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Welcome Message

Dear Valued Supplier,

Welcome to the **DalBuy Quick User Guide**—a resource designed to help make working with Dalhousie University seamless and efficient.

At Dalhousie, we truly value the strong relationships we have with our suppliers. Your role is essential in ensuring smooth and effective procurement, and we are committed to making the process as simple and transparent as possible. This guide walks through key tasks such as **receiving Purchase Orders, submitting Sales Invoices, tracking payments, and managing invoice details**, providing clear steps to help you navigate the DalBuy Supplier Portal with confidence.

By following this guide, you'll gain a thorough understanding of how to search for and view a Sales Invoice in DalBuy. We hope this resource makes managing your invoices easier, more efficient, and stress-free.

Thank you for taking the time to review this guide. We appreciate your partnership and look forward to continued collaboration. If you ever need assistance, support is available to help every step of the way.

Warm Regards,

Veronica MacNeil Director, Procure to Pay (P2P) Financial Services





Getting Started

DalBuy

Simple Definitions

Supplier: lorem ipsum

Procurement: the method of discovering and agreeing to terms and purchasing goods or services, or other works from an external source.

Purchasing: the process a business or organization uses to acquire goods or services.

Accounts Payable: The amount owed to the supplier is paid by processing the supplier invoice.

P2P: The Procure to Pay process encompasses all procurement actions from sourcing requisitioned goods or services to payment upon delivery.

Helpful Icons



Home: This is where you can find your Supplier Information, Quick Links to Common Tasks, Contracts, Invoice Creation.



Orders: This is where you can view your Sales Orders and Shipments.



DalBuy Supplier Quick Tutorial

Logging In and Bookmarking

There are two ways to log in to the DalBuy Portal as a Supplier. This section covers both ways so you can choose what best fits you.

- 1. Logging Into Dalbuy Portal via Email
- 2. Logging Into Dalbuy Portal via via Supplier Resource Portal

It will also walk you through how to bookmark the DalBuy Supplier Portal web page address or URL for quick and easy access whenever needed. Let's get started!

Logging Into DalBuy Portal via Email

This section of the quick guide provides step-by-step instructions on logging into the DalBuy Supplier Portal, powered by Jaggaer, using the email link from Dalhousie.

I. Logging in via Email: Registration Complete Notification

After completing your registration for the DalBuy Supplier Portal, a confirmation email from Dalhousie University will arrive in your inbox. This email serves as an acknowledgment that your registration is complete. Inside, you'll find a hyperlink to the DalBuy Supplier Portal. Simply click on the link to be directed to the login page.









II. Logging in via the Supplier Resource Portal

You may access the Supplier Resource Portal by visiting the following URL: https://www.dal.ca/dept/procurement/DalBuy.html.

A black 'Login to DalBuy' button is clearly visible on this page. Click it to go to the DalBuy Supplier Portal and log in.



Figure 1.2: DalBuy Supplier Resource Portal

Accessing the Login Page

Either one of the login options provided above will take you directly to the DalBuy Supplier Portal's login page.

- 1. Enter your email address and password to log in. Be sure to keep your login details always secure.
- 2. Once your credentials are entered, click 'Login.'
- 3. If the details are correct, access to the DalBuy Supplier Portal's home page will be granted.

Pro Tip: Always keep your login credentials such as your password safe and secure.





Figure 1.3: DalBuy Portal Supplier Login Page





Bookmarking DalBuy Supplier Portal

DalBuy

Suppliers

Bookmarking web pages in your browser provides a convenient and efficient method for accessing frequently visited websites. This section will guide you through the process of bookmarking the DalBuy Supplier portal, ensuring you can quickly and easily reach the portal quickly and efficiently.

Bookmarking On Your Web Browser

- 1. In your web browser, find and click the star icon in the address bar—this is where website URLs are entered.
- 2. Once clicked, a pop-up window will appear, prompting you to save the bookmark. To make it easy to find later:
 - a. Enter 'DalBuy Supplier Portal' in the 'Name' field
 - b. Choose '**Bookmarks Bar'** in the '**Folder**' section, select

	Edit bookmark	×
٢	Name DalBuy Portal	
	Folder All Bookmarks	•

c. Click 'Done' to save the bookmark.

Figure 1.4: Bookmarking the DalBuy Portal

Confirming the Bookmark

Going forward, accessing the DalBuy Supplier Portal will be quick and easy.

Simply click the bookmark you created, which is in your bookmarks bar just below the address bar of your web browser.

This will take you straight to the login page, getting you one step closer to your DalBuy Supplier Portal dashboard.



When

bookmarking, be sure to save the login page of the DalBuy Supplier Portal and not the home page. The correct URL to bookmark is: https://uit01.jaggae r.com/apps/Router/ SupplierLogin?Cust Org=Dal&tmstmp= 1734466455658



Figure 1.5: Save and Access: Bookmarking the DalBuy Login Page

DalBuy Supplier Portal Dashboard Orientation

This section provides an overview of the key features of the Supplier Portal dashboard, helping you navigate the portal effortlessly and make the most of your DalBuy experience.

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Figure 1.6: DalBuy Supplier Main Page





Menu Bar

The left-hand side of the DalBuy Supplier Portal features the **'Menu Bar,'** your main navigation panel. It provides access to key areas like the **'Home Page,' 'Orders,' 'Administration**,' and **'Managing Registration**.' Simply hover over each icon to explore its options and start using the portal's features.

Your **dashboard** is the **main page** of the portal and acts as **a central hub**, giving you easy access to all key resources and features in DalBuy.

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					Invoice No.			
					Invoice Date	02/05/2025		
					PO Number	Optional PO Number		



I. Sales Order / Purchase Order Menu

Navigate to the Orders section in the Menu Bar. Here, you'll find two options: **'Sales Orders and Shipments**' allows you to track and manage all orders placed through DalBuy for your organization, while the **'Supplier Invoices'** section is dedicated to handling all tasks related to managing your invoices

Pro Tip: Sales Orders are the same as Purchase Orders. These terms are used interchangeably.

Please note that the payment due date is determined by adding the payment terms to the invoice date.



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Figure 1.8: Orders Section in the DalBuy Menu Bar

II. Contracts and Reporting

The '**Contracts**' and '**Reporting'** sections are not currently included in your dashboard setup. You will be notified when these sections become applicable to your account. In the meantime, we will concentrate on the remaining components of your dashboard and the tools presently available to support your tasks.

III. User Management

The '**Manage Users'** feature allows you to add other team members to your DalBuy account. To get started:

- 1. Go to the **'Administer'** section in the **'Menu Bar'** on the left-hand side of the DalBuy Supplier Portal.
- 2. Click on '**Manage Users**' and select '**Send New User Request**'. This will take you to a page where you can enter all required details of the team member you wish to add.
- 3. The required contact details include 'First Name', 'Last Name', 'Phone Number' and 'Email Address'. Remember, all starred fields are required to complete the invitation.
- 4. Once done, click 'Send User Request'.
- 5. The additional user will then receive an email with further instructions to access DalBuy.



FINANCIAL SERVICES

L	Supplier Quick Tutorial								
Su	ppliers								
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í.	Orders	Administer > Manage Users > Send New User Request							
õ	Catalogs and Contracts	Sending a user registration request To send a registration request to a new user, please enter the user's contact information. Select the role that you would like the user to be assigned. An anal will be sent to the email address below with instructions on how to register. Pending registrations can be viewed on the registrations page.							
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Figure 1.9: Send New User Request under Manage Users

DelD



Figure 2.0: New User Registration Email notification with link to DalBuy portal.





