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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

### 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.

## 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.

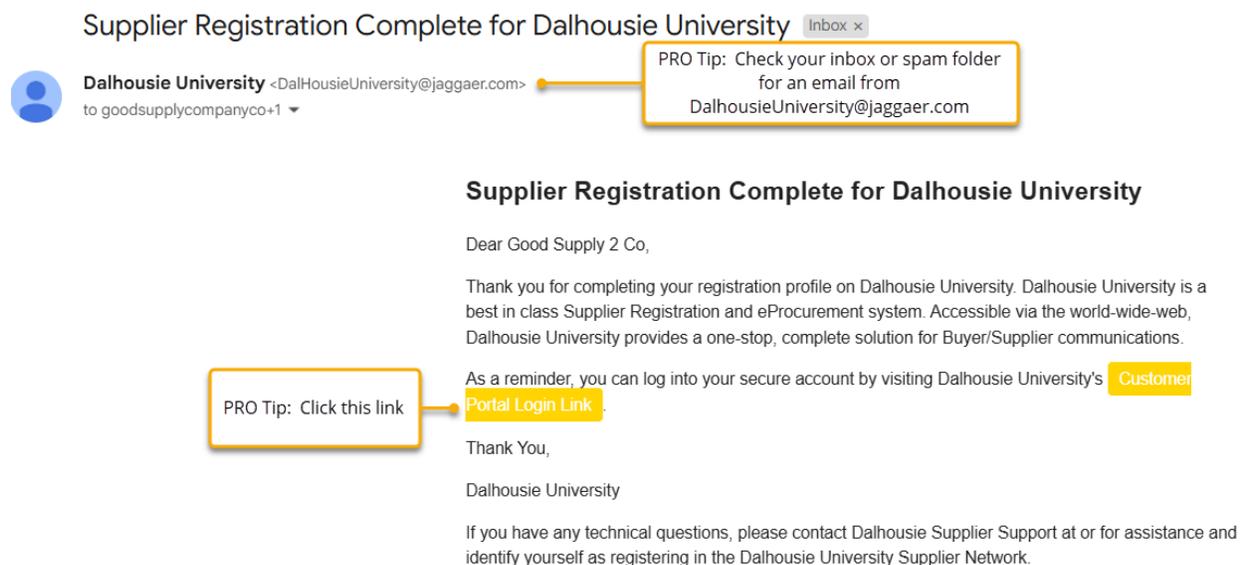


Figure 1.1: Supplier Registration Complete Email notification with link to DalBuy portal.

## 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.

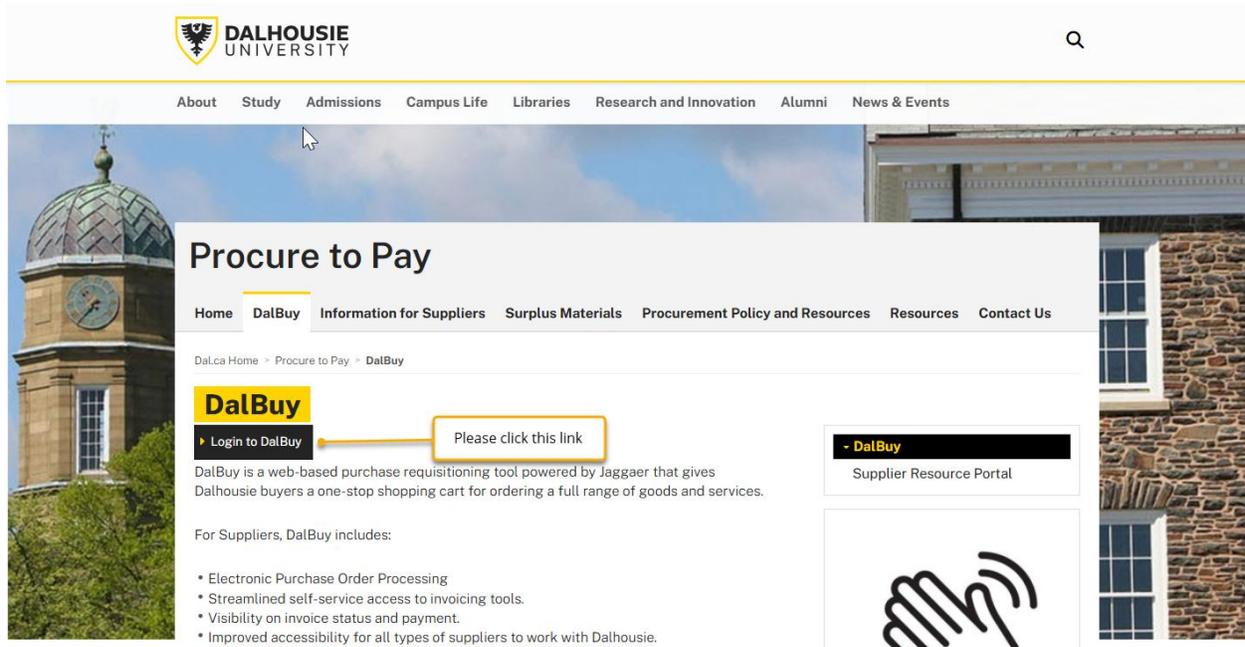


Figure 1.2: DalBuy Supplier Resource Portal

### 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.

## Welcome to the Dalhousie University's Supplier Portal!

Greetings from Dalhousie University! This serves as an invitation to register your company as an approved Dalhousie University Supplier for information management, order placing and invoicing.

- No fees associated to use eProcurement including registration and interaction with Dalhousie University.
- Electronic invoices leading to improved accuracy, efficiency and cycle times
- Visibility to POs, invoice status and payment information in a central location
- All invoices must include a PO# or they will not get processed for payment and will be returned to supplier.

Enter your email to Login/Create Account

English ▾

goodsupplycompanyco@gmail.com

Next

Email

Enter your email address here

Once done, click 'Next'

Please contact Dalhousie Supplier Support (Procure to Pay Services) at [suppliersupport@dal.ca](mailto:suppliersupport@dal.ca) for assistance.

POWERED BY  
JAGGAER

Figure 1.3: DalBuy Portal Supplier Login Page



## Bookmarking DalBuy Supplier Portal

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
  - c. Click '**Done**' to save the bookmark.

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?CustOrg=Dal&tmstmp=1734466455658>

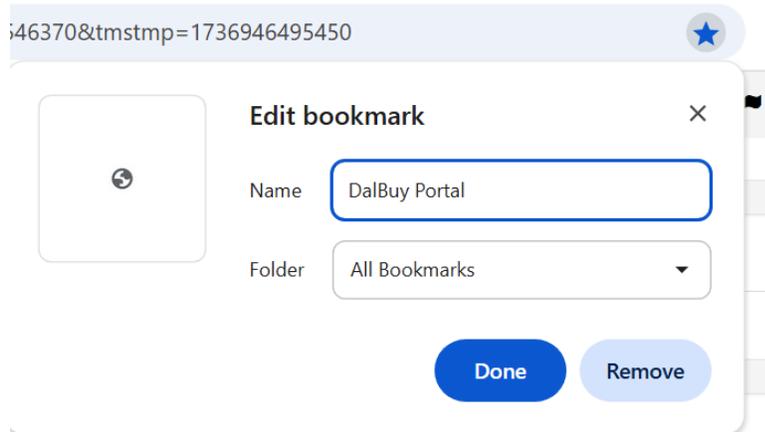


Figure 1.4: Bookmarking the DalBuy Portal

### 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.

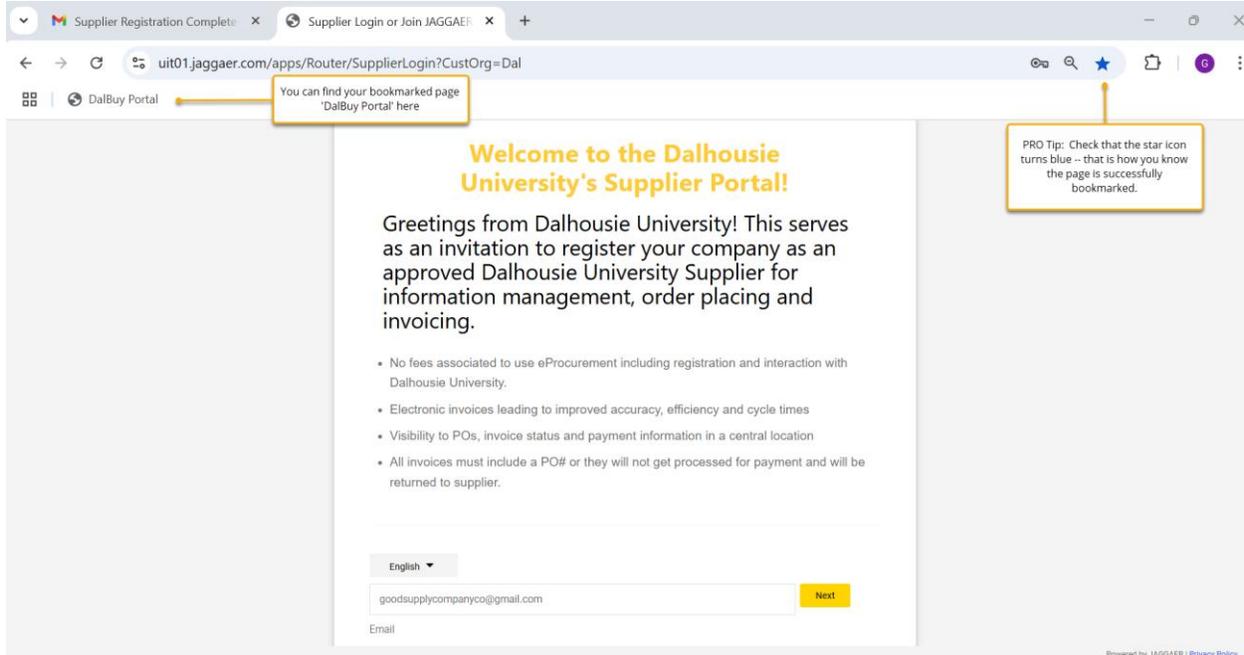


Figure 1.5: Save and Access: Bookmarking the DalBuy Login Page

## 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.

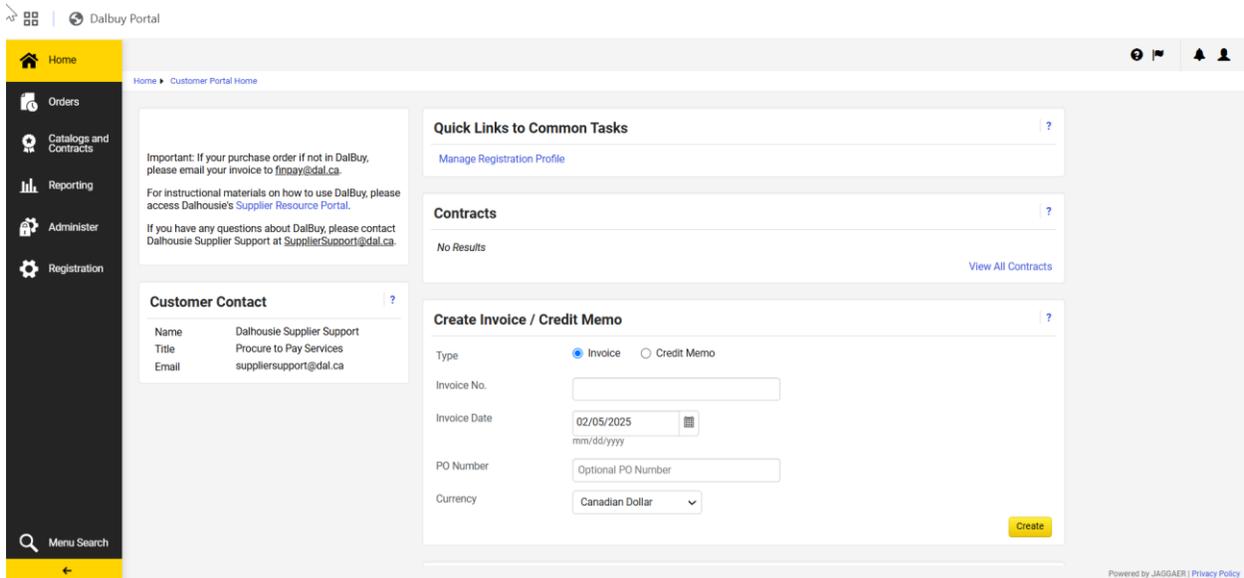


Figure 1.6: DalBuy Supplier Main Page

## 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.

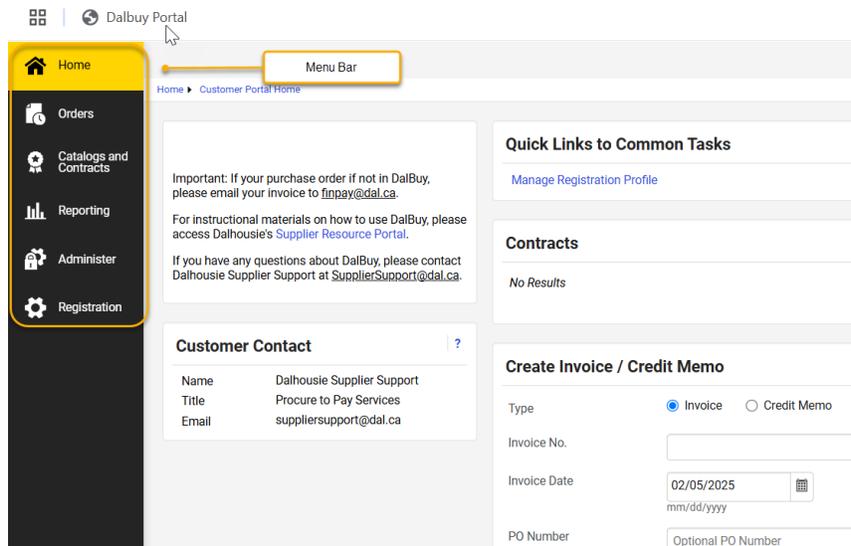


Figure 1.7: DalBuy Menu Bar

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.

