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## Welcome Message

Dear Valued Supplier,

Welcome to DalBuy! This guide is designed to help you register and navigate DalBuy, Dalhousie University's best-in-class Procure-to-Pay (P2P) system, powered by Jaggaer. By joining DalBuy, you become part of our supplier network and qualify you to do business with Dalhousie University.

DalBuy is built to make your transactions with us seamless and efficient. Here's how it benefits you:

- **Faster Order Processing:** Say goodbye to manual paperwork – DalBuy streamlines order management, reducing delays.
- **Simplified Invoicing:** Submit and track invoices with ease, saving time and avoiding errors.
- **Real-Time Payment Updates:** Stay on top of your cash flow with up-to-date payment information.
- **Opportunities for All:** Equal access for businesses of all sizes, without requiring complex technology.

DalBuy is free, secure, easy to use, and quick to set up. Once you've registered, your profile will be reviewed and subject for approval by the DalBuy team, ensuring smooth supplier verification for future transactions.

At Dalhousie University, we are committed to improving efficiency, accuracy and accessibility for all our suppliers through DalBuy. For existing suppliers, DalBuy offers an enhanced experience, ensuring collaboration is easier and more efficient. We look forward to working with you and strengthening our partnership.

Warm Regards,

Veronica MacNeil

Director, Procure to Pay (P2P)

Financial Services



## Getting Started

### Simple Definitions

**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.

## Registration Process

### Invitation to Register

To join DalBuy, suppliers must first receive an email invitation to register from Dalhousie University. Without this invitation, registration and access to DalBuy are not possible.

The email message includes a brief overview of DalBuy and a link to get started. To proceed, simply click the '**Register Now**' button at the bottom of the email to begin setting up your profile on the DalBuy portal.

