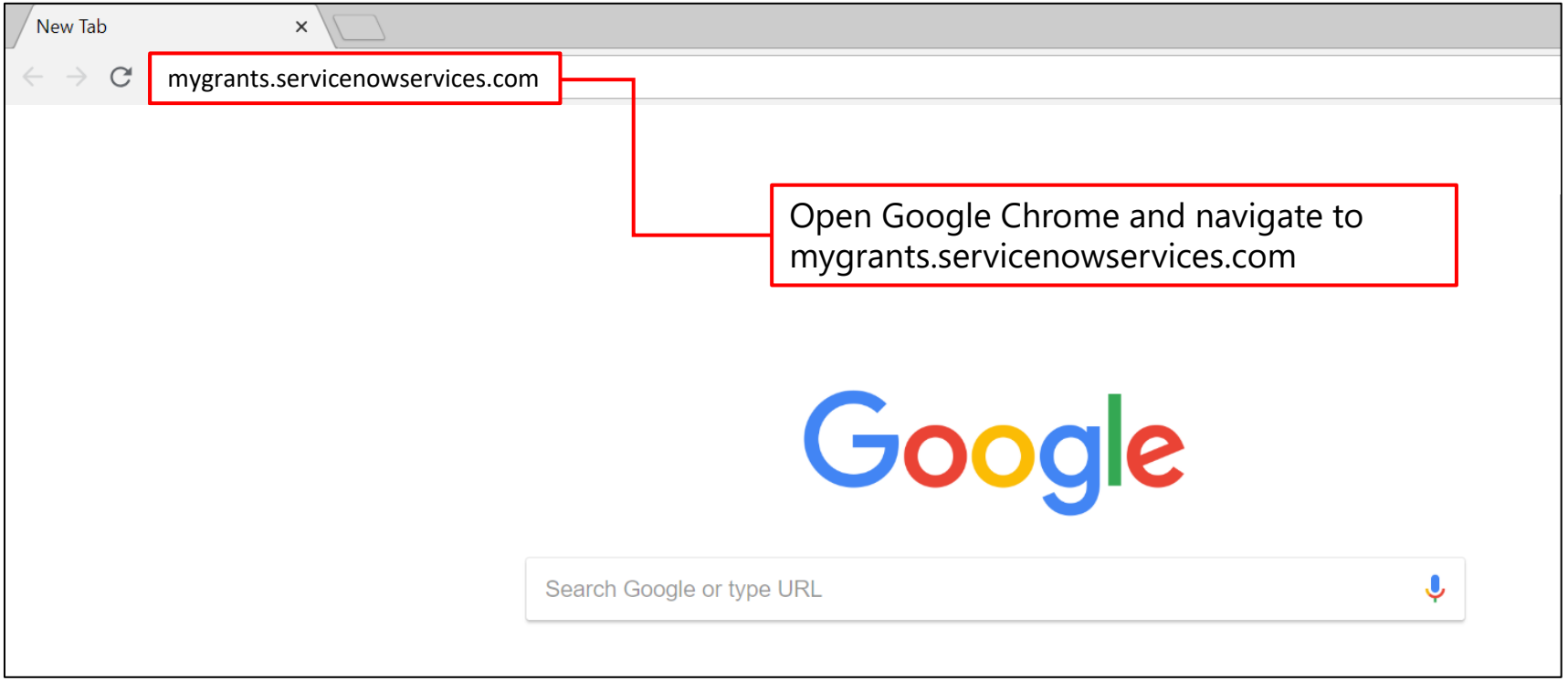
Creating and Submitting an Invoice

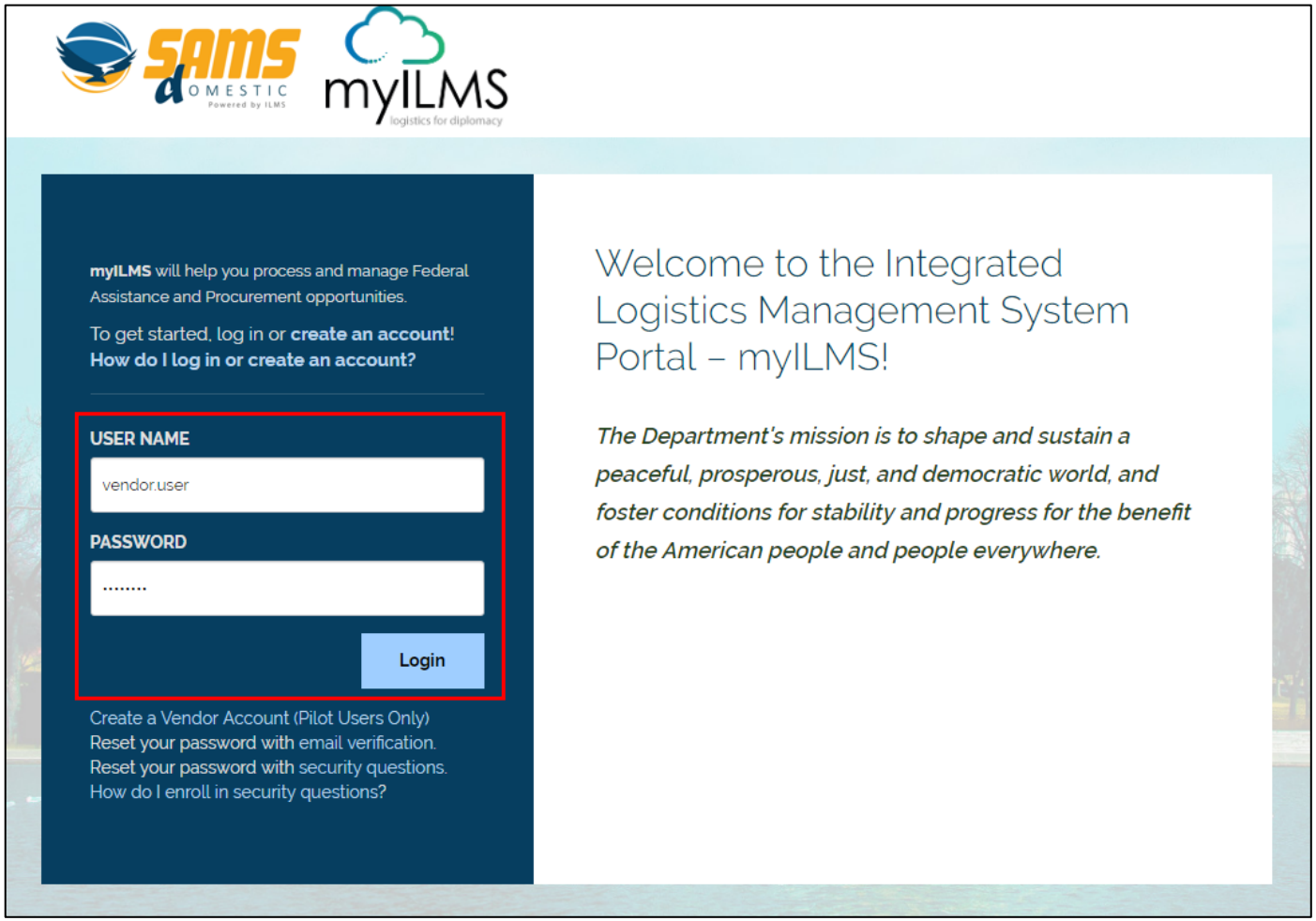
myILMS Portal
ACCESS

Vendors can access the cloud-based myILMS Portal through an internet browser, such as Chrome.



myILMS Portal
LOGIN PAGE

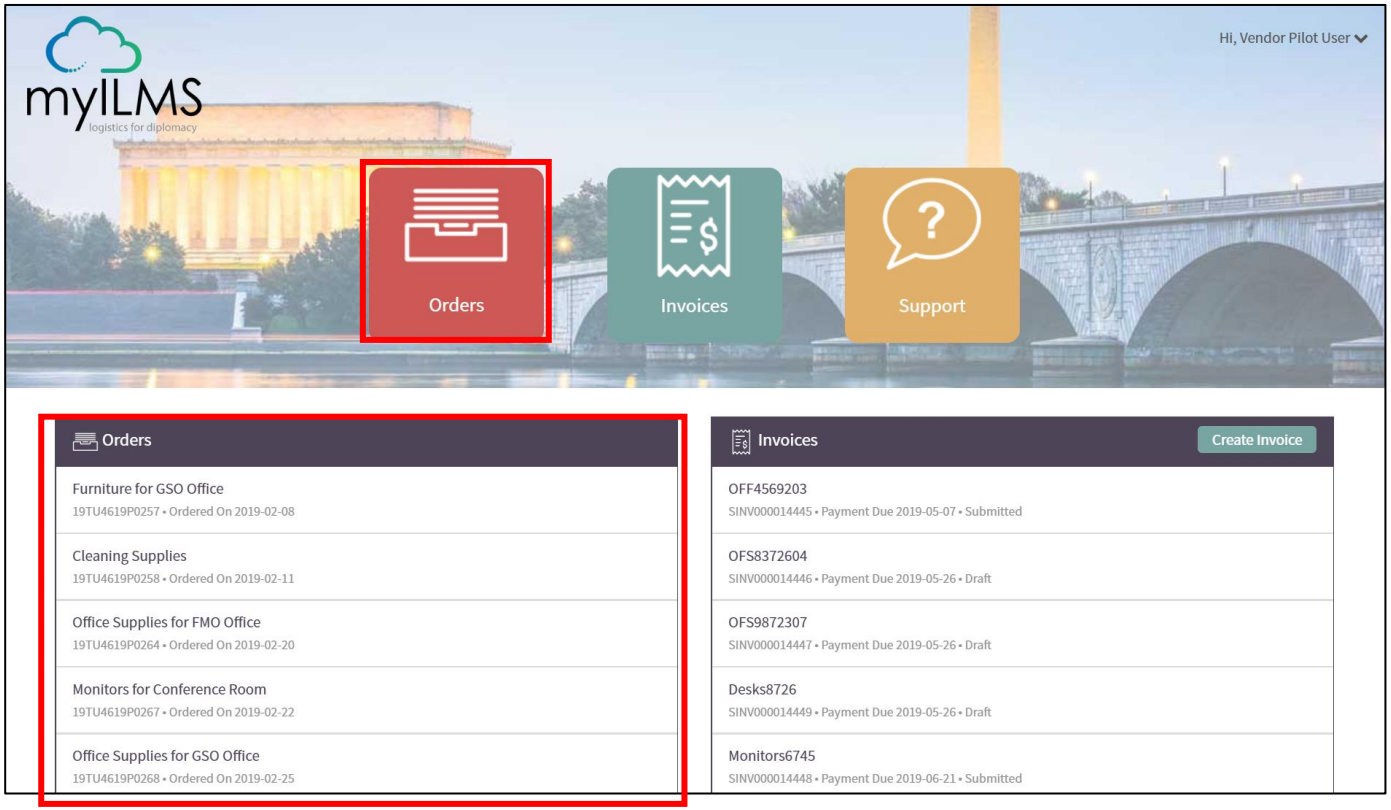
Vendors can log in to the myILMS Portal by entering their user name and password credentials.