### 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.

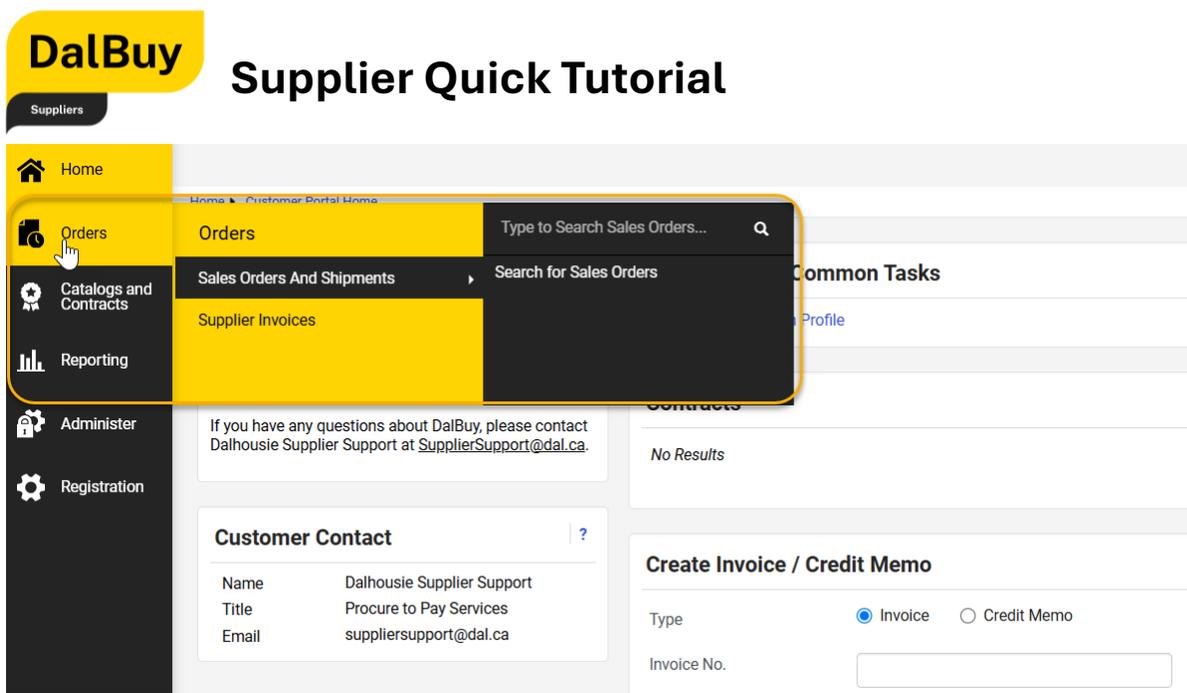


Figure 1.8: Orders Section in the DalBuy Menu Bar

## 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.

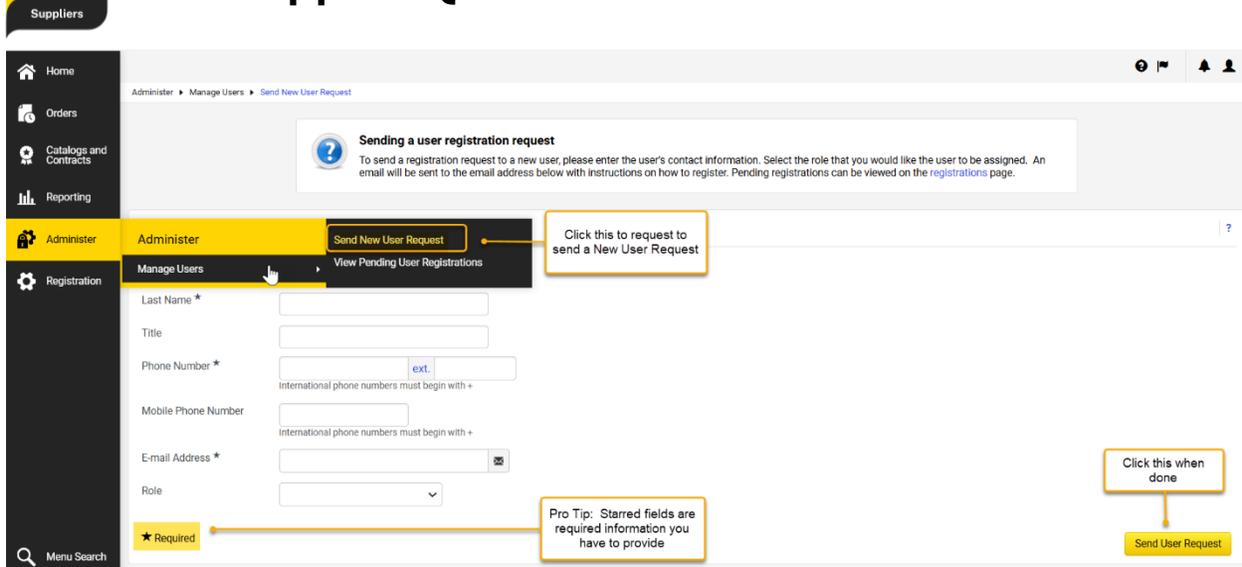


Figure 1.9: Send New User Request under Manage Users

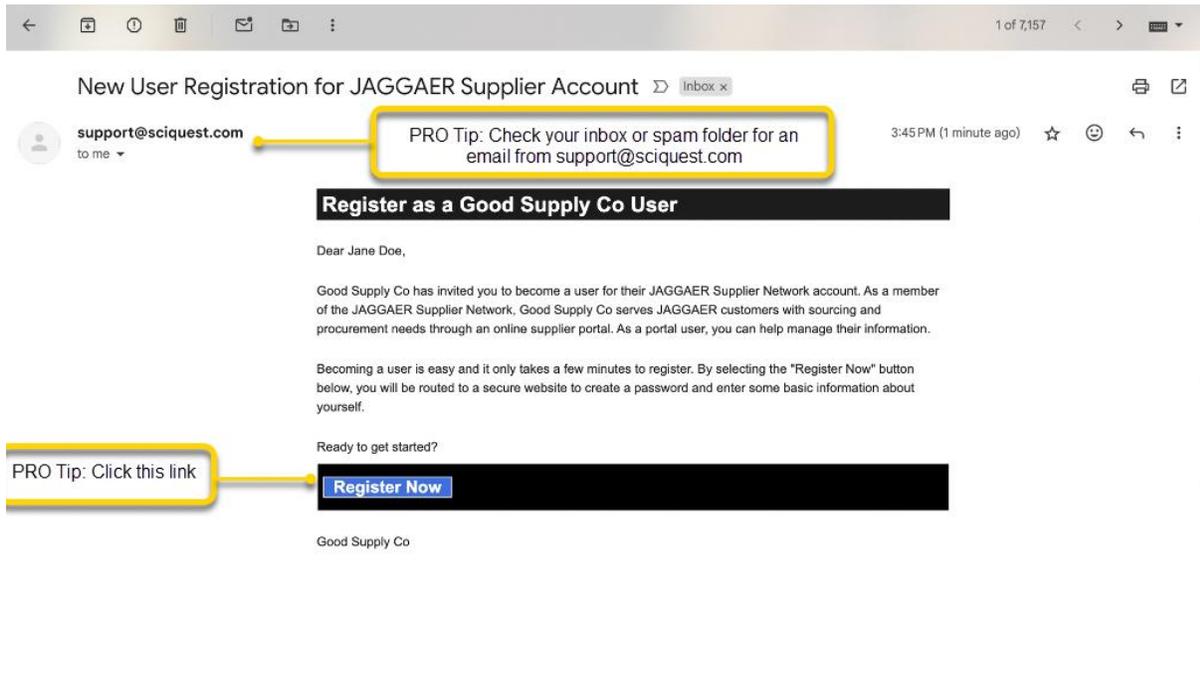


Figure 2.0: New User Registration Email notification with link to DalBuy portal.

#### 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 [link](#).

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

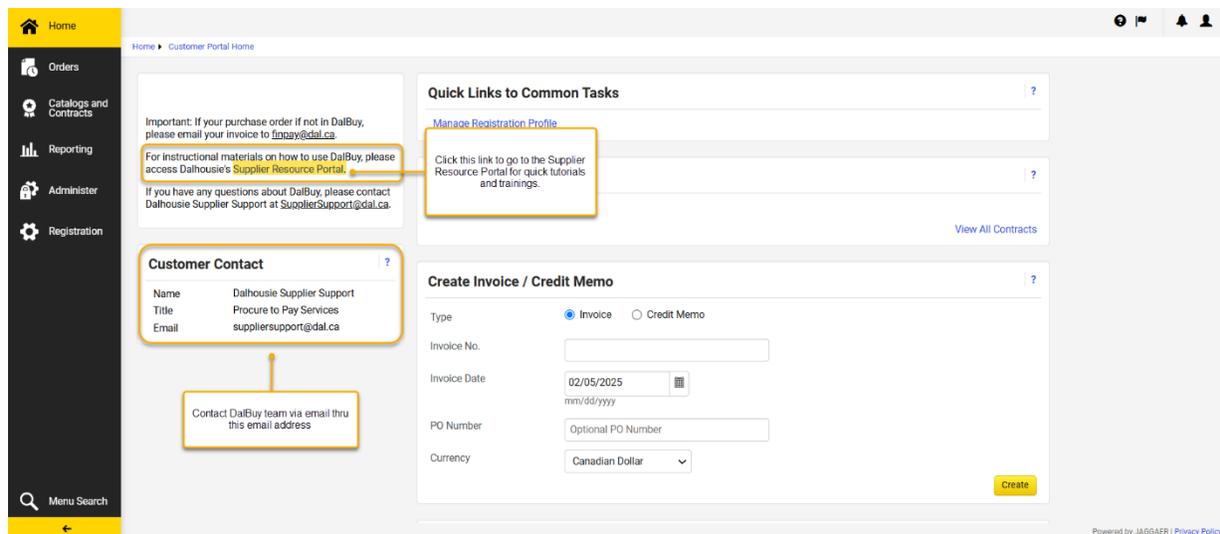


Figure 2.1: Contact and Support Section in DalBuy

#### 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.

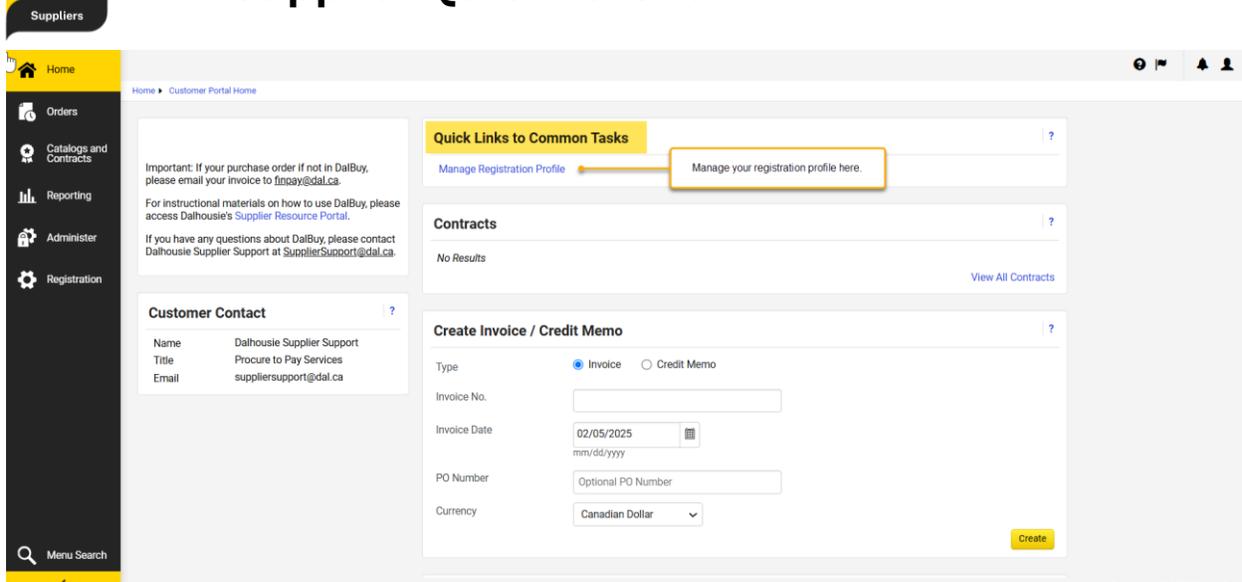


Figure 2.2: Quick Links to Common Tasks Section in DalBuy

## 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 [Supplier Resource Portal](#). 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.

