



<https://www.msinvoiceexchange.com>

Getting Started with MS Invoice Exchange

Intended Audience

Employees and vendors of Microsoft who need to invoice companies to recover costs that cannot be billed through standard means within other Microsoft Corporation's billing systems.

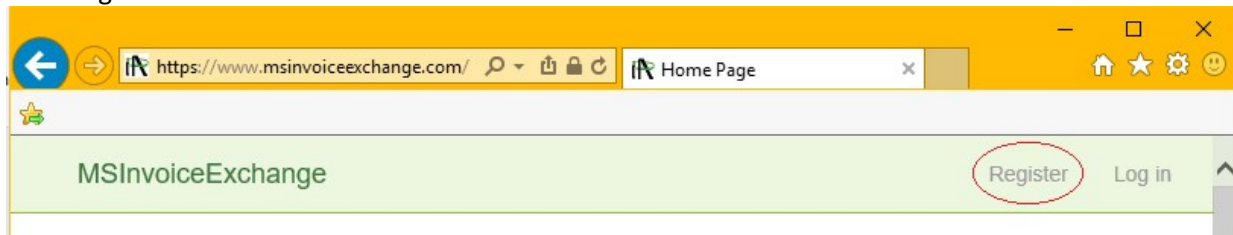
All payments processed using this web tool are received into a Microsoft bank account and are uploaded into the intended Internal Order/Cost Center by the Finance department.

Register for an Account on MSIE

To create an account, follow these steps:

Go to <https://www.msinvoiceexchange.com>

Click Register



Fill out the form shown below. Unless you are working with the Microsoft Studios Division, leave the Division drop down list as it is defaulted (Microsoft).

Only email addresses in the @microsoft.com domain are allowed to register.

Email Address *	<input type="text" value="joe@microsoft.com"/>
Password *	<input type="password" value="....."/>
Confirm password *	<input type="password" value="....."/>

First Name *	<input type="text" value="Joe"/>
Last Name *	<input type="text" value="Smith"/>

Select the division you need to access

Division *	<div>Microsoft ▼</div>
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Cancel

Register

After clicking Register, you will receive an email that will ask you to confirm your email address.

Once you confirm your email address, you will be able to login.

The first time you login, you will be required to provide an alternate contact email address in the event your email address is no longer available.

Login!

Click Login from the home screen and enter your username and password.

Once logged in, the first thing you will be asked is to provide an Alternate Email Address. When a v-account expires or your email address becomes invalid for any reason, we need to know who we can contact in case any issues come up related to your invoices or payments.

Alternate Email Address

In the event your user account is no longer active, we need to get an alternate email address that we can use for notifications and other follow ups.

If you have a "v-" account, you are probably aware that it is deactivated every 18 months. When this happens, we can use the alternate email address to send payment notifications, late notices etc.

Please provide an alternate email address in the field below. Please try to use a non "v-" email address to ensure we can reach someone on your team in the event your email address is deactivated.

Email Address

Save

You can update this email address anytime by going to your user preferences.

MSIE Pricing

There is a per invoice creation fee. As this billing tool is hosted on behalf of Microsoft, it is not part of the internal Microsoft billing programs.

Our fee is charged for each invoice you create on the site. The fee is calculated as 3% of the total invoice amount up to a maximum \$50.00 per invoice created.

You can pay for the fee with a Microsoft Purchase order or you can pay your fee with a credit card.

Purchase Order Requirement for MSIE Fees

MSIE fees must be billed via a Microsoft Purchase Order

To create a PO, you will need to use the internal Microsoft site "MyOrder".

Here is how the process will work:

1. You will create a PO using MyOrder (Microsoft internal web site). The process to create a PO automatically sends us the PO information to MSIE when it is created.
2. We will enter the PO information onto MSIE. The first time you create an invoice, you will enter the PO number on the site to link it to your account. You will select the PO number and create your invoice.
3. Every time you create an invoice, the site will verify that you have enough remaining funds on the PO to process the invoice. If your PO is fully depleted, you will not be able to create an invoice until you either create a new PO or add a new line item to your existing PO with additional funds.

Create your MS Purchase order with our Microsoft Supplier Number 0001126280 - INVOICESANYWHERE LLC for Country Code 1010 (USA). For Country Code 1075 (Canada), use Microsoft Supplier Number 0002324961 (InvoicesAnywhere, LLC).