- Pilot vendors will receive their login information after their training and lab sessions.

User Interface
VENDOR HOMEPAGE

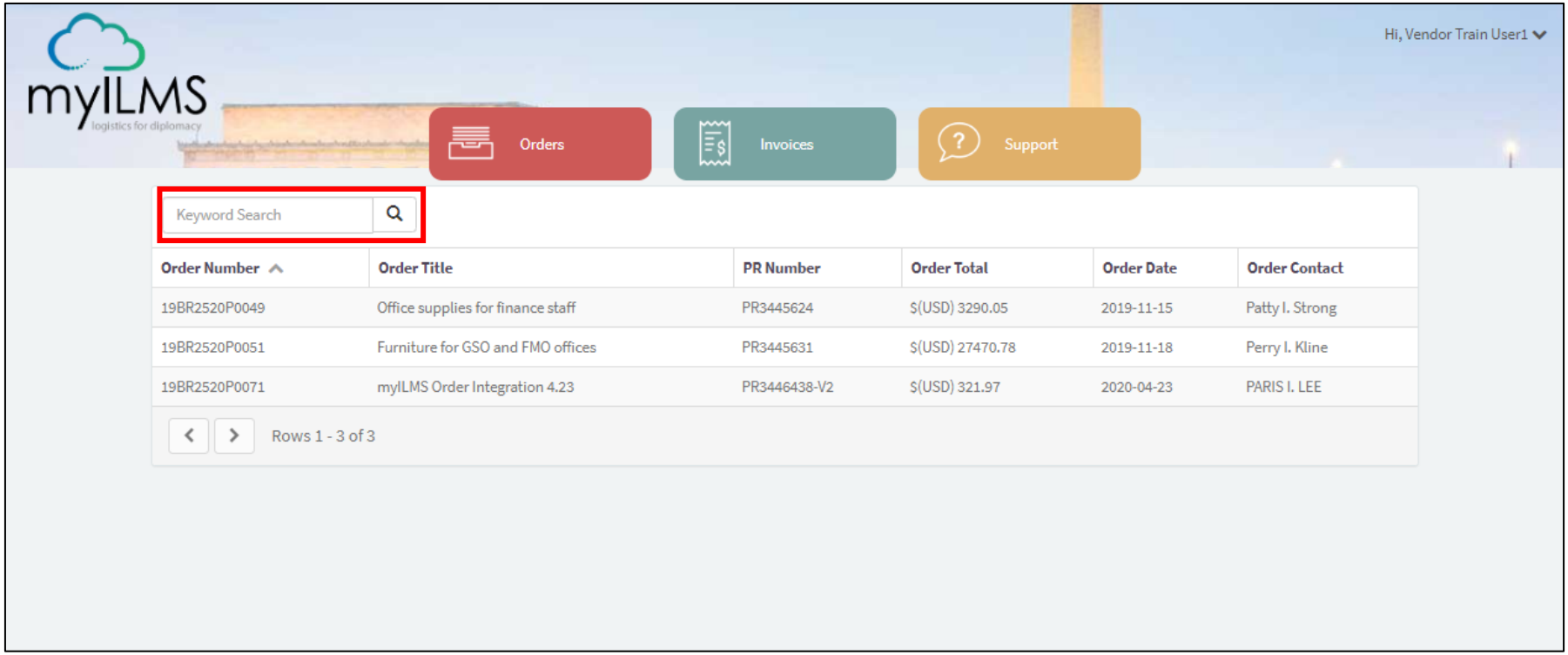
In the portal, vendors will be taken to a landing page where they can see a snapshot of their recent orders and invoices.



- Vendors can navigate to a specific record from the list preview or use the tiles to view all orders and invoices associated with their vendor.
- The Orders List Preview on the Homepage will display Orders approved by Post that have a Remaining Order Balance greater than zero.
- The Orders will sort from oldest to newest, so that vendors can see their most outstanding orders first.

User Interface
FINDING ORDERS

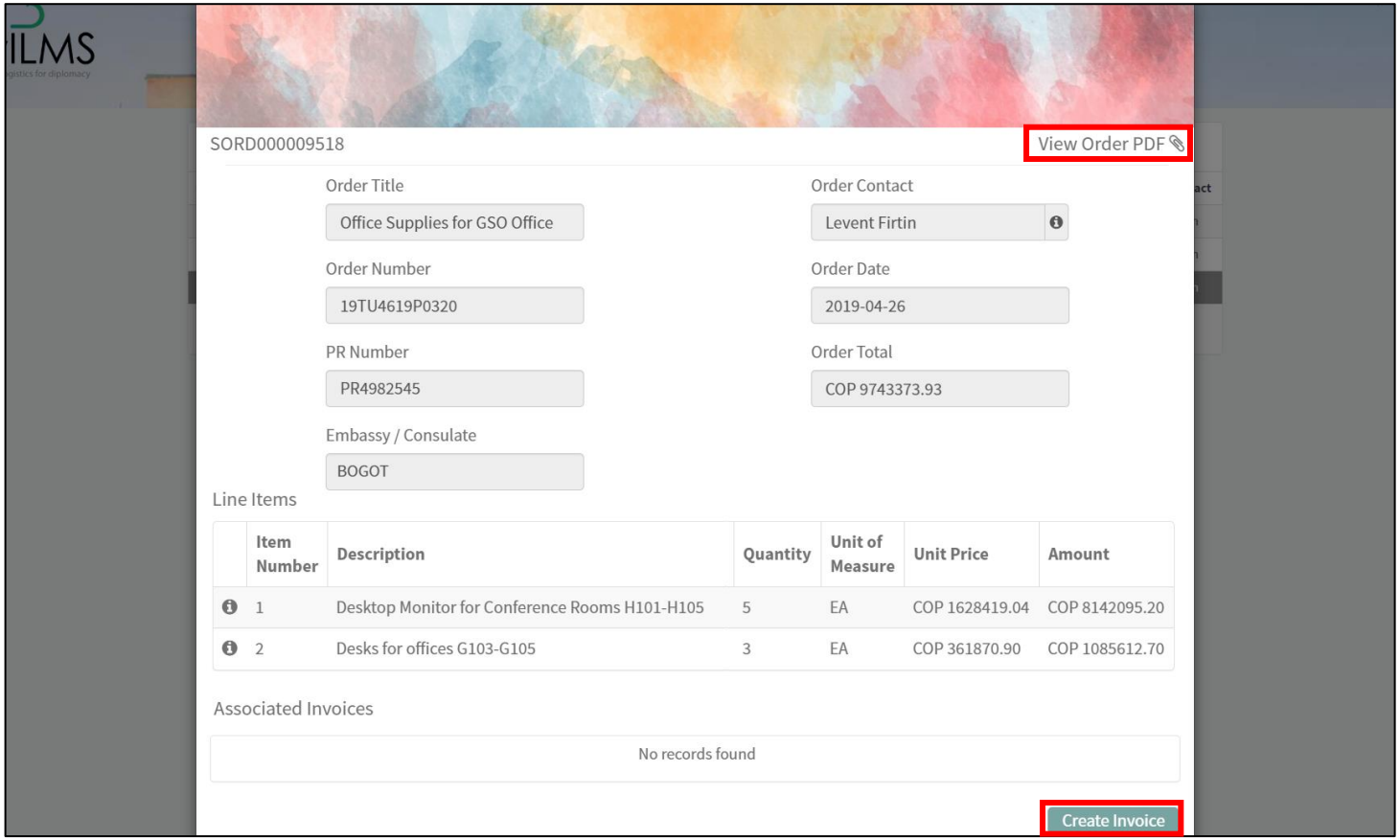
Clicking on the Orders Tile will take the vendor to the Order Table which displays all orders that are tied to the vendor.



- Vendors can use the Search Bar to find a specific order form to invoice against
- Note: always enter at least 2 characters when searching for an order

Creating an Invoice
METHOD 1: FROM AN ORDER

The order form will display order fields, line item data, and the order PDF.

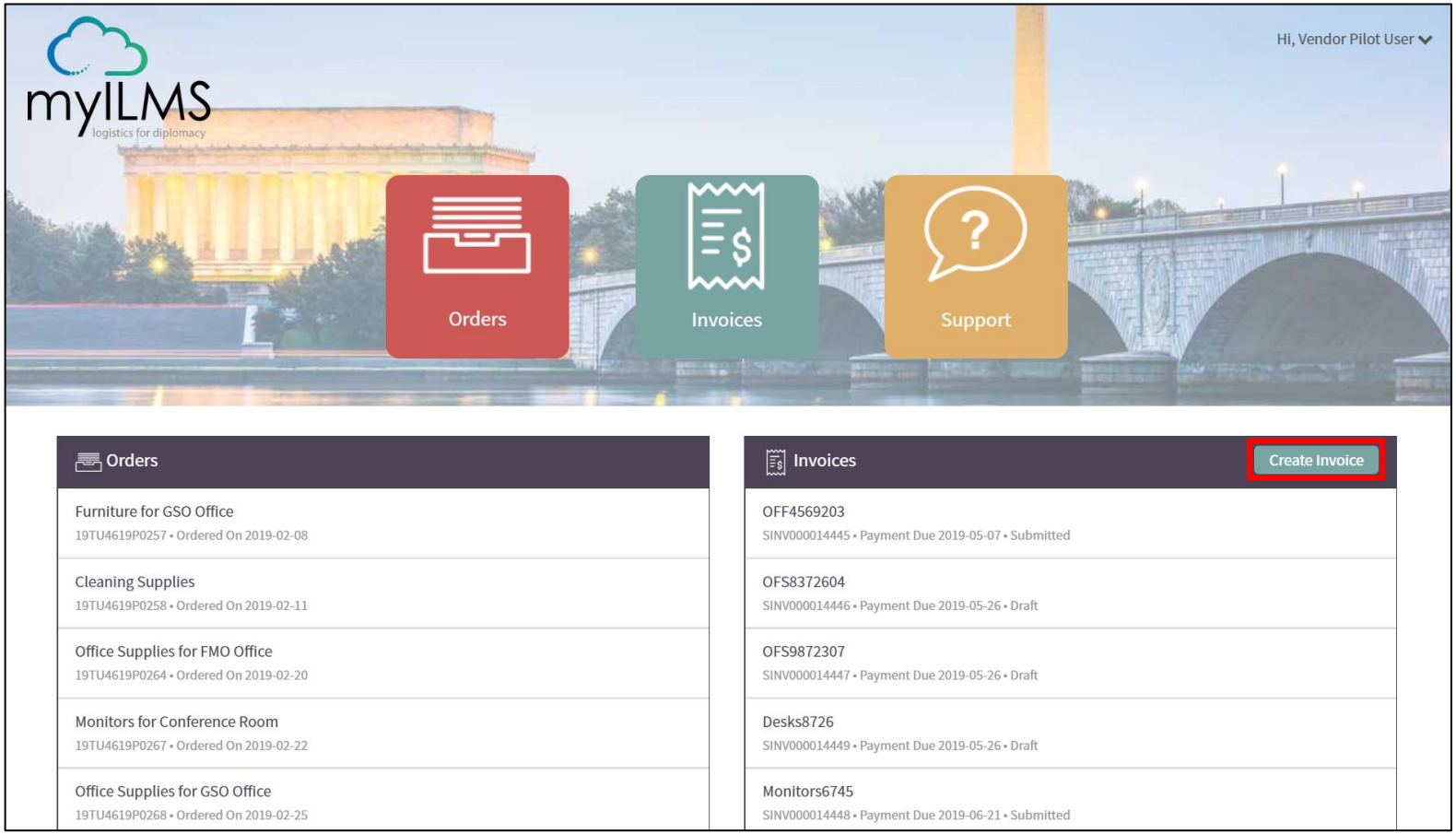


- Vendors can download the order PDF to review information to fulfill the order.
- If the vendor is ready to submit an invoice, they can create it directly from the order form.