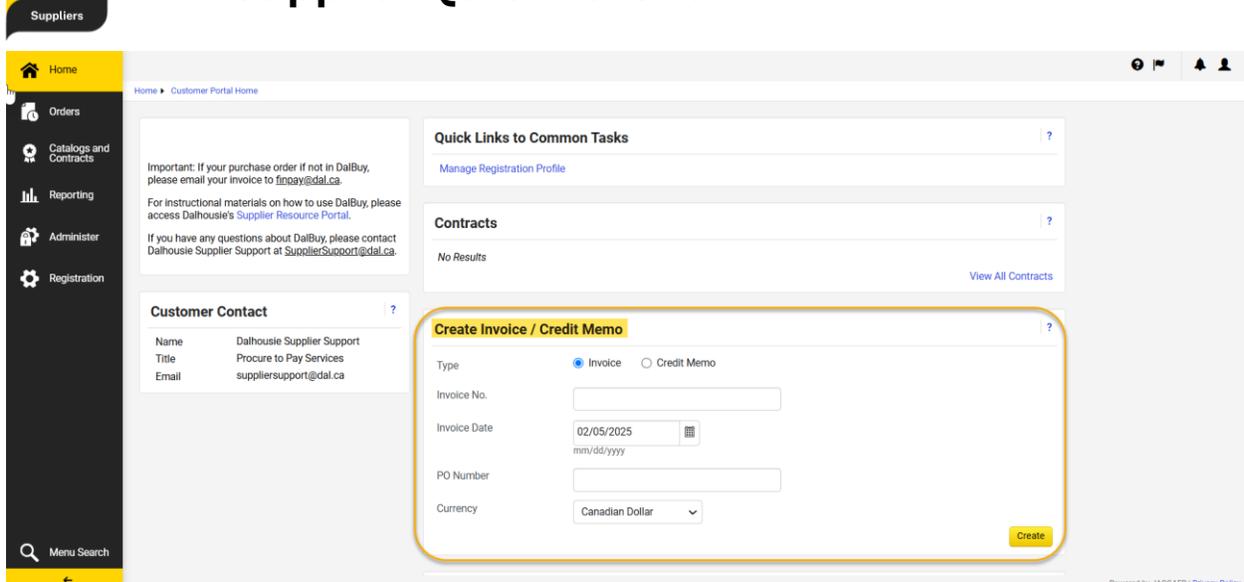


Figure 2.3: Creating Invoice / Credit Memo

### 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.

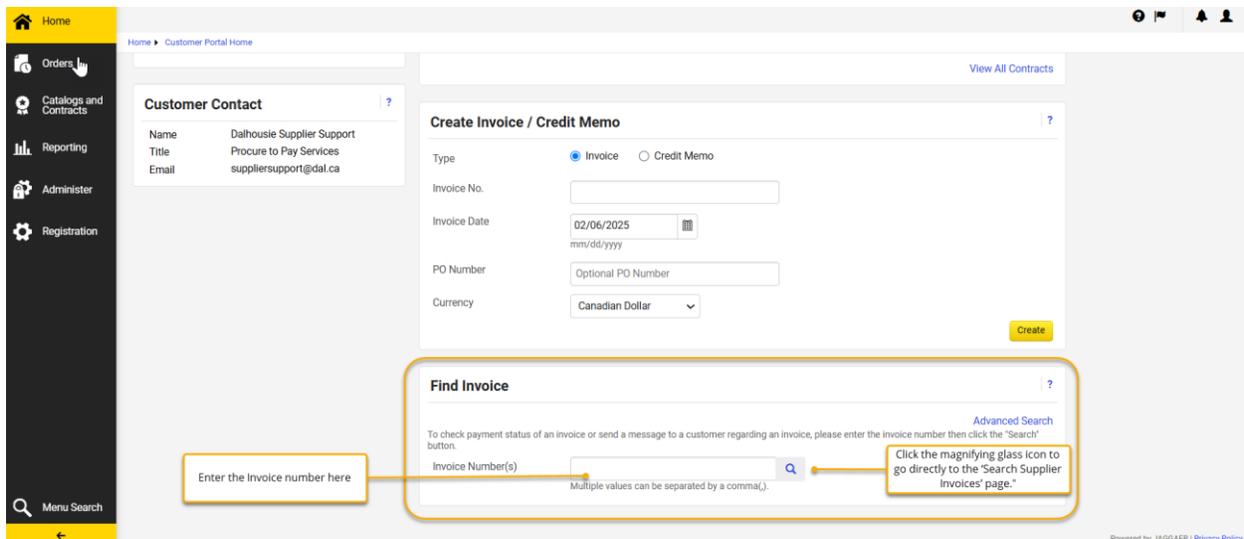


Figure 2.4: Find Invoice Section

## 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.

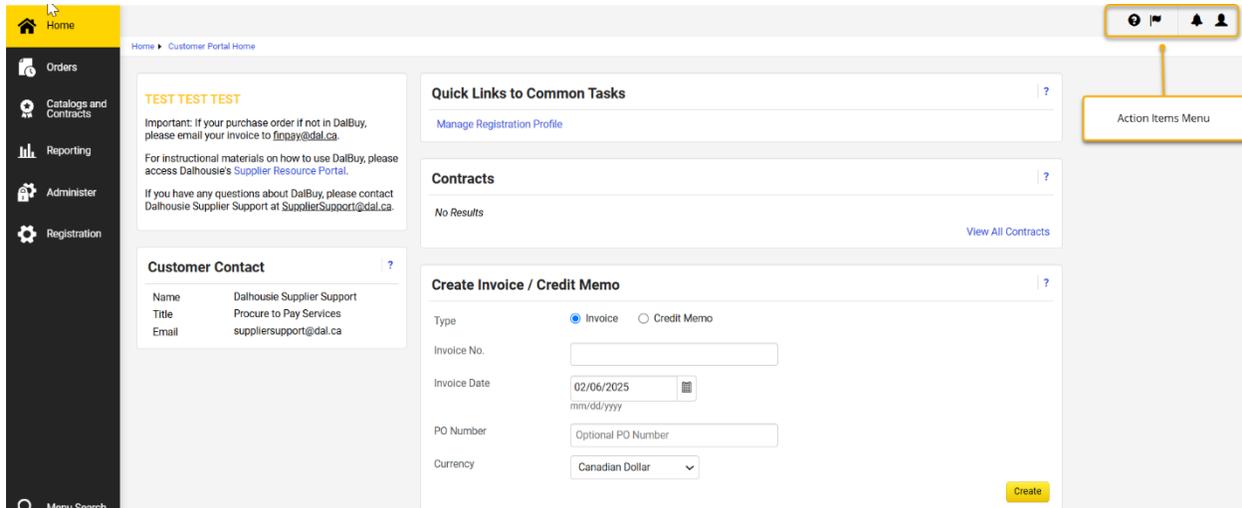


Figure 2.5: Action Items Menu Section

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

## 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.

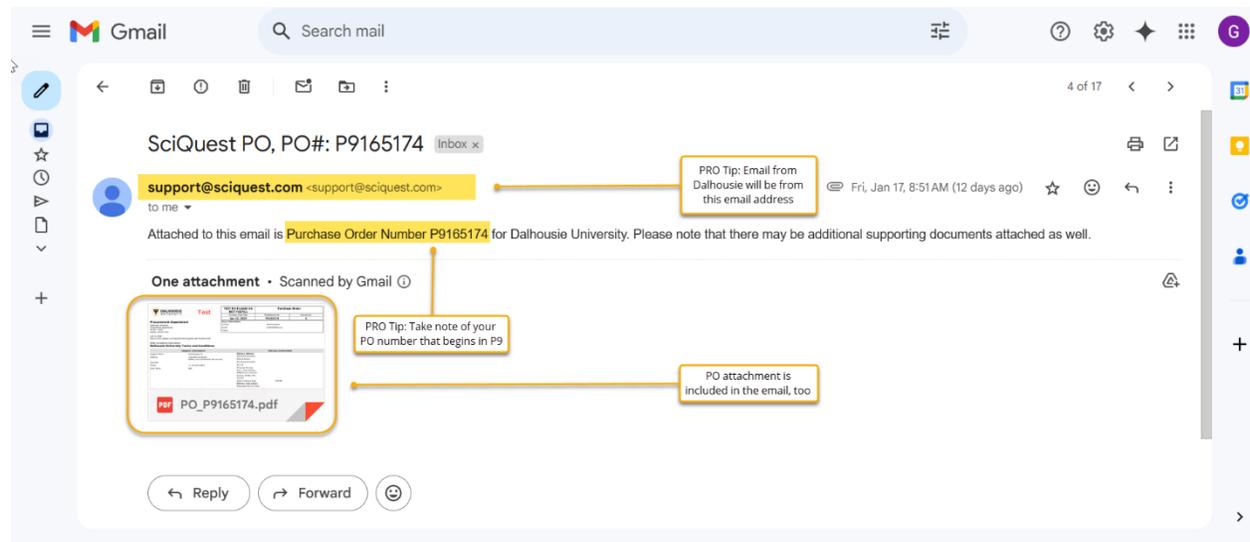


Figure 2.6: Purchase Order (P.O) Email Notification

## Bookmarking and Logging In

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

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.