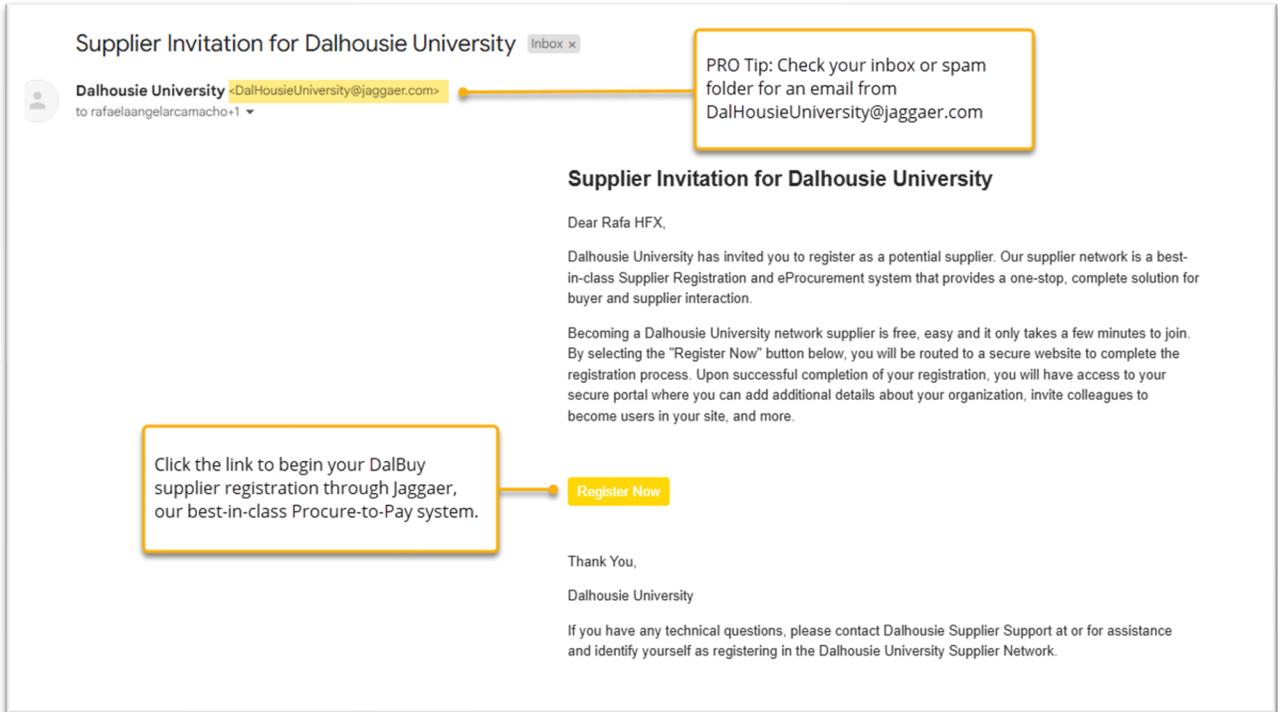


Figure 1.1: Supplier Email Invitation from Dalhousie University

## Accessing the Registration Page

After receiving the email invitation and clicking the **'Register Now'** button, you will be directed to the **'Welcome to Supplier Registration'** page.

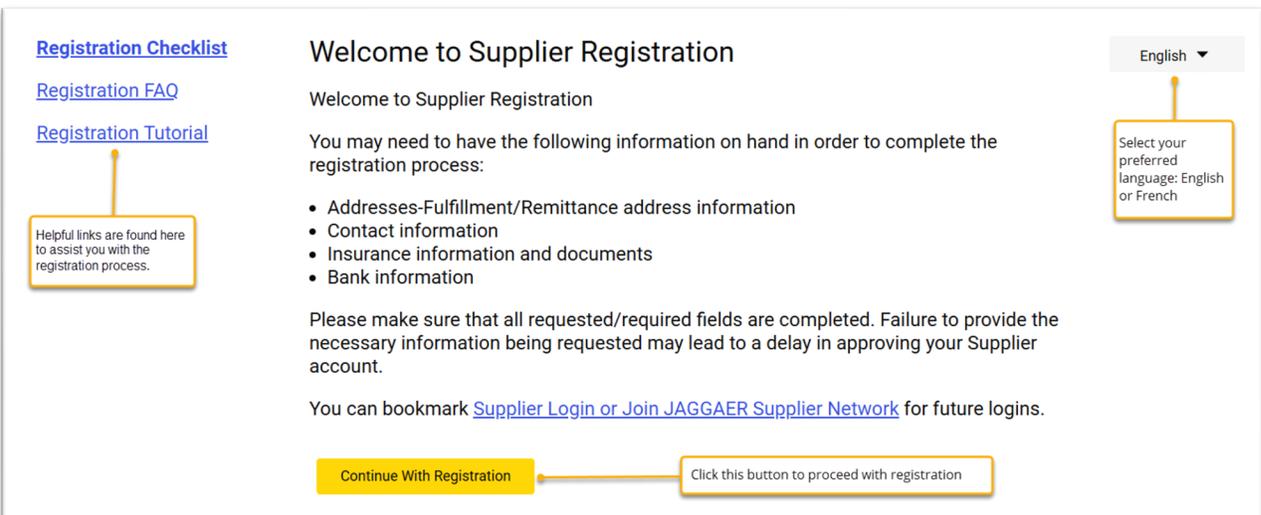


Figure 1.2 Welcome to Supplier Registration Page

The **‘Welcome to Supplier Registration’** page provides an overview of the information required to complete the registration process, including:

- Addresses: Fulfillment and remittance payment details.
- Contact Information: Primary points of contact for your business.
- Insurance Information: Documentation needed for verification.
- Bank Information: Details for payment processing.
- Proof of Business Registration: Documents that contain your company name and address to establish your business details

**Pro Tip:** Please ensure all required fields are completed to avoid delays in the review and approval process.

Helpful links at the top left of the page are provided to assist you with the registration process:

- Registration Checklist
- Registration FAQ
- Registration Tutorial

**Note:** Fields marked with ★ are mandatory.

To proceed, **click the ‘Continue with Registration’ button.**

By completing this step, you are not only joining DalBuy’s supplier network but also connecting to Jaggaer’s extensive platform, unlocking greater opportunities for your business.

**Pro Tip:** For future logins, please bookmark the ‘Supplier Login’ or ‘Join the Jaggaer Supplier Network link’

**DalBuy**, our P2P system, is powered by **Jaggaer**, a leading supplier network solution platform. By registering with DalBuy, suppliers are also registered to the **Jaggaer Supplier Network System**, gaining wider visibility to other companies that use Jaggaer – expanding your business opportunities.

