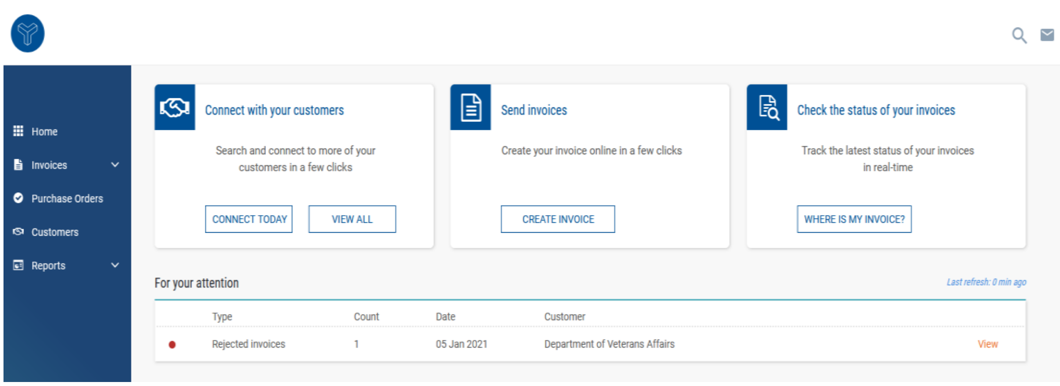
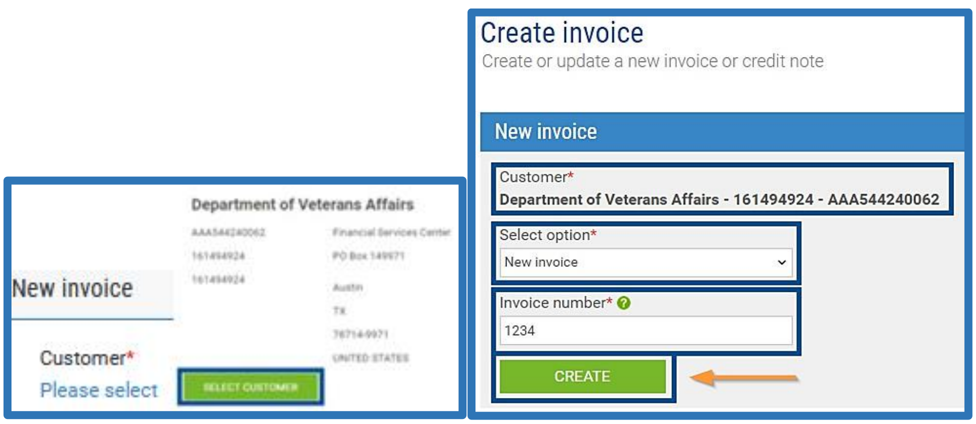
VA Commercial e-Invoicing User Guide – CLIN required

How to Create an Invoice

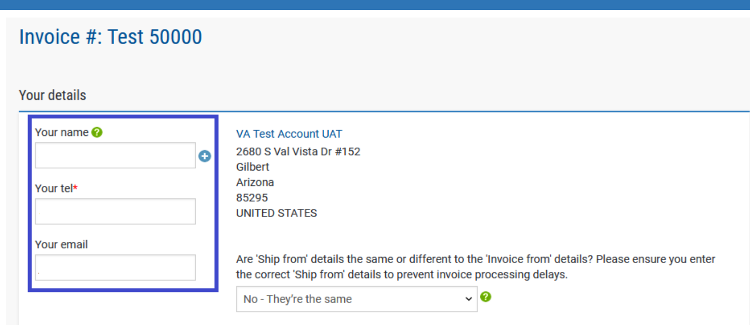
Step 1 – Select Create Invoice



Step 2 – Create Your Invoice



Step 3 – Fill in your contact details



Required fields are indicated with a red asterisk *

Step 1:

1. Go to Tungsten login page https://portal.tungsten-network.com/Login.aspx?Return Url=%2f
2. Sign in using your user credentials created when you first registered.
3. Once logged into your account there are two ways to create an invoice. One way is by selecting: "Create Invoice" on our home page. The other way is by clicking on the Invoices tab and selecting "Create Invoice."

Step 2

1 * Click on the “Select Customer” button. Note: If Department of Veterans Affairs does not appear as an option, your Tungsten account is not currently connected to the VA. To correct this, select the “Customer” tab on the left menu and select “New Connection” to connect with the Department of Veterans Affairs – 161494924 – AAA544240062.