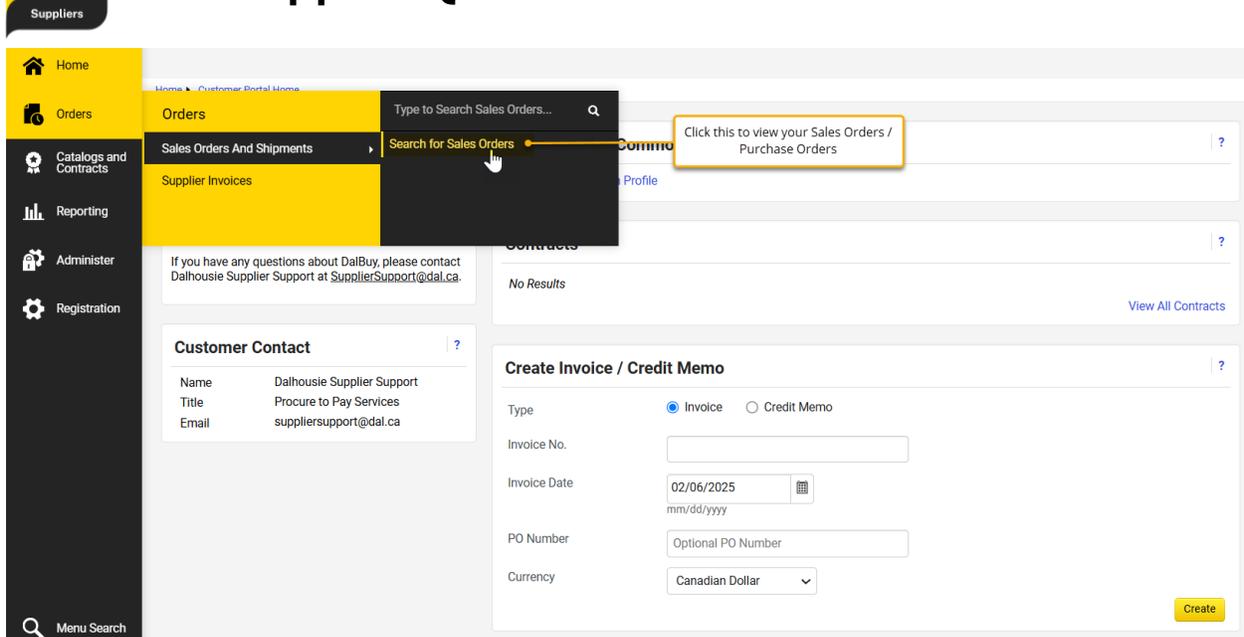


Figure 2.7: Search for Sales Orders Menu

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

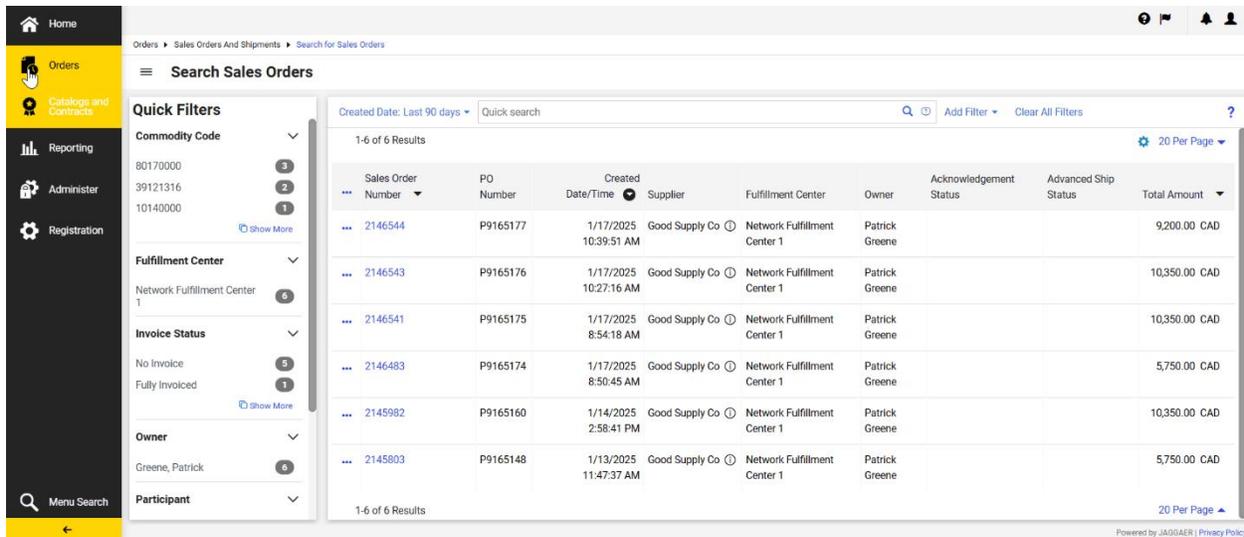


Figure 2.8: Search for Sales Orders Main Page

## 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.

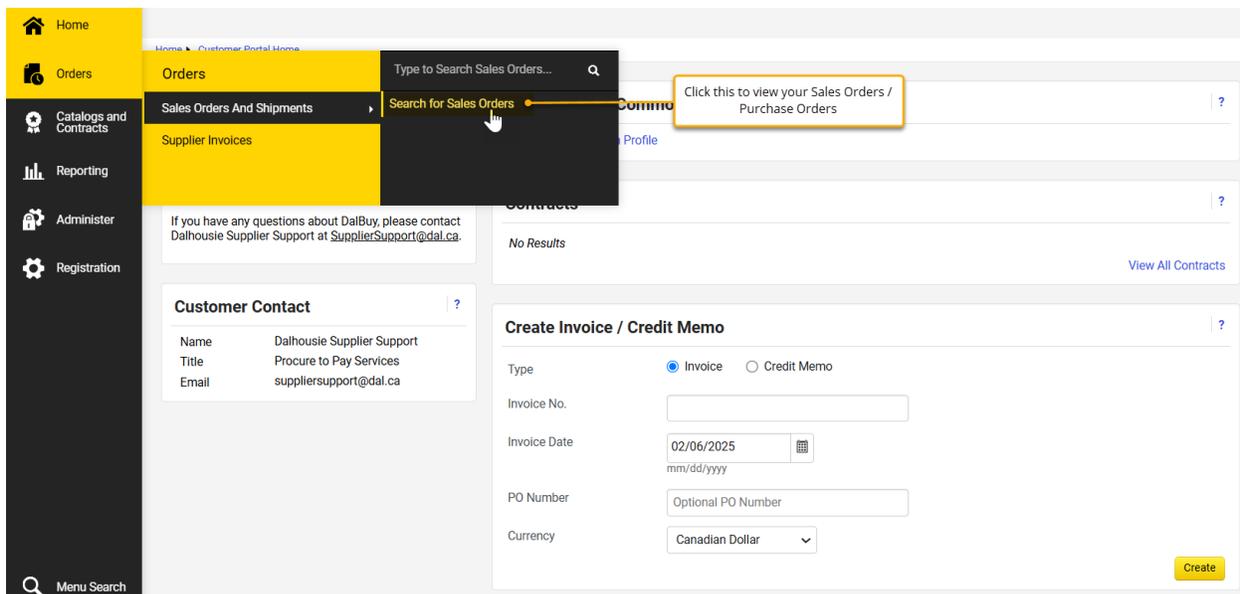


Figure 2.9: Search for Sales Orders Menu

### 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.

Sales Order Number	PO Number	Created Date/Time	Supplier	Fulfillment Center	Owner	Acknowledgement Status	Advanced Ship Status	Total Amount
2146544	P9165177	1/17/2025 10:39:51 AM	Good Supply Co	Network Fulfillment Center 1				9,200.00 CAD
2146543	P9165176	1/17/2025 10:27:16 AM	Good Supply Co	Network Fulfillment Center 1				10,350.00 CAD
2146541	P9165175	1/17/2025 8:54:18 AM	Good Supply Co	Network Fulfillment Center 1				10,350.00 CAD
2146483	P9165174	1/17/2025 8:50:45 AM	Good Supply Co	Network Fulfillment Center 1				5,750.00 CAD
2145982	P9165160	1/14/2025 2:58:41 PM	Good Supply Co	Network Fulfillment Center 1				10,350.00 CAD
2145803	P9165148	1/13/2025 11:47:37 AM	Good Supply Co	Network Fulfillment Center 1				5,750.00 CAD

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**.

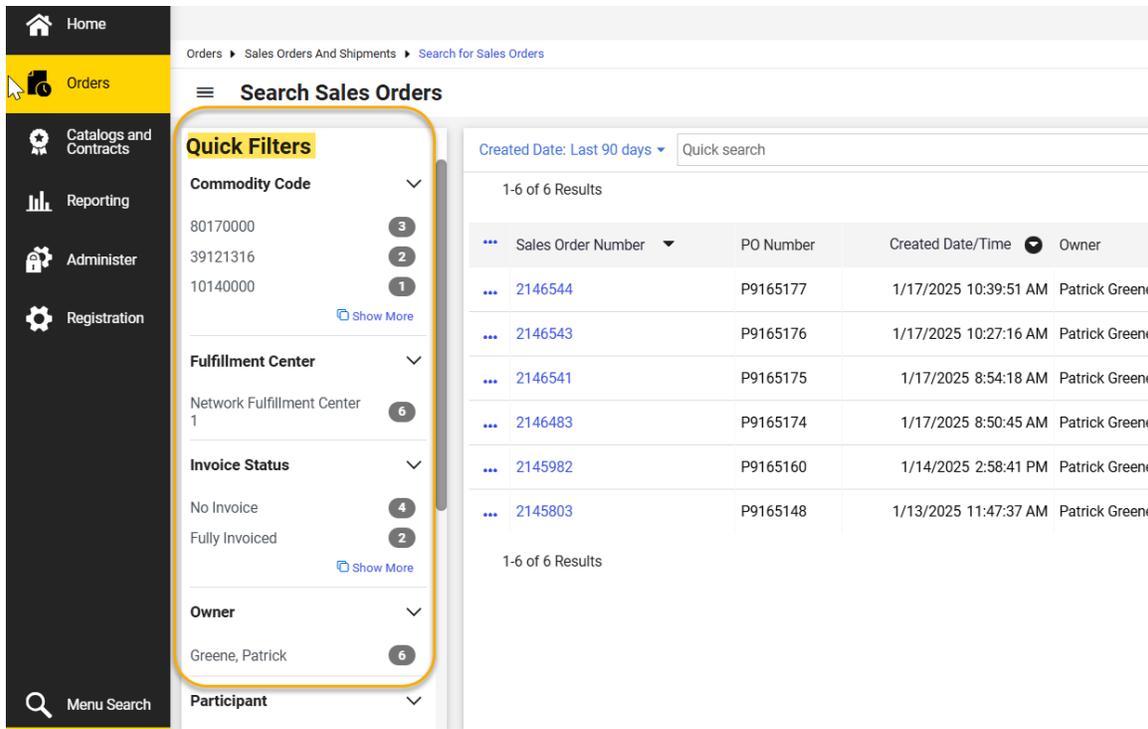


Figure 3.1: Quick Filter in the Search Sales Orders Page

## 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.

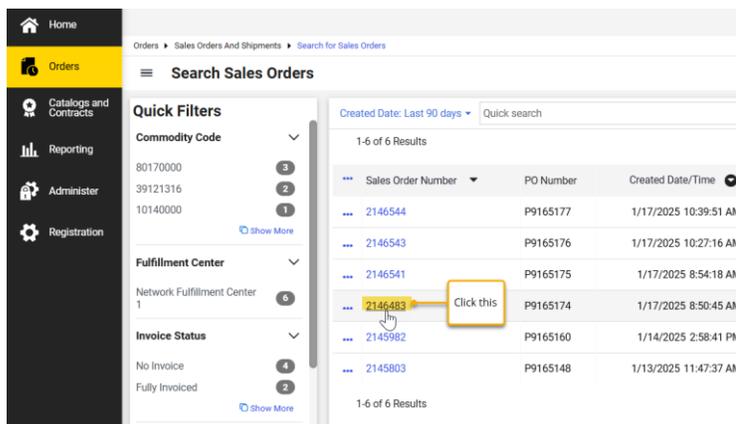


Figure 3.1: Locating the Sales Order Number

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.

The screenshot displays the 'Sales Order • 2146483 Revision 0' page. At the top right, there is a 'Print' icon (a printer symbol) which is highlighted by a yellow box. A callout bubble with the text 'Click this to print your Purchase Order' points to the 'Print' icon. Below the header, there are tabs for 'Status', 'Summary', 'Revisions 1', 'PO Documents', 'Invoices 1', 'Order Acknowledgments', and 'Advance Ship Notices'. The main content area is divided into three columns: 'General Information', 'Shipping Information', and 'Billing Information'. The 'General Information' column includes fields for Priority (Normal), Sales Order No. (2146483), Sales Order Create Date (1/17/2025), PO/Reference No. (P9165174), PO Creation Date (1/17/2025), and Buyer Name (Patrick Greene). The 'Shipping Information' column includes 'Ship To' (Dalhousie University, Canada) and 'ShipTo Address Code' (FNSHB4). The 'Billing Information' column includes 'Bill To' (Financial Services Dalhousie University, PO Box 15000, 6283 Alumni Crescent, Halifax, NS B3H 4R2, Canada) and 'Bill To Address Code' (FNDHH4). There is also a 'Billing Options' section with 'Accounting' and 'Date' fields.

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.

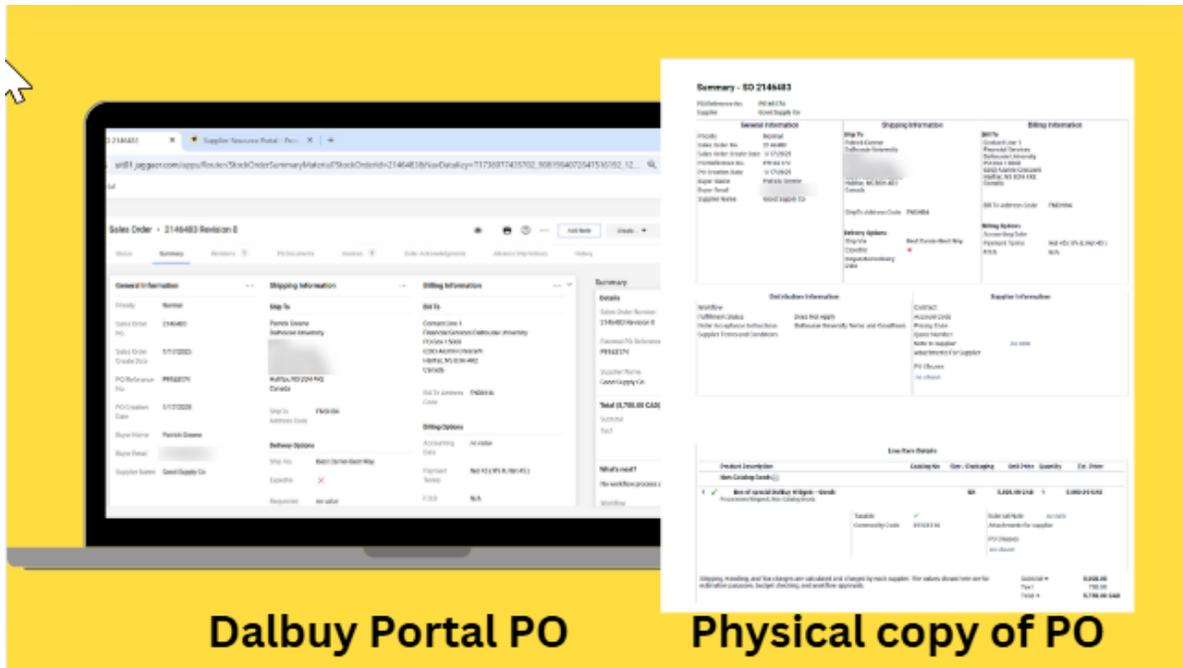


Figure 3.3: Side by side comparison of P.O. in the DalBuy Portal and physical copy of the P.O.

