




Siemens
Global Business Services

INVOICES ON-LINE (IOL) GUIDE

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NEW USER REGISTRATION- VENDORS

NAVIGATION TO REGISTRATION PAGE

1. Navigate to the IOL Logon page <http://www.siemensap.com> and select “Siemens Vendors - Register Here”.

New to Invoices On-Line?

Siemens Vendors:

[Register Here](#)

VERIFICATION AND CREATION OF USER ID

2. Enter your User ID and Email address to verify if you've already registered. If no match found, feel free to proceed with creating your own IOL User ID

Verify Account

User Info

Email Verification

Invoice/Entitlement Verification

0%

Please enter your User ID and Email Address to check if you have registered already.

User ID:*

Email Address:*

Cancel

Next

COMPLETION OF REGISTRATION PROCESS

3. Please fill out the below form with your user information.
Upon creation of User ID, click on Next to move onto the next step of registration.

Verify Account

User Info

Email Verification

Invoice/Entitlement Verification

25%

Please fill out the below form with your user information. Once complete click on Continue to Next Steps to move onto the next step of registration.

First Name:*

User ID:*

Password:*

Company Name:*

Phone Number:*

Language:*


EN-US [English, United States]

Last Name:*

Email Address:*

Confirm Password:*

Security Code:



☐ Show another code

Type the code shown:

Please enter the characters exactly as displayed above (Case Sensitive)

Cancel

Next

4. A confirmation email is sent verifying your email address. Open email and click “Continue User Registration”.

Verify Account

User Info

Email Verification

Invoice/Entitlement Verification

50%

For the email verification step, A confirmation email from nursely@siemens.com has been sent with instructions that must be followed in order to continue your IOL registration and finish the last step. If you do not receive the email, please check your spam or junk folder before contacting the IOL Support Team at iol.support@siemens.com for assistance.

ACTIVATION OF IOL ACCOUNT

5. Registration is not complete until we verify your account. To activate your IOL Account, kindly choose any one option below. The best choice is

Verify Account User Info Email Verification **Invoice/Entitlement Verification**

75%

Registration is not complete until we verify your account. The best choice is if you have an existing invoice that you have paid in the last ninety days.

Best

I have a valid Siemens Paid Invoice to complete my Registration with

Register with Invoice

[Submit](#)

Option 1

OR

Better

I don't have a Siemens Paid Invoice but believe I have a Siemens account

Search for My Account

[Search](#)

Option 2

OR

Last

I don't have an invoice and I cannot find my account

Submit Support Request

[Submit](#)

Option 3

Option 1: You could use details of a valid Siemens Paid invoice in the last 90 days.

Option2: You could use your Company’s Remit To Address (Street # or PO Box# and Postal code) to look up your company.

LOGIN PROCEDURE

6. After successfully completing the above steps, you can log in by clicking on the 'Login' button under the Siemens Vendors label on the homepage.

Select Login Type

Siemens Vendors:

[Login Here](#)

Siemens Employees:

[Login Here](#)

VALIDATION AND PASSWORD UPDATE

7. Once you populate your User ID and Password the following screen will appear. A validation code will be emailed to the existing email address on your IOL Profile. Enter the validation code (validation code must be entered exactly as it was received), enter the displayed “Security Code” listed and select “Authenticate”.

A validation code was emailed to the existing email address on your IOL profile. (Check your “junk/spam” folder if email is not delivered to your inbox). Please stay on this page until you receive the validation code and enter it (exactly as provided in email; with both lower and upper case letters) in the “validation code” field. Select the “Remember Me” if not a shared or public computer. Enter Security Code exactly as shown and then select “Authenticate”.

Warning: Do not click “Remember Me” when using a public or shared computer.

Enter User Details

User ID:

Validation Code:

Remember Me: ☐

Security Code: *

Enter the characters exactly as displayed above:

[Reload](#)

[Authenticate](#)

8. Update your password. Please refer to the screenshot for password specifications. The criteria for IOL include at least 1 uppercase letter. Note that only the following special characters are allowed: @, #, \$, %, ^, &, +, and =. Once you've completed the requirements, click on "Update" to proceed.

Note: Your new password cannot be the same as your UserID or your current password. It should be 8 to 20 characters in length and must contain at least 1 upper case letter, 1 number and one of the special characters (@#%\$%^&+=)

Change Password

Current Password *

New Password *

Re-enter New Password *

[Update](#)

SECURITY QUESTIONS SETUP

9. For enhanced security, IOL mandates security questions. Please select a question from the dropdown menu for each question (5 are mandatory) and provide an answer for each. Once done, click on "Update" to proceed.

Note: Must have at least 5 security questions, each question can only be used once. Answers must be alphanumeric and contain less than 100 characters.

Security Questions	
Question 1 *	What is the make and model of your first car? ▼
Answer 1 *	<input type="text"/>
Question 2 *	What is the name of the street you lived on growing up? ▼
Answer 2 *	<input type="text"/>
Question 3 *	What was the last name of your third grade teacher? ▼
Answer 3 *	<input type="text"/>
Question 4 *	Where were you New Year's 2000? ▼
Answer 4 *	<input type="text"/>
Question 5 *	Who was your childhood hero? ▼
Answer 5 *	<input type="text"/>
Question 6	In what city did you meet your significant other? ▼
Answer 6	<input type="text"/>
Question 7	What school did you attend 8th grade? ▼
Answer 7	<input type="text"/>
Question 8	What was your childhood phone number? ▼
Answer 8	<input type="text"/>
Question 9	Where did your parents first meet? ▼
Answer 9	<input type="text"/>
Question 10	What band or singer played at your first concert? ▼
Answer 10	<input type="text"/>

Update

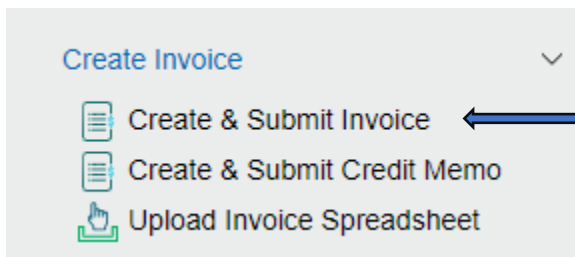
INVOICE SUBMISSION (PO BASED)

There are 8 steps in invoice submission process, please refer to the below instructions.

