



BUILDING AMERICA™

ORISS Material Invoice Template Help

ORISS Web Link

<https://oriss.www.transentric.com/ors/>

Additional Help

<http://www.transentric.com/products/oriss/index.shtml>

ORISS Invoice Template Setup

1. Sign in to the ORISS web page using the user name and password Transentric emailed to you. If this is your first time signing in you will be asked to change your password.
2. Bring up a blank invoice template to fill out. First click on the “Invoice Templates” tab in the upper left corner as circled in the screen shot below. Next, under create a blank template, ensure that Union Pacific Railroad is in the customer drop down box as circled in the screen shot below. Then click the “Create” button directly below the customer drop down box.

The screenshot shows the Transentric Online Rail Industry Supply System interface. The top navigation bar includes 'Home', 'Invoices', 'Invoice Templates' (circled in red), 'Registrations', 'Help', and 'Log Out'. The date '10/15/2007' is displayed in the top right. Below the navigation bar, there are two main sections: 'Invoice Template Search' and 'Create Invoice Template'. The 'Create Invoice Template' section has two options: 'Create a blank Template' and 'Enter an Invoice number to create a Template from or search Invoices'. In the 'Create a blank Template' option, the 'Customer' dropdown menu is set to 'Union Pacific Railroad' (circled in green) and the 'Create' button is visible. The 'Invoice Number' field is also present with a 'Create' button below it.

3. Complete the template form
 - a. Template Name – enter an appropriate template name
 - b. Customer To Invoice – ensure Union Pacific Railroad is in the drop down box
 - c. Purchase Order Number – list the PO number provided by the UP Supply dept if you are creating a template for a specific PO nbr. If you will be using various PO nbrs when invoicing, leave the field blank on the template. The field will be populated when the invoices are created.
 - d. Remittance Address – data should pre-populate with remit address information previously provided during registration
 - e. Shipped From Address – check mark the “Use Remittance Address” box if this address should be used. If material is generally shipped from a specific location other than the remit address, populate the fields with this information. If you would prefer to provide a specific location on each invoice, enter your vendor name into the Company Name field and leave the other fields blank. You will then be requested to populate these fields at the time the invoice is created.
 - f. Ship To Address – if the material is generally sent to the same address each time, populate these fields. If the location generally changes, populate the Company Name field with “Union Pacific Railroad” and leave the other fields

blank. You will then be requested to populate these fields at the time the invoice is created.

- g. Payment Terms – Select “US” for Currency. Enter discount and net days as directed by the PO provided by the UP Supply dept. Use the default for Freight Terms and FOB Point. Choose the shipment method that best matches to the type being used.
- h. Carrier Information – Type your vendor name or the third party carrier that you use for the carrier name (e.g. UPS). Type “999” for reference number and bill of lading number.
- i. Line Items –
 - i. Add Line Item – These fields will be populated at the time the invoice is created as these are generally specific to a given invoice.
 - ii. Add Additional Charges – If additional charges such as freight will generally be invoiced, click on “Add Additional Charge”. In the “Type” drop down box, select the applicable additional charge and enter a comment. If multiple additional charges need to be invoiced, click on “Add Additional Charge” again until all additional charges are entered on the screen.
 - iii. Add State Tax – If taxes will generally be invoiced, click on “Add State Tax”. In the “Type” drop down box, select the appropriate tax. Then populate the state, zip code and comment fields. If multiple taxes need to be invoiced, click on “Add State Tax” again until all taxes are entered on the screen.

4. When the template is complete, click on the “Create” button.

5. A message will be provided to confirm that the invoice template was created.

Modify The Invoice Template

Select the “Invoice Templates” tab on the upper left corner, and search for the invoice template that needs to be modified. On the “Invoice Template Summary” screen, select the template you need to modify. On the “Invoice Template Detail” screen, select “Modify this Template” located in the upper left side. Modify the template as needed and click the “Save” button.

Create An Invoice From The Template

Select the “Invoice” tab on the upper left corner. Select the appropriate template from the “Template” drop down box on the right side as circled in the screen shot below. Then click the “Create” button. On the “Create Invoice” screen, provide the invoice details that are specific to this invoice and ensure that the data that was pre-populated by using the template is accurate for this particular invoice. Then click the “Send” button to submit the invoice.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Invoices', 'Invoice Templates', 'Registrations', and 'Help'. The 'Invoices' tab is highlighted with a red circle. Below the navigation bar, there are two main sections: 'Invoice Search' and 'Create Invoice'. The 'Invoice Search' section has a heading 'Leave all criteria blank to search for all records.' and three input fields: 'Customer:' with a text box containing 'Union Pacific Railroad', 'Invoice Number:' with an empty text box and the instruction 'Enter all or part of an Invoice number', and 'Order Number:' with an empty text box and the instruction 'Enter all or part of a Purchase Order number'. The 'Create Invoice' section has a heading 'Create a blank Invoice' and a 'Customer:' dropdown menu with 'Union Pacific Railroad' selected. Below this is a 'Create' button. Underneath, it says 'or Create an Invoice from a Template'. This section has a 'Template:' dropdown menu with 'Test' selected, which is circled in green, and a 'Create' button below it.