IV. Contact & Supplier Resource Portal

Need assistance? The '**Customer Contact'** section provides detailed instructions on how to reach the Dalhousie Supplier Support team via email.

For comprehensive, step-by-step guidance and additional resources, please visit the '**Supplier Resource Portal**' found in this <u>link</u>.

The **Supplier Resource Portal** is a valuable tool for finding answers to frequently asked questions and learning how to use DalBuy more effectively.

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	+					Developed by 18.00 APD 1 Delayer Dellay

Figure 2.1: Contact and Support Section in DalBuy

V. Quick Links to Common Tasks

The 'Quick Links to Common Tasks' section provides direct access to managing your DalBuy Registration Profile.

Pro Tip: Go to the **'Quick Links to Common Tasks'** section to update your profile, ensuring your information stays current and accurate.



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Suppliers			
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Orders Orders Contracts ILL Reporting Administer Registration	Home > Cuatomer Portal Home Important: If your purchase order if not in DaiBuy plesse email your invoice to <u>finasy@cal.ca</u> . For instructional materials on how to use DaiBuy access Daihousie's Supplier Resource Portal. If you have any questions about DaiBuy plesse c Daihousie Supplier Support at <u>SupplierSupport@</u>	Quick Links to Common Tasks Manage Registration Profile Manage your registration profile here. Contracts No Results	? ? Contracts
	Customer Contact Name Dalhousie Supplier Support	? Create Invoice / Credit Memo	?
Q Menu Search	Title Procure to Pay Services Email suppliersupport@dal.ca	Type Invoice Credit Memo Invoice No. Invoice Date 02/05/2025 Invoice Date 02/05/2025 Import PO Number Optional PO Number Currency Canadian Dollar	Creat

Figure 2.2: Quick Links to Common Tasks Section in DalBuy

VI. Contracts

The '**Contracts**' section is part of the DalBuy Supplier Portal dashboard, and we will notify you when this section becomes relevant to your activities. In the meantime, take some time to explore the other features on your dashboard. These tools are designed to enhance your experience and make your interactions within the DalBuy portal more efficient.

VII. Create Invoice / Credit Memo

The '**Create Invoice**' or '**Credit Memo**' section on your dashboard lets you submit an invoice or credit memo.

Pro Tip: Be sure to fill in all required fields accurately, including the **invoice number, P.O. number, date, and currency.**

Once all required information is entered, click '**Create**' to continue. This will take you to the 'Create a Sales Invoice' page. For additional guidance, check out the video tutorial on entering a sales invoice, available in the <u>Supplier Resource Portal</u>. There's also a tutorial that explores different ways to create an invoice, giving you a deeper understanding of the process.

A **Purchase Order** is always necessary for the creation or submission of an invoice.



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	For instructional materials on how to use DalBuy, pleas access Dalhousie's Supplier Resource Portal.	Contracts	?
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Registration			View All Contracts
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		Invoice Date 02/05/2025 III mm/dd/yyyy	
		PO Number	
		Currency Canadian Dollar 🗸	
Q Menu Search			Liteate

Figure 2.3: Creating Invoice / Credit Memo

VIII. Find Invoice

To check the status of an invoice or track its progress, use the '**Find Invoice**' feature on your DalBuy Supplier Portal dashboard. Just enter the invoice number in the search field and click '**Search'**.

Pro Tip: Additionally, you have the capability to search for multiple invoices simultaneously by separating each invoice number with a comma (,).

Alternatively, you may click on the magnifying glass icon to be directly navigated to the **'Search Supplier Invoices'** page.

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õ	Catalogs and Contracts	Customer Contact ?		
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a7	Administer		Invoice No.	
\$	Registration		Invoice Date 02/06/2025 III mm/ddyyyy PO Number Optional PO Number Currency Canadian Dollar V	
			Create	
			Find Invoice ?	
م	Menu Search	Enter the Invoice number here	To check payment status of an invoice or send a message to a customer regarding an invoice, please enter the invoice number then click the "search" button. Invoice Number(s) Multiple values can be separated by a comma(). Click the magnifying glass icon to go directly to the Search Supplier Invoices' page."	J

Figure 2.4: Find Invoice Section





IX. Action Items Menu

In the top-right corner of your dashboard, the 'Action Items' bar provides quick access to your Account Management menu, notifications, and any tasks that need your attention.

Â	Home				0 M 4 1
	Orders Catalogs and Contracts	TEST TEST TEST Important If your purchase order if not in Dalibuy, please email your invoice to <u>fingay@dal.ca</u> .	Quick Links to Common Tasks Manage Registration Profile	? 	Action Items Menu
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		Customer Contact Name Dalhousie Supplier Support Title Procure to Pay Services Email suppliersupport@dal.ca	Create Invoice / Credit Memo Type Invoice No.	redit Memo	
a	Menu Search		Invoice Date 02/06/2025 mm/dd/yyyy PO Number Optional PO Number Currency Canadian Dollar	er Create	

Figure 2.5: Action Items Menu Section

Pro Tip: This section helps you stay organized and up to date with important updates related to your account.



DalBuy Supplier Quick Tutorial

Receiving a Purchase Order (P.O.)

This section explains how to access and manage a Purchase Order (P.O.) from Dalhousie University in DalBuy. It will guide you to the right place in the portal, making it easy to find, view, and manage your purchase orders.

Receiving the Purchase Order Email

Receiving a Purchase Order starts with an email notification from Dalhousie University. This email includes the Purchase Order as an attachment, letting you know it's ready for review.

Take a moment to check the attached document. If you have any questions or need assistance, the DalBuy support team is available to help.



Figure 2.6: Purchase Order (P.O) Email Notification





Bookmarking and Logging In

The email includes a link to log in to the DalBuy Supplier Portal.

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	Delivery and visibility of electronic purchase	orders						
	Easy and quick invoice submission from yo	our PO						
	Potential exposure to boarder opportunities							
Imp	ortant: If your purchase order is not in DalBuy, please to <u>finpay@dal.ca</u> .	email your invoice						
Enter your e	mail to Login/Create Account	English 🔻						
goodsupplyc	ompanyco@gmail.com	Next						
Email								

Figure 2.7: DalBuy Login Page

Once the login page is bookmarked or accessed, enter your credentials to log in securely and continue with the process.

Navigating to and Viewing Sales Orders

To view your Purchase Order,

- 1. Open the left-hand **Menu Bar** on the DalBuy Supplier Portal dashboard.
- 2. Select Orders > Sales Orders and Shipments > Search for Sales Orders

For easy access, bookmark the login page. If you haven't yet, check the 'Bookmarking DalBuy Supplier Portal' section of this user guide for guidance.

This will take you to a page where all your purchase orders are listed.



Â	Home			
ñ	Orders	Orders Type to Search S	Sales Orders Q Click this to view your Sales Orders /	2
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հր	Reporting			
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			Invoice No.	
			Invoice Date 02/06/2025 III	
			PO Number Optional PO Number	
			Currency Canadian Dollar 🗸	
٩	Menu Search			Create

Figure 2.7: Search for Sales Orders Menu

DalBuy

Suppliers

Pro Tip: Please note that the term 'Sales Order' is synonymous with 'Purchase Order'.