If you need to use a Statement of Work (SOW) in order to create a PO, click [here](#) to download a template for Country Code 1010. Click [here](#) for Country Code 1075.

Once you have either made a credit card payment or you have created a PO, you can begin creating invoices.

Create an Invoice

To create your invoice, click *Enter Invoices* from the home page.

Enter Invoices

You will need to enter your PO number in the

If you already have a PO linked to your account, you can select it from the grid. Or, enter a PO number and click Lookup

Use this screen to select a Purchase Order to be used for your invoice entry.

Because this is a vendor hosted service to Microsoft, there is a fee that is charged for each invoice created. This is required in order to pay the costs to maintain this service.

Fees are invoices at the end of each month for invoices created during the month.

Fees are calculated as the 3% of the invoice amount up to a maximum of \$50.00.

If the Balance Available on your PO is less than \$50, you will need to either create a new PO or add a new Line Item to your existing PO.

Don't see your PO listed? Enter the PO Number here and click Lookup to see if it is available to be linked to your account:

Lookup

Enter your PO Number and click Lookup

If you are looking up a PO and it is found, you can Link it to your account. Just tick the Link box and click Link.

We found the following PO lines. Click the Link checkbox

PO Numbers				
Link	PO Number	Line Number	Approver	Description
<input type="checkbox"/>	<input type="text"/>	10	<input type="text"/>	Test

Then select the PO from the grid by clicking Select.

PO Numbers							
Select	Link Me	PO Number	Line Number	Pending Amount	Balance Available	Description	Approver
<input type="button" value="Select"/>		<input type="text"/>	10	721.38	99,228.62	Test	

You are now at the invoice entry screen.

This Getting Started document will provide the basics you will need to create an invoice. There are other options on the screen that you should find self explanatory. If you need more information about something on this screen, send us an email at msie@msinvoiceexchange.com and we will be happy to help.

Make sure you enter a 6 digit Account Code and either an IO or Cost Center. This is where your payment will be posted to once it is received.

Currency	Selected PO for MSIE Fees	Country Code *	This is where your payment will be posted		
US Dollars <input type="button" value="Set as default"/>	PO Number <input type="text"/> PO Balance <input type="text"/>	1010 <input type="button" value="Set as default"/>	Account Code 120116 <input type="button" value="Set as default"/>	IO Number 1234567	Cost Center <input type="text"/> <input type="button" value="Set as default"/>

You can tick the Set as default checkboxes and your entries will be saved and filled automatically the next time you create an invoice.

Now, enter your customer information:

Bill To Address	
Company Name *	<input type="text" value="Some Company"/>
Contact Name *	<input type="text" value="Abraham Lincoln"/>
Address *	<input type="text" value="57 Main Street"/> * <input type="text"/> <input type="text"/>
City *	<input type="text" value="Hatville"/>
Country *	<input type="text" value="United States"/> ▼
State *	<input type="text" value="Illinois"/> ▼
Zip Code *	<input type="text" value="49091"/>
Customer Phone #	<input type="text"/>
VAT Tax Number	<input type="text"/> Use this when an invoice is sent to a company in Europe and it is required by that company.
GST/HST Tax Number	<input type="text"/> <input type="checkbox"/> Set as default Use this when an invoice is sent to a company in Canada and it is required by that company.
Other Tax Number	<input type="text"/> Use this to print a general tax ID on your invoice if required by your customer (not VAT or GST).

You will usually leave this section as it is. If your customer provided you with their Purchase Order Number, you can fill it in here.

General Invoice Information	
Payment Terms	<input type="text" value="Net 30 Days"/> ▼ <input type="checkbox"/> Set as default
Customer PO Number	<input type="text"/>
Allow Credit Card payment	<input checked="" type="checkbox"/> Allow CC Payments <input type="checkbox"/> Set as default
Show Check Remittance Info on the Invoice	<input checked="" type="checkbox"/> Show Check Remittance Info <input type="checkbox"/> Set as default
Show ACH Remittance Info on Invoice	<input checked="" type="checkbox"/> Show ACH Remittance Info <input type="checkbox"/> Set as default
Email the Invoice	<input checked="" type="checkbox"/>

Enter your customer's email address and click Add. You can add as many email addresses as you wish.