Creating an Invoice

METHOD 2: FROM THE HOMEPAGE

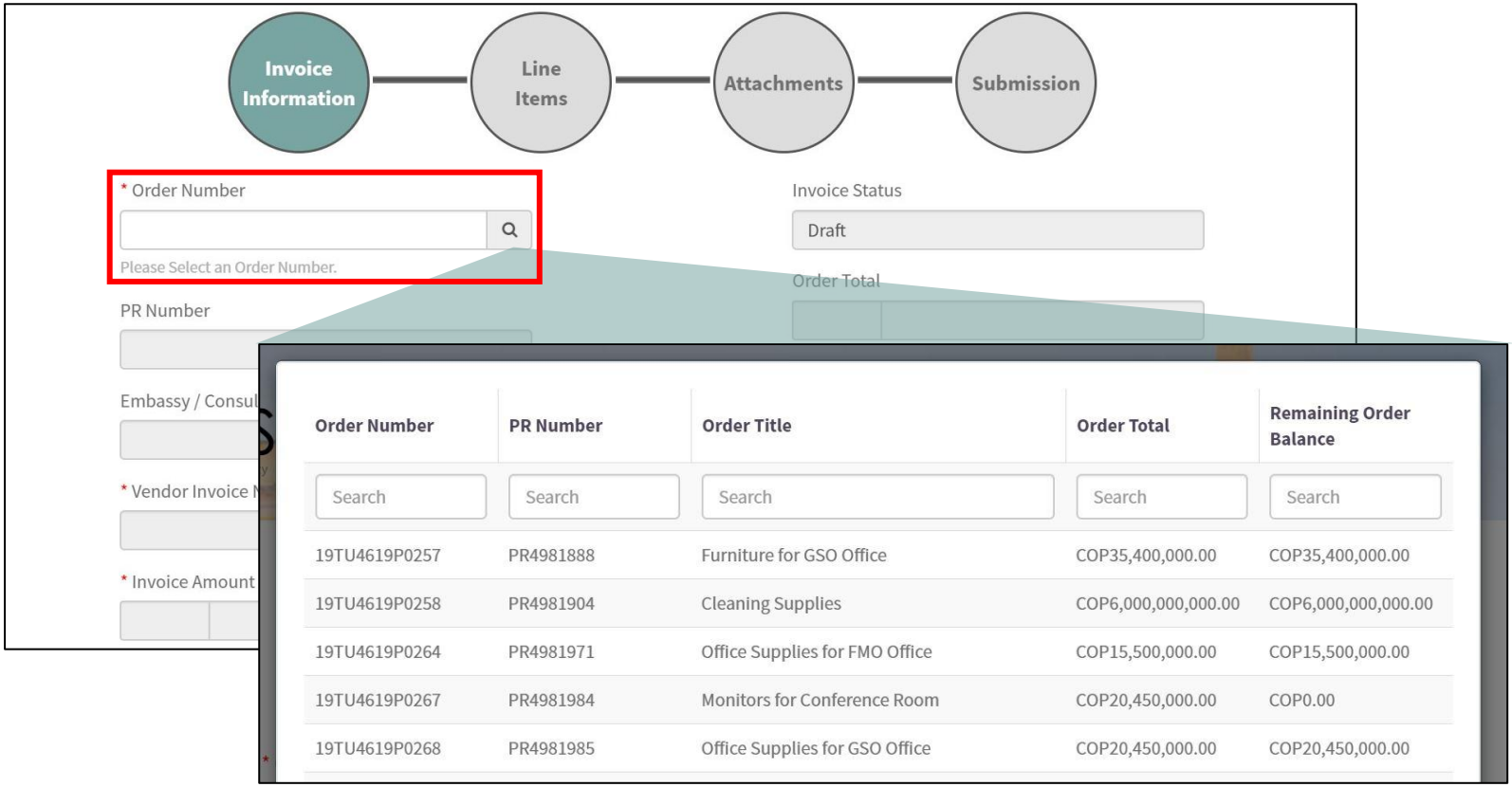
Vendors can also create invoices directly from the homepage by clicking the "Create Invoice" button on the Invoices List Preview.



- The Invoice Table can be accessed by clicking "View All" on the Invoice List Preview or the Invoices Tile on the homepage.
- Vendors can create invoices from the Invoice Table by clicking the "Create Invoice" button.

Creating an Invoice
DRAFT INVOICE

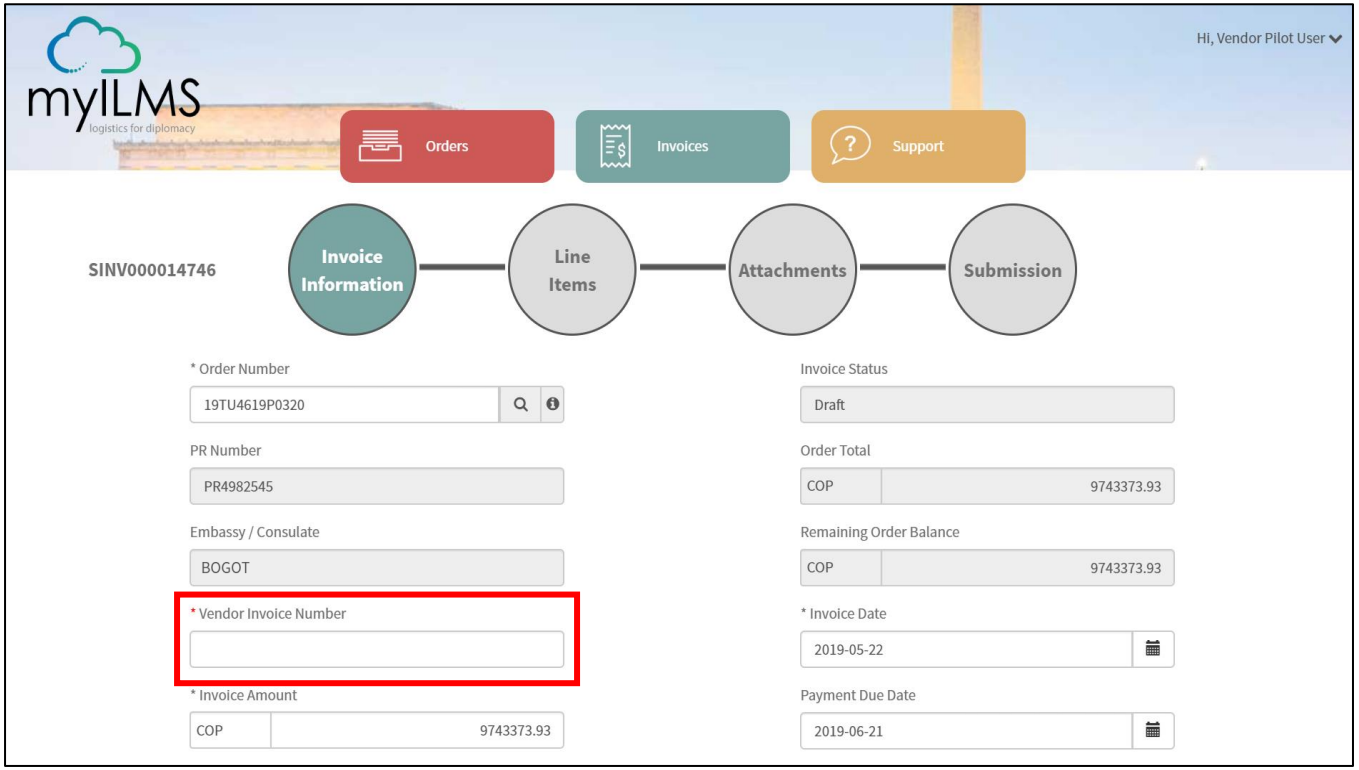
When the vendor creates a new invoice from the homepage or Invoice Table, they will be directed to a draft invoice where they will be prompted to select an Order Number from the look up.



- The vendor must select an associated order before the Invoice can be saved.
- Vendors can search by the **Order Number**, **PR Number**, and **Order Title** when looking for an order.
- Vendors can also sort by the **Order Total** or **Remaining Order Balance** when looking for an order.

Creating an Invoice
ASSOCIATED ORDER FIELDS

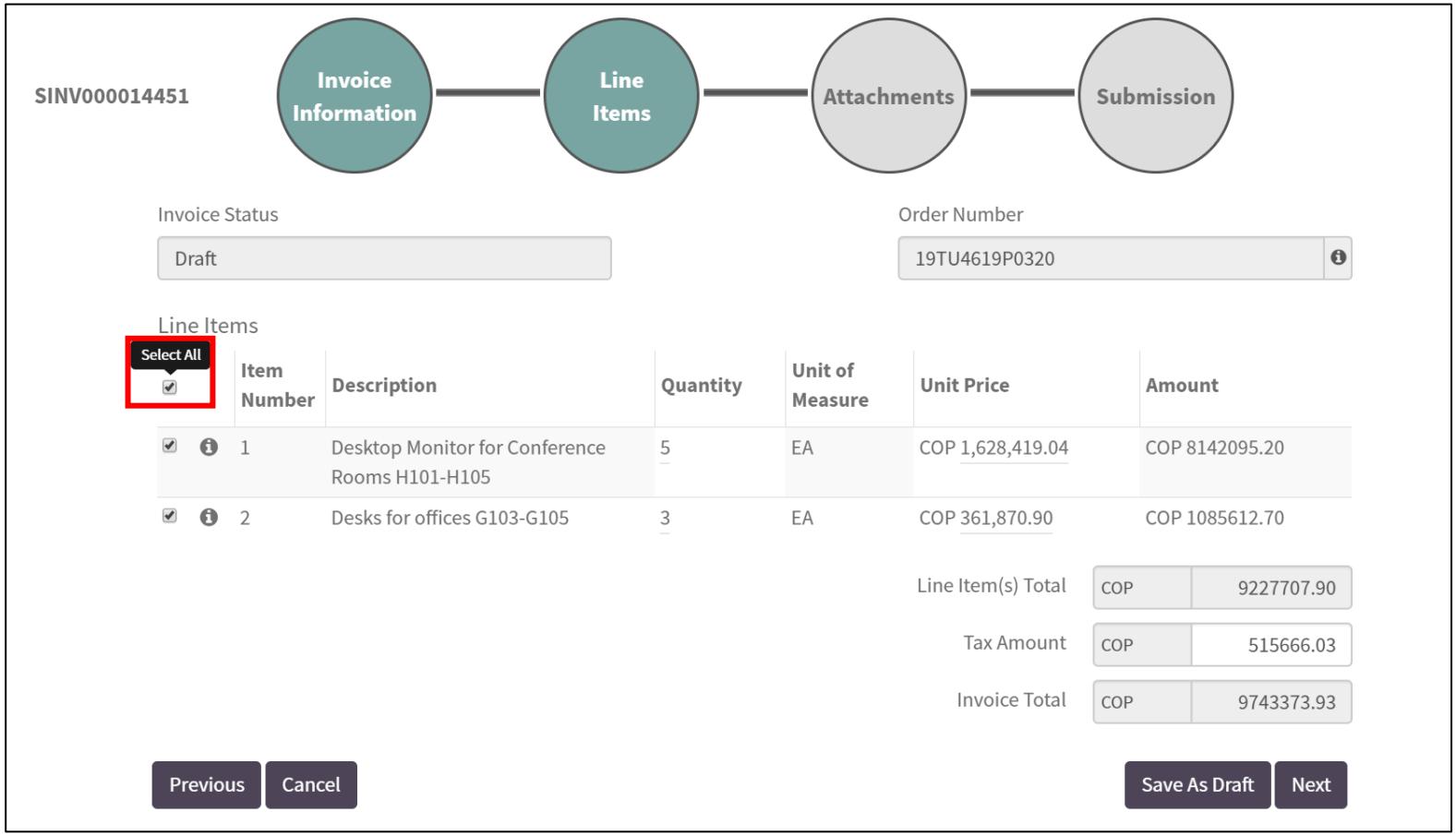
When the vendor selects an order from the look up, the associated order fields will populate with the order information.