- 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.

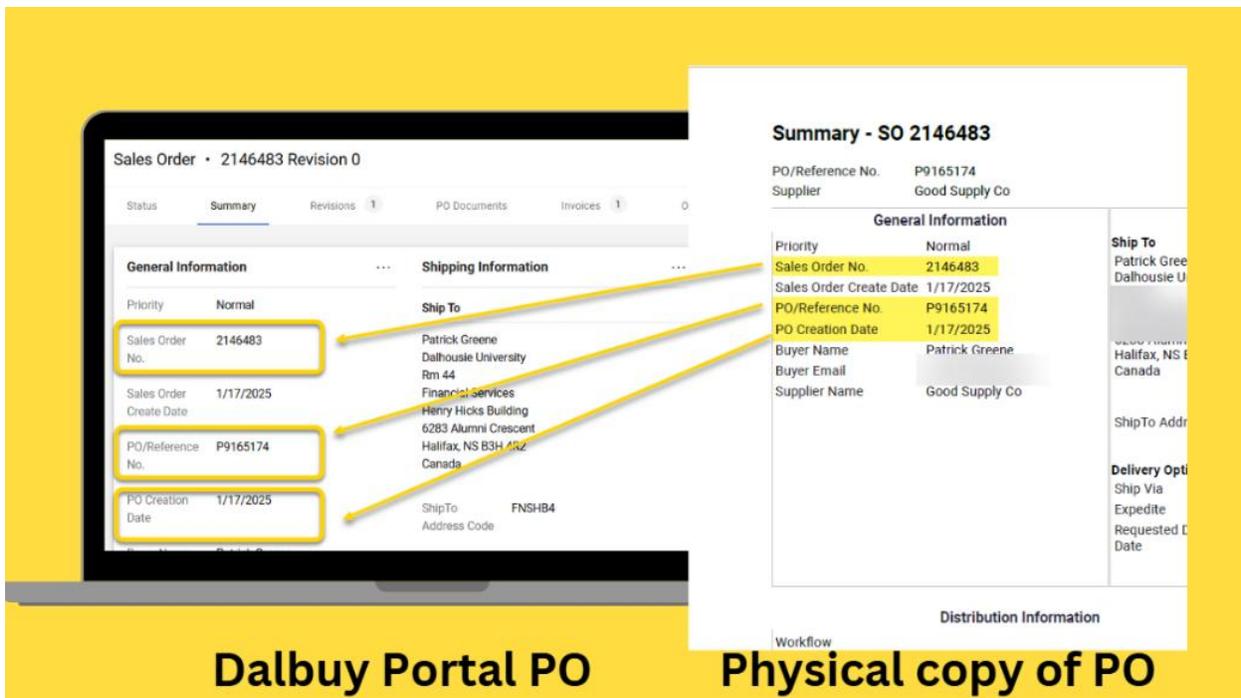
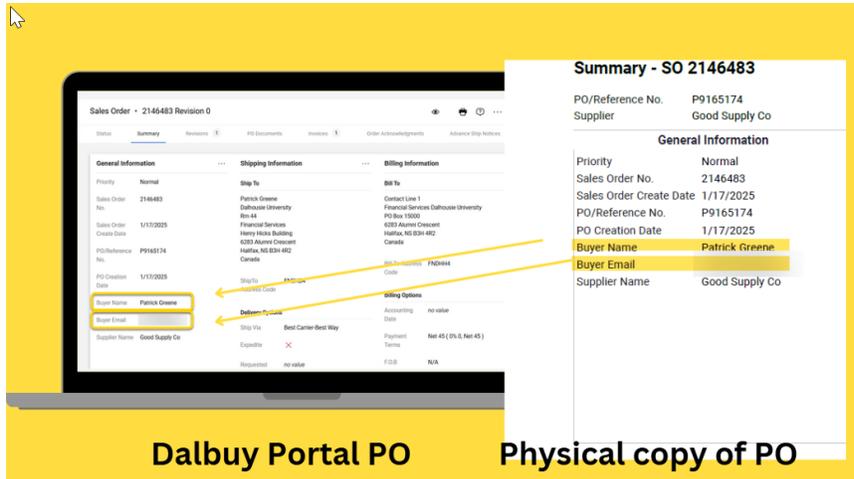


Figure 3.4: Locating the Sales Order No, P.O. Reference No. and P.O. Creation Date.

# Supplier Quick Tutorial

- 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.



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.

Figure 3.5: Locating the Buyer Name and Email Address

- iii. 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.

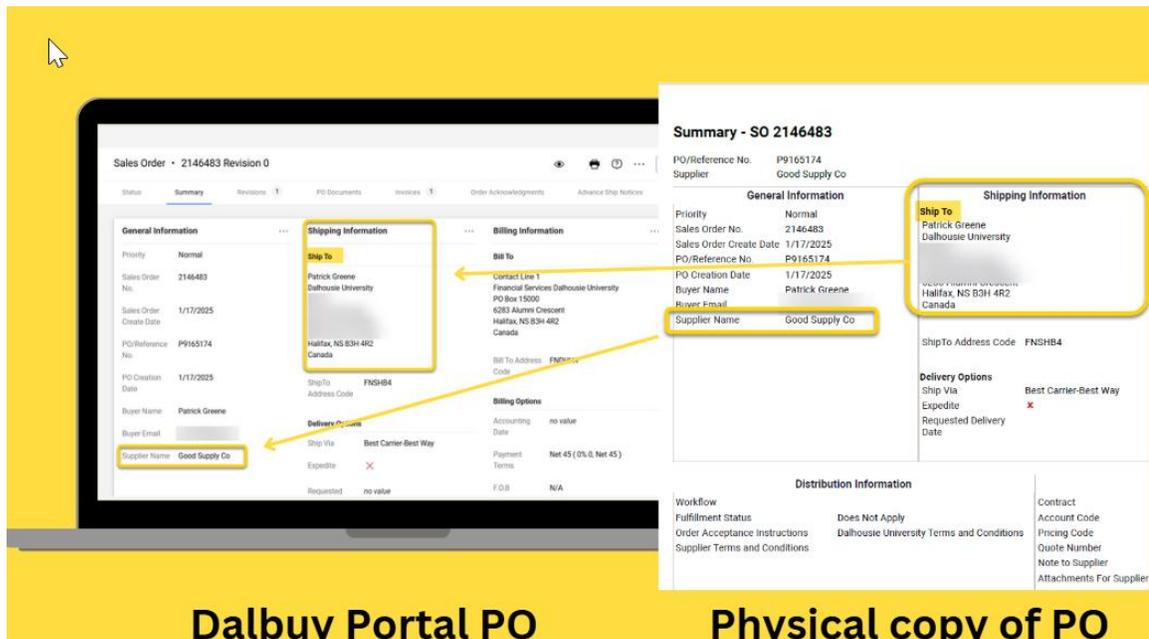


Figure 3.6: Locating the Ship To information

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

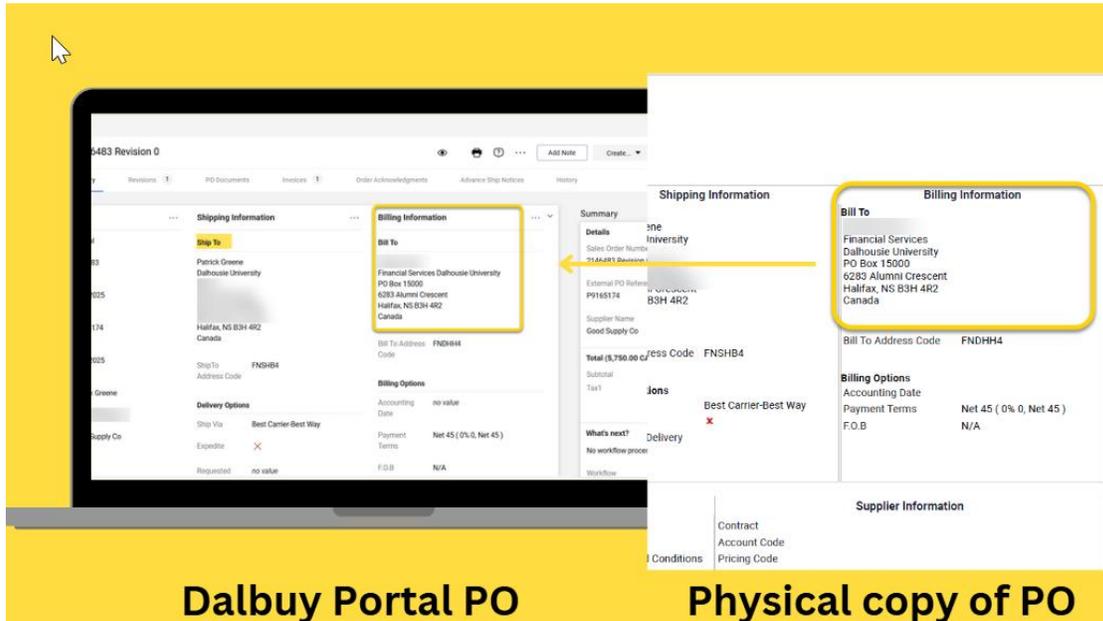
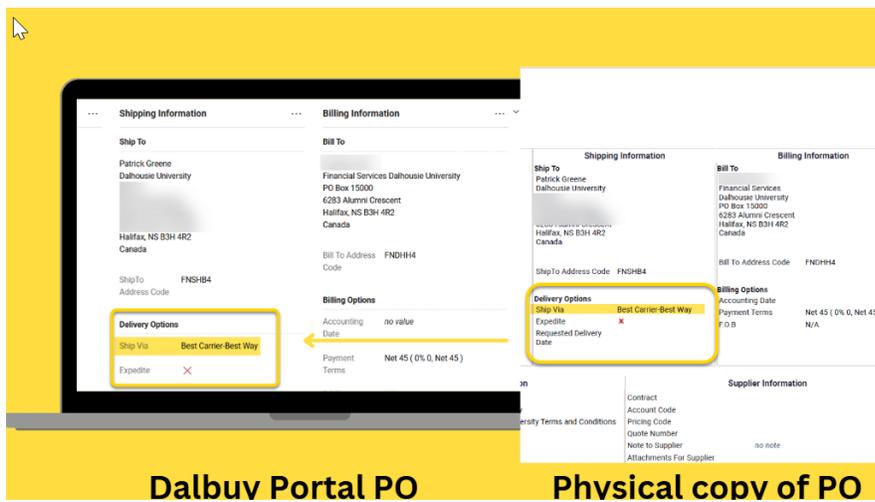


Figure 3.7: Locating the Bill To information

- 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.