Fields noted with an asterisk (*) are mandatory.

INITIATING INVOICE SUBMISSION

1. Click on “Create and submit invoice” option in the IOL home page, which will be available towards your top left-hand side.



SELECTION OF OPERATING COMPANY AND INVOICE TYPE

2. Select the Siemens Operating Company from a drop-down menu and select the Invoice Type as Purchase Order and enter the purchase order number.

Invoice Entry

Siemens Operating Company: MC-IMA010 - Siemens Energy, Inc.

Invoice Type: ☐ Non Purchase Order ☒ Purchase Order

PO Number:

[Create Invoice](#)

MANDATORY FIELDS AND DETAILS VERIFICATION

3. In step 1, fields noted with an asterisk (*) are mandatory.
 - Enter invoice number (no spaces/special characters/leading zeroes).

- Enter invoice date (Invoice Date (MM/DD/YY)).
Note: By default, system would capture current date
- Account number, payment terms and Canadian Tax Registration ID (+) is required only for Canada location invoices.

Step 1 of 8: Invoice Header

Invoice Number (no spaces/special characters/leading zeroes) *

Invoice Currency *

Invoice Date (mm/dd/yy) *

Account No

Payment Terms

Canadian Tax Registration ID (+)

REVIEW AND ADDITION OF INVOICE LINE ITEMS

4. In step 2, Verify the details under all the 3 blocks (Bill To, Ship To, Remit To) Note: If any changes required on Remit To address field, kindly reach IOL support team for assistance.

Step 2 of 8: Bill-To / Ship-To / Remit-To Information

Bill To

Search Contact by First or Last Name [Add Contact](#)

Contact Name *

Contact Email Address

Name

Address

City

State

Zip

Country

Mail Code

Ship To

Name *

Address *

City *

State *

Zip *

Country *

Remit To

Vendor No

Name

Address

City

State

Zip

Country

* Country required for non-US State


4. In Step 3, your Purchase Order line items are displayed. Select line(s) from the PO and click on “Add selected lines to invoice” button.

Select/Lock	Line Number	Item Number	Item Description	Tax Description	Unit of Measure	Qty to Invoice	Price Per Unit	Original Quantity	Remaining Quantity	Line Item Balance	Tax Type	Status	Siemens Part Number
<input checked="" type="checkbox"/>	00010	AEK30109446	CONDUIT,NIPPLE,3/4 X 2,GALV,RIGID,THREAD	Non-Taxable	ST	4	1.870000	4.0000	4.0000	7.48		Open	
<input type="checkbox"/>	00020	AEK30109447	CONDUIT,NIPPLE,3/4 X 2-1/2,GALV	Non-Taxable	ST		3.480000	4.0000	4.0000	13.92		Open	
<input type="checkbox"/>	00030	AEK30109448	CONDUIT,NIPPLE,3/4 X 3,GALV,RIGID	Non-Taxable	ST		2.210000	4.0000	4.0000	8.84		Open	
<input type="checkbox"/>	00040	AEK30064603	CONDUIT,OUTLET BOX W/ COVER,90° 3/4"FNPT	Non-Taxable	ST		36.880000	1.0000	1.0000	36.88		Open	
<input type="checkbox"/>	00050	AEK30064602	OUTLET BOX,CONDUIT,W/COVER,EABC,3/4"STR	Non-Taxable	ST		40.090000	4.0000	4.0000	160.36		Open	

Page 1 of 10 (Records 1 - 5 of 46) - [0 Descs]

[Add Selected Line\(s\) to Invoice](#) Locked in another invoice Locked in current invoice Closed

You will now get to see the Invoice line items.



Select	PO Line Number	Product/Service Number	Product/Service Description	Siemens Part Number	Quantity	Unit Of Measure	Price Per Unit	Amount	Tax	Total	PO Line Balance
<input checked="" type="checkbox"/>	00010	ADX30109446	CONDUIT,NIPPLE,3/4 X 2,GALV,RIGID,THREAD		4.0000	ST	1.870000	7.48	0.00	7.48	7.48

Page 1 of 1 [Records 1 - 1 of 1] - [0.0secs]

To edit an invoice line, select line from Invoice Line Items table below; the line editing form would open up in edit mode; make changes in the Line Editing Form and click 'Update Line'.

If you have taxes to be added, you can add taxes here.

- Select invoice line items in brown background.
- Select the line under invoice line items and a **Line Editing Form** would pop up with blue background right on top of **Invoice Line Items**.
- Select the **tax code** from the dropdown, select **percent/amount** and enter the **value** in the box next to it. Click on **ADD**
- Click on **Update line**.

Line Editing Form

PO Line Item No *

00010

Product/Service Number (+)

ADX30109446

Product/Service Description (+)

CONDUIT,NIPPLE,3/4 X 2,GALV,RIGID,THREAD

Siemens Part No

Quantity *

4

Unit *

ST

Price per Unit *

1.870000

Tax Code

--Select--

Percent

Amount

Add

Del

Tax

Update line

Delete line

- To delete invoice lines, select one or more lines from table below and click Delete Line.

ADDITION OF SURCHARGES OR DISCOUNTS

- In step 4, Appropriate Surcharges or Discounts can be added to the invoice. Review your invoice totals for accuracy and then select Continue to Next Steps.

Step 4 of 8: Surcharges/ Freight Charges/ Discounts etc. (Optional)

Surcharges/ Discounts: 0.00 [Add / View](#)

SURCHARGES/DISCOUNTS

Charge

AAC - Modification Costs

Amount

Update

Delete

Add

Select	Charge	Description	Amount
<input type="checkbox"/>			
No charges found			
Page 1 of 1 [Records 1 - 1 of 1] - [0.0secs]			

Close

- In step 5, Review the prices with your invoice and click on continue if everything matches. If not, click on "Cancel and Return to Invoices Home" and re-enter the correct price details.