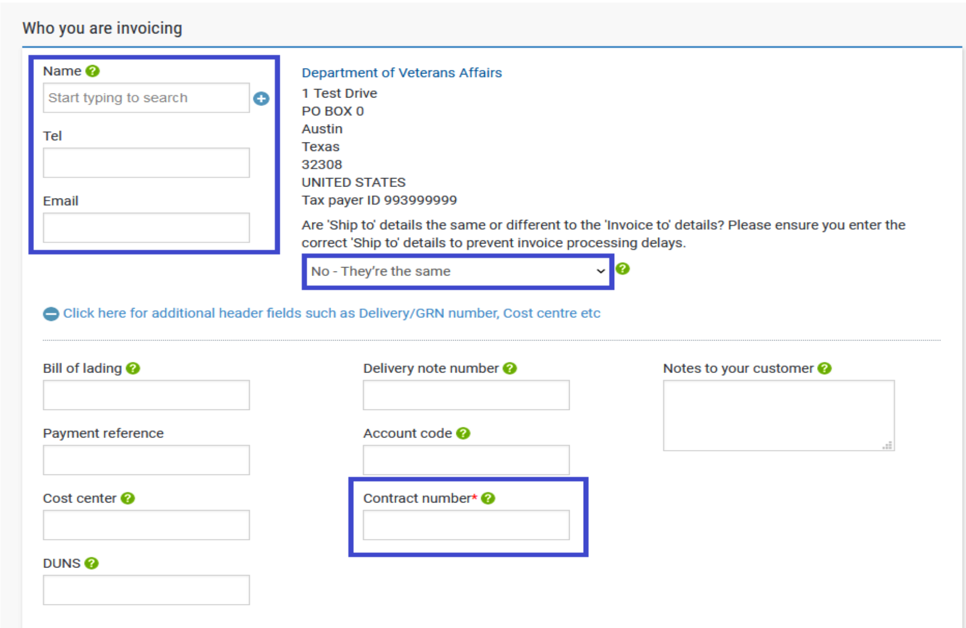
2. * Select New Invoice from Select option dropdown.
3. * Enter a unique invoice number.
4. Select "Create".

Step 3:

Fill in your contact details.
Note: The contact information should be the person creating the invoice.

1. Fill in your name.
2. * Fill in your telephone number.
3. Fill in your email address.

Step 4 – Fill in the contact details of the VA and your contract number


Who you are invoicing

Name
Start typing to search

Tel

Email

Department of Veterans Affairs
1 Test Drive
PO BOX 0
Austin
Texas
32308
UNITED STATES
Tax payer ID 993999999

Are 'Ship to' details the same or different to the 'Invoice to' details? Please ensure you enter the correct 'Ship to' details to prevent invoice processing delays.

No - They're the same

Click here for additional header fields such as Delivery/GRN number, Cost centre etc

Bill of lading

Delivery note number

Notes to your customer

Payment reference

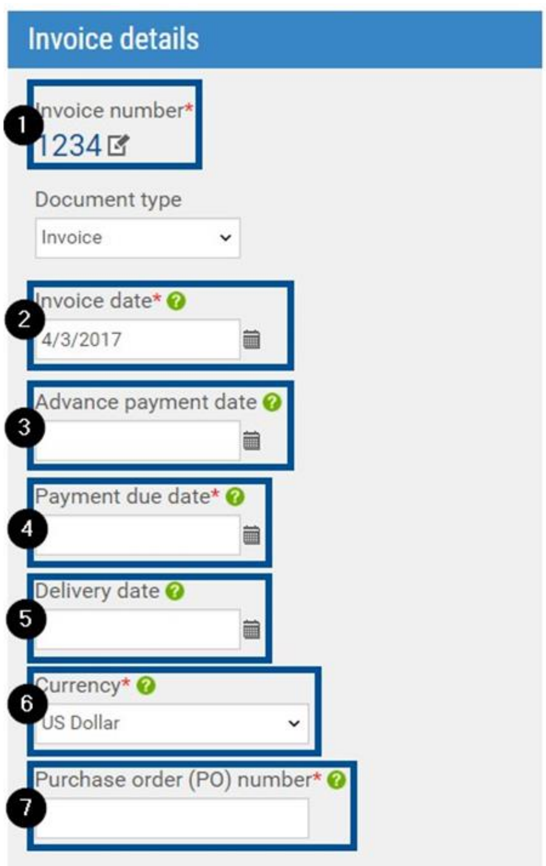
Account code

Cost center

Contract number*

DUNS

Step 5 – Fill in the "Invoice details" section


Invoice details

1 Invoice number*
1234

Document type
Invoice

2 Invoice date*
4/3/2017

3 Advance payment date

4 Payment due date*

5 Delivery date

6 Currency*
US Dollar

7 Purchase order (PO) number*

Step 4:

Fill out the contact information for the Department of Veterans Affairs.