- The **Invoice Amount** will populate with the Remaining Order Balance from the order, but may be updated.
- The **Invoice Date** will populate with the date the invoice is created, but will remain editable.
- The **Payment Due Date** will be set to 30 days from the Invoice Date, but will also remain editable.
- The vendor must input the **Vendor Invoice Number** before proceeding to the next step.

Creating an Invoice
LINE ITEMS

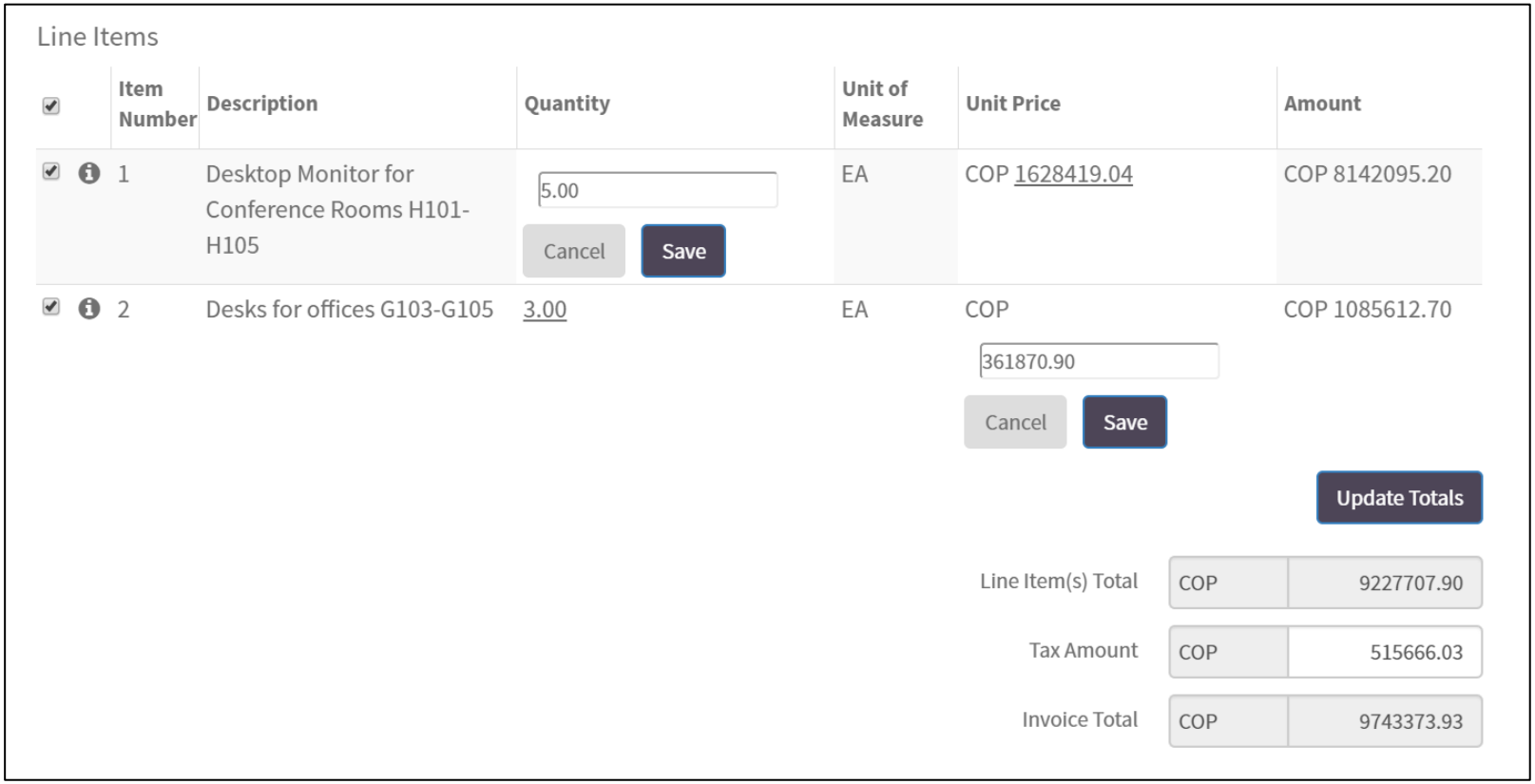
At the Line Items step, vendors can review and edit the line items from the associated order based on their invoice requirements.



- Vendors can select some or all of the line items to invoice against.
- If the vendor is submitting a partial invoice, the **Line Item(s) Total** will updated based on the items that are selected.

Creating an Invoice
UPDATING LINE ITEMS

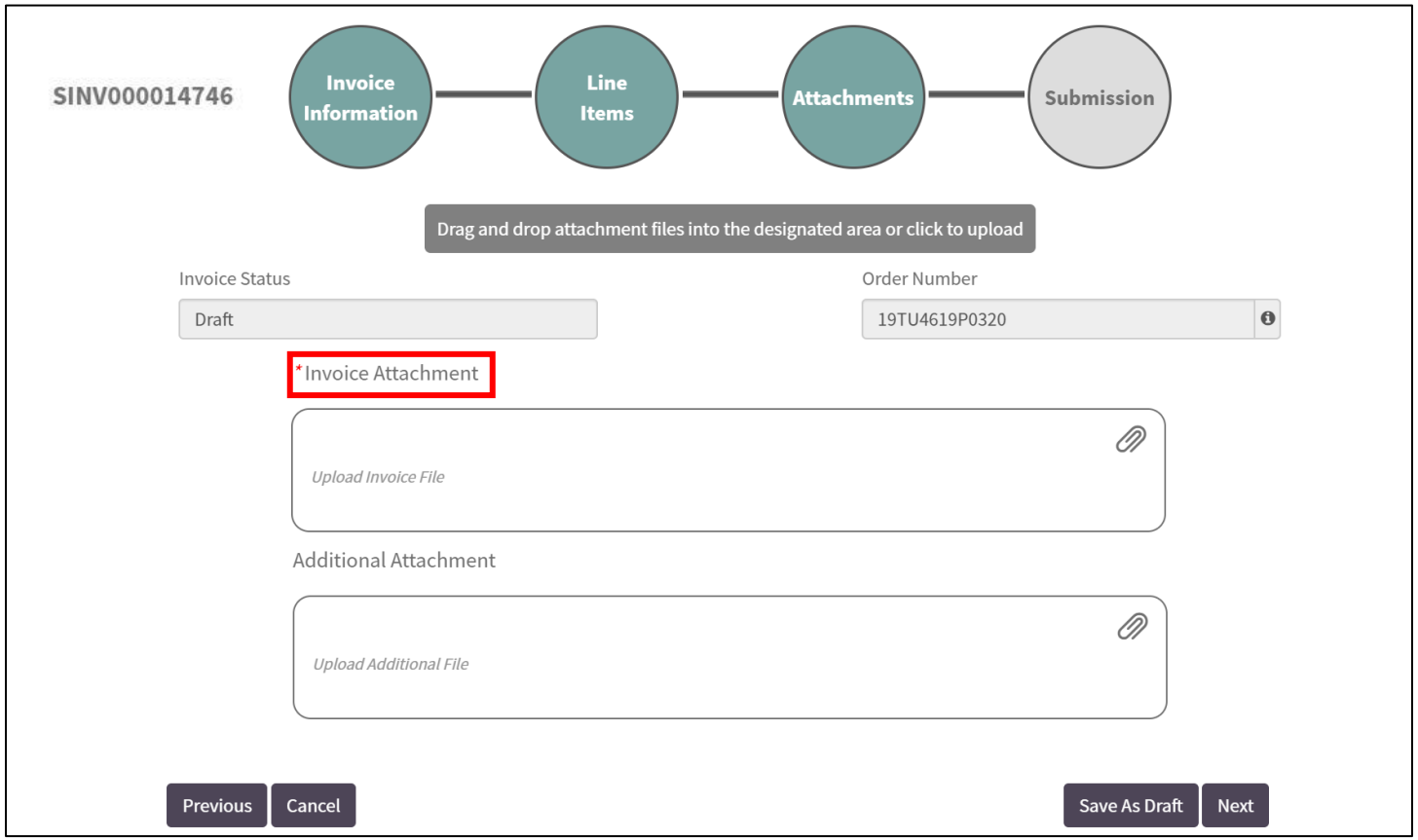
Vendors can also update the Quantity or Unit Price of the line items by clicking on the current value and changing it.



- The **Amount** on each line item will be calculated by the quantity times the unit price.
- Vendors cannot update the **Unit of Measure**, ensuring that the quantity on the invoice can be easily compared to the order.