Step 5 of 8: Review and Continue

Review Totals

Line Items Total (excl Taxes):

7.48

Total Tax:

0.00

Total Surcharges/Discounts:

0.00

Total Amount:

USD 7.48

Continue to Next Steps

[Cancel and Return to Invoices Home](#)

ATTACHMENT OF SUPPORTING DOCUMENTATION

ATTACHMENTS 2

- In step 6, Add any supporting Documentation (Required for Canadian and Mexico Siemens Entities) or Notes to your invoice to facilitate approval. IOL can accept multiple attachments (Attachment size limit: 5 MB).

Step 6 of 8: Add Supporting Documents/ Instructions (Required for Siemens Canada and Mexico Entities)

• **Attachments:** [Add / View](#)

Note: For Siemens Mexico, the attached document must back up the selected position for this PO, otherwise it will be rejected upon receipt by Siemens. You may attach multiple supporting electronic documents such as scanned receipts, images or text files. Please note however, that the size of each document must be less than 5 Megabytes and the total of all attachments must not exceed 80MB.

Special Note for Blanket Purchase Orders: Please attach a pdfImage with Invoice Line Item details. Blanket Purchase Orders are often generic. (Qty = 1, Price = \$20,000, Unit = Lot). However, invoices against this Purchase Order should be specific (Example: 10 Hours at \$20/hour) to facilitate the approval of the invoice.

• **Notes/Instructions:** [Add / View](#)

Add special instructions or notes to this invoice.

Click on Add,

Invoice Number: 123
Supplier Name: WHOLESALE ELECTRIC SUPPLY COMPANY

Select	Name	Create Date
<input type="checkbox"/>	Invoice	3/20/2024 9:02:50 AM

Page 1 of 1 [Records 1 - 1 of 1] - [0.0secs]

[Add](#) [Delete](#) [Print](#) [Close](#)

- Attachment Name: "invoice" or (your invoice number).
- Attachment Type: Other
- Click on choose file and select the invoice copy saved on your desktop and click on Add.

Add Attachment

Attachment Name:

Attachment Type:

Attachment Path: [Choose File](#) No file chosen

Please Note:
The maximum allowed Attachment file size is 5120 KB.

[Add](#) [Cancel](#)

Invoice Number: 123
Supplier Name: WHOLESALE ELECTRIC SUPPLY COMPANY

Select	Name	Create Date
<input type="checkbox"/>	Invoice	3/20/2024 9:02:50 AM

Page 1 of 1 [Records 1 - 1 of 1] - [0.0secs]

[Add](#) [Delete](#) [Print](#) [Close](#)

You can now click on close. Attachment is added.

REVIEW AND SUBMISSION OF INVOICE

In Step 7, you can review the invoice details you have entered in page 1 and take a printout if you require.

Step 7 of 8: Review or Edit this Invoice (Optional)

[Edit this Invoice](#) [Review / Print this Invoice](#)

- In step 8, Click the "Submit" button.
After submission, you will see the confirmation message shown below, and no further edits on the invoice can be made.

Step 8 of 8: Submit this Invoice to Siemens AP

Select the "Submit Now" button below to submit this invoice to Siemens Accounts Payable.
Please note: After submission, this invoice will not be available for any further modifications.

[Submit Now](#)



Your invoice has been successfully submitted to Siemens for review.

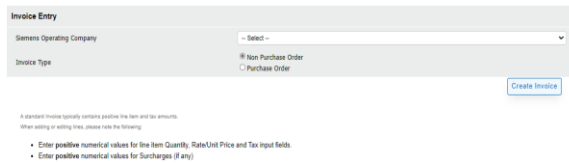
Thank you for submitting your invoice electronically.
In order to ensure proper accounting and controls, electronic invoice submissions will now be required and paper invoices will be rejected for all Siemens companies on your profile.

[Click to Return Home](#)

NON-PO INVOICE CREATION

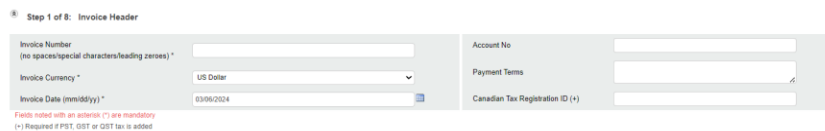
INITIATING NON-PO INVOICE CREATION

- Click on **“Create and Submit Invoice”** on the top left corner of the page.
- Select the correct **Siemens Operating Company** that you need to invoice from the drop-down list.
- Select non-PO invoice from the invoice type.
- Click **“Create Invoice”**



ENTERING INVOICE DETAILS

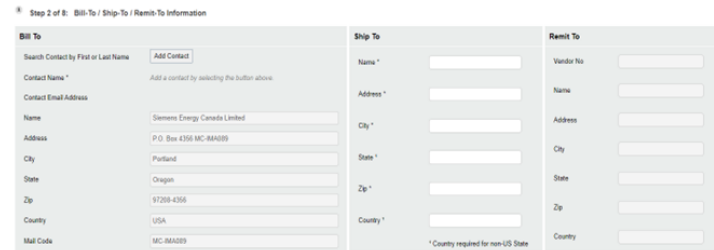
Step 1 – Enter the **Invoice Number**, **invoice currency** and the **Invoice Date** (mandatory fields). Enter the Canadian Tax Registration ID (Only for Canadian users)



Step 2 – Please make sure the Bill To, Ship to and Remit to address is populated.

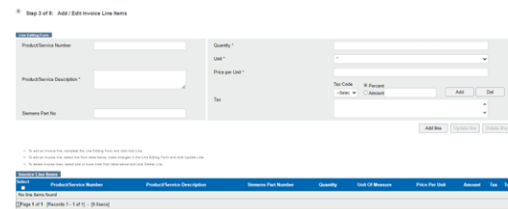
VERIFICATION OF ADDRESSES

If the Ship To address is blank, please copy line by line from Bill To and paste it to Ship To address field.



ADDITION OF LINE ITEMS

Step 3 – In the Line Editing Form, please enter the **product service number**, **Product service description** (small description of the invoice) and **line-item number**.



- Please enter the **quantity** as per the invoice, select the **correct unit** and the **correct price per unit**.