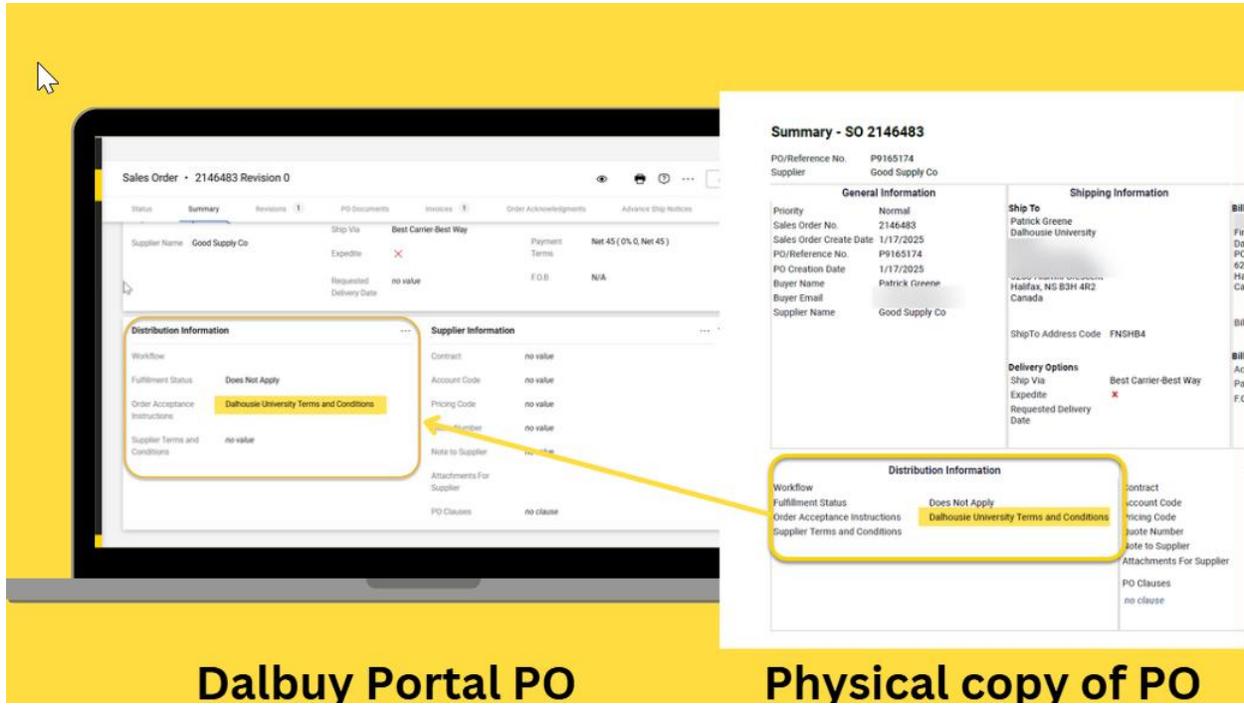
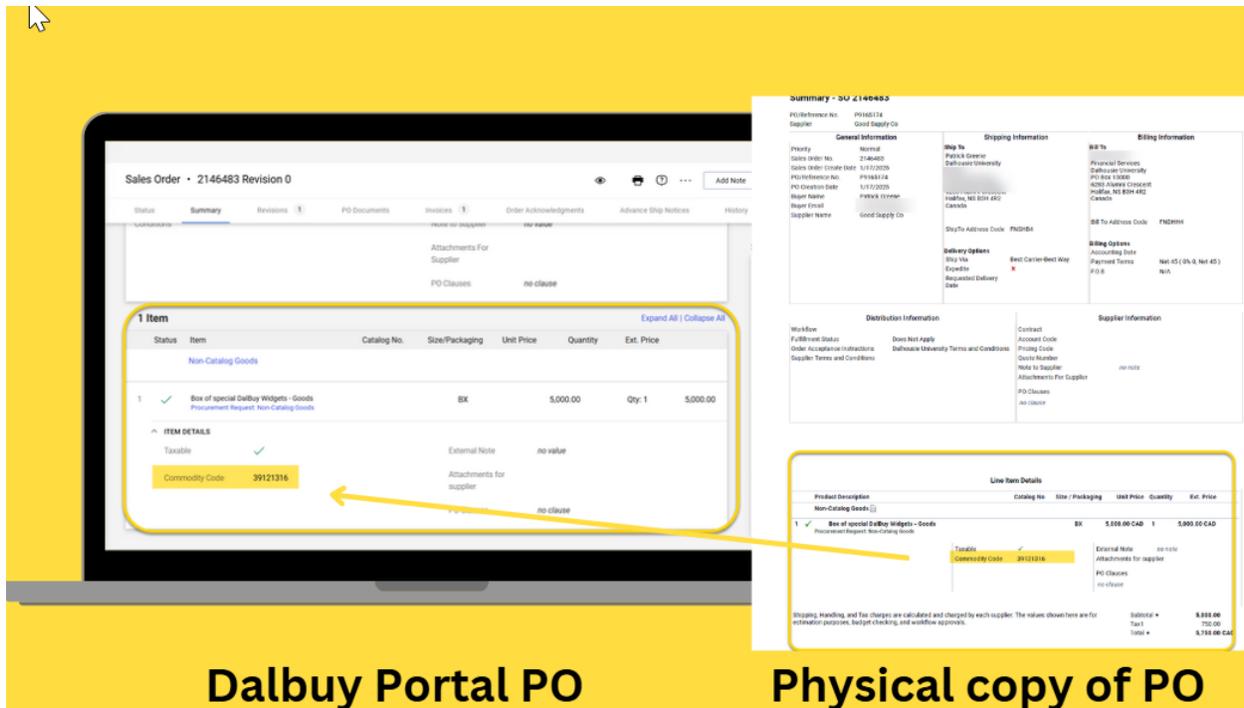


Figure 3.9: Locating the Distribution information section for Dalhousie Terms and Conditions

- 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.



Dalbuy Portal PO

Physical copy of PO

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.

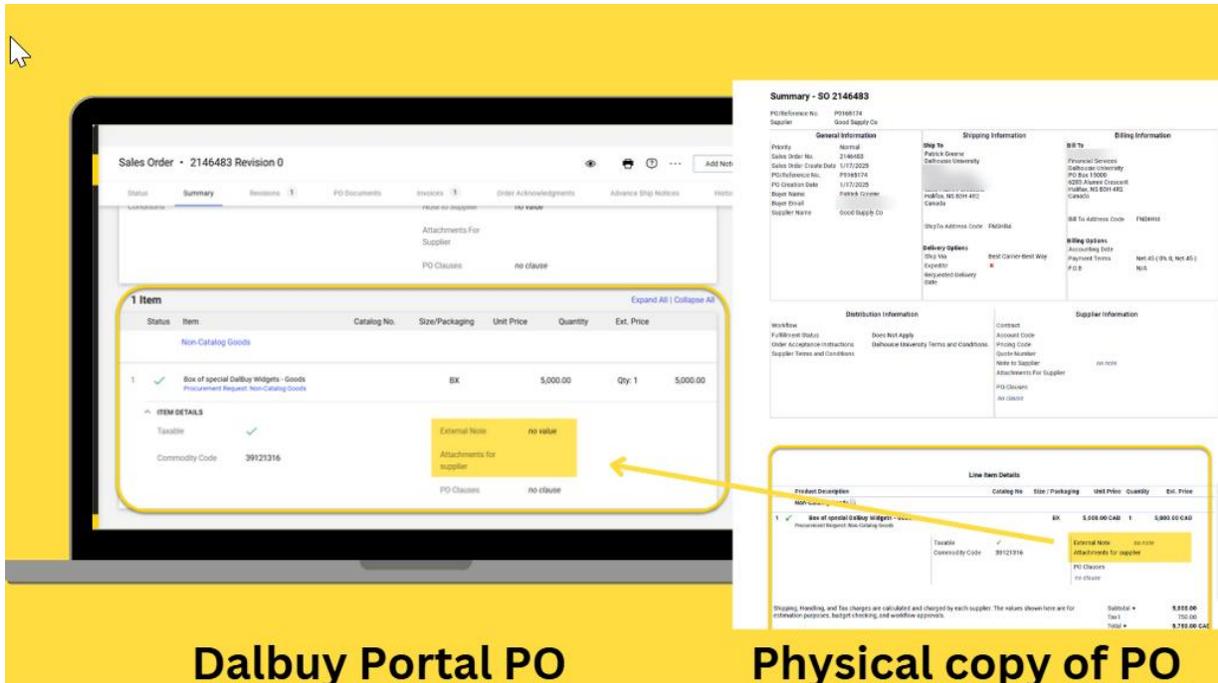


Figure 4.1: Locating the External Note Section

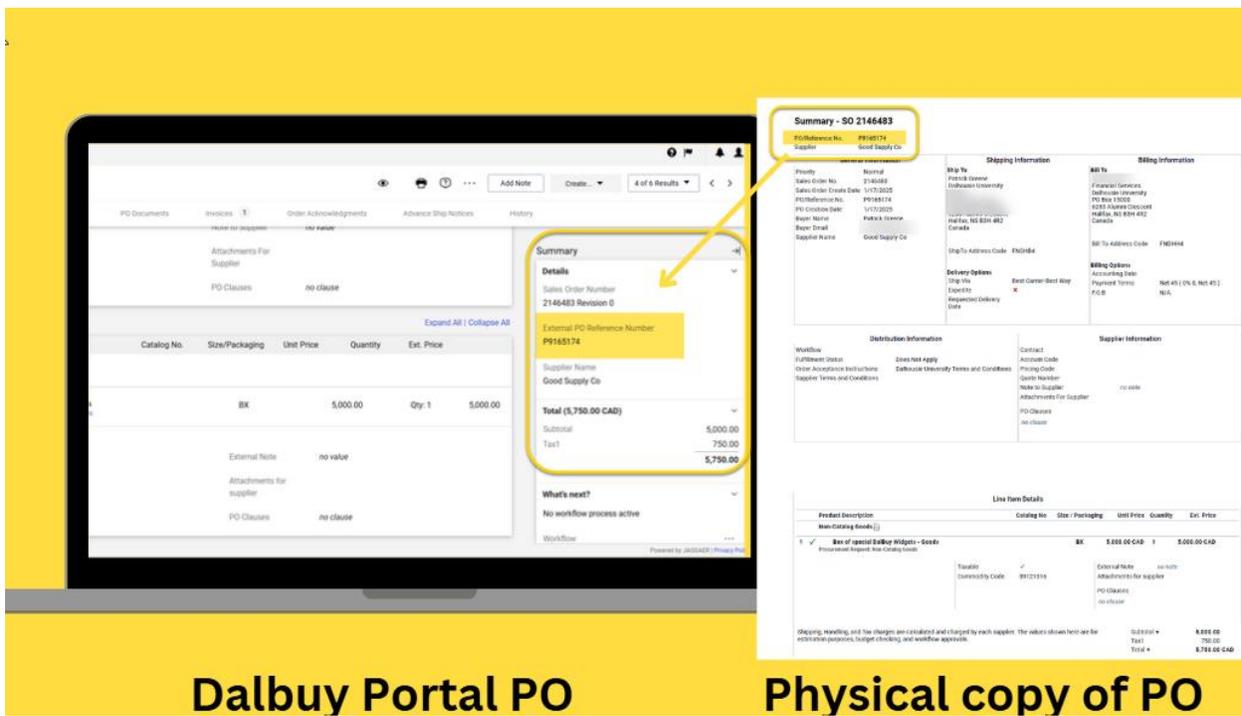
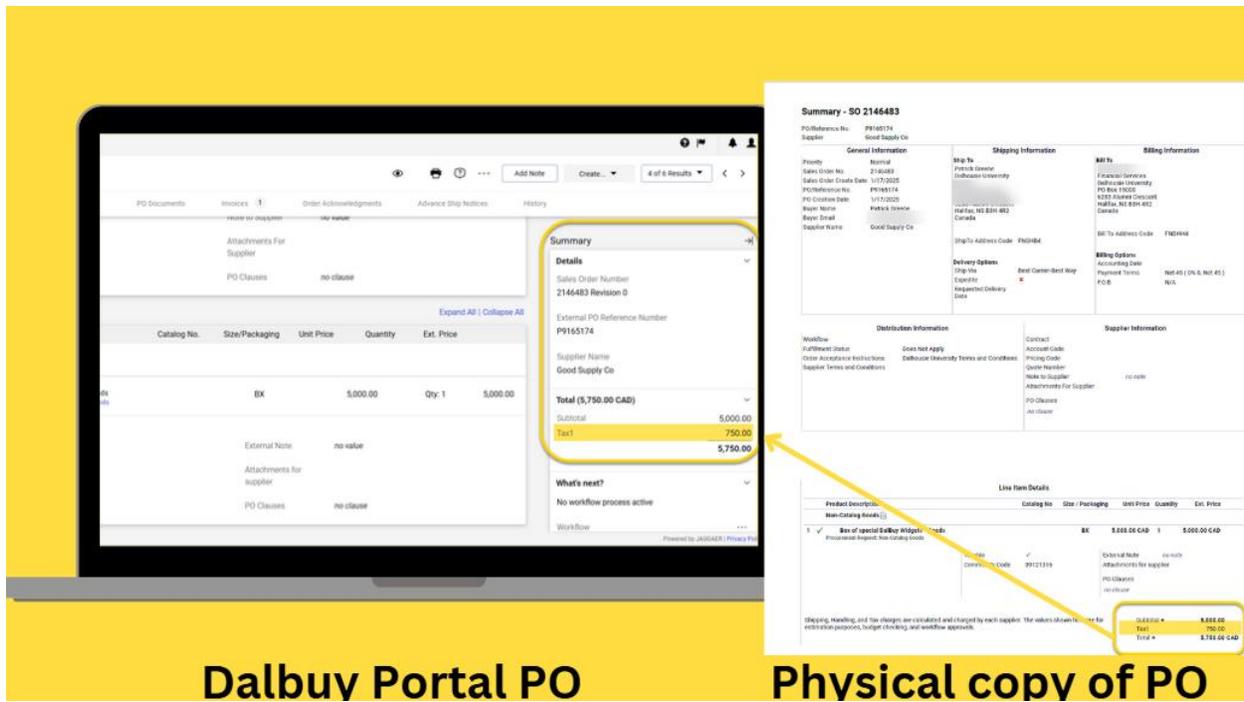