Creating an Invoice
ATTACHMENTS

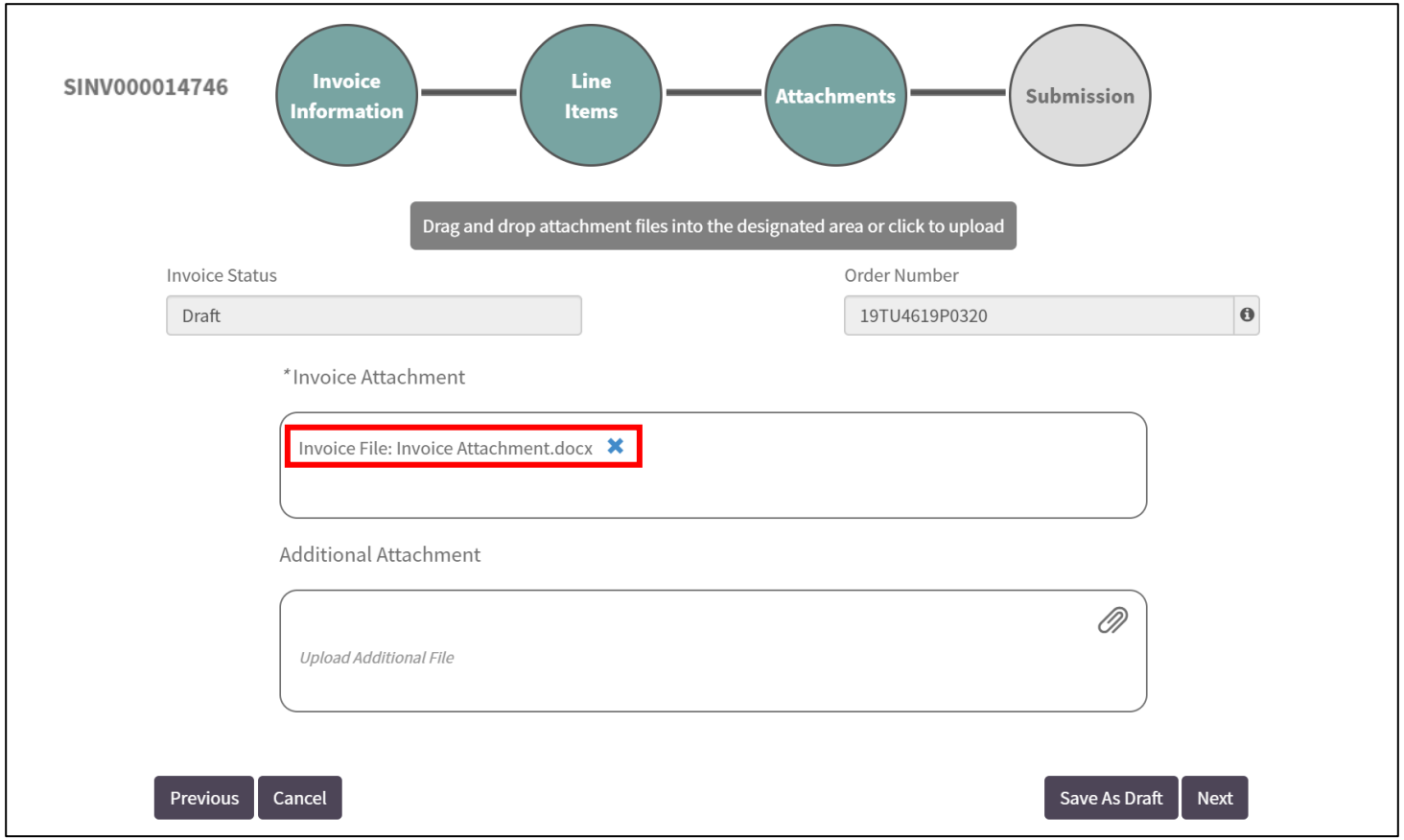
At the Invoice Attachment step, vendors are required to upload an associated invoice file.



- Vendors may also upload an additional attachment.
- These attachments will be sent to the post users who process the invoice.

Creating an Invoice
ATTACHMENTS

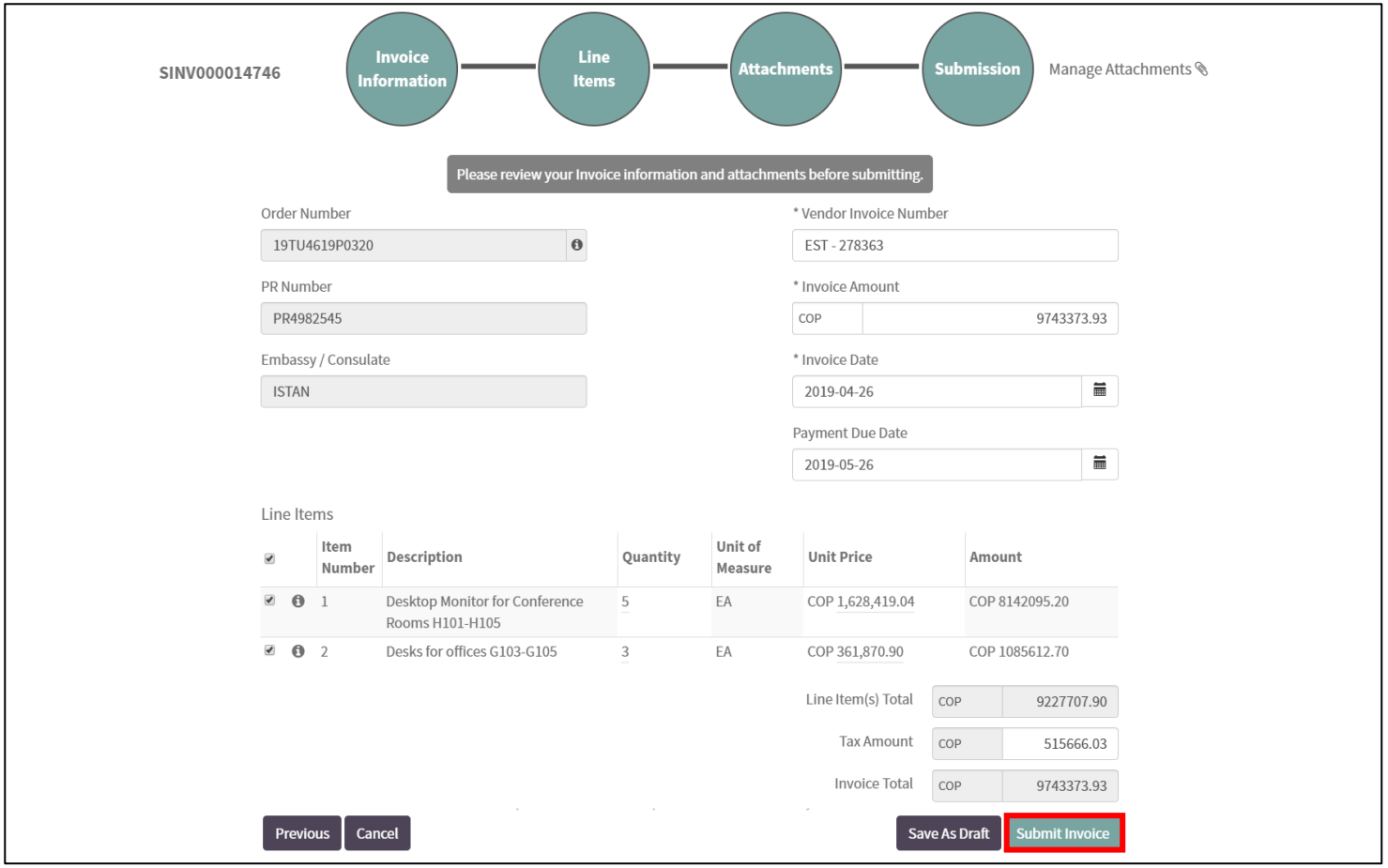
Vendors can click to upload a file from their desktop or drag and drop a file to upload it.



- Once an attachment has been added, the file name will display in the section.
- An "X" will display next the file to allow the vendor to remove the attachment and upload a new one, if needed.

Submitting an Invoice
REVIEW

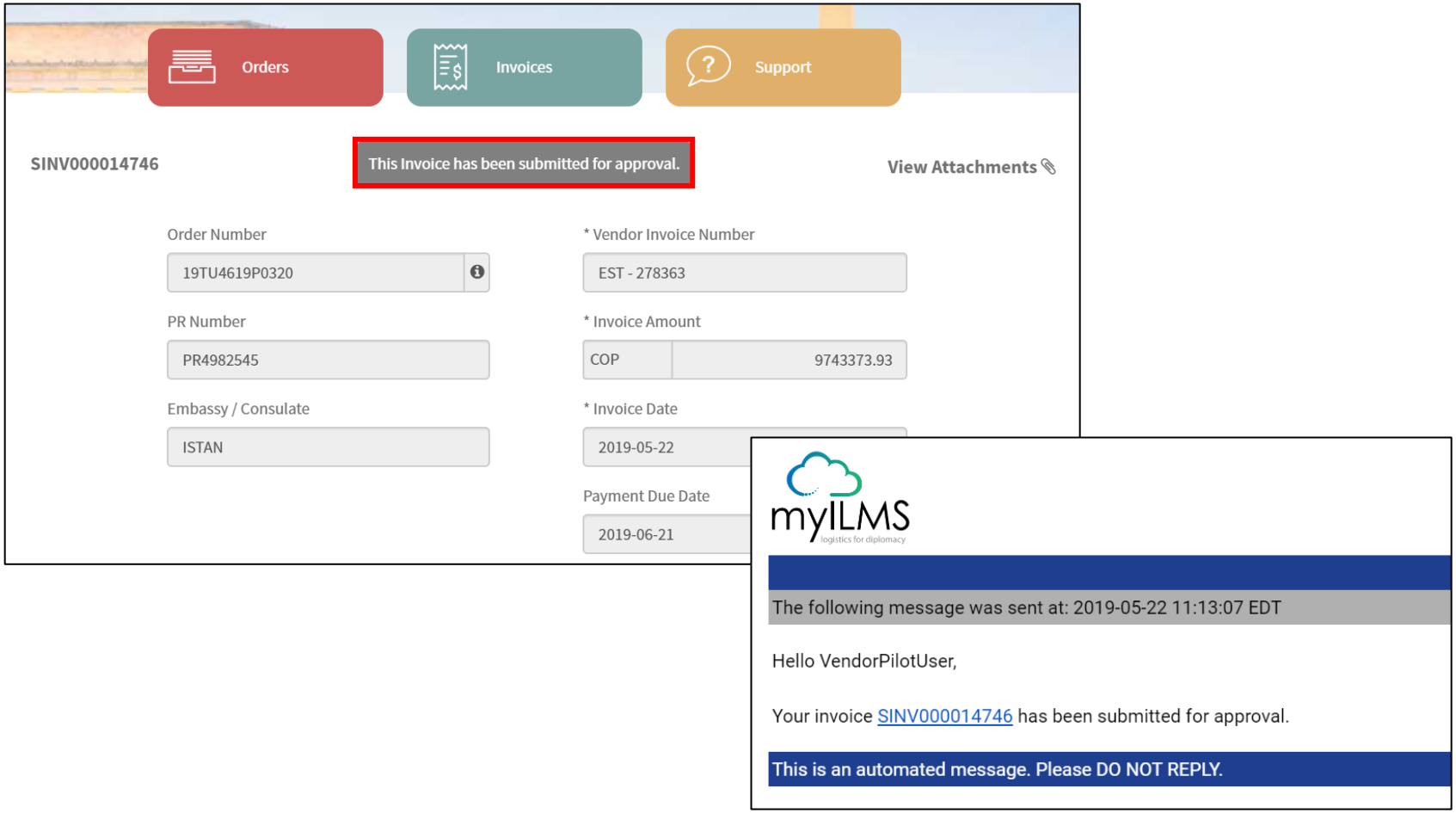
On the Submission step, vendors will be prompted to review the invoice information prior to submission.