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	Orders + Sales Orders And Shipments + Search	h for Sales Orders									
Orders	\equiv Search Sales Orders										
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Figure 2.8: Search for Sales Orders Main Page





Searching For and Viewing a Purchase Order (PO)

This section provides an overview of how to locate and review a Purchase Order in the DalBuy Supplier Portal. It covers how to navigate the portal to find purchase orders and understand the key details within them, ensuring all necessary information is clear and accessible.

Accessing a Purchase Order

Once you have successfully logged in to the DalBuy Supplier portal, click the 'Menu Bar' and follow these steps to access your Purchase Orders:

- i. Click on 'Orders'.
- ii. Select 'Sales Orders and Shipment'.
- iii. Choose 'Search for Sales Order'.

Following this sequence in the DalBuy Supplier Portal's 'Menu Bar' will take you to the page where all Purchase Orders are listed.

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			PO Nu	mber Optional PO Number
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				Create
_ Q	Menu Search			

Figure 2.9: Search for Sales Orders Menu

Sales Orders Main Page

On the main list of Purchase Orders, you will find important details like the '**Sales Order Number**', '**Purchase Order (P.O.) Number**', P.O. Creation Date, who placed the order ('Owner'), and the Total Amount.

Scroll through the list of Purchase Orders to find the one you need.





Pro Tip: For a quicker search, enter the Purchase Order number (P9 number) in the search bar at the top of the page. This will bring up the specific Purchase Order instantly.

Â	Home	Orders 🕨 Sales Orders And	d Shipments 🕨 Search	for Sales	Orders	Pro Tip: For a quicker se number (P9 num	arch, enter the Purch ber) in the search bai	ase Order					9 🖻	4 1
	Urders	≡ Search Sa	ales Orders				1							
Ģ	Catalogs and Contracts	Quick Filters		Crea	ited Date: Last	90 days - Quick search	•			٩	Add Filter • Cle	ear All Filters		?
nl	Reporting	Commodity Code	~	12	I-6 of 6 Results	3							🗘 20 Per l	Page 👻
â	Administer	80170000 39121316 10140000	0		Sales Order Number 👻	PO Number	Created Date/Time	Supplier	Fulfillment Center	Owner	Acknowledgement Status	Advanced Ship Status	Total Amou	unt 🔻
đ	Registration	10110500	Show More		2146544	P9165177	1/17/2025 10:39:51 AM	Good Supply Co	Network Fulfillment Center 1				9,200.00) CAD
		Fulfillment Center	enter 6		2146543	P9165176	1/17/2025 10:27:16 AM	Good Supply Co 🛈	Network Fulfillment Center 1				10,350.00) CAD
		Invoice Status	~	-	2146541	P9165175	1/17/2025 8:54:18 AM	Good Supply Co	Network Fulfillment Center 1				10,350.00	CAD
		No Invoice Fully Invoiced	0		2146483	P9165174	1/17/2025 8:50:45 AM	Good Supply Co ①	Network Fulfillment Center 1				5,750.00	CAD
		Owner	C Show More		2145982	P9165160	1/14/2025 2:58:41 PM	Good Supply Co (i)	Network Fulfillment Center 1				10,350.00	CAD
		Greene, Patrick	6		2145803	P9165148	1/13/2025 11:47:37 AM	Good Supply Co ①	Network Fulfillment Center 1	•			5,750.00) CAD
Q	Menu Search	Participant	~		I-6 of 6 Results	3							20 Per l	Page 🔺
	+											Po	wered by JAGGAER	Privacy Po

Figure 3.0: Quick Search Bar in the Search Sales Orders Page

Search Sales Orders Page

On the left side of the page, the 'Quick Filters' section provides a range of filtering options to help locate and manage orders efficiently. Filters include 'Commodity Code,' 'Fulfillment Center,' 'Invoice Status,' 'Owner' (PO Issuer), 'Participant,' and more.

To refine the list, select the filters that match your needs. This helps narrow down search results, making it easier to find relevant Purchase Orders and improving efficiency. The **Purchase** Order (P.O.) Number is the string of characters that starts with **P9**.



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Suppliers			~			-			
Â	Home								
<mark>, í</mark> to	Orders	Sales Orders And Shipme Search Sales	Orders	r Sales	Orders				
Q	Catalogs and Contracts	Quick Filters		Crea	ated Date: Last 90 days 🔻	Quick s	earch		
հր	Reporting	Commodity Code	~	1	1-6 of 6 Results				
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\$	Registration	C Show	w More		2146543		P9165176	1/17/2025 10:27:16 AM	Patrick Greene
		Fulfillment Center	~		2146541		P9165175	1/17/2025 8:54:18 AM	Patrick Greene
		Network Fulfillment Center	6		2146483		P9165174	1/17/2025 8:50:45 AM	Patrick Greene
		Invoice Status	~		2145982		P9165160	1/14/2025 2:58:41 PM	Patrick Greene
		No Invoice	a		2145803		P9165148	1/13/2025 11:47:37 AM	Patrick Greene
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		Owner	\sim						
		Greene, Patrick	6						
٩	Menu Search	Participant	~						

Figure 3.1: Quick Filter in the Search Sales Orders Page

Viewing a Purchase Order

To view the details of a specific Sales Order / Purchase Order, click on the corresponding Sales Order Number. This will open the order, allowing you to review all its details.

^	Home					
		Orders 🕨 Sales Orders And Shipme	ents 🕨 Search	for Sales Orders		
ĺo	Orders	≡ Search Sales	Orders			
õ	Catalogs and Contracts	Quick Filters		Created Date: Last 90 days - Quick	search	
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		10140000	0	2146544	P9165177	1/17/2025 10:39:51 AM
₽	Registration	C Sho	w More	2146543	P9165176	1/17/2025 10:27:16 AM
		Fulfillment Center	× I	2146541	P9165175	1/17/2025 8:54:18 AM
		Network Fulfillment Center	6	2146483 Click this	P9165174	1/17/2025 8:50:45 AM
		Invoice Status	~	2145982	P9165160	1/14/2025 2:58:41 PM
		No Invoice	0	2145803	P9165148	1/13/2025 11:47:37 AM
		Fully Invoiced	2 w More	1-6 of 6 Results		

Figure 3.1: Locating the Sales Order Number

The Sales Order number is a system-generated identifier/number created by Jaggaer (which powers DalBuy), while the P.O. Number (starts with P9) is provided by Dalhousie **University**. This distinction is important for accurately tracking and managing your orders.





For a PDF copy of the Purchase Order, click the 'Print' icon at the top of the screen. This will generate a PDF that can be saved or printed as needed.

Status	Summary	Revisions	1	PO Documents Invoices 1	Order	Acknowledgments	Advarice Ship Notic
General Infor	mation			Shipping Information		Billing Informat	Click this to print your Purchase Order
Priority	Normal			Ship To		Bill To	
Sales Order No.	2146483			Dalhousie University		Financial Services	Dalhousie University
Sales Order Create Date	1/17/2025					6283 Alumni Creso Halifax, NS B3H 4F Canada	cent R2
PO/Reference No.	P9165174			Canada		Bill To Address F	⁻ NDHH4
PO Creation Date	1/17/2025			ShipTo FNSHB4 Address Code		Billing Ontions	
Buyer Name	Patrick Greene						

Figure 3.2: Locating the Print icon

Highlighting Key Purchase Order (P.O.) Details

This section helps match the physical Purchase Order with the electronic version in the DalBuy Supplier Portal. Below is a comparison of both formats for easy reference.