1. Fill in the contact name.
2. Fill in the phone number.
3. Fill in the email address.

Note: This should be your contracting officer or COR.

4. 'Ship to' details – If the 'ship to' differs from the 'Invoice to' details, change the populated answer from, "No – They're the same" to "Yes- Add a 'ship from" address" or "N/A – Leave 'ship from' blank."

Note: If you select, "Yes – Add 'a ship from' address, additional fields will appear. Please provide an answer for all fields. For the TIN, answer "no". This field is referring to the VA's TIN - NOT your supplier TIN.

5. * Within the "Additional Header Fields" section select the plus (+) symbol and fill in your contract number.

Note: The contract number may or may not be the same as a PO/Obligation number. If you do not have a contract number, enter N/A.

Step 5:

Fill out the required data in the "invoice details" section.

1. * Select your invoice number.
2. * Select the date of the invoice.

Note: For a previous invoice date, the date must be within the last 364 days. For future dates, the invoice date cannot be dated beyond 30 days from the current date.

3. Advance payment dates.

Note: This field will only be used if a payment has been received prior to the invoice being entered into the Tungsten portal.

4. * Select the Payment due date.

Note: This date must be a future date or the same as the date entered into the Tungsten portal. The payment due date should be AT LEAST 7 days after the date entered into the Tungsten portal.

5. Delivery Date

Note: This is the date that the goods or services were provided. If goods or services were provided over a period of time, leave this field blank.

6. * Currency will automatically default to US Dollar.
7. * Fill in the Purchase Order Number.

PO Notes:
Confirm with VA - Your obligation number may be obtained from your contracting officer or the ordering official.

NOTES CONTINUE ON THE NEXT PAGE

Step 5 – Fill in the “Invoice details” section continued

Examples of PO/Obligation Numbers:

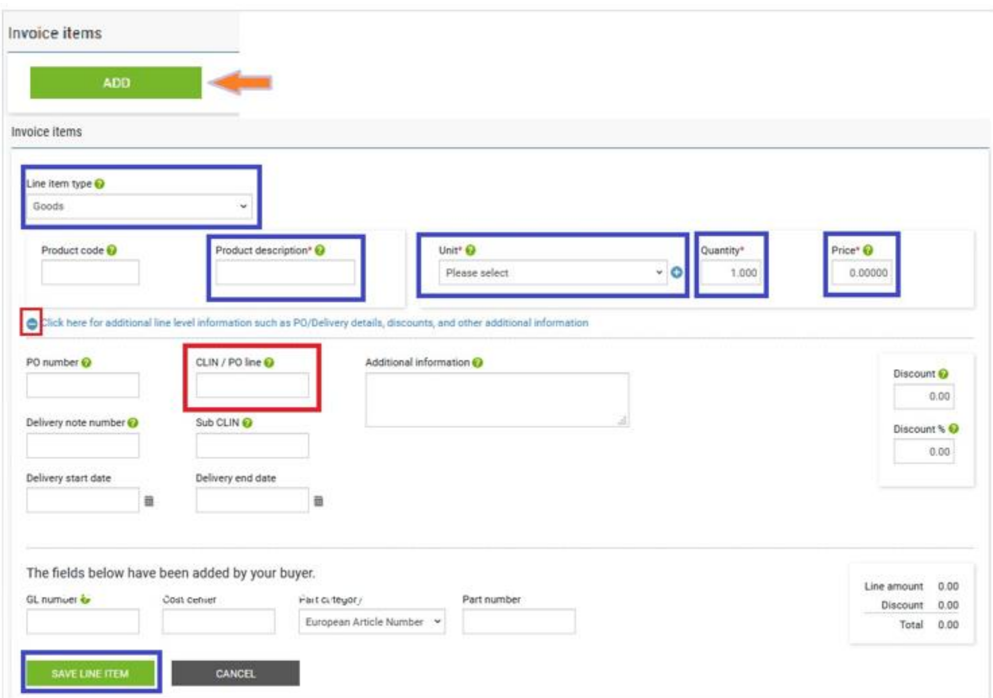
36C78621C1234

36C78618C4321

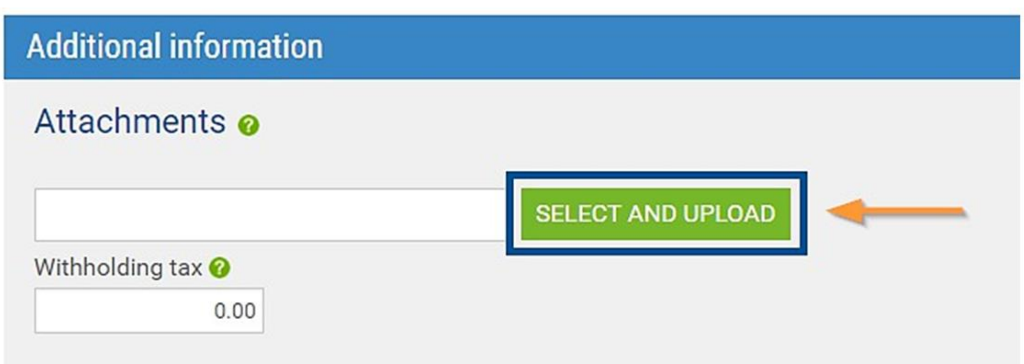
OST20033000002

36010720C00001

Step 6 – Invoice Items – Create a line



Step 7 – Attachments



-The PO/Obligation Number will be 13-14 characters in length with at least 1 alpha character as shown in the examples to the left.

Step 6:

Fill out the fields that are required in the "Invoice Items" section.

1. * Select "Add" to create a line.
2. Select a line item type.
3. * Fill out the product description.

Note: The description should match the description listed on the PO or contract.

4. * Select the unit.
5. * Fill in the quantity.
6. * Fill in the price.
7. * Select the "+" symbol to see the fields for "PO/Delivery details, discounts, and other additional information such as CLIN"
8. * Add the CLIN/PO Line Number.

Note: This is a required field for all iFAMS vendors.

Example: If your contract shows CLIN 001, you would input line 001. If your contract shows CLIN 4001, you would input 4001.

9. Add the delivery start date and the delivery end date of the service.

Note: This is required for “Services” line types only.

10. Select "Save line item” to save your line.

Note: You CAN add multiple line items; however, those will need to be added one at a time. You must save each line item before you are able to add a new line. You MUST have at least one line for GOODS or SERVICES before you can add a special charge (e.g. freight, insurance, etc.).

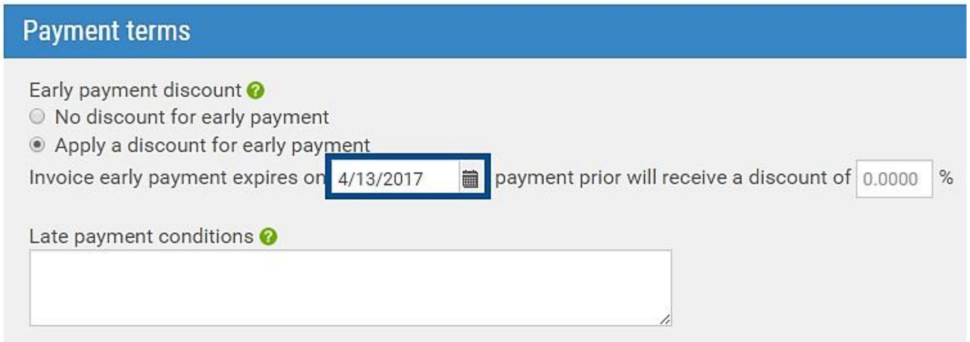
Step 7:

Attachments are optional unless required by your contracting officer/VA employee certifying your invoice. Claim forms being processed as invoices should always include attachments.

1. Select the “Select and Upload” button to add an attachment.

Note: The only acceptable attachment format is PDF.