Figure 4.2: Locating the Summary Section



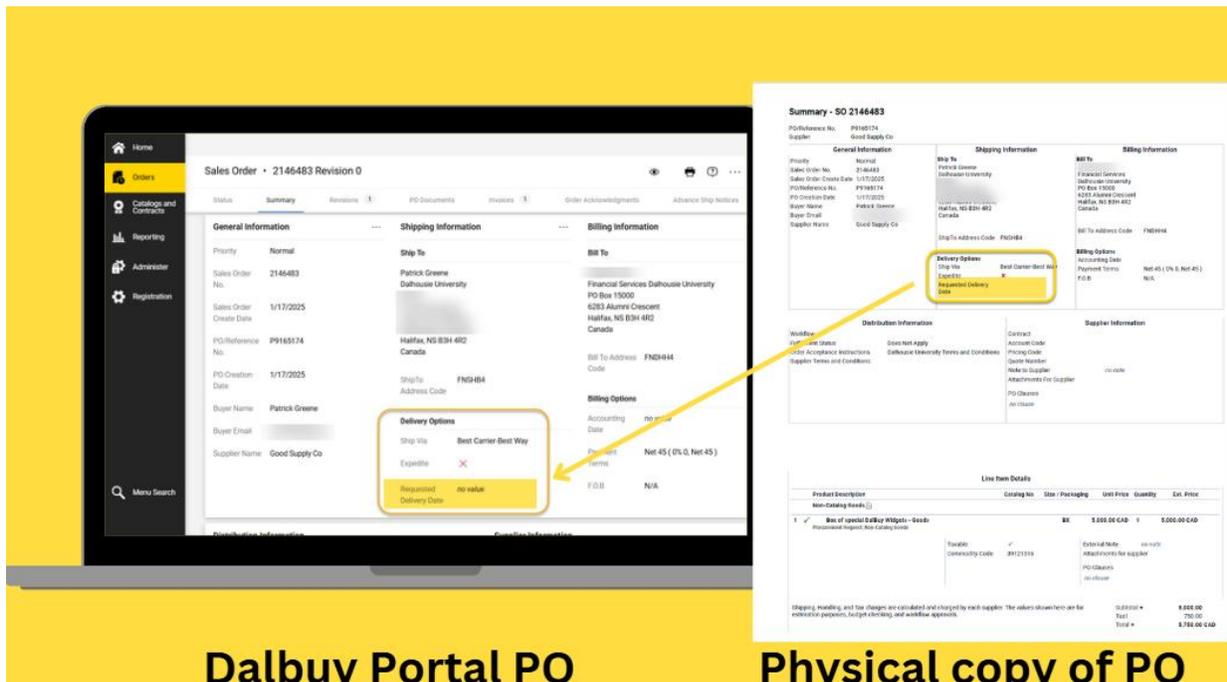
Dalbuy Portal PO

Physical copy of PO

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.



Dalbuy Portal PO

Physical copy of PO

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.)** is always necessary 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.



# Supplier Quick Tutorial

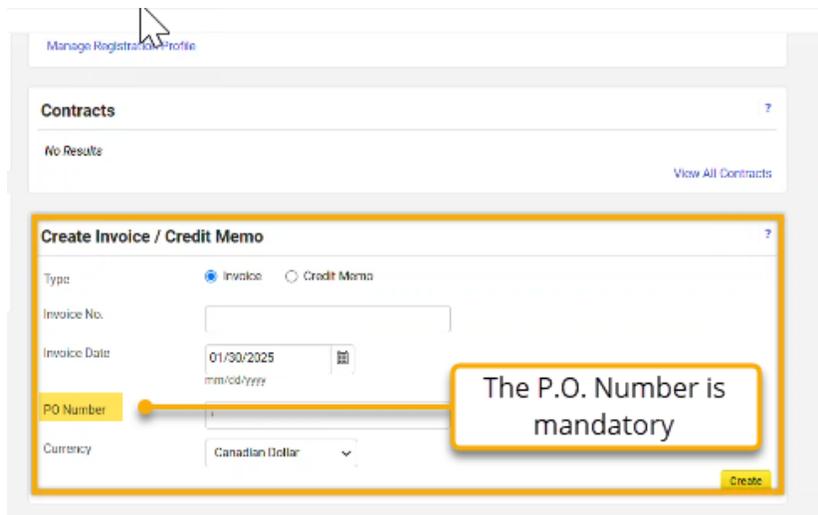


Figure 4.5: Creating an Invoice - Method 1: From the Dashboard

## 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.

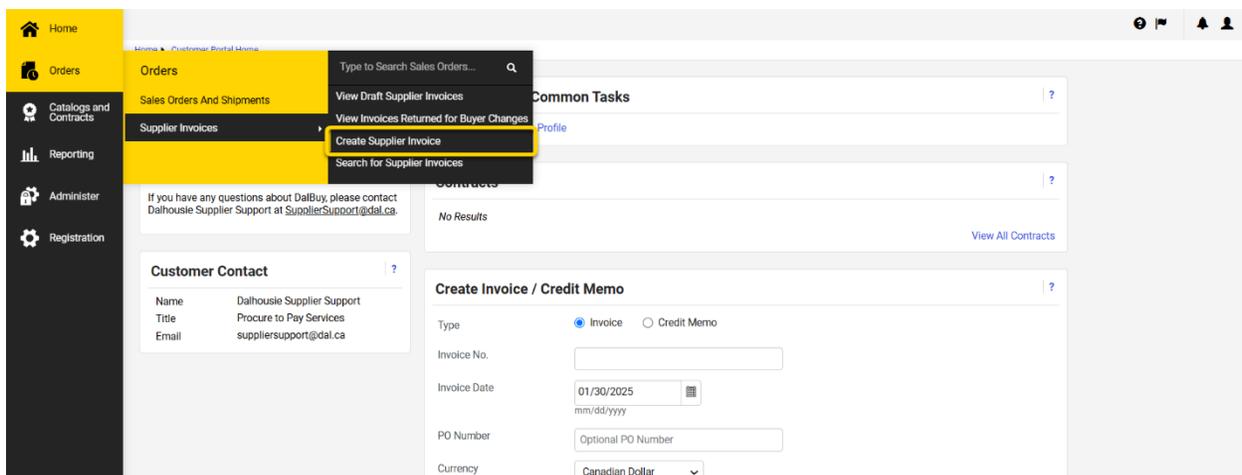


Figure 4.6: Creating an Invoice - Method 2: From the Menu Bar – Supplier Invoices

### 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.

Sales Order Number	PO Number	Created Date/Time	Supplier
2146514	P9165177	1/17/2025 10:39:51 AM	Good Supply Co
2146543	P9165176	1/17/2025 10:27:16 AM	Good Supply Co
2146541	P9165175	1/17/2025 8:54:18 AM	Good Supply Co
2146483	P9165174	1/17/2025 8:50:45 AM	Good Supply Co
2146982	P9165160	1/14/2025 2:59:41 PM	Good Supply Co
2145803	P9165148	1/13/2025	Good Supply Co

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.

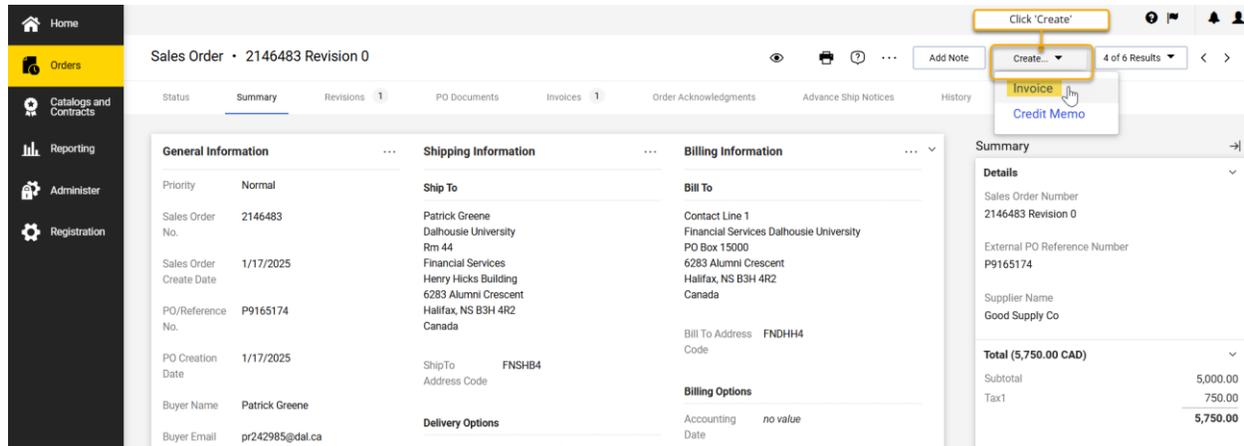


Figure 4.8: Creating an Invoice - Method 4: Directly from the Purchase Order Page

## 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.

The screenshot displays the DalBuy Supplier Portal interface for entering invoice details. The main form is titled 'Invoice • 3038389' and has tabs for 'Entry', 'Summary', 'Matching', 'Messages', 'Attachments', and 'History'. The 'Entry' tab is active, showing fields for 'Buyer Invoice Number' (no value), 'Invoice Date' (2/10/2025), 'Due Date' (3/27/2025), 'Invoice Owner' (Patrick Greene), and 'Supplier Name' (Good Supply Co). A 'Remit To' section lists contact information for John Doe. A 'Summary' section on the right shows a total of 9,200.00 CAD. Annotations highlight the 'Simple' view toggle, the 'Save' button, and the 'Invoice Number' field.

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.

Entry   Summary   Matching   Messages   Attachments   History

Payment Cancel Date *no value*

✓ **Discount, Tax, Shipping & Handling**

Allocation

Header-level

Terms Discount	0.00 CAD
Discount	<input type="text" value="0.00"/>
Total Taxes	<input type="text" value="0.00"/>
Shipping	<input type="text" value="0.00"/>
Handling	<input type="text" value="0.00"/>

Discount, Tax, Shipping and Handling section: Provide inputs here if needed

**1 Line** Line Item Details

**P9165177** This is your PO Number

Status	PO Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓	1 Service Requisition		HR	<input type="text" value="800.00"/>	<input type="text" value="10"/>	8,000.00	

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 record-keeping 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.



The screenshot shows the 'Invoice • S0007' page in the DalBuy system. The 'Complete' button is highlighted with a yellow box, and a callout box points to it with the text: "PRO Tip: Click 'Complete' once you've reviewed the invoice and are ready to submit." The interface includes a 'Simple' toggle, 'Add Invoice Image', 'Complete', and 'Save' buttons. Below the buttons are tabs for 'Entry', 'Summary', 'Matching', 'Messages', 'Attachments', and 'History'. The main content area is divided into two sections: 'Entry' and 'Summary'.

**Entry Section:**

Buyer Invoice Number	no value	Remit To	John Doe 1000 Morning Street Halifax, Nova Scotia B3H 4R2
Invoice Date	2/10/2025		Canada Email goodsupplycompanyco@gmail.com Phone 1-902-8359473-
Due Date	3/27/2025		
Invoice Owner	Patrick Greene		
Supplier Name	Good Supply Co		
Invoice Number ★	S0007		
Currency	Canadian Dollar		
Sales Order Number	2146544		
Customer	Dalhousie University		
Paid Date	no value		
Payment Cancel Date	no value		

**Summary Section:**

<b>Be aware of these issues.</b>	
You may review and proceed.	
Required receipt has not been created.	
<b>Dalhousie University</b>	
<b>Total (9,200.00 CAD)</b>	
Subtotal	8,000.00
Terms Discount	0.00
Discount	0.00
Tax1	1,200.00
Shipping	0.00
Handling	0.00
Miscellaneous Fees	0.00
	<b>9,200.00</b>
<b>Related Documents</b>	
<a href="#">Sales Order: 2146544</a>	

Figure 5.2: Submitting the Sales Invoice

## Draft of Sales Invoice

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'**.