Figure 3.3: Side by side comparison of P.O. in the DalBuy Portal and physical copy of the P.O.

i. Pay close attention to key details such as the **Sales Order Number, PO Number,** and **PO Creation Date**, as these are essential for accurate verification and management of Purchase Orders.

Sales Order	• 2146483 F	tevision 0		_	PO/Reference No. Supplier	P9165174 Good Supply Co	
Status	Summary	Revisions 1	PO Documents Invoices 1	0	Gei	neral Information	
					Priority	Normal	Ship To
General Info	rmation		Shipping Information		Sales Order No.	2146483	Patrick C
					Sales Order Create I	Date 1/17/2025	Dailious
Priority	Normal		Ship To		PO/Reference No.	P9165174	
Sales Order	2146483		Patrick Greene	and the second se	PO Creation Date	1/17/2025	
No.	2140400		Dalhousie University		Buyer Name	Patrick Greene	Halifax,
		_	Rm 44	and the second se	Buyer Email		Canada
Sales Order	1/17/2025		Financial services		Supplier Name	Good Supply Co	
Create Date		-	Henry Hicks Building				ShipTo
PO/Reference	P9165174		Halifax, NS B3H ARZ				
No,			Canada				Delivery
_		=					Ship Via
PO Creation	1/17/2025		ShipTo FNSHB4				Expedite
Date			Address Code				Request
10 AV	Dutit D	_					Date

Figure 3.4: Locating the Sales Order No, P.O. Reference No. and P.O. Creation Date.





ii. The Purchase Order includes the **Buyer's Name** and **Email Address** for direct communication. This allows for quick and efficient resolution of any questions or concerns.



Figure 3.5: Locating the Buyer Name and Email Address

 While reviewing a Purchase Order, a section will display your company's name along with key shipping details.
 Ensure that all shipments are sent to the address listed in the 'Shipping Information' section to guarantee accurate and efficient delivery. For any questions or concerns about an order, **always provide the PO Number, which starts with P9**, when contacting Dalhousie University.

Be sure to **use the P.O. Number**—not the Sales Order Number—for inquiries.

Sales Order	2146483 Revision 0	Differentin pages 1 da	ی که او	Summary - SO 2146483 PO/Reference No. P9105174 Supplier Good Supply Co	Alto in the second
General Info	rmation	Shipping Information	Billing Information •••	Priority Normal Sales Order No. 2146483 Sales Order Create Date 1/17/2025	Shipping information Ship To Patrick Greene Dalhousie University
Poorty Sales Order No.	Normal 2146483	Ship To Patrick Greene Dathousie University	Bill To Contact Line 1 Financial Services Dathousie University PO Box 1500 5/22 Alexand Concern	PO/Reference No. P9165174 PO Creation Date 1/17/2025 Buyer Name Patrick Greene Buyer Email	Halifax, NS B3H 4R2 Canada
Portection Portection	P9165174	Halifax, NS 83H 4R2 Canada	Hallax, NS 554 482 Canada Bill To Address FND550 Code	Supplier Name Good Supply Co	ShipTo Address Code FNSHB4
Dato Duper hianne Duper Ernati	Patrick Greene	Address Code Defivery Options Ship Via Best Carrier-Best Way	Billing Options Accounting no value Date		Ship Via Best Carrier-Best Wi Expedite X Requested Delivery Date
Supplier Name	 Good Supply Co 	Epodie X Reputed novabe	Pagrent Net 45 (0%.0, Net 45) FOB N/A	Distribution Informatic Workflow Fulfiliment Status Does Not Apph Order Acceptance instructions Dalhousie Univ Supplier Terms and Conditions	on Contract Account Code ersity Terms and Conditions Pricing Code Quote Number Note to Suppler

Figure 3.6: Locating the Ship To information





iv. Review the '**Billing Information**' section carefully. Verifying both shipping and billing details helps ensure a smooth and seamless transaction.

6483 Revision 0 y Bevision 1	PD Documents Analoces 1 Ord	er Acknowledgerents Advance Ship Kotices Mits	ote Create •	
4 83	Shipping Information	Billing Information Y Bill To Francial Services Dathouse University	Shipping Information Summary Details 3ne Iniversity Sales Order Name 214681 Desteror	Billing Information Bill To Financial Services Dalhousie University PO Box 15000 6/383 Auron (crescent
125	Halifan, NS 834 482 Canada	PO Bor 1500 6283 Alumi Crepcent Harlaru NS BN 482 Canada Bill Te Activess PNDH944	Extend PD Refer P9165174 B3H 4R2 Supplier Name Good Supply Co	Halifax, NS B3H 4R2 Canada Bill To Address Code FNDHH4
1025 i Greene	ShipTo FNSHB4 Address Code	Dilling Options Accounting no value	Tetal (6,750.00 c/ess Code FNSHB4 Subtrati Tax1 Jons Best Carrier-Best Way	Billing Options Accounting Date
Supply Co	Ship Via Best Carrier Best Way Expedite Requested no value	Date Payment Net 45 (0%0, Net 45) Terms F.D.B N/A	X What's next? Delivery Ne workflow proce:	FO.B N/A
				Supplier Information

Figure 3.7: Locating the Bill To information

v. Delivery Options and Payment Terms: The '**Ship Via'** section in the Purchase Order outlines the delivery method.



If Delivery Option states **'Best Carrier-Best Way,'** you have the flexibility to choose any courier service that best fits your shipping needs. Note that this applies only to physical goods.

Figure 3.8: Locating the Delivery Option information





vi. **Distribution Information**: This section in the Purchase Order includes a link to Dalhousie University's standard terms and conditions. Reviewing these terms is recommended to ensure compliance with all relevant policies.

Sales Order + 2146483 Revision 0		• • • •	Summary - SO 2146483 PO/Reference No. P9165174 Supplier Good Supply Co	
Bits Burniary Roviers 1 P0 Suppress Supplier Name Coold Supply Ca Stap Via Best Ci Supplier Name Coold Supply Ca Expedite X Distribution Information Ministry Ministry Ministry Volution Fullnews Deen Net Apply Ministry Ministry Order Acceptance Extensity Terms and Conditions Ministry Ministry	Investas 1 Octor AcAbardenigneemen miner elekt Way Payment Terms F 0.8 N Supplier Information Contrast Acoust Data Pacific no value Pacific no value Pacific Data No value	Advect this human ert 45 (OK 0, Ner 45) KA	General Information Priority Normal Sales Order No. 2146483 Sales Order Oraste Date. 1/17/2025 PO/Reference No. P91615714 PO/Reference No. P91615714 PO/Reference No. P916174 PO/Reference No. P916174 Suppler Name P41rick Greene Buyer Email Supplier Name	Shipping Information ship To Patrick Greene Dahouse University Haifax, NE B3H 4R2 Canada ShipTo Address Code FNSHB4 Delivery Options Ship Via Expedite X Requested Delivery Date
Boptin Terra and a solute Conditions	Non to Supplier - Non-Lee Attachments For Supplier PIO Clauses - No clause		Distribution Infor Workflow Fulfilment Status Order Acceptance instructions Suppler Terms and Conditions	mation Apply Ethilversity Tems and Conditions Ethilversity Tems and Conditions Joint Rum Joint Rum Joint Rum PO Clause no clause

Figure 3.9: Locating the Distribution information section for Dalhousie Terms and Conditions

vii. In the '**Line Item'** details, the commodity code categorizes the goods or services being ordered. This code is useful for accurate record-keeping and inventory management.