Step 8 – Payment Terms

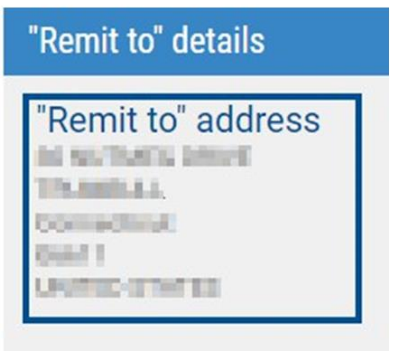


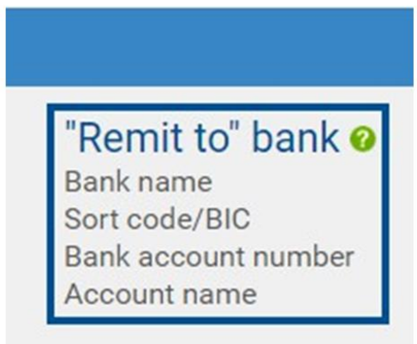
Step 8:

1. If a discount for early payment is offered, the date should be AT LEAST 5-7 business days AFTER the date the invoice was entered into the Tungsten portal and should not be the same date as the original invoice due date.

Note: The early payment due date must also be BEFORE the payment due date

Step 9 – Review "Remit to" Details



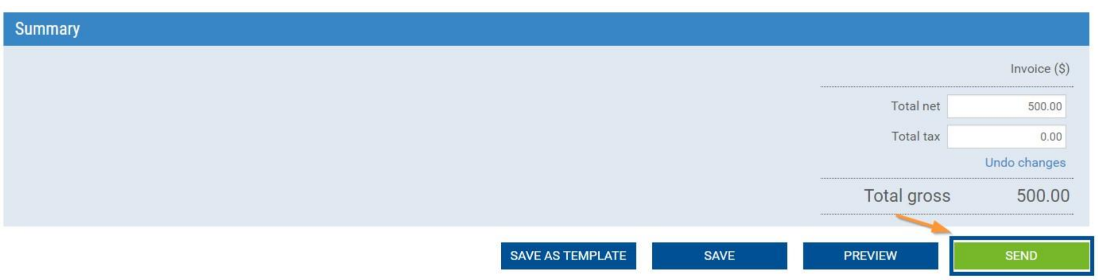


Step 9:

The VA Financial Service Center pays you according to the information they have on file for your account, not according to the banking information listed in Tungsten Network. In order to update your banking information, contact the VA FSC at (877) 353-9791 opt 2.

If you also want to update it in the Tungsten portal log in and click "Your Account," in the top right. At the bottom left of the page you will see "Invoice Information," "Remit details." Click that if you wish to add your banking to the Tungsten portal.

Step 10 – Review your Summary



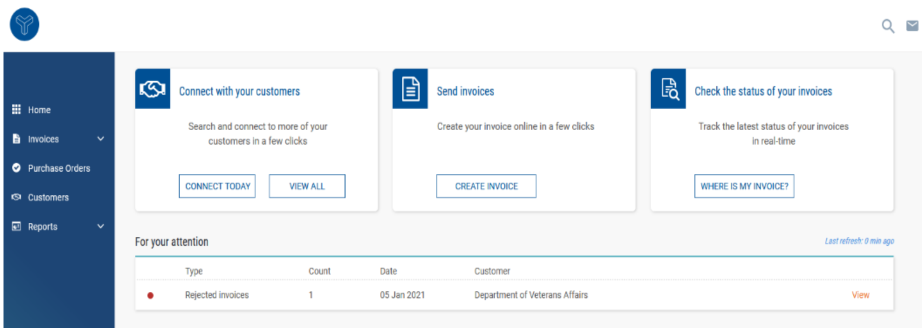
Step 10:

Please check all fields to ensure everything is accurate before selecting "Send". Once you have sent the invoice, it cannot be edited or deleted.

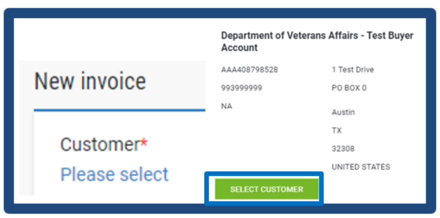
Note: After you send your invoice, you will receive a confirmation email. The portal will not display the complete invoice for up to 4 hours after entry. You will be unable to download/print the invoice before you "send"; however, once the portal has updated, you may download the invoice by going to "Reporting,", "Invoices submitted."