## Creating an Account

After clicking the **‘Continue with Registration’** button, you will be taken to the **Supplier Registration** page. There are two things you must do for this process.

- 1) You will be requested to provide your **Contact Information:**
  - First Name
  - Last Name
  - Title
  - Phone Number (with ext., if applicable)
  - Preferred Time Zone



**Supplier Registration** [Registration Tutorial](#) English ▾

To begin your registration, please complete this page and click "Create Account". You will be directed to Supplier Management Portal to enter your information.

**Your Contact Info**

First Name ★ Last Name ★

Title

ext.

Phone Number ★

International phone numbers must begin with +

Preferred Time Zone ★

Figure 1.3 Contact Information in the Supplier Registration Page

**Your Login**

You are creating a JAGGAER One Login account. Once the account is created, you will be able to use this to access all JAGGAER applications using the same credentials. If you already have an account, please provide the details below.

rafaelaangelarcamacho+2@gmail.com

Email ★

rafaelaangelarcamacho+2@gmail.com

Confirm Email ★

.....

Password ★

.....

Re-Enter Password ★

I am a user in need of accessibility assistance

I have read and accepted JAGGAER's [Terms and Conditions](#)

I am human

 hCaptcha  
Privacy - Terms

**Create Account**

This field automatically filled with your registered email address at Dalhousie.

Make sure this matches the email address above to avoid any issues.

Make sure the password matches for a successful login.

Tick this box if you require accessibility assistance.

Please review and accept Jaggaer's Terms and Conditions to proceed.

Tick the Captcha box to confirm you're human.

Click this button to create your account.

Figure 1.4 Step 2 on the Supplier Registration Page: Create your Login Profile.

- 2) Create your Login Profile for the first-time by:
  - a) **Email Address:** the email field is pre-filled with the email address registered at Dalhousie. Please double-check that this is accurate.

## Supplier Reference Guide

- b) **Confirm Email:** Re-enter your email address in the **Confirm Email** field. Make sure it matches the email above to avoid issues
- c) **Password:** Create a secure password and re-enter it in the **Re-Enter Password** field. Ensure both entries match for a successful login.
- d) **Accessibility Assistance:** If you require accessibility support, tick the checkbox labeled “I am a user in need of accessibility assistance.”
- e) **Terms and Conditions:** Read and accept Jaggaer’s Terms and Conditions by ticking the checkbox. This is required to proceed.

**Pro Tip:** Since DalBuy is powered by Jaggaer, their Terms and Conditions apply to using the platform. Jaggaer provides the technology that makes DalBuy work seamlessly.

- f) **Captcha Verification:** Tick the Captcha box labeled “I am human” to confirm you are not a robot.

**Creating your Jaggaer One Login Account:** By creating a **Jaggaer One Login Account** you will gain universal access to the Jaggaer Supplier Network. This means that you can use the same credentials for DalBuy and the Jaggaer platform, having universal access to the Jaggaer Network.

Once all fields are completed, click the ‘**Create Account**’ button to finalize this step.

### Welcome to the Supplier Registration Portal

After creating your Account, you will be redirected to the Supplier Registration Portal.

To ensure a smooth registration process for the remaining steps (1-8), please ensure that you have the following information ready:

- Addresses: **Fulfillment** (shipping or warehouse address) and **Remittance** (account receivable or operational) address information
- Contact information
- Insurance information and documentation
- Bank account information

You will need to confirm your legal company name in the field box provided. This is required to go to the next steps.