Figure 4.0: Locating the Line Item Section for Commodity Code

- viii. Any notes or attachments from Dalhousie University related to the Purchase Order can be found under the 'External Note' section.
- ix. The 'Summary' section on the right-hand side of the Purchase Order displays the P.O. Reference Number (also known as the PO Number). This number is important for tracking and managing orders, so be sure to take note of it.

Pro Tip: The tax shown in the 'Summary' section is an estimate. Review it carefully, and if adjustments are needed, update your invoice to avoid discrepancies and ensure smooth payment processing. Check the **Line**-**Item section** for any additional instructions, updates, or files from Dalhousie University. Important details or specific requirements may be included in this section.





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Sales Order - 2146483 Revision 0 Sales Order - 2146483 Revision 0 Mathematy Reviews Proto an equipped Proto an equipp	Summary - 50 214-6433 Provide Statistics Sta
1 Item Copured AI Collapore AI Status Rem Catalog No. Size/Packaging Unit Price Quantity Ext. Price Non-Catalog Goods	Definitions Definition Suggle Information restrice Definition Contract Allower restrice Suggle Information Contract restrice Suggle Information Suggle Information restrice Suggle Information Suggle Information restrice Suggle Information Suggle Information restrestrice Suggle Information Su
Commodity Coler 20121316	Live Same Datability Frieder Description Califie (No Distribution (NO <thdistribution (no<="" th=""> <th< th=""></th<></thdistribution>
Dalbuy Portal PO	Physical copy of PO

Figure 4.1: Locating the External Note Section

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Catalog No.	Size/Packaging	Unit Price Quantity	Expand All Collapse All Ext. Price	External PO Reference Number P9165174 Guodeler Name Good Supply Co		Distribution Information Workflow Fortilineer Status Chier Acceptance Institutions Taggier Tenso and Conditions	Date Contract See W Contract Account Code Promy Dode Promy Dode Promy Dode	Supplier Information
	BX External Note	5,000.00 no value	Qgr.1 5.000.00	Total (\$,750.00 CAD) Subtotal Tax1	5,000.00 750.00 5,750.00		Anarysets is upp Po Charas do Charas	
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Figure 4.2: Locating the Summary Section





Figure 4.3: Locating the Tax in Summary Section

x. You'll notice the expected delivery date is blank. Dalhousie expects immediate fulfillment.

Pro Tip: If there's a delay in delivery of orders, please notify the Dalhousie buyer immediately.

😚 Hame				Summary - SO 2146483 Polybolinese No. P9165174 Suppler Good Supply Co General Information	Shipping Information	\$45ing linfort
Consers	Sales Order • 2146483 Revision 0	and the second s	• • • • • •	Phanely Morenal Sales Order No. 2146483 Sales Order Frank Sales 1/17/2025 PORtBelence Nu. PS165174 PORtBelence Nu. PS165174	Ship Tu Patrola Greene Dalibasan Ustwentity	BET Yo Financial Services Deliberation University PO Bes 15000 6255 Alumne Crescent
Catalogs and Contracts	General Information	Shipping Information	Billing Information	Buyer Name Patick Street Buyer Drail Dappler Name Good Tapply Co	Halton HE 82H 482 Carrieda	Halfox NS 83H 482 Canada Bill To Address Code PNDP
Arrester	Priority Normal Sales Order 2146483	Ship Te Patrick Greene	Bill To	-	Delivery Options Ship-Vis Best Carver-Best Mit Travelise X	Rilling Options Accounting Date Physicent Terms - Net 4
Registration	No. Sales Order 1/17/2025	Dothousie University	Financial Services Dathousie University PO Box 15000 6283 Alumni Chesoett Hunters M Diff Diff (200		Requested (tokway Code	FOB NA
	POliteformee P9165574 No.	Halifax, NS 83H 4R2 Canada	Canada Bill To Address ENDHH4	Distribution informatio Woldow Age and Sama Age and Sama Acceptance instructions Safescie Terms and Candidans	a Contract Account Oode Pricing Code Pricing Code Data Manufact	Sappler Information
	PO-Creation: 1/17/2025 Date:	tation Tex FINSHB4 Address Code	Code Billing Options		Note to Supplier Attachments For Supplier PO Oleanns	co note
	Buyer Name Patrick Greene Buyer Email	Delivery Options Ship Via Best Carrier-Best Way	Accounting no years Date		10 Long	
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				thepping Honding and tax thespes are consisted execution parameters builted checking and avoiding	nd charged by each suppler. The values shown here an	er far sudstaal •

Figure 4.4: Delivery Options Section





With these key details in mind, navigating and reviewing a Purchase Order in the DalBuy Supplier Portal becomes more manageable. Taking note of these highlighted items helps ensure easy access to the information needed for order management.

Creating a Sales Invoice

This section guides you through the process of creating a Sales Invoice in the DalBuy Supplier Portal, with step-by-step instructions to help navigate each stage.

The process starts with locating the correct section in DalBuy, followed by entering the required details, finalizing, and submitting the invoice.

A Purchase Order

(P.O.) <u>is always</u> <u>necessary</u> for the creation or submission of an invoice. The **P.O. number** always start with **'P9'**.

Different Ways to Create a Sales Invoice

There are four (4) different ways to create a Sales Invoice in DalBuy, each with its own advantages. This section provides a brief overview of each method to help determine which one best fits your needs.

Understanding these options allows you to choose the approach that works best for your workflow and business requirements.

Method 1: From the Dashboard

The first method for creating a Sales Invoice in DalBuy is directly from the portal dashboard. This option is quick and convenient, especially if all necessary details are readily available. This method is ideal for those who prefer a fast and direct approach to invoicing.

Pro Tip: Before using this option, make sure have your PO Number ready, as it is required to create an invoice.

To do this:

- i. Navigate to 'Create Invoice / Credit Memo,'
- ii. Enter desired Sales Invoice Number.
- iii. Enter the P.O. Number (mandatory).
- iv. Enter the Invoice Date.





Contracts		2
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-o Number	1	mandatory
	Consider Boller	

Figure 4.5: Creating an Invoice - Method 1: From the Dashboard

Method 2: From the Menu Bar – Supplier Invoices

The second way to create a Sales Invoice in the DalBuy Supplier Portal is by using the **'Menu Bar.'** This method is helpful if you prefer navigating through the portal's main options to access invoicing features. It provides a clear and organized way to reach the necessary invoicing functions within the DalBuy Supplier Portal.

To do this:

- i. Click on 'Orders' in the 'Menu Bar'.
- ii. Select 'Supplier Invoices' from the flyout menu.
- iii. Click on 'Create Supplier Invoice'.

Pro Tip: Before using this option, make sure have your PO Number ready, as it is required to create an invoice.

â	Home						● ■	4 1
í7.	Orders	Home Customer Portal Home Orders	Type to Search S	ales Orders Q				
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		Customer Contact	r lier Cumment	Create Invoice	/ Credit Memo	?		
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				Invoice No.				
				Invoice Date	01/30/2025 🖿			
				P0 Number	Optional PO Number			
				Currency	Canadian Dollar			

Figure 4.6: Creating an Invoice - Method 2: From the Menu Bar – Supplier Invoices





Method 3: From the Search Sales Orders Main Page

The third method for creating a Sales Invoice in DalBuy provides a complete list of all existing Purchase Orders (POs). This approach makes it easy to select the correct PO, ensuring accuracy and efficiency.