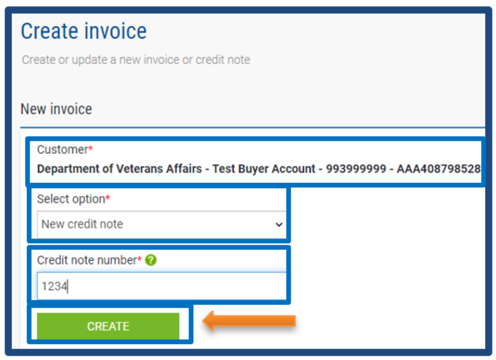
How to Create a Credit Note

Step 1 – Select Create Credit Note

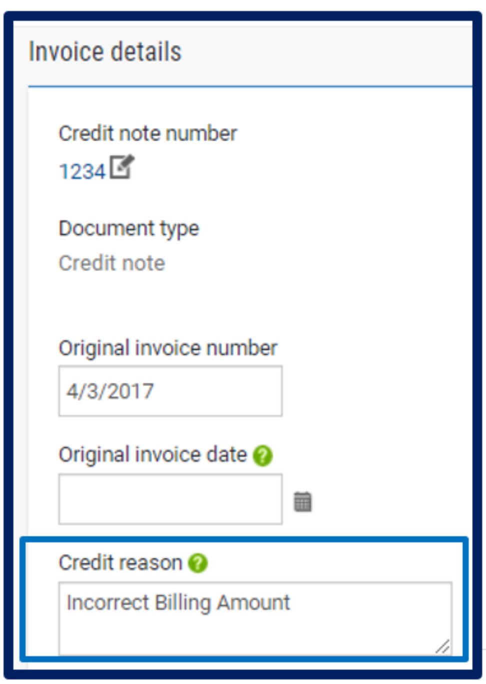


Step 2 – Create Your Credit Note





Steps 3 - 10 – Completing Your Credit Note



Step 1:

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3. Once logged into your account there are two ways to create an invoice. One way is by selecting: "Create Invoice" on our home page. The other way is by clicking on the Invoices tab and selecting "Create Invoice."

Step 2:

1. * Click on the "Select Customer" button.
Note: If Department of Veterans Affairs does not appear as an option, your account is not currently connected. To correct this, select the "Customer" tab on the left menu and select "New Connection" to connect with the Department of Veterans Affairs – 161494924 – AAA544240062.
2. * Select New credit note.
3. * Enter a unique credit note number.
4. Select "Create".

Steps 3 - 10:

Steps 3- 10 are the same as entering a new invoice. There is one additional field in step 5 where you will indicate the Credit Reason.
Credit Note Notes:
-When entering your credit note line item(s), do NOT make the number value negative. The credit note recognizes this value as a credit. A negative value will cause a failure.
-You cannot send a credit note or invoice with a negative or $0 value.

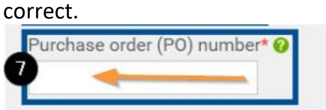
Additional Information:

An invoice will be delivered to the Department of Veterans Affairs Financial Service Center headquarters within 24 hours after it is accepted by Tungsten Network, at which point it is no longer in Tungsten Network's hands. This is a "delivered" status. Tungsten Network is an electronic invoicing company; it does not process payments or keep track of the payment status. For the status of your payment, and payment method inquiries, you will need to contact the VA Financial Service Center at (877) 353-9791 opt 2, or by visiting the VA Inquiry System at https://www.vis.fsc.va.gov or emailing them at vafsccshd@va.gov.

Frequent Errors:

If the number(s) of the purchase order on your invoice is/are outside the range used by your customer. Please make sure that you are billing the appropriate account, correct the number(s) of the purchase order and resend the invoice.

1. Verify that you have entered the purchase order/obligation number correctly as it appears on the purchase order provided by your customer/buyer.
2. Verify that the purchase order/obligation number was filled in the "Invoice details" section of the invoice is correct.



How can I delete or edit an invoice that has been rejected or has not been sent?

To delete or edit

1. Click on the Invoicing tab.
2. Go to "Saved Invoices" at the bottom of the page.
3. Click "edit" or "delete" on the right side.

To correct a rejected invoice

1. Click on the Invoicing tab.
2. Select "Invoice Status"
3. Select in the red section of the status circle of the invoices.
4. Select the paper icon under "view details" of the invoice in error.
5. Select the navy blue "reactivate Invoice" button.
6. Click on the Invoicing tab.
7. Go to "Saved Invoices" at the bottom of the page.
8. Click "edit" or "delete" in the section of "Saved Invoices".

Invalid Contract Telephone Number

1. Please review step 3 to correct the invoice that has failed.
2. Follow the steps "**To correct a rejected invoice**" to reactivate your invoice. Once reactivated you can edit and resend it to be reprocessed. Please make sure when editing that the contact telephone number field is filled in under the "**Your details**" section.