- **To add Taxes** – Select the **tax code** from the dropdown, select **percent/amount** and enter the **value** in the box next to it. Click on **ADD**

-Click on **ADD LINE**.

INCLUSION OF SURCHARGES OR DISCOUNTS

Step 4 -If you have any **surcharges, Freight charges or discounts** please add it in this step.

⊗ Step 4 of 8: Surcharges/ Freight Charges/ Discounts etc. (Optional)

Surcharges/ Discounts: 0.00 [Add / View](#)

Step 5- Please check the total on step 5. And then click on **Continue to Next Steps**.

⊗ Step 5 of 8: Review and Continue

Review Totals

Line Items Total (excl Taxes): **55.00**

Total Tax: **0.00**

Total Surcharges/Discounts: **0.00**

Total Amount: CAD 55.00

[Continue to Next Steps](#)

ATTACHMENT OF INVOICE COPY

Step 6 – Please **attach a copy of the invoice** in this step. (It is mandatory to attach the invoice if you are billing Siemens Canada Sector) You can also add **some notes** if required.

⊗ Step 6 of 8: Add Supporting Documents/ Instructions (Required for Siemens Canada and Mexico Entities)

• Attachments: [Add / View](#)

Note: For Siemens Mexico, the attached document must back up the selected position for this PO, otherwise it will be rejected upon receipt by Siemens. You may attach multiple supporting electronic documents such as scanned receipts, images or text files. Please note however, that the size of each document must be less than 5 megabytes and the total of all attachments must not exceed 80MB.

Special Note for Blanket Purchase Orders: Please attach a portrait image with Invoice Line Item details. Blanket Purchase Orders are often generic. (Qty = 1, Price = \$20,000, Unit = Lot). However, invoices against this Purchase Order should be specific (Example: 10 Hours at \$20/hour) to facilitate the approval of the invoice.

• Notes/ Instructions: [Add / View](#)

Add special instructions or notes to this invoice.

Step 7 – **Review and print** the electronic invoice copy if needed.

⊗ Step 7 of 8: Review or Edit this Invoice (Optional)

[Edit this Invoice](#)

[Review / Print this Invoice](#)

REVIEW AND SUBMISSION OF INVOICE

➤ **Step 8** – Click on **Submit now**.

After submission, you will see the confirmation message shown below, and no further edits on the invoice can be made.



Your invoice has been successfully submitted to Siemens for review.

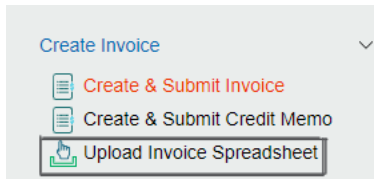
Thank you for submitting your invoice electronically.
In order to ensure proper accounting and controls, electronic invoice submissions will now be required and paper invoices will be rejected for all Siemens companies on your profile.

[Click to Return Home](#)

SPREADSHEET

UNLOCKING PROFILE FOR SPREADSHEET USE

Spreadsheet Upload can be used to submit all the Invoice at a time. You need to send an Email -iol.support.in@siemens.com to unlock the profile to use the spreadsheet.



Click the “Show/Hide” button and read the instructions that appear below before uploading the spreadsheet.

Upload Requirements and Guidelines:

Show / Hide

DOWNLOADING EXCEL TEMPLATE

Click “Download Excel Template” and download the template file every time before uploading.

To download the most recent version of the template, please click the button below.
This template was last updated on
If you downloaded the template before the update was done, you will have to download it again for it to be processed successfully.

Download Excel Template

ENTERING INVOICE INFORMATION

Please enter all the Invoice information into the Excel template carefully. Save the spreadsheet once all your invoice information is entered into it. Use the “Browse” button to find the spreadsheet file you saved.

	A	B	C	D	E	F	G	H	I	J
1	* SIEMENS Operating Company	* Invoice No. (no spaces/ special characters/ leading zeroes)	* Invoice Date (mm/dd/yyyy)	* Invoice Currency	Canadian Tax Registration ID	Purchase Order No.	Account No.	Payment Terms	* Bill To Contact Name	* Bill To Contact Email
2										
3										
4										
5										
6										

UPLOADING AND SUBMISSION

After entering your invoice information into the template, click Browse and select your completed spreadsheet. Check the Auto- Submit checkbox if you want your spreadsheet’s invoices to be submitted directly to Siemens AP.

Auto-submit Invoices ☐

File to upload No file chosen

Upload

CHECKING UPLOAD HISTORY

Click the “View” button to find the Upload History page to check on whether your batch of invoices was processed properly or not. An e-mail will also be sent to your e-mail address informing you of the status of that spreadsheet.

Upload History and Processing Status:

View

If your spreadsheet did not process successfully, review your errors, make the corrections on your spreadsheet file, and go back to Step 4 by clicking on “Go to Upload page”

Spreadsheet Upload Status and History:

Spreadsheets Uploaded:

Login User	Date Uploaded	File Name	Invoices Processed	Status
—	5/8/2023 1:50:26 PM	Siemens April 2023.xls	0	Batch Failed

CREATING A CREDIT MEMO

- Click on “**Create and Submit Credit Memo**” on the top left corner of the page.

Create Invoice

- Create & Submit Invoice
- Create & Submit Credit Memo
- Upload Invoice Spreadsheet

SELECTION OF OPERATING COMPANY

Select the correct **Siemens Operating Company** that you need to invoice from the drop-down list.

Invoice Entry

Siemens Operating Company:

Invoice Type: ☐ Non Purchase Order ☒ Purchase Order

PO Number:

[Create Credit Memo](#)

ENTERING CREDIT MEMO DETAILS

Step 1 – Enter the **Invoice Number** and the **Invoice Date** (mandatory fields). Enter the Canadian Tax Registration ID (Only for Canadian users)

Step 1 of 8: Invoice Header

Invoice Number (no spaces/special characters/leading zeros):

Final Invoice (This is to be checked only if you have received a down payment on this Purchase Order number): ☐

Invoice Currency:

Invoice Date (mm/dd/yyyy):

Purchase Order:

Account No:

Payment Terms:

Canadian Tax Registration ID (+):

Invoice must be with an estimate (?) are mandatory
(+) Required if PST, GST or QST tax is added

Step 2 – Please make sure the Bill To, Ship to and Remit To address auto populate.

