SimulTracker

Vendor Portal - Invoicing Quick Start Guide

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Contents

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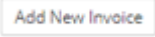
Page	Details	Version	Author	Authorization	Release Date
All	New Document	1.0	Kenneth Larmer	Kenneth Larmer	20180424
4	Additions for Germany	1.1	Ditha Pahnke	Kenneth Larmer	20200121

Invoices Module

Use the Invoicing module to create new invoices for completed jobs and monitor the payment status of submitted invoices.

How to create and submit a new invoice

1. Open the Vendor Portal sign-in page at http://projects.simultracker.com
2. Enter your username/email address and password.
3. Click the **Sign In** action button.
4. Click on the **Invoices** module icon in the left-hand button bar.
5. Click on the **Add New Invoice** action button.
6. Select the jobs you want to be invoiced in the **Jobs to be invoiced** section, based on the supplied invoicing guidelines *(reference SimulTracker Vendor Portal - Invoicing Guidelines (v1.0))*.
   - Use the icon on the **Your Contact** column to sort jobs by SimulTrans Project Manager.
   - Click the icon to remove a job from the **Jobs to be invoiced** pane. The removed job will be available for invoicing when you create a new invoice.

7. In the **Enter invoice details** section, enter the following information:
   - Enter your invoice number in the **Invoice No.** field.
   - Enter the invoice date in the **Invoice Date** field.
   - Select the invoice signee from the **Signed by** drop-down menu.

8. Attach your invoice file to the **Upload Invoice Files** pane.
   - The value of the uploaded invoice must match the gross total of the selected jobs to be invoiced.
   - The gross total of the selected jobs to be invoiced is displayed in **Gross Total** field, in the **Enter invoice details** section.

9. Add additional notes by clicking on the **Write additional notes for SimulTrans (optional)** link and add the notes to the text field.

10. When finalized, click the **Add Invoice** action button to submit the invoice for processing and payment. SimulTracker will send an automated notification to the Finance Department.

Additional Help Resources

Listed below are links to some helpful videos about the Vendor Portal:

Title	Link
Creating an invoice through the Vendor Portal	https://youtu.be/Y_Pbn95aATU
Vendor Portal User Guide	http://help.simultracker.com

Contact SimulTrans

If you have any questions or require further assistance, please contact the relevant billing location contact or SimulTracker Support:

Contact	Billing Location	Email Address
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