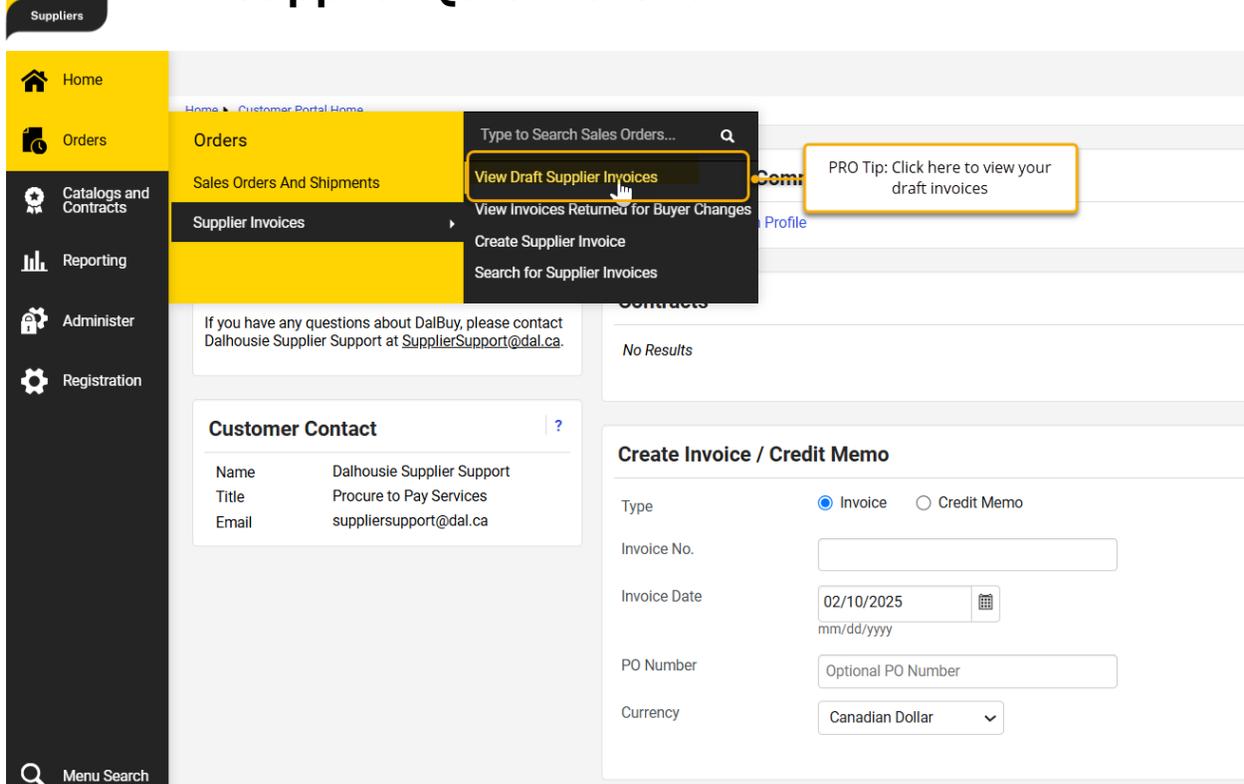


Figure 5.3: Viewing Draft Invoices

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.

Invoice No.	Customer	PO No.	Invoice Date	Type	Total
S0003	Dal	No PO	1/30/2025	Invoice	10,350.00 CAD
Unassigned	Dal	P9165160	1/30/2025	Invoice	10,350.00 CAD
Unassigned	Dal	P9165160	1/30/2025	Invoice	10,350.00 CAD
Unassigned	Dal	P9165177	1/21/2025	Invoice	9,200.00 CAD
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

Figure 5.4: Sample Draft Invoices Page

## 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

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.

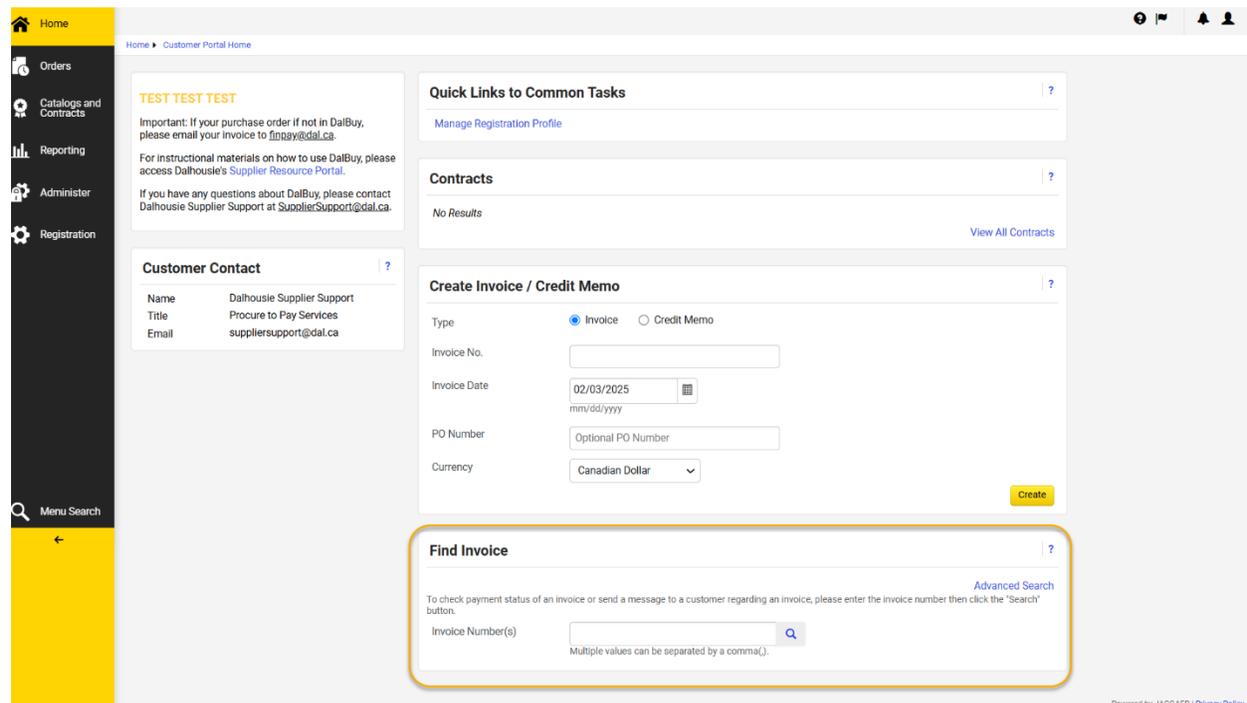


Figure 5.5: Searching for a Sales Invoice - Method 1: From the Dashboard

## 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.

The screenshot shows the DalBuy interface. On the left is a dark sidebar menu with options: Home, Orders, Catalogs and Contracts, Reporting, Administer, and Registration. The 'Orders' menu is expanded, showing 'Sales Orders And Shipments', 'Supplier Invoices', 'Create Supplier Invoice', and 'Search for Supplier Invoices'. The 'Search for Supplier Invoices' option is highlighted with a yellow box. The main content area displays a table of supplier invoices with columns: Supplier Invoice Number(e), Invoice Number, Customer Name, Invoiced/Created By, PO Number, Supplier Invoice Date, Created Date/Time, Invoice Source, Invoice Type, Due Date, Paid Date, Discount Amount, and Total Amount. Two invoices are listed:

Supplier Invoice Number(e)	Invoice Number	Customer Name	Invoiced/Created By	PO Number	Supplier Invoice Date	Created Date/Time	Invoice Source	Invoice Type	Due Date	Paid Date	Discount Amount	Total Amount
... S0002	IN000675	Dalhousie University	System	P9165175	1/27/2025	1/27/2025 8:56:11 AM	Supplier Portal	PO Invoice	3/13/2025		0.00 CAD	10,350.00 CAD
... S0001	IN000653	Dalhousie University	System	P9165174	1/17/2025	1/17/2025 11:41:00 AM	Supplier Portal	PO Invoice	3/3/2025		0.00 CAD	5,750.00 CAD

At the bottom of the page, there is a URL: <https://uit01.jaggaer.com/apps/Router/SupplierInvoiceElasticSearch?tmstamp=1738594378848> and a footer note: "Powered by JAGGAER | Privacy Policy".

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

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.

The screenshot shows the DalBuy interface for searching supplier invoices. The left sidebar contains navigation options: Home, Orders (highlighted), Catalogs and Contracts, Reporting, Administer, and Registration. The main content area is titled 'Search Supplier Invoices' and includes a search bar and a 'Created Date' filter set to 'Last 90 days'. Below the search bar, the 'Quick Filters' section is expanded, showing the following filters:

- Matched**: 1
- Unmatched**: 1
- Mismatch Reasons**:
  - No Receipt: 1
  - Pay Status**: 1 (highlighted with a yellow box)
  - In Process: 1
  - Payable: 1
- Payment Method**:
  - Unknown: 2
- Product Category**:
  - No Product Category: 2

The search results show 1-2 of 2 results:

Supplier Invoice Number(s)	Invoice Number	Customer Name
S0002	IN000675	Dalhousie University
S0001	IN000653	Dalhousie University

Figure 5.7: Using Quick Filters to view Payment Status

## 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 Invoices > Search for Supplier Invoices

Search Supplier Invoices

Quick Filters

Brand: No Brand (2)

Commodity Code: 39121316 (1), 80170000 (1)

Invoice Owner

Created Date: Last 90 days

Quick search

1-2 of 2 Results

20 Per Page

Supplier Invoice Number(s)	Invoice Number	Customer Name	PO Number	Supplier Invoice Date	Created Date/Time	Due Date	Paid Date	Total Amount
S0002	IN000675	Dalhousie University	P9165175	1/27/2025	1/27/2025 8:56:11 AM	3/13/2025		10,350.00 CAD
S0001	IN000653	Dalhousie University	P9165174	1/17/2025	1/17/2025 11:41:00 AM	3/3/2025		5,750.00 CAD

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.

Invoice • S0001

Summary Matching Messages Attachments History

General	Addresses	Note/Attachments														
<b>Invoice Type</b> Invoice <b>Payment Status</b> Payable <b>Buyer Invoice Number</b> IN000653 <b>Invoice Number</b> S0001 <b>Supplier Name</b> Good Supply Co <b>Invoice Owner</b> Patrick Greene <b>Invoice Date</b> 1/17/2025 <b>Discount Date</b> no value <b>Due Date</b> 3/3/2025 <b>Terms</b> Net 45 (0% 0, Net 45) <b>Terms Discount</b> 0.00 CAD <b>Invoice Name</b> 2025-01-17 goodsupplycompanyco@gmail.com 01 <b>Invoice Source</b> Supplier Portal <b>Contains substituted item(s)</b> <span style="color: red;">✗</span> <b>Customer Information</b> <b>Customer</b> Dalhousie University <b>Sales Order Number</b> 2146483 <b>Paid Date</b> no value <b>Payment Cancel Date</b> no value	<b>Remit To</b> John Doe 1000 Morning Street Halifax, Nova Scotia B3H 4R2 Canada Email: goodsupplycompanyco@gmail.com Phone: 1-902-839-9473 <b>Bill To</b> Contact Line 1 Financial Services Dalhousie University PO Box 15000 6283 Alumni Crescent Halifax, NS B3H 4R2 Canada	<b>Notes</b> no value <b>Attachments</b> <b>Shipping, Handling, and Tax</b> Values vary by line. Discount, tax, shipping & handling Allocation Weighted <table border="1"> <thead> <tr> <th></th> <th>Header-level</th> </tr> </thead> <tbody> <tr> <td>Terms Discount</td> <td>0.00 CAD</td> </tr> <tr> <td>Discount</td> <td>0.00 CAD</td> </tr> <tr> <td>Total Taxes</td> <td>0.00 CAD</td> </tr> <tr> <td>Shipping</td> <td>0.00 CAD</td> </tr> <tr> <td>Handling</td> <td>0.00 CAD</td> </tr> <tr> <td><b>Total</b></td> <td><b>5,790.00 CAD</b></td> </tr> </tbody> </table> Miscellaneous: 0.00 CAD <a href="#">view/edit</a> Fees		Header-level	Terms Discount	0.00 CAD	Discount	0.00 CAD	Total Taxes	0.00 CAD	Shipping	0.00 CAD	Handling	0.00 CAD	<b>Total</b>	<b>5,790.00 CAD</b>
	Header-level															
Terms Discount	0.00 CAD															
Discount	0.00 CAD															
Total Taxes	0.00 CAD															
Shipping	0.00 CAD															
Handling	0.00 CAD															
<b>Total</b>	<b>5,790.00 CAD</b>															

**1 Line**

Status	PO Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
Non-Catalog Goods							
		Contract:					no value
1	✓	1 Box of special DalBuy Widgets- Goods Procurement Request: Non-Catalog Goods		BX	5,000.00	Qty: 1	5,000.00
<b>ITEM DETAILS</b> <b>PO Number</b> P9165174 <b>Substitute Item</b> <span style="color: red;">✗</span> <b>Taxable</b> <span style="color: green;">✓</span> <b>Line Match Status</b> Matched <b>Contract No.</b> <b>SHIPPING, HANDLING, AND TAX</b> Values have been overridden for this line Discount, tax, shipping & handling							

Figure 5.9: Sales Invoice Summary Tab

Figure 6.0: Add Attachment Tab

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.