Step 2 of 8: Bill-To / Ship-To / Remit-To Information

Bill To

Search Contact by First or Last Name: [Add Contact](#)

Contact Name:

Contact Email Address:

Name:

Address:

City:

State:

Zip:

Country:

Mail Code:

Ship To

Name:

Address:

City:

State:

Zip:

Country:

Remit To

Vendor No:

Name:

Address:

City:

State:

Zip:

Country:

* Country required for non-US State

ADJUSTMENT OF LINE ITEMS

Step 3 – There will be Purchase Order in blue background.

- Select the line that is under the PO, it gets highlighted to yellow.

- Make changes on **quantity as -1 (since it is for credit)** and **price per unit** as per the amount you want to bill.

And then click **Add selected lines** to invoice in **Green**.

To add Taxes – Select invoice line items in brown background.

Select	PO Line Number	Product/Service Number	Product/Service Description	Siemens Part Number	Quantity	Unit Of Measure	Price Per Unit	Amount Tax	Total	PO Line Balance
<input checked="" type="checkbox"/>	00001	ECLIPSE GLASSES	ECLIPSE GLASSES		80.0000	ST	2.000000	160.00	0.00160.00	160.00

Page 1 of 1 (Records 1 - 1 of 1) - (0.0sec)

Select the line under invoice line items and a **Line Editing Form** would pop up with blue background right on top of **Invoice Line Items**.

Line Editing Form

PO Line Item No:

Product/Service Number (+):

Product/Service Description (+):

Siemens Part No:

Quantity:

Unit:

Price per Unit:

Tax Code:

Tax:

(+) Product/Service Number or Product/Service Description is required

Select the **tax code** from the dropdown, select **percent/amount** and enter the **value** in the box next to it. Click on **ADD**

Click on **Update line**.

INCLUSION OF SURCHARGES OR DISCOUNTS

Step 4 – If you have any **surcharges, Freight charges or discounts** please add it in this step.

⌕ Step 4 of 8: Surcharges/ Freight Charges/ Discounts etc. (Optional)

Surcharges/ Discounts:	0.00	Add / View
---------------------------	------	------------

Step 5- Please check the total on step 5. The total amount should be in negative sign.

⌕ Step 5 of 8: Review and Continue

Review Totals	
Line Items Total (excl Taxes):	160.00
Total Tax:	0.00
Total Surcharges/Discounts:	0.00
<hr/>	
Total Amount:	USD 160.00

And then click on **Continue to Next Steps**.

[Continue to Next Steps](#)

ATTACHMENT OF INVOICE COPY

Step 6 – Please **attach the copy of the invoice** in this step. (It is mandatory to attach the invoice if you are billing Siemens Canada Sector) You can also add **some notes** if required.

Please continue to **Step 8** below to submit this invoice to Siemens for processing

⌕ Step 6 of 8: Add Supporting Documents/ Instructions (Required for Siemens Canada and Mexico Entities)

Attachments Add / View

Note: For Siemens Mexico, the attached document must back up the selected position for this PO, otherwise it will be rejected upon receipt by Siemens.

You may attach multiple supporting electronic documents such as scanned receipts, images or text files. Please note however, that the size of each document must be less than 5 Megabytes and the total of all attachments must not exceed 80MB.

Special Note for Blanket Purchase Orders: Please attach a pdf/image with Invoice Line Item details. Blanket Purchase Orders are often generic: (Qty = 1, Price = \$20,000, Unit = Lot). However, invoices against this Purchase Order should be specific (Example: 10 Hours at \$20/hour) to facilitate the approval of the invoice.

Notes/Instructions Add / View

Add special instructions or notes to this invoice.

Step 7 – Review and print the electronic invoice copy if needed.

REVIEW AND SUBMISSION OF CREDIT MEMO

Step 8 – Click on **Submit now**.

⌕ Step 7 of 8: Review or Edit this Invoice (Optional)

[Edit this Invoice](#) [Review / Print this Invoice](#)

⌕ Step 8 of 8: Submit this Invoice to Siemens AP

Select the "Submit Now" button below to submit this invoice to Siemens Accounts Payable.
Please note: After submission, this invoice will not be available for any further modifications.

[Submit Now](#)

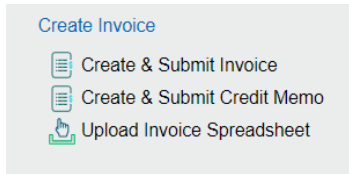
If you would like to defer submission to a later date/time, you may click the button below to return to your Invoices home page. This invoice will continue to exist as a preliminary invoice in the system for up to 6 months and is subject to deletion thereafter. Please ensure its timely submission for further processing.

You will also be able to submit this invoice from your Invoices home page directly.

[Return to Invoices Home](#)

CREATING A NON-PO CREDIT MEMO

- Click on “**Create and Submit Invoice**” on the top left corner of the page.



SELECTION OF OPERATING COMPANY

Select the correct **Siemens Operating Company** that you need to invoice from the drop-down list.

ENTERING CREDIT MEMO DETAILS

Step 1 – Enter the **Invoice Number** and the **Invoice Date** (mandatory fields). Enter the Canadian Tax Registration ID (Only for Canadian users)

VERIFICATION OF ADDRESSES

Step 2 – Please make sure the Bill To, Ship to and Remit to address is populated. If the Ship To address is blank, please copy line by line from Bill To and paste it to Ship To address field.

ADDITION OF LINE ITEMS

Step 3 – In the Line Editing Form, please enter the **product service number**, **Product service description** (small description of the invoice) and **line-item number**.

- Please enter the **quantity** as per the invoice, select the **correct unit** and the **correct price per unit**.

To add Taxes – Select the **tax code** from the dropdown, select **percent/amount** and enter the **value** in the box next to it. Click on **ADD** - Click on **ADD LINE**.

INCLUSION OF SURCHARGES OR DISCOUNTS

Step 4 – If you have any **surcharges**, **Freight charges** or **discounts** please add it in this step.