To do this:

- i. Navigate to the 'Menu Bar'.
- ii. Click on 'Sales Orders and Shipments'.
- iii. Select 'Search for Sales Order'.
- iv. Locate the Purchase Order (P.O.) you want to invoice.
- v. Click the three dots beside it to reveal additional options.
- vi. Select 'Invoice' from the dropdown menu.

One key advantage of **Method 3** is that the **P.O. Number is automatically included** in the Sales Invoice, eliminating manual entry. This saves time and reduces the risk of errors, making the invoicing process more efficient and accurate.

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հե	Reporting	Commodity Code 🗸 🗸	1	1-6 of 6 Results				
ø	Administer	39121316 2		Sales Order Number 🔻	P0 Number	Created Date/Time	Supplier	F
0	Registration	Stow More		2146544	P9165177	1/17/2025 10:39:51 AM	Good Supply Co	ł
		Fulfillment Center Network Fulfilment Center		9146543	P9165176	1/17/2025 10:27:16 AM	Good Supply Co 🕕	
		Invoice Status	-	2146541	P9165175	1/17/2025 8:5418 AM	Good Supply Co 🕥	1
		No Invoice () Fully Invoiced ()	E	2146483	P916517 <mark>4</mark>	1/17/2025 8:50:45 AM	Good Supply Co ①	•
		© Show More	***	2145982	P9165160	1/14/2025 2:58:41 PM	Good Supply Co ①	
		Granna Politica		21 45808	P9165148	1/13/2025	Good Supply Co ①	٢

Figure 4.7: Creating an Invoice - Method 3: From the Search Sales Orders Main Page

Method 4: Directly From the Purchase Order

This method builds on the third approach but adds an extra step to ensure greater accuracy. Instead of creating the Sales Invoice directly, first open the Purchase Order (PO) to review its details before proceeding. This method is recommended for those who prefer a more thorough and meticulous approach to invoicing.





To do this:

- i. Go to the Search Sales Orders page and find the P.O. you need to invoice.
- ii. Click on the P.O. to open it and review the details.
- iii. Once inside, navigate to the top-right panel, click 'Create', and select 'Invoice'.

Pro Tip: Opening the PO before generating the invoice ensures all details are verified, reducing the risk of errors. This method also automatically includes the PO Number, making the process more precise.

				Click 'Create'	0 ► 4
Sal	les Order • 2	146483 Revision 0		💿 🖶 🕐 ···· Add Note Create. 🔻 4 of 6 R	esults 🔻 < >
and St	tatus Sum	Revisions 1	PO Documents Invoices 1	Order Acknowledgments Advance Ship Notices History Credit Memo	
g G	General Informati	ion	Shipping Information	··· Billing Information V Summary	
ster Pr	Priority No	ormal	Ship To	Bill To Details Sales Order Number	
Sa tion No	ales Order 214 Io.	46483	Patrick Greene Dalhousie University Rm 44	Contact Line 1 2146483 Revision 0 Financial Services Dathousie University PO Box 15000 External PO Reference Number	
Sa	ales Order 1/1 Create Date	17/2025	Financial Services Henry Hicks Building 6283 Alumpi Croscont	6283 Alumni Crescent P9165174 Halifax, NS B3H 4R2	
P	O/Reference P9 lo.	165174	Halifax, NS B3H 4R2 Canada	Good Suppler Name Good Supply Co Bill To Address FNDHH4	
P	O Creation 1/1 late	17/2025	ShipTo FNSHB4 Address Code	Code Tetal (5,750.00 CAD) Subtotal	5,000.
B	luyer Name Pat	trick Greene		Billing Options Tax1	750.
B	luyer Email pr2	242985@dal.ca	Chin Mine Post Carrier Post May	Date	5,750.

Figure 4.8: Creating an Invoice - Method 4: Directly from the Purchase Order Page

Entering Sales Invoice Details

When opening a Purchase Order (PO) to create a Sales Invoice, the page automatically opens in **Simple** view. This layout keeps things clean and straightforward. For those who prefer a more detailed breakdown, switching to a different view is easy—just toggle the view button at the top.

For this illustration, the **Simple** view will be used. The next step is to enter the **Invoice Number** in the designated textbox. This number is what keeps the Sales Invoice properly tracked and processed, ensuring everything stays organized. Click **'Save'** after any updates to keep entries recorded and avoid losing progress. This ensures a smooth and uninterrupted invoicing process.



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🏠 Home						0 ⊨ ▲ 1
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Catalogs and Contracts	Entry Summary	Matching Messages	Attachmen	ts History You can toggle this button to		PRO Tip: Always save your progress
LL Reporting	Buyer Invoice Number	no value		Remit To		Summary
Administer	Invoice Date	2/10/2025	Ē	John Doe 1000 Morning Street		You are unable to proceed until addressed.
Registration		mm/dd/yyyy		Halifax, Nova Scotia B3H 4R2		Required: Invoice Number
	Due Date	3/27/2025		Canada Email goodsupplycompanyco@gmail.com		A Be aware of these issues. ~ You may review and proceed.
	Invoice Owner	Patrick Greene		Phone 1-902-8359473-		Required receipt has not been created.
	Supplier Name	Good Supply Co				Good Supply Co
	Invoice Number 🖈			Enter your Invoice Number here		Total (9,200.00 CAD) ~
		Required				Subtotal 8,000.00

Figure 4.9: Entering Sales Invoice Number Details

Adjusting Sales Invoice Details

The **Discount, Tax, Shipping & Handling** section allows adjustments to discounts, tax information, and shipping charges to ensure accurate invoicing. Reviewing these fields helps maintain correct financial details.

The **Lines** section automatically fills in details from the Purchase Order (PO), including unit measures, prices, and item descriptions. These fields can be adjusted as needed to reflect actual quantities and prices, keeping the invoice consistent with the PO.

These features help streamline the invoicing process, making it easy to update details and generate accurate Sales Invoices in the DalBuy Supplier portal.



Da	lBuy
Suppliers	

Invoice • 3038389						Simple	?	
Entry Summary Matching	Messages	Attachments	s History					
Payment Cancel Date no value Discount, Tax, Shipping & Handling Allocation Weighted ~								
		Header-level						
Terms Discount		0.00 CAD						
Discount	0.00							
Total Taxes	0.00		•	Discount, 1 section	Fax, Shipping an : Provide inputs needed	d Handling s here if		
Shipping	0.00							
Handling	0.00							
1 Line P9165177 This is your PO No	umber	Line Item D	Details					
Status PO Line Item		Actalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		
1 ✓ 1 Service Requisition			HR	800.00	10	8,000.00	Î	

Figure 5.0: Discount, Tax, Shipping & Handling and Line Item Details

Attaching an Invoice Image - Optional

Suppliers who prefer to attach their own system-generated Sales Invoices for recordkeeping can do so easily.

While creating the Sales Invoice, click **'Add Invoice Image'** in the top-right panel. This will prompt an upload option—simply select the invoice file from your computer and attach it.

PRO Tip: This step is optional and provided for convenience. The DalBuy portal will still capture the necessary invoice details, whether an additional document is attached or not.