- Vendors can review and edit the information that they input before submitting the Invoice Form.
- Clicking the Submit Invoice button will send the invoice directly to the finance team at post.

Submitting an Invoice
CONFIRMATION

After submitting the Invoice Form, vendors can review their copy of the invoice with a confirmation message that it has been sent to the post for approval.



- The vendor will also receive an email confirming their invoice submission.

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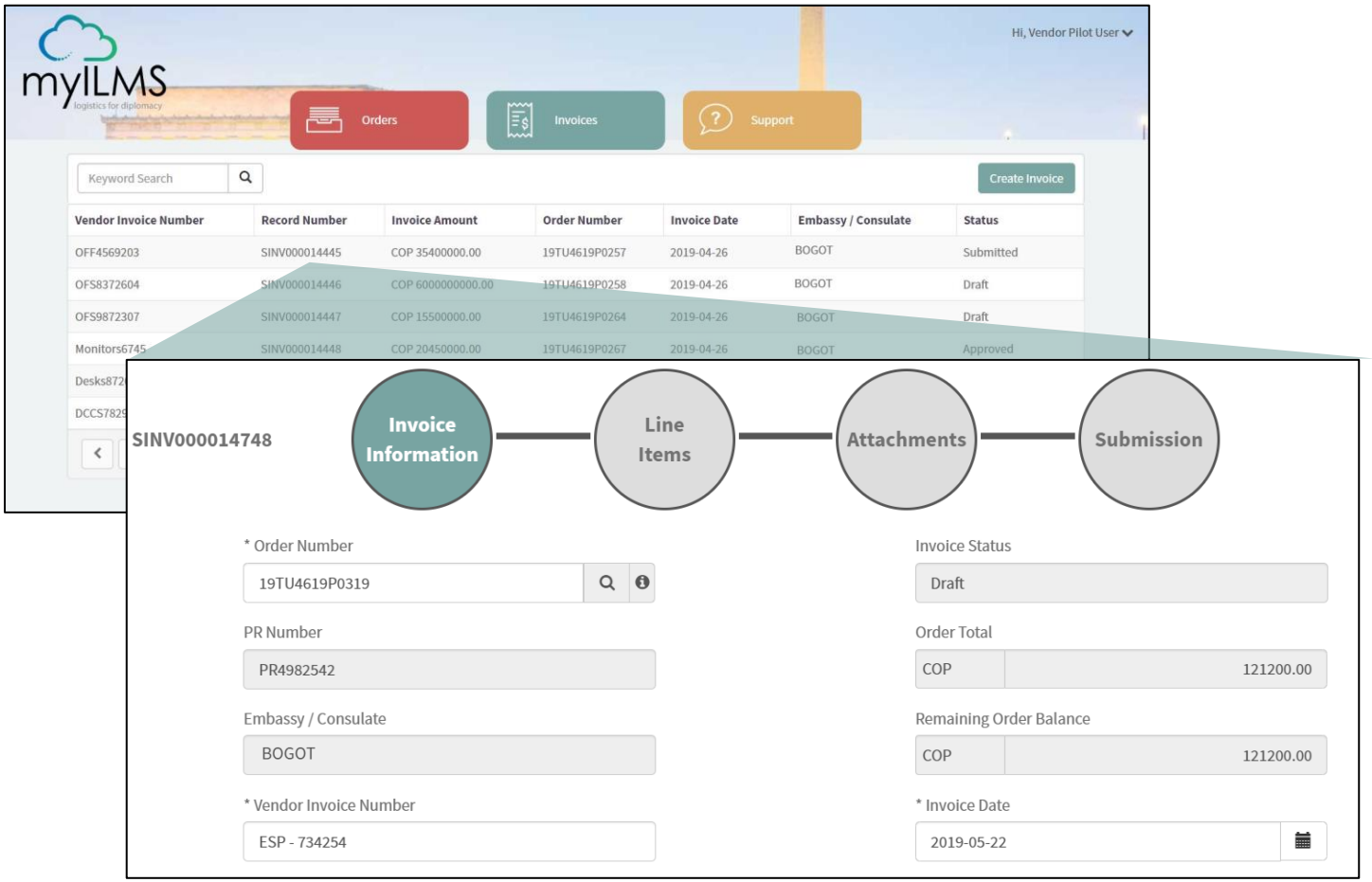
Invoice Statuses

Invoice Statuses

DRAFT

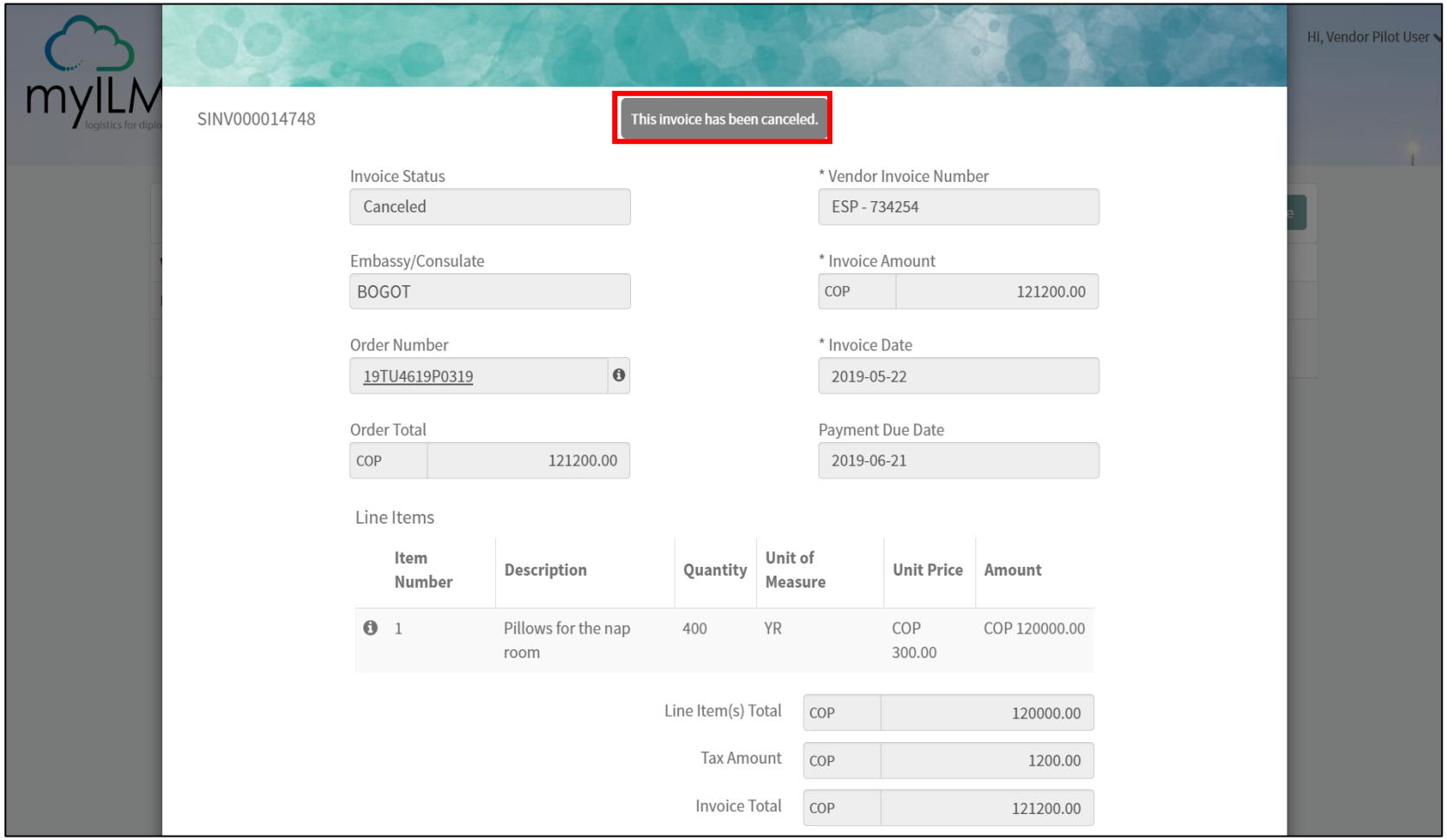
If the vendor saves their invoice while it is in progress, they can return to complete and submit it.



- Only the person who created the invoice is able to edit it while it is in Draft status.

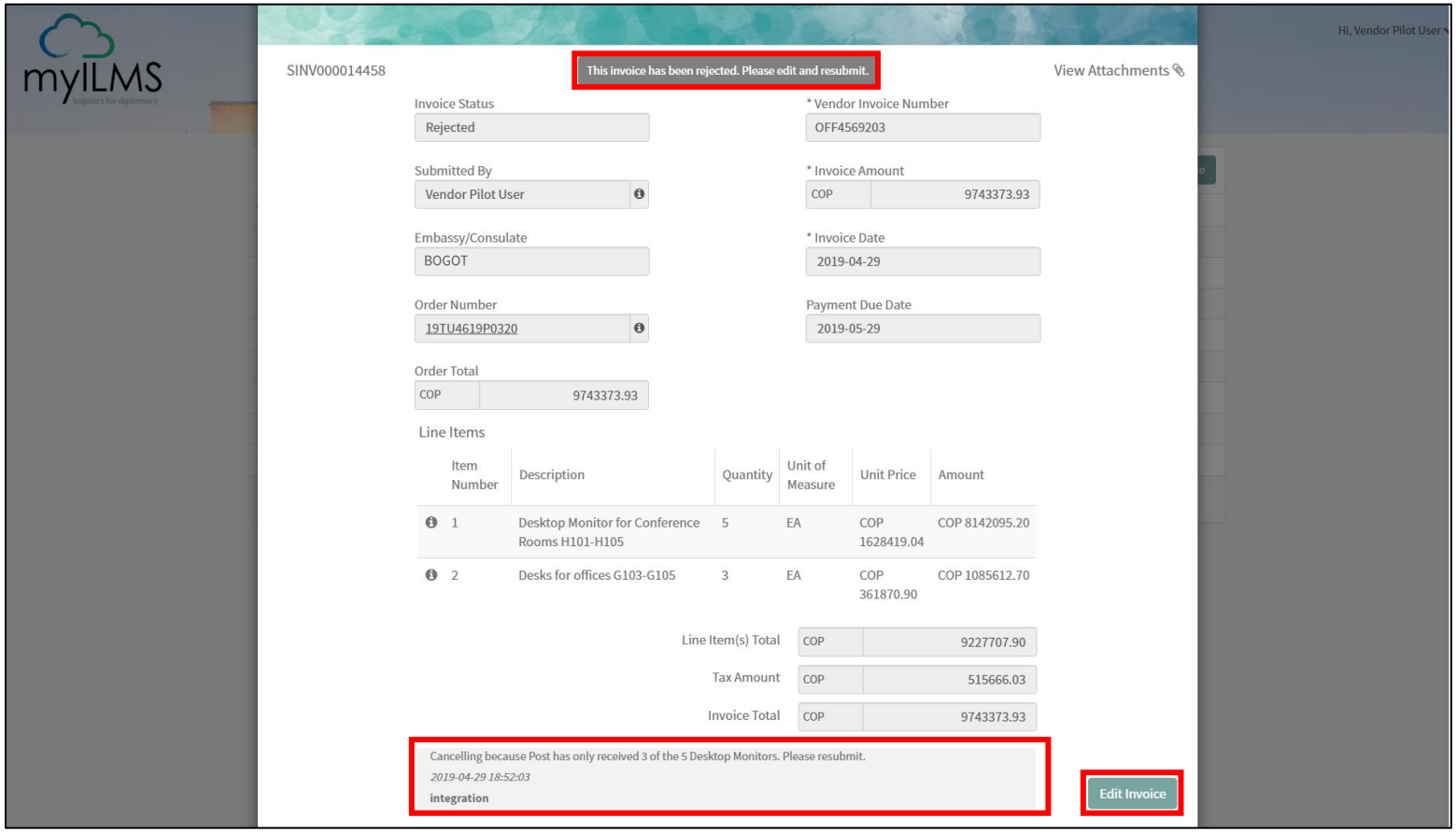
Invoice Statuses
CANCELED

Vendors can cancel their invoice if it is in Draft status using the "Cancel" button. Once an invoice is canceled, it will become read only and uneditable.