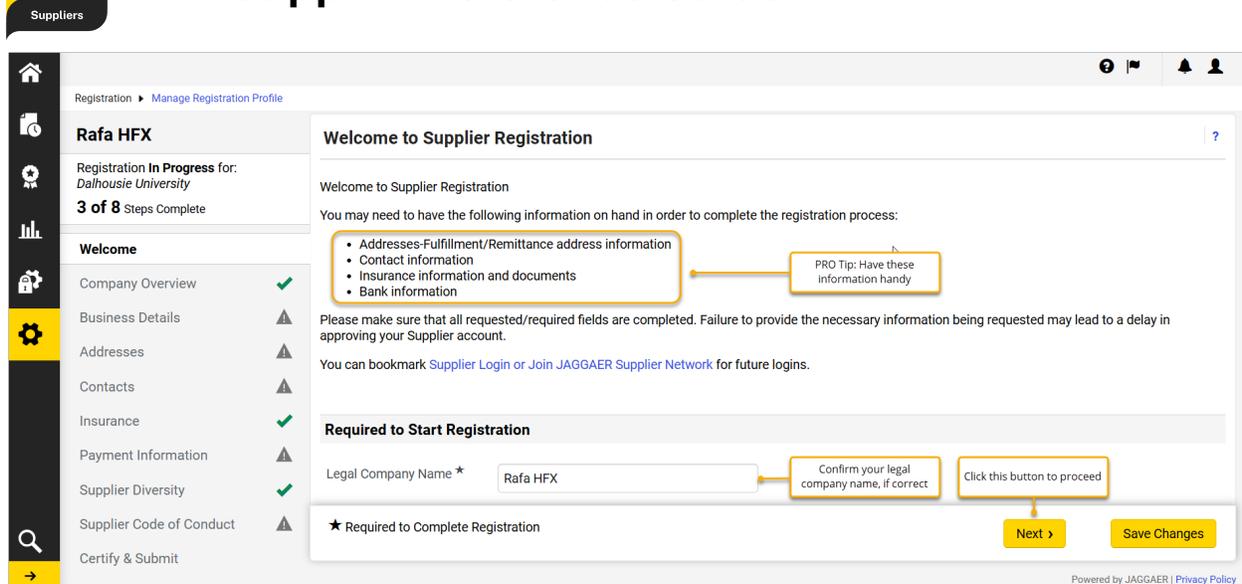


Figure 1.5 Welcome to the Supplier Registration Portal Page

Once done, please follow these eight (8) steps to proceed with your registration:

### Step 1: Company Overview

The **'Company Overview'** section helps the DalBuy team maintain accurate and up-to-date information about your company.

The following details are required:

- a. **Doing Business As (DBA):** This refers to an alternate name your company operates under or is commonly known by. It may differ from your legal company name. If your company does not have a DBA name, simply re-enter your legal company name.
- b. **Country of Origin:** Select the country where your business is registered, which will be used for tax purposes.
- c. **Legal Structure:** Choose the legal structure that applies to your company:
  - For individuals, select **'Individual/Sole Proprietor or Single-Member LLC.'**
  - For Canadian companies and businesses, choose **'Other'**
- d. **Tax ID Number:** If your company earns less than **\$30,000 per year** and is not required to collect HST/GST, as outlined in Bill C-62, Section 148, then type **'Tax Exempt'**, otherwise, please enter your company's Tax ID Number. This ensures compliance with tax regulations and helps streamline your transactions with Dalhousie University.
- e. **Upload Proof of Company Documents:** It is required that you upload a copy of a document that includes the name and address of your business. Please click **'Select file'**, then proceed to upload any of the following documents from your computer unto the DalBuy Portal:

# Supplier Reference Guide

- Documents of Incorporation
- Current Registry of Joint Stock
- Utility Invoice
- CRA Remittance Advice documentation

**PRO Tip:** Always save your progress by clicking **'Save Changes'**.

Please take a moment to review and confirm that all information is accurate. Once you're ready, click **'Next'** to proceed.