						0 I	41
Invoice • 3038389				Simple 🔵 🖶	? ·	Add Invoice Image Complete	Save
Entry Summary	Matching Messages Atta	achments	History			PRO Tip: Click here to	
						optionally add an invoice image	
Buyer Invoice Number	no value		Remit To			Summary	→
Invoice Date	2/10/2025	8	John Doe 1000 Morning Street		-	You are unable to proceed until addresse	d.
	mm/dd/yyyy		Halifax, Nova Scotia B3H 4R2			Required: Invoice Number	
Due Date	3/27/2025		Canada Email goodsupplycompanyco@gmail.com			Be aware of these issues. You may review and proceed.	~
Invoice Owner	Patrick Greene		Phone 1-902-8359473-				
Supplier Name	Good Supply Co					Required receipt has not been created	
Supplier Hume						Good Supply Co	
Invoice Number 🖈						Total (9,200.00 CAD)	~
	Required					Subtotal	8,000.00
Currency	Canadian Dollar					Terms Discount	0.00
ounency	Ganadian Donar					Discount	0.00
Sales Order Number	2146544					Tax1	1,200.00
Customer	Dalhousie University					Shipping	0.00
	,					Miccollancous Econ	0.00
Paid Date	no value					Wildenaneous rees	9 200 00
							9,200.00

Figure 5.1: Optional: Adding an Invoice Image

Submitting the Sales Invoice

After reviewing all details and confirming accuracy, the final step is to submit the Sales Invoice for processing.

To do this, go to the **top-right panel** and click **'Complete'**. This finalizes the invoice and sends it to Dalhousie University for review and processing.

Pro Tip: Double-Check Before Submitting: Before clicking 'Complete', take a moment to check the Invoice Number, PO Number, and item details to ensure everything is accurate.



Suppliers	Supplier	Quick lutor	al		
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Invoice · S0007			Simple 🔵 🖶 🧿 …	Add Invoice Image Complete	Save
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Buyer Invoice Number	no value	Remit To		PRO Tip: Click 'Complet you've reviewed the inve are ready to subm	te' once oice and nit. →
Invoice Date	2/10/2025	John Doe		You may review and proceed.	V
	mm/dd/yyyy	Halifax, Nova Scotia B3H 4R2		Required receipt has not been cr	reated.
Due Date	3/27/2025	Canada Email goodsupplycompanyco@gmail.com		Dalhousie University	~
Invoice Owner	Patrick Greene	Phone 1-902-8359473-		Total (9,200.00 CAD)	~
Supplier Name	Good Supply Co			Subtotal Terms Discount	8,000.00 0.00
Invoice Number 🖈	S0007			Discount	0.00
Currency	Canadian Dollar			Tax1 Shipping	1,200.00
Sales Order Number	2146544			Miscellaneous Fees	0.00
Customer	Dalhousie University				9,200.00
Paid Date	no value			Related Documents	~
Payment Cancel Date	no value			Sales Order: 2146544	

Figure 5.2: Submitting the Sales Invoice

Draft of Sales Invoice

DalBuv

If a Sales Invoice was started but not completed, it can be continued later if it was saved before exiting. This keeps all entered details intact and ready for finalization.

To access your draft invoices, follow these steps:

- i. Navigate to the 'Menu Bar'.
- ii. Click on **'Orders'**.
- iii. Select 'Supplier Invoices' from the flyout menu.
- iv. Click 'View Draft Supplier Invoices'.



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	Contracts	Supplier Invoices	Create Supplier Inv								
հղ	Reporting		Search for Supplie	r Invoices							
.	Administer	If you have any questions about DalBu Dalhousie Supplier Support at <u>Supplie</u>	iy, please contact r <u>Support@dal.ca</u> .								
₽	Registration										
		Customer Contact	?								
		Name Dalhousie Supplie	r Support	Create Invoice / Credit Memo							
		Title Procure to Pay Ser Email suppliersupport@	vices dal.ca	Туре	Invoice Credit Memo						
				Invoice No.							
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					mm/dd/yyyy						
				PO Number	Optional PO Number						
				Currency	Canadian Dollar	~					
٩	Menu Search										

Figure 5.3: Viewing Draft Invoices

DalBuy

This will take you to a page where all your draft invoices are stored. From here, you can select the specific draft you wish to continue working on. Simply click on the draft Sales Invoice, and you will be able to resume editing and complete the necessary details.

This feature makes it easy to pause and return to invoicing without losing progress.

*	Home											0 ►	41
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հր	Reporting	S0003		Dal		No PO	1/30/2025		Invoice		10,350.00 CAD		
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A 7	Administer	Unassigned		Dal		P9165160	1/30/2025		Invoice		10,350.00 CAD		
		Unassigned		Dal		P9165177	1/21/2025		Invoice		9,200.00 CAD		
- C	Registration	Unassigned		Dal		P9165177	1/29/2025		Invoice		9,200.00 CAD		
		Unassigned		Dal		P9165177	1/29/2025		Invoice		9,200.00 CAD		
		Unassigned		Dal		P9165177	1/30/2025		Invoice		9,200.00 CAD		
		Unassigned		Dal		P9165177	1/30/2025		Invoice		9,200.00 CAD		
		S0006		Dal		P9165177	1/30/2025		Invoice		9,200.00 CAD		
		S0007		Dal		P9165177	2/10/2025		Invoice		9,200.00 CAD		
		Results Per Page 10 🗸										Page 1	✓ of 2 ►
												Delete Invo	ice 🛩 😡

Figure 5.4: Sample Draft Invoices Page



DalBuy **Supplier Quick Tutorial**

Searching and Viewing an Invoice

This section provides a step-by-step guide to locating and reviewing a Sales Invoice in the DalBuy Supplier portal. Follow the instructions below to navigate this process efficiently.

Searching for a Sales Invoice

Suppliers

There are two ways to find and view a Sales Invoice in DalBuy. This section covers both methods, making it easy to choose the most convenient option.

Method 1: From the Dashboard

The quickest way to find a Sales Invoice in DalBuy is by using the **Find Invoice** section on the Supplier Portal dashboard.

- 1. On the dashboard, locate the Find Invoice section.
- 2. Enter the Invoice Number used when creating the Sales Invoice.
- 3. Click the **Search** button.

This will take you directly to the **Supplier Invoices** page, where the Sales Invoice can be viewed by clicking on it.

PRO Tip: This method is fast and efficient but requires knowing the Invoice Number beforehand.

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orting For instructional materia access Dalhousle's Supp	als on how to use DalBuy, please olier Resource Portal.	Contracts	?
istration	s about DalBuy, please contact ort at <u>SupplierSupport@dal.ca</u> .	No Results View All Contra	icts
Customer Conta	ct ?	Create Invoice / Credit Memo	2
Name Dalh Title Proc Email supp	ousie Supplier Support ure to Pay Services vliersupport@dal.ca	Type Type Type	
		Invoice No.	
		m/dd/yyy	
		PU Number Optional PO Number Currency Canadian Dollar	
nu Search		Crea	te
-		Find Invoice	2
		Advanced Sea To check payment status of an invoice or send a message to a customer regarding an invoice, please enter the invoice number then click the "Search" Invoice Number(s)	rch
		Multiple values can be separated by a comma().	