Invoice Statuses
REJECTED

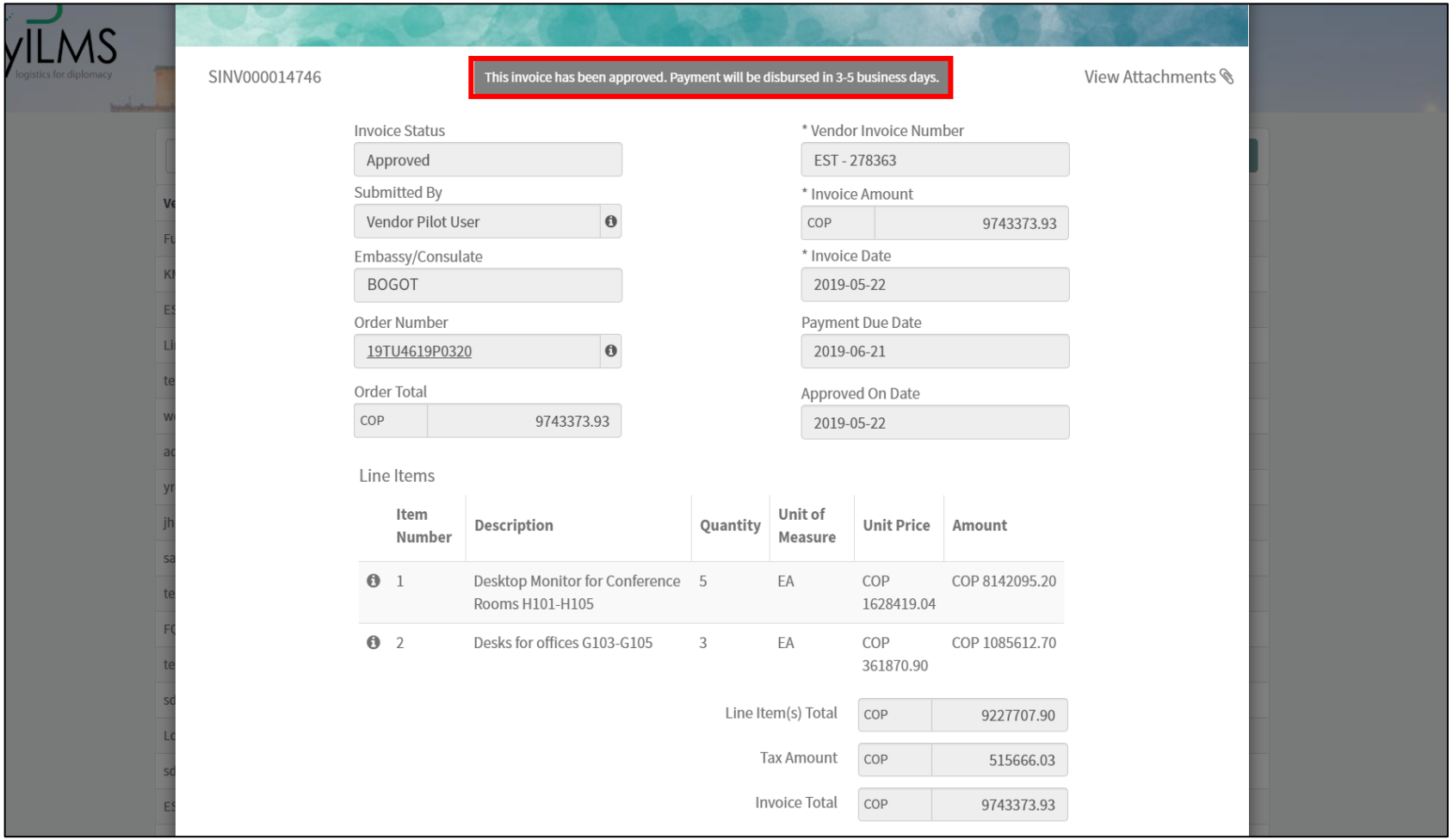
When Post rejects an invoice, the invoice will move to "Rejected" status in the portal and the rejection comments will display on the form.



- Vendors can click the "Edit Invoice" button to edit and resubmit the invoice based on the rejection comments from Post.
- Only the user who originally created the invoice can edit a Rejected invoice.

Invoice Statuses
APPROVED

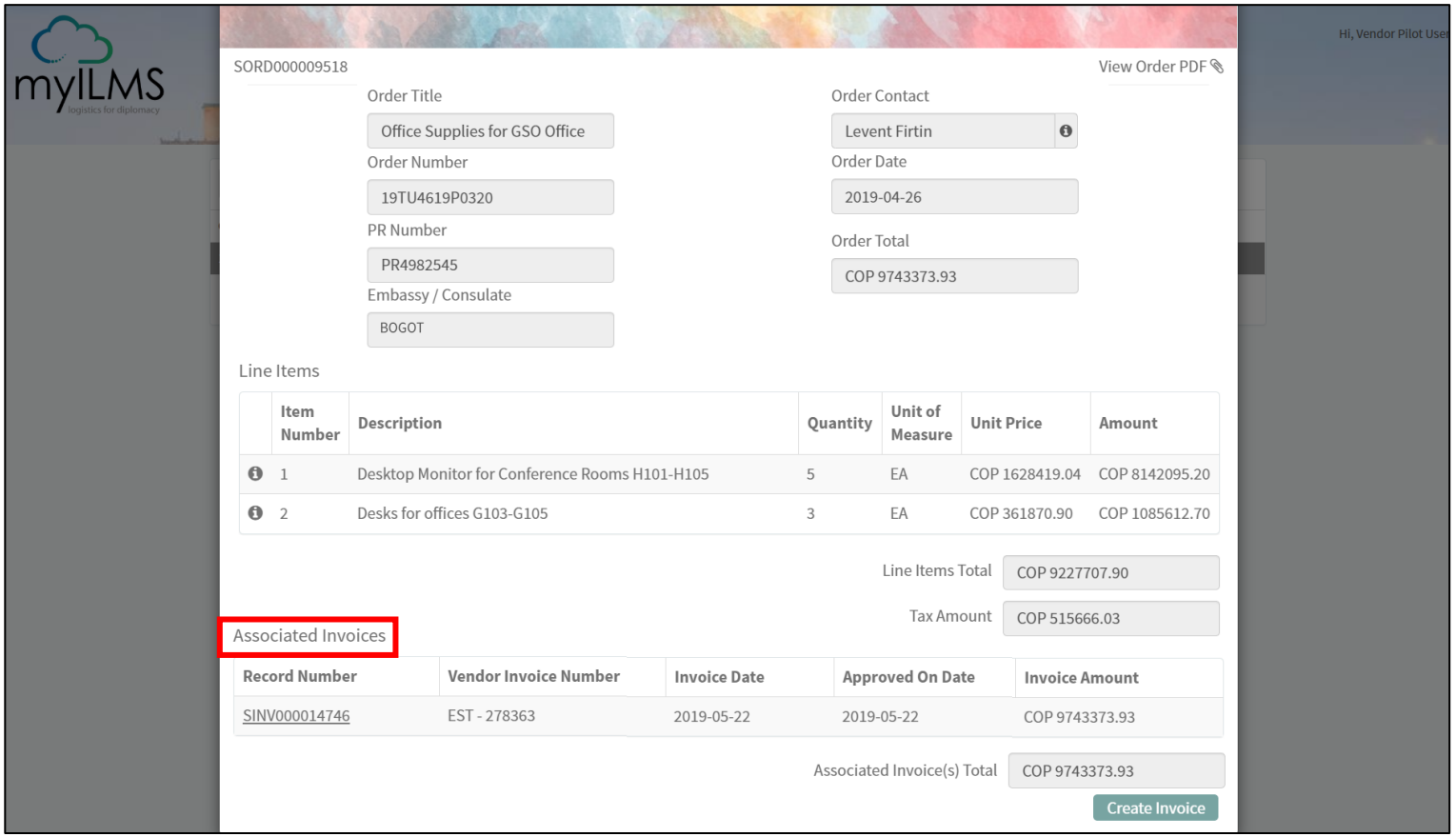
When Post Approves an Invoice, the Invoice will move to Approved status in the Portal.



- The Invoice will remain read only.

Invoice Statuses
ASSOCIATED INVOICES

When an invoice is approved by Post, it will be displayed in the Associated Invoices section on the order form.



- The Remaining Order Balance will updated based on the amount of the invoices that have been approved against an order.