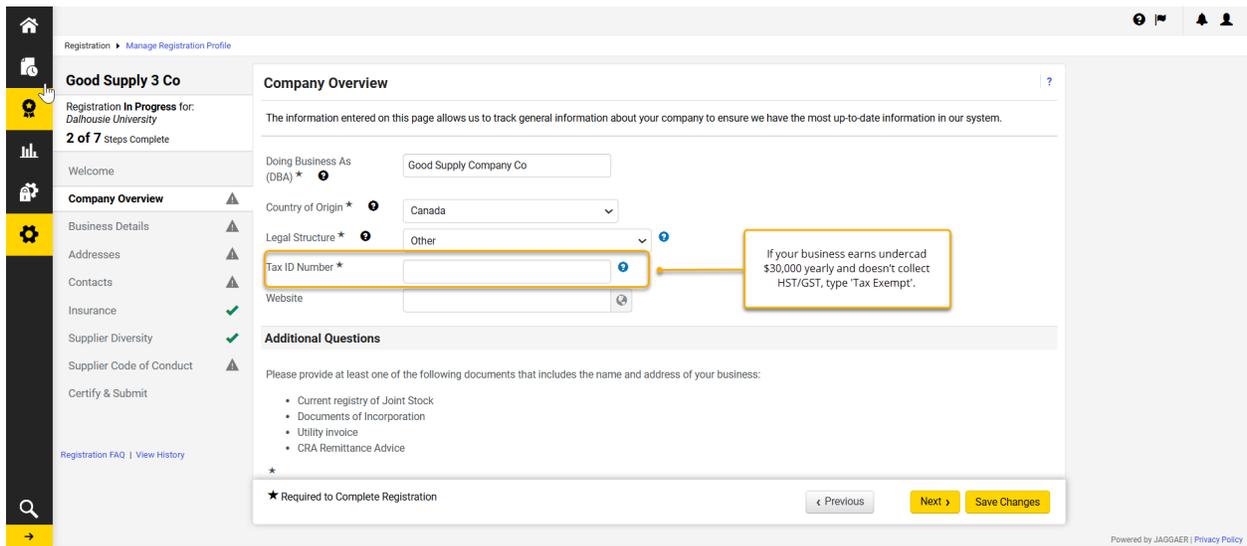
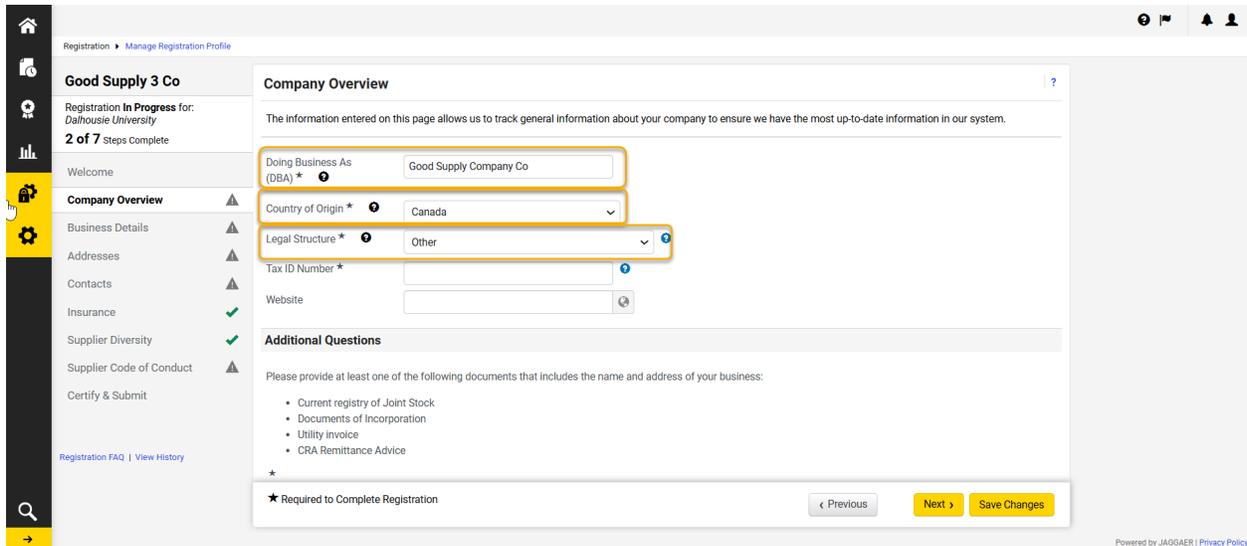


Figure 1.6 Company Overview Page

## Step 2: Business Details

In this section, you'll need to add one or more UN commodity codes for your company's products and services. At least one code is required to proceed.