⚙️ Step 4 of 8: Surcharges/ Freight Charges/ Discounts etc. (Optional)

Surcharges/ Discounts:	0.00	Add / View
------------------------	------	----------------------------

Step 5- Please check the total on step 5. The total amount should be in negative sign.

⬆️ Step 5 of 8: Review and Continue

Review Totals	
Line Items Total (excl Taxes):	160.00
Total Tax:	0.00
Total Surcharges/Discounts:	0.00
<hr/>	
Total Amount:	USD 160.00

And then click on **Continue to Next Steps**.

[Continue to Next Steps](#)

ATTACHMENT OF INVOICE COPY

Step 6 – Please **attach the copy of the invoice** in this step. (It is mandatory to attach the invoice if you are billing Siemens Canada Sector) You can also add **some notes** if required.

Please continue to **Step 8** below to submit this invoice to Siemens for processing

⚙️ Step 6 of 8: Add Supporting Documents/ Instructions (Required for Siemens Canada and Mexico Entities)

• Attachments [Add / View](#)

Note: For Siemens Mexico, the attached document must back up the selected position for this PO, otherwise it will be rejected upon receipt by Siemens.

You may attach multiple supporting electronic documents such as scanned receipts, images or text files. Please note however, that the size of each document must be less than 5 Megabytes and the total of all attachments must not exceed 50MB.

Special Note for Blanket Purchase Orders: Please attach a pdf/image with Invoice Line Item details. Blanket Purchase Orders are often generic: (Qty = 1, Price = \$20,000, Unit = Lot). However, invoices against this Purchase Order should be specific (Example: 10 Hours at \$20/hour) to facilitate the approval of the invoice.

• Notes/ Instructions [Add / View](#)

Add special instructions or notes to this invoice.

Step 7 – Review and print the electronic invoice copy if needed.

REVIEW AND SUBMISSION OF CREDIT MEMO

Step 8 – Click on Submit now.

⚙️ Step 7 of 8: Review or Edit this Invoice (Optional)

[Edit this Invoice](#) [Review / Print this Invoice](#)

⚙️ Step 8 of 8: Submit this Invoice to Siemens AP

Select the "Submit Now" button below to submit this invoice to Siemens Accounts Payable.
Please note: After submission, this invoice will not be available for any further modifications.

[Submit Now](#)

If you would like to defer submission to a later date/time, you may click the button below to return to your Invoices home page. This invoice will continue to exist as a preliminary invoice in the system for up to 9 months and is subject to deletion thereafter. Please ensure its timely submission for further processing.

You will also be able to submit this invoice from your Invoices home page directly.

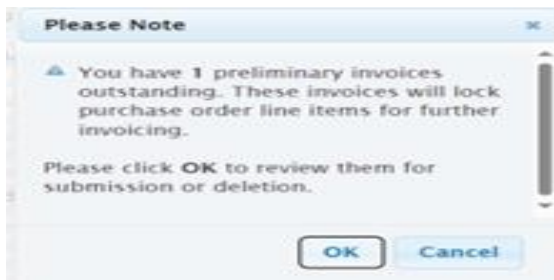
[Return to Invoices Home](#)

PRELIMINARY INVOICE

Kindly follow the instructions to submit the preliminary invoice.

ACCESSING PRELIMINARY INVOICE

- Navigate to the IOL Portal login page.
- Enter your credentials (username and password) in the designated fields.
- After entering your credentials, a pop-up may appear indicating the presence of a preliminary invoice.
- Click on the "OK" button on the pop-up to proceed.



EDITING OR SUBMITTING PRELIMINARY INVOICE

- After clicking "OK" on the preliminary invoice pop-up, follow these steps:
- Navigate to the bottom of the page where the list of available invoices is displayed.
- Locate the preliminary invoice you were prompted about.
- Select the invoice by clicking on it.
- This action will allow you to access and view detailed information about the selected invoice.

Select	Vendor Number	Vendor Name	Invoice Number	Invoice Date	Sched Pay Date	Status/Payment Details	Total Invoice	Currency	Payment Number
<input type="checkbox"/>	50089324		50089324	10/2024		Preliminary Invoice	425.94	USD	

- To edit the invoice, select the radio button 'Add/Edit invoice' or 'Delete' to delete the invoice or <Submit> to submit this invoice.

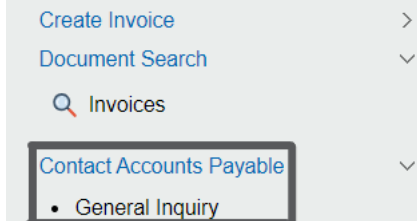
Select	Vendor Number	Vendor Name	Invoice Number	Invoice Date	Sched Pay Date	Status/Payment Details	Total Invoice	Currency	Payment Number
<input type="checkbox"/>	50089324		50089324	10/2024		Preliminary Invoice	425.94	USD	

GENERAL INQUIRY

SUBMISSION PROCESS

General inquiries are submitted for all questions and clarifications related to invoice status, remittance details, and invoice rejection etc.

To submit a general inquiry, login to the IOL portal, click on "Contact Accounts Payable," and then select "General Inquiry" to submit your inquiry to the Customer Relations Team.

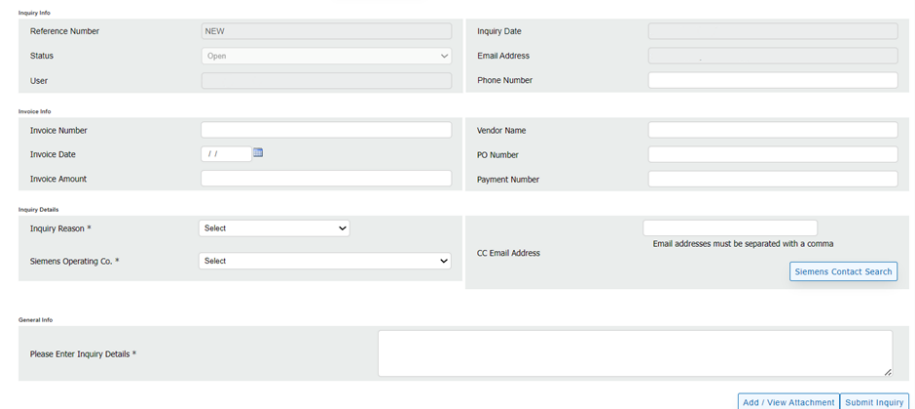


INQUIRY FORM COMPLETION

Please select the appropriate option from the "Inquiry Reason" dropdown menu and elaborate on your query in the "General Info" section.