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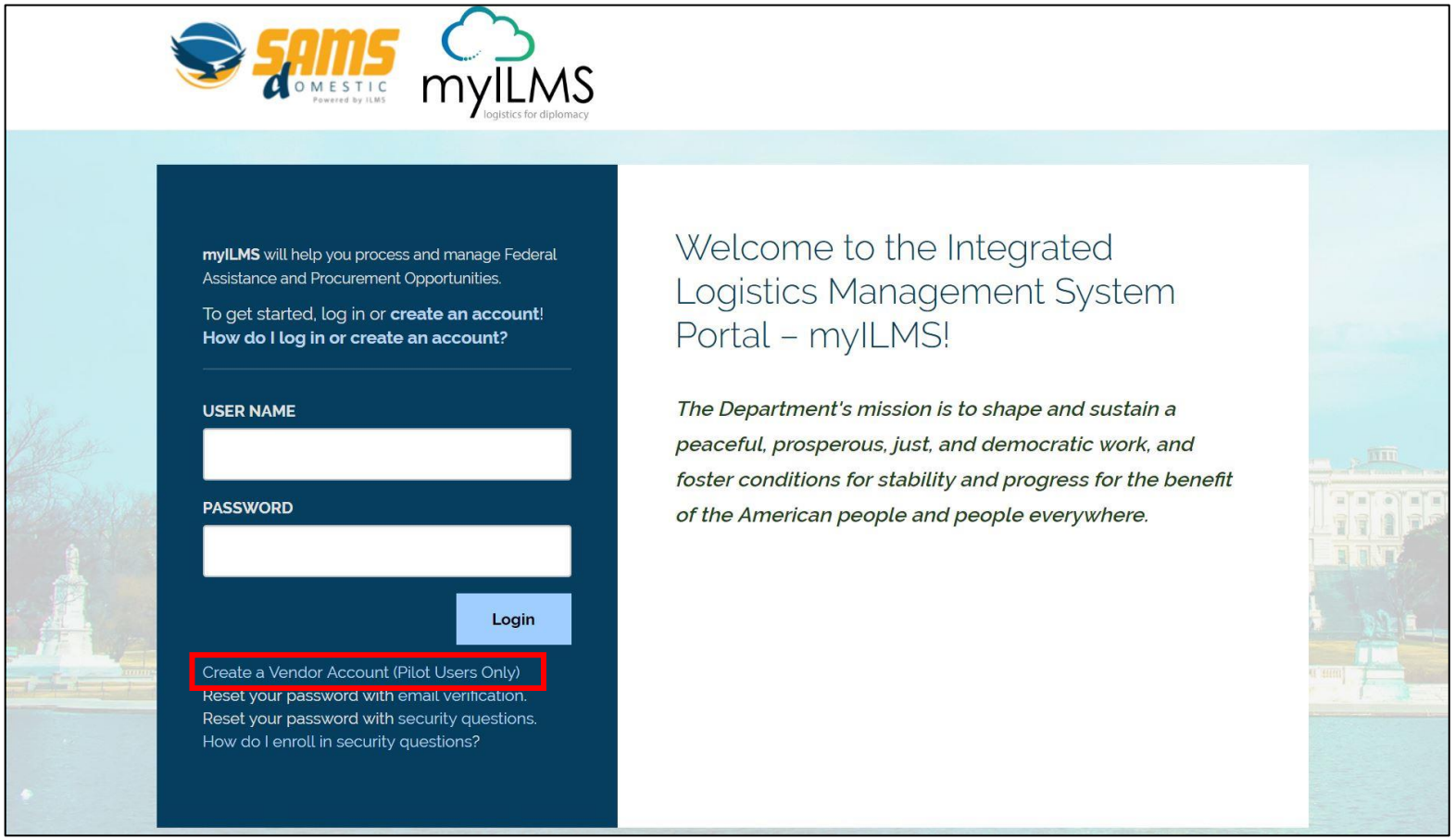
Account Requests

Account Requests
CREATE ACCOUNT LINK

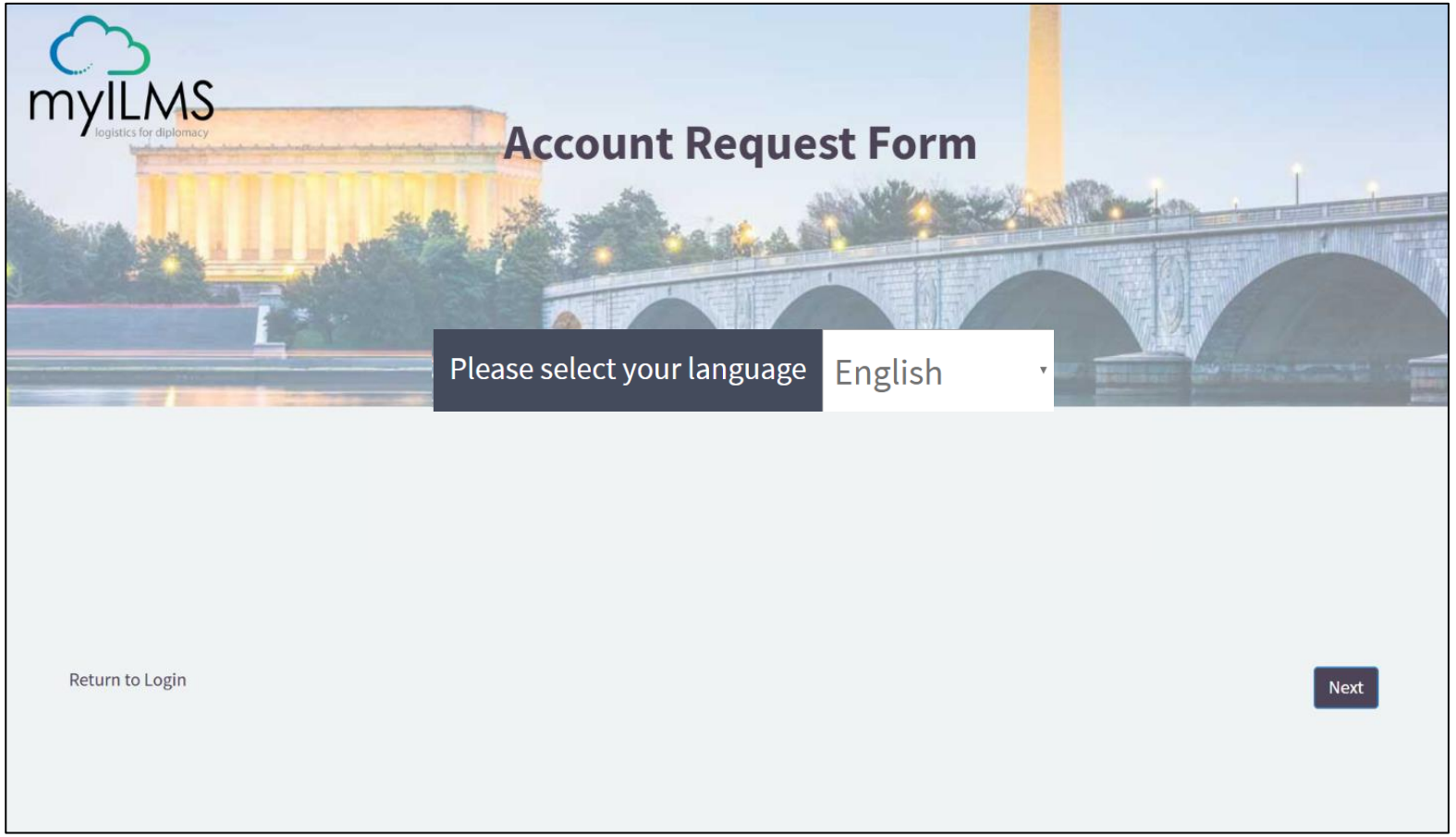
The login page is a shared page for SAMS and myILMS users that is accessible through the internet.



- When a new vendor comes to the login page, they will click on the Create a Vendor Account link and be taken to the Vendor Account Request Form.

Account Requests
PREFERRED LANGUAGE

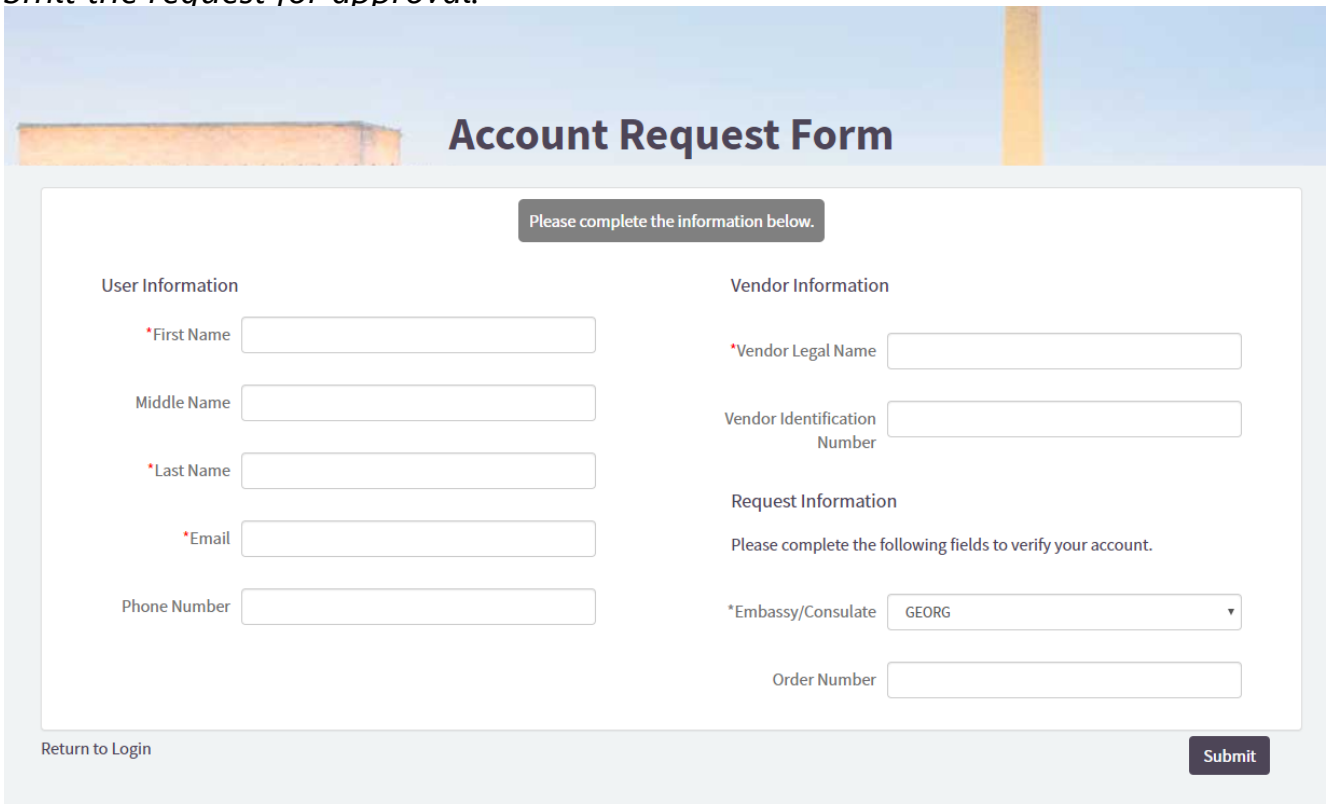
On the Account Request Form, vendors will first select their preferred language from a dropdown list.



- The vendor's language preference will be saved to their account.
- From this page, vendors can continue to the rest of the Account Request Form or return to the login page.

Account Requests
PREFERRED LANGUAGE

On the Account Request Form, vendors will fill out their contact information and vendor identification number and submit the request for approval.



- **First Name**, **Last Name**, **Email**, and **Vendor Legal Name** fields are required.
- The vendor must choose an **Embassy** which will determine which post approval group receives the request.
- Vendors may also enter their **Vendor Identification Number** or a **sample Order Number** for the post approver to link their account to the correct company.