Email Addresses

Contact Email Address

Add


Now you will enter your line items to bill.

You can leave the Activity as is, or add a new one that describes what you are billing for.

Activity

Other Non-taxable Service

☐ Set as default



Click the edit icon to add an activity if you wish.

In this section, you will make selections that will be used for MS Tax reporting. Depending on what you select, the visibility of some options in this section will change.

Event / Category	This is an EVENT	The Event is Virtual/Digital	This Line is for Multiple Cities
<div>1</div> <div>Not Assigned</div> <div></div>	<div>2</div> <div><input checked="" type="radio"/> Yes <input type="radio"/> No</div>	<div>3</div> <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div>	<div>4</div> <div><input type="radio"/> Yes <input checked="" type="radio"/> No</div>

Please provide the Address where the Event is taking place

City *	Country *	State *	Zip Code *
<input type="text"/>	Select one...	<input type="text"/>	<input type="text"/>

5

1 If you click the edit icon, you can add custom Events/Categories that will be used to default the options in the section. You will have the option to set the default Account Code and IO code so that when you select an Event/Category, it will update the invoice to those settings. NOTE, the Event does not need to be an actual Event. It can be for any purpose you need.

2 If the invoice is not related to an Event, select No. If you select No, items 2, 3, 4 and 5 will not be displayed.

3 If this is an Event that is being offered Virtually (not in-person), select Yes.

4

Is your Event being held in Multiple locations? If your customer is paying for an Event that is being held in Multiple locations, select Yes. This option only applies when the amount being billed for a line item is INCLUSIVE of more than one location. If the line item you are entering is only for a single location, select No.



You will be required to enter the address for the Event. If Yes is selected for either option 3 or 4, or if this is not an Event, this section will not be displayed.

Enter these fields and click Save Line. If taxes are required, additional columns will be displayed in this section. There are some cases where your Event will be taxable. We will let you know if that is the case.

Quantity *	Price *	Extended	Discount	Subtotal	Line Total
<input type="text" value="1"/>	<input type="text" value="50000.00"/>	50000.00	<input type="text" value="0.00"/>	50000.00	50000.00

Line Description

Sample description

☐ Add this description to your Quick Descriptions

Reset Line

Save Line

After you save your line, your saved lines will be displayed. You can click the Edit icon to edit the line, or click the Delete icon to delete it.

Saved Line Items

Activity Type	Description	Quantity	Price	Extended	Less Discount	Subtotal	Line Tax	Line Total	Del	Mod
Other Non-taxable Service	Sample description	1	50,000.00	50,000.00	0.00	50,000.00	0.00	50,000.00		
Invoice Totals				50,000.00	0.00	50,000.00	0.00	50,000.00		

You can now submit your invoice! At the bottom of the screen click the Submit Now button. You can also save it as a draft and edit/submit it at a later time.

Discard

Save Draft

Submit Now

After clicking *Submit Now*, you will be presented with the Email screen. This screen allows you to tailor the email that is going to be sent to your customer along with the PDF invoice you have created.

Format The Email To Your Customer

Use this screen to make any adjustments to the email you are about to deliver to your customer with your invoice.

Separate multiple email addresses with a semi-colon

To:

CC:

Subject:

Body:

Hello Abraham Lincoln,

Invoice EVE0044192 for Some Company is available to download.
Please click this link to begin your download:
<http://localhost:49160/RetrieveInvoiceV2?Id=d4b9acfde5f845d486b9c78ba21fc1c8>.

Please make your payment using one of the following options:

Credit Card
Remit payment by credit card by using this link:
<http://localhost:49160/CSOneTimePayment.aspx?PaymentPrehandleType=wqDMNuSI97YttFPIwGaNWD4gyWXT2GGvU5WLMx4x3Ws%3d>.

NOTE: If your email program doesn't support active links, please enter this URL in your browser: <https://www.MSInvoiceExchange.com>
~~Then click on the Credit Card Payment button and enter your Invoice Number (EVE0044192) and Customer Number (A000005).~~

The default template will reflect the selected payment methods above.

PDF Attachment Options

☒ Attach PDF to this email

☐ Set as default

Your invoice has been created. If you cancel at this point you will need to send your invoice to your customer manually.

Click Send Email. Your invoice will be emailed to your customer and you will be cc'd on the email.

--END OF DOCUMENT