Figure 5.5: Searching for a Sales Invoice - Method 1: From the Dashboard





Method 2: From the Menu Bar

For a more navigational approach, invoices can be found through the **Menu Bar**:

- 1. Open the Menu Bar and select Supplier Invoice.
- 2. Click Search for Supplier Invoices.

This will open the **Supplier Invoices** page, displaying a list of all invoices. To find a specific invoice, enter the **Invoice Number** in the search bar at the top. Once located, click on the invoice to open and view its details.

Method 2: Searching from the Menu Bar provides a structured approach to finding and reviewing Sales Invoices, allowing for easy access to invoice records when needed.

ñ	Home																	0		1
6	Orders	Orders Supplier Invoid	nee 🔺 Search for Sumpli	Type	e to Search Sales Or	rders Q														
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ä	Contracts	Supplier Invoices	,	View	Invoices Returned 1	for Buyer Chang	ges <mark>rch</mark>						Q	Add	Filter -	Cle	ear All Filters			?
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a 7	Administer	Commodity Code	~		Supplier Invoice Number(s) -	Invoice Number -	Customer Name	Invoiced/Created By	P0 Number	Supplier Invoice Date	Created Date/Time	Invoice Source	Invoice Type	Date •	ue Date	Paic	d Discount Amount	Total A	mount	•
\$	Registration	39121316 80170000	Show More		S0002	IN000675	Dalhousi e University	System	P91651 75	1/27/2025	1/27/2025 8:56:11 AM	Suppli er Portal	P0 Invoice	3/13/20	25		0.00 CAD	10,3	50.00 CA	D
		Invoice Owner Greene, Patrick	2		S0001	IN000653	Dalhousi e University	System	P91651 74	1/17/2025	1/17/2025 11:41:00 AM	Suppli er Portal	P0 Invoice	3/3/20	25		0.00 CAD	5,75	50.00 CA	D
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		Supplier Portal	0																	
		Invoice Type	~																	
		PO Invoice	0																	
q	Menu Search	Matching Status	~																	
		Matchad	-																	-

Figure 5.6: Searching for a Sales Invoice - Method 2: From the Menu Bar



Supplier Invoices Page: Using Quick Filters

Supplier Invoices Page: Payment Status

DalBuy

Suppliers

To monitor the payment progress of a Sales Invoice, use the **Pay Status** filter in the **Quick Filters** section.

- In Process The invoice is under review.
- **Payable** The invoice has been approved and is ready for payment.
- **Paid** The payment has been processed. An email with remittance details, including the payment number, will be sent at this stage.

The **Payment Status Quick Filter feature** provides visibility into the status of Sales Invoices at every stage.









Supplier Invoices Page: Sorting Invoices

Sales Invoices can be organized by various criteria, such as **creation date, due date, total invoice amount,** and more. This sorting feature helps streamline searches, making it easier to locate specific invoices efficiently.

Pro Tip: Adjust the sort order ensures invoices are arranged in a way that best fits workflow and preferences.

Orders Supplier Invoid	ces Search for Supplie	Invoice	s											
Search S	K Search Supplier Invoices													
Quick Filters		Cre	ated Date: Last 90 days 👻	Quick search				Q (1) Add Filter •	Clear All Filte	rs	?			
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No Brand	2	C	Supplier Invoice	Invoice		PO	Supplier Invoice	Created	Due	Paid				
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	C Show More		S0001	IN000653	Dalhousie University	P9165174	1/17/2025	1/17/2025 11:41:00 AM	3/3/2025		5,750.00 CAD			
Invoice Owner	~													

Figure 5.8: Sorting Invoices

Viewing a Sales Invoice

When you open a Sales Invoice, you will find that all the information is organized into three key sections, each designed to provide you with a comprehensive view of the Invoice details.

A Sales Invoice in DalBuy is organized into three key sections, providing a clear and structured view of all details. It helps keep all invoice-related information well-organized and easily accessible:

- Summary Tab Displays essential invoice details, including shipping information, billing details, and line items for quick reference.
- Attachments Tab Allows supporting documents, such as receipts or additional paperwork, to be uploaded and stored in one place for easy access.
- Messages Tab Enables direct communication with the Dalhousie University buyer for any questions or clarifications.





ummary	Matching Messages	Attachments	History				
eneral		Addresses			Note/Attachments		
voice Type	Invoice	Remit To			Notes no vai	iue	
ayment tatus	Payable	John Doe 1000 Morning St Halifax, Nova Sc	reet ntia R3H 4R2		Attachments		
uyer Invoice umber	IN000653	Canada Email goodsuppl Phone 1-902-835	ycompanyco@gmail.com				
woice	S0001	Bill To					
upplier Name	Good Supply Co	Contact Line 1 Financial Service PO Box 15000	s Dalhousie University				
voice Owner	Patrick Greene	6283 Alumni Cre Halifax, NS B3H	scent 4R2				
voice Date	1/17/2025	Canada	112				
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orms	Net 45 (0% 0 Net 45)	P			oblasias Has Mas		
MIIIS	Net 40 (0.4 0, Net 40)	Payment Infor	mation		Shipping, Handling,	and Tax	
iscount	0.00 CAD	Shipping Terms	N/A		Values vary by line.		
ivoice Name	2025-01-17 goodsupplycompanyco@gmail.co m 01	Payment Method	Unknown		Allocation	a handling 🕐	
unined By	Inter Doe	Payment Record No.	no value		Weighted		
latch Status	Matched	Payment Date	no value			Header-leve	B
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ales Order umber	2146483				Miscellaneous 0.00 0 Fees	CAD view/edit	
aid Date	no value						
ayment ancel Date	no value						
1 Line							
9165174							
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	Non-Catalog Goods						
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~	1 Box of special DalBuy Widget: Procurement Request: Non-Ci Goods	a - Goods Italog	вх	5,000.0	00 Qty: 1	5,000.00	
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	ntch Status Matched						
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Line Mi Contra	st No.				Volume	lave been overridden for	

Figure 5.9: Sales Invoice Summary Tab





Invoice · S0001	0	2 of 2 Results ▼ 〈 〉
Summary Matching Messages Attachments History		
Attachments found: 0	Summary	→
	Dalhousie University	~
There are no attachments for this document	Buyer Invoice Number	IN000653
	Total (5,750.00 CAD)	~
to add an	Subtotal	5,000.00
attachmen	it, if Terms Discount	0.00
	Tax1	750.00
	Shipping	0.00
	Handling	0.00
	Miscellaneous Fees	0.00
		5,750.00
	Related Documents	~
	Sales Order: 2146483	÷
Figure 6.0: Add Attachment Tab		4 ™ 6
		· · · -
Invoice · S0001	e 🤊	2 of 2 Results 🔻 < >
Summary Matching Messages Attachments History		
Records Found: 0	Summary	\rightarrow
	Dalhousie University	~
No messages have been added	Buyer Invoice Number	IN000653
	Total (5,750.00 CAD)	~
PF	RO Tip: Click Subtotal	5,000.00
th	his to send a Terms Discount	0.00
D	DalBuy team	0.00
	Shipping	0.00
	Handling	0.00

Figure 6.1: Send a Message Tab

And that concludes our tutorial on searching and viewing a Sales Invoice! You now have a thorough understanding of how to search for and view a Sales Invoice in DalBuy. We trust that this guide will simplify the process of managing your Sales Invoices, making it more efficient and straightforward. Thank you for taking the time to review this tutorial.



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Miscellaneous Fees

Related Documents

Sales Order: 2146483