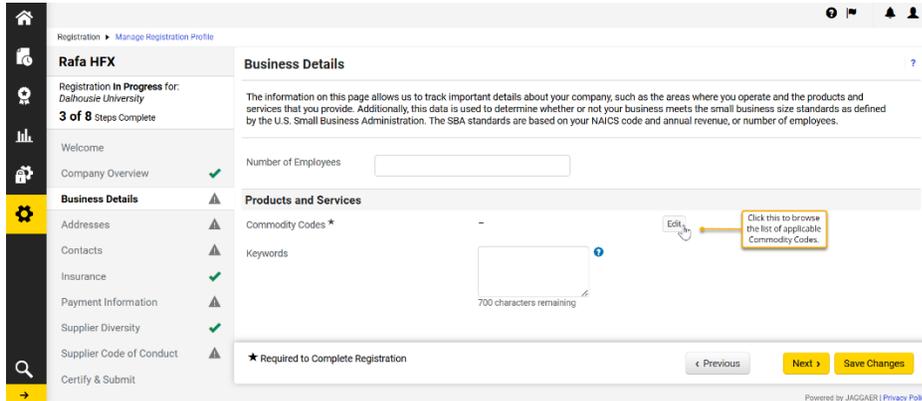


Figure 1.7 Business Details: Browsing UN Commodity Codes

Providing detailed information about your products and services is highly encouraged, as it increases your business's visibility and helps the DalBuy team maintain accurate, vetted records. This ensures a safe and trustworthy environment for you, your customers, and other suppliers.

### How to Select Commodity Codes

- Access the Search Box:** In the Commodity Codes window, locate the search box at the top of the page.
- Enter a Keyword:** Type a relevant keyword in the search box that describes your product or service (e.g., "office").
- Click 'Search':** After typing your keyword, click the yellow 'Search' button.
- Review the Search Results:** A list of applicable commodity codes will appear below the search box, displaying the Commodity Code and its corresponding Description.
- Select a Code:** Click on the appropriate commodity code(s) that best match your products or services. Selected codes will be highlighted (e.g., "Office Equipment and Accessories and Supplies").

**PRO Tip:** You can select multiple codes if needed.

- Sort the List (Optional):** Use the 'Sort by' dropdown to organize results by either Commodity Code or Description for easier navigation.

**UN commodity codes, or United Nations Standard Products and Services Code® (UNSPSC®)**

categorizes your products and services in a clear, standardized way.

**Did you know that** there are about 1,580 different commodity codes to select from in DalBuy.

- g. **Finalize Your Selection:** Once you've selected the applicable codes, click the 'Done' button at the bottom-right corner.

PRO Tip: If you need to exit without making any changes, click 'Close' instead.

## Commodity Codes



Use Search or browse the list to select applicable Commodity Codes. You can select multiple before clicking Done.

office

Type a relevant keyword in the search box that describes your product or service and click 'Search'

### 1 Selected Codes

Showing 1 - 4 of 4 results

Results Per Page: 20 Sort by: Commodity Code Page 1 of 1

Commodity Code	Description
43231513	Office suite software
44000000	Office Equipment and Accessories and Supplies
44110000	Office and desk accessories
44120000	Office supply

Click on the appropriate commodity code(s) that best match your products or services. Selected codes will be highlighted (e.g., "Office Equipment and Accessories and Supplies"). You can select multiple codes if needed.

Figure 1.8 Business Details: Selecting UN Commodity Codes

Once you've selected the appropriate Commodity Codes, you'll go back to the **Business Details** section.

The screenshot shows the 'Business Details' section for 'Rafa HFX'. The 'Products and Services' section is active, displaying a list of selected commodity codes: 44000000 (Office Equipment and Accessories and Supplies), 44110000 (Office and desk accessories), 44120000 (Office supply), and 60120000 (Arts and crafts equipment and accessories and supplies). A text box explains that users can see the selected codes and that multiple codes can be selected. Below the codes is a 'Keywords' field with the text 'Office, equipment, supplies, accessories, desk, arts, crafts' and a note to type relevant terms that describe the company's products or services. The interface also includes a 'Number of Employees' field and a 'Certify & Submit' button at the bottom of the sidebar.

Figure 1.9 Business Details: Commodity Codes and Keywords

**a. Verify or Add Commodity Codes:**

- i. Review the Commodity Codes listed under the Products and Services section. These should reflect the codes you previously selected.
- ii. To make changes, click the 'Edit' button next to the codes. This will allow you to search for and add additional codes or remove any that are not applicable.

**b. Add Keywords:**

- i. In the **Keywords** box, enter relevant terms that describe your company's products or services.

PRO Tip: Use descriptive and broad terms (e.g., "Office," "Equipment," "Supplies," "Accessories," "Arts," "Crafts") to help increase your company's visibility in the DalBuy system.