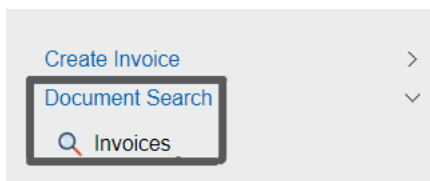
If you wish to send a copy to someone, please include their email address(es) in the 'CC Email Address' field, separating multiple addresses with commas.

Once you have filled in all the necessary details, click on "Submit Inquiry."



INVOICE INQUIRY

An invoice inquiry is submitted to obtain details on a particular invoice. To initiate this process, log in to the IOL portal, navigate to the Document Search Panel, and select "Invoices." This action will direct you to the Invoice Search Panel page where you can proceed with your inquiry.



ACCESSING INVOICE DETAILS

Enter the details in the below field and click **“Search”**.

® Search:

Please submit all Accounts Payable inquiries using the "Inquiry" or "Contact Accounts Payable" links.
If your inquiry is not responded to within 24 hours or for invoice search panel help, please click on the help button ""?"" in the upper right corner of this page.
For IOL technical issues, please submit an email to iol.support.in@siemens.com

Enter filter criteria and select 'Search' (% is the wildcard)

Invoice Search Panel	
Invoice Number (no spaces/special characters/leading zeroes)	<input type="text"/>
PO Number	<input type="text"/>
Payment Number (Check Number or ACH Number)	<input type="text"/>
Invoice Date (Begin/End)	<div><div>Last 180 days</div><div>09/06/2023</div><div>03/04/2024</div></div>
Scheduled Payment Date (Begin/End)	<div><div>Select Date Range</div><div>//</div><div>//</div></div>
Payment Date (Begin/End)	<div><div>Select Date Range</div><div>//</div><div>//</div></div>
Invoice Amount (999999.99)	<div><div>Select Operator</div><div></div></div>
Payment Amount (999999.99)	<div><div>Select Operator</div><div></div></div>
Siemens Operating Company	<div><div>Select</div><div></div></div>
Status ID	<div><div>Select</div><div></div></div>
<div><div>Reset</div><div>Search</div></div>	

Once you've conducted the search, you'll find the results under "Available Invoices." Select the relevant invoice from the list and click on "Inquiry" from the action buttons located above the results. This will enable you to proceed with further inquiries or actions regarding the selected invoice.

Available Invoices									
Please Note: Sorting by a column other than Invoice Date will increase response time. Selecting the Status link will provide additional information for the selected status.									
Select	Vendor Number	Vendor Name	Invoice Number	Invoice Date	Schd Pay Date	Status/Payment Details	Total Invoice	Currency	Payment Number
Please enter appropriate filter criteria and select Search.									
Page 1 of 1 [Records 1 - 0 of 0] - [0.0secs]									

SUBMISSION OF INQUIRY

Please select the appropriate option from the "Inquiry Reason" dropdown menu and elaborate on your query in the "General Info" section.

If you wish to send a copy to someone, please include their email address(es) in the 'CC Email Address' field, separating multiple addresses with commas.

Once you have filled in all the necessary details, click on "Submit Inquiry."

Inquiry Info	
Reference Number NEW	Inquiry Date
Status Open	Email Address
User	Phone Number
Invoice Info	
Invoice Number	Vendor Name
Invoice Date //	PO Number
Invoice Amount	Payment Number
Inquiry Details	
Inquiry Reason *	
Siemens Operating Co. *	
CC Email Address Email addresses must be separated with a comma	
<div>Siemens Contact Search</div>	
General Info	
Please Enter Inquiry Details *	
<div>Add / View Attachment Submit Inquiry</div>	

to Resolve, offering guidance on steps to take to address any issues or concerns related to the selected status.

INVOICE STATUS

CHECKING INVOICE STATUS

Upon logging into IOL, the user is directed to the Home Page, which prominently displays the Invoice Search Panel. To obtain invoice status, users can enter the appropriate search criteria and click on the "Search" button. It's important to note that the default date range is set for the last 180 days.

Enter filter criteria and select 'Search' (% is the wildcard)

Invoice Search Panel			
Invoice Number (no spaces/special characters/leading zeroes)	<input type="text"/>		
PO Number	<input type="text"/>		
Payment Number (Check Number or ACH Number)	<input type="text"/>		
Invoice Date (Begin/End)	Last 180 days	09/20/2023	03/18/2024
Scheduled Payment Date (Begin/End)	Select Date Range	/ /	/ /
Payment Date (Begin/End)	Select Date Range	/ /	/ /
Invoice Amount (999999.99)	Select Operator	<input type="text"/>	
Payment Amount (999999.99)	Select Operator	<input type="text"/>	
Siemens Operating Company	Select	<input type="text"/>	
Status ID	Select	<input type="text"/>	
<input type="button" value="Reset"/>			

The search results are presented below the Invoice Search Panel. In this section, the column labeled "Status" will showcase the current status of each invoice. Following approval, a Scheduled Payment Date is assigned to the invoice.

Available Invoices

Please Note: Sorting by a column other than Invoice Date will increase response time. Selecting the [Status Link](#) will provide additional information for the selected status.

Select	Vendor Number	Vendor Name	Invoice Number	Invoice Date	Schd Pay Date	Status/Payment Details	Total Invoice	Currency	Payment Number
Please enter appropriate filter criteria and select Search.									
Page 1 of 1 Records 1 - 0 of 0 0 Items									

Users have the flexibility to select any status from the list, which will then prompt the display of additional information. This includes the Status Definition, providing a clear understanding of the status, as well as Recommended Actions

Status Details

Invoice Status:	Awaiting Payment
Status Definition:	Invoice is scheduled to be released for payment. Under this status the Scheduled Payment Date column will be populated.
Recommended Actions to Resolve:	No Action Needed. NOTE Due to various payment run schedules (weekly, monthly, etc.), the actual payment date may not be the Schd Pay Date. If not paid by the Schd Pay Date, the invoice should pay on the next scheduled payment run. Please refer to your Purchase Order copy for further payment details.

Also within the same window are Payment Details and Rejection Reason if relevant.

Payment Details

Payment Method	<input type="text"/>
Payment Number	<input type="text"/>
Payment Date	<input type="text"/>
Payment Amount	0.0000
Payment Currency	USD
Invoice Paid Amount	0.00

representative to review the discrepancy. For more information, please contact your Siemens business representative.

UNDERSTANDING STATUS DEFINITIONS

Preliminary Invoice – Electronic invoice has been created and saved, awaiting supplier to submit invoice to Siemens Accounts Payable. During the preliminary status, supplier can edit invoice.

Submitted – Electronic invoice has been created and submitted to Siemens Accounts Payable. A submitted invoice cannot be edited.

Cancelled – Invoice previously submitted to Siemens Accounts Payable and processed has been cancelled and deleted from the accounting system.

Awaiting Payment – Invoice is scheduled to be released for payment. Under this status the Scheduled Payment Date column will be populated.

Rejected – Invoice has been rejected and returned to supplier. For more information about the reason for the rejection, please use the invoice detail popup screen (select the click under the Payment Details column).

Paid – Invoice has been paid. Invoice detail popup screen (select the click under the Payment Details column) will provide payment detail information (payment method, payment number, payment amount).

Awaiting processing in Accounts Payable – Invoice is currently with the Accounts Payable Invoice Processing Team awaiting processing.

Blocked for Other Reasons – Invoice could be blocked for multiple of reasons (excludes PO discrepancy or awaiting IRS W9 or W8 form). Select the invoice and then select the Customer Relations Invoice Inquiry icon to submit an inquiry request to AP request the reason for the block.

Blocked for PO Discrepancy – Invoice associated with a purchase order has been blocked for payment release due to price or quantity discrepancy.

Routed to Contact name due to Discrepancy – Invoice associated with some kind of invoice discrepancy has been routed to the Siemens business

Routed to Contact name for approval – Invoice not associated with purchase order requires review and approval by Siemens. Invoice is with Siemens contact awaiting approval. For more information, please contact your Siemens business representative.

Payment held due to Management Direction – Siemens management has instructed Accounts Payable to hold all invoice payments until further instructions. Please contact your Siemens business representative for more information.

Payment held awaiting IRS W9 or W8 form – Invoice is held for payment awaiting IRS W9 form (US vendor) or IRS W8 form (international vendor). Please send appropriate form to your Siemens business contact to ensure a timely release of the payment.

Payment held awaiting IRS W9 or W8 form and blocked for PO discrepancy – There are two reasons invoice payment is being held for release. The explanation for these two reasons is listed above. In order for the invoice to be released both reasons must be resolved.

Payment held awaiting IRS W9 or W8 form and Payment held due to Management Direction – There are two reasons invoice payment is being held for release. The explanation for these two reasons is listed above. In order the invoice to be released both reasons must be resolved.

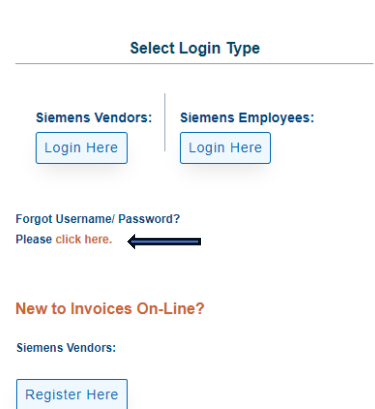
Payment held due to Management Direction and Blocked for PO Discrepancy There are two reasons invoice payment is being held for release. The explanation for these two reasons is listed above. In order the invoice to be released both reasons must be resolved.

PASSWORD RESET

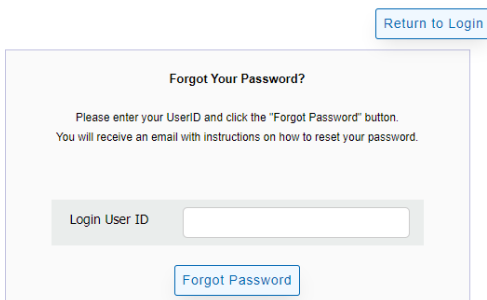
PASSWORD RESET STEPS

Please follow these steps to reset your password,

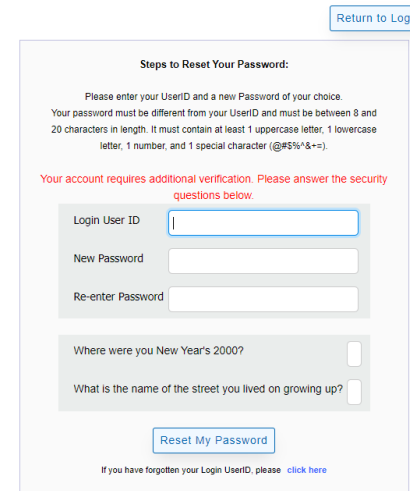
- Click on the option “Click here” under Forgot Username/Password.



- Enter your Login User ID and click on Forgot password.



- An email is sent to your registered email address with the password reset link.
- Click on the link to reset the password.



- Enter the Login User id, new password and re-enter the new password.
- Answer the two security questions and click on the Reset my Password button. (You had set up security answers during logging in for the 1st time to IOL portal).

Note: Your password must be different from your User ID and must be between 8 and 20 characters in length. It must contain at least 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character (@#%\$^&*+=).

ASSISTANCE FOR FORGOTTEN SECURITY QUESTIONS

Please submit a request with IOL Technical Support, who will trigger an email with the password reset link to be sent to your email address registered with IOL

PASSWORD RESET REMINDER

Note: You must reset the password every 90 days (about 3 months) in IOL portal.

IOL CONTACT DETAILS.

EMAIL ADDRESS: iol.support.in@siemens.com