- c. **Enter Number of Employees (optional):** Enter the total **Number of Employees** for your business in the designated field. This information may help the DalBuy team assess your company's capacity and align with procurement strategies.

**d. Save or Proceed:**

- i. To save your progress, click '**Save Changes**' at the bottom of the page.
- ii. Once all fields are complete and accurate, click '**Next**' to proceed to the next step of the registration process.

**Commodity codes**

help connect your business with the right buyers by categorizing your products using globally recognized UNSPSC standards. They **boost your visibility**, ensure **clear communication**, **build trust**, and **simplify matching** your offerings with buyer needs.

### Step 3: Addresses

You will be asked to provide your address details in this step. This ensures accurate information for order fulfillment and remittance.

Please click the '**Add Address**' button.



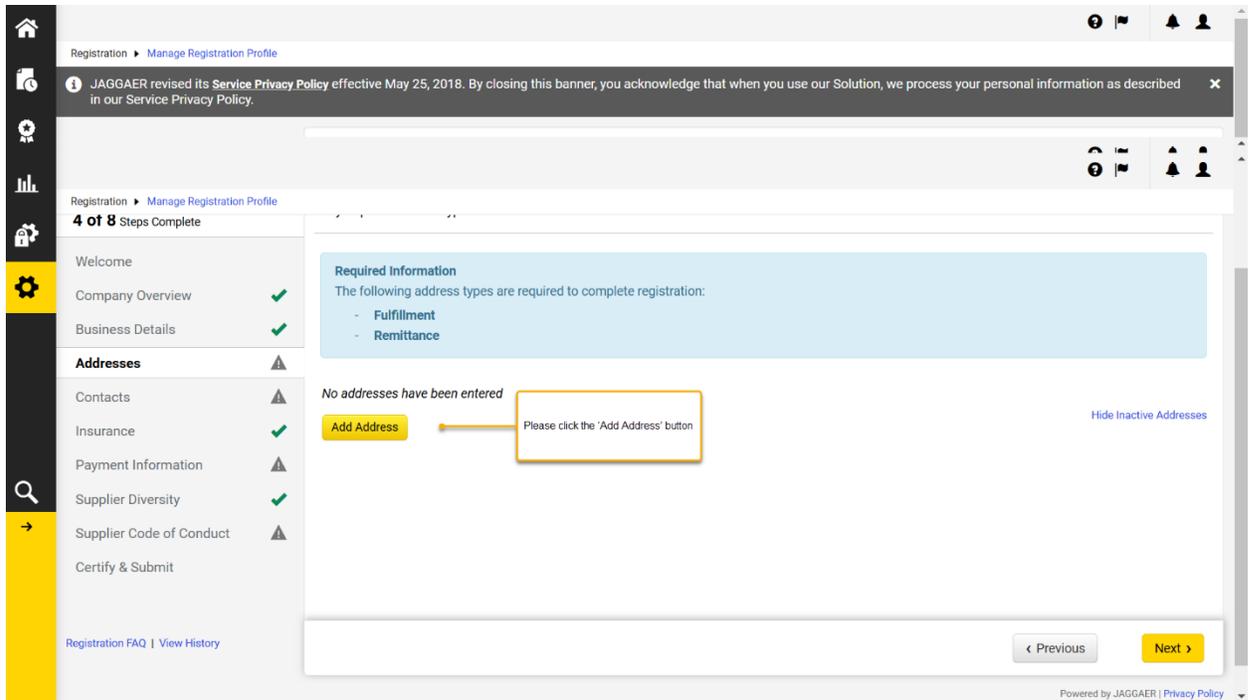


Figure 2.1 Add Address

Once you click the **'Add Address'** button, follow these steps to input your address information:

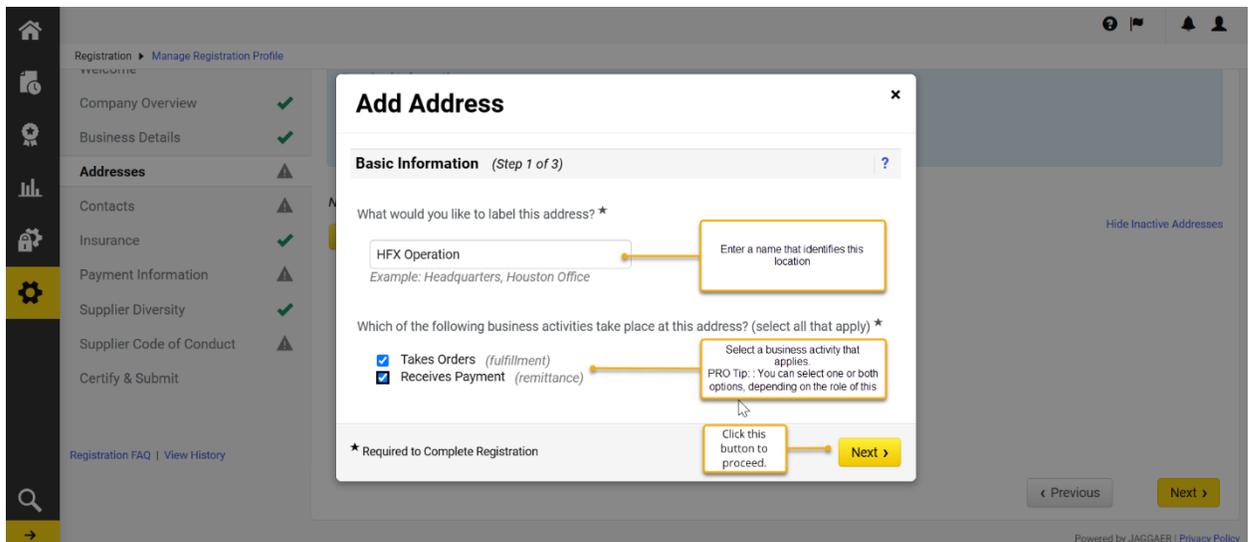


Figure 2.2 Add Address: Basic Information

### 1. Basic Information (Step 1 of 3)

- a. **Label Your Address:** In the **'What would you like to label this address?'** field, enter a name that identifies this location (e.g., "HFX Operation," "Headquarters," or "Houston Office").

PRO Tip: This label helps quickly recognize the purpose of this address in your operations.

- b. **Select Business Activity:** Choose the applicable activities for this address by checking the appropriate boxes:
- 'Takes Orders (Fulfilment)': If this location handles order processing or shipments.
  - 'Receives Payment (Remittance)': If this address is used for financial transactions or billing.

PRO Tip: You can select one or both options, depending on the role of this address.

Click **'Next'** to move to the next step of adding your address as part of the registration process.

It may happen that the **Fulfillment** and **Remittance Addresses** are the same. If that's the case, **simply tick both 'Takes Orders' and 'Receives Payment'** when adding your address, to enter it once.

The screenshot shows the 'Add Address' form with the following fields and instructions:

- How would you like to receive purchase orders for this fulfillment address?** (Dropdown menu: Email) - Callout: "Use the drop down to select 'Email' as the option to receive purchase orders"
- Email Address** (Text input)
- Confirm Email** (Text input)
- Country \*** (Dropdown menu)
- Address Line 1 \*** (Text input)
- Address Line 2** (Text input)
- State/Province** (Text input)
- Postal Code** (Text input)
- Phone \*** (Text input) - Callout: "Make sure to fill in these fields"
- Toll Free Phone** (Text input)
- Fax** (Text input)
- Next >** button - Callout: "Once completed, click 'Next'"

Figure 2.3 Add Address Details

## 2. Address Details (Step 2 of 3)

- a. Please select **'Email'** in the dropdown menu as the option to receive purchase orders.
- b. Make sure to fill in the following fields:

## Supplier Reference Guide

- Email Address
- Confirm Email
- Country
- Address Line 1
- City/Town
- State/Province
- Phone

Once completed, click 'Next'.

### 3. Primary Contact for this Address (Step 3 of 3)

The screenshot shows the 'Add Address' modal window at Step 3 of 3, titled 'Primary Contact For This Address'. The form is divided into several sections:

- Contact Type Selection:** Two radio buttons are present: 'Enter New Contact' (selected) and 'Not Applicable'. A callout box explains: 'Choose Contact Type. PRO Tip: You can also update and add Contacts later from the Contacts page.'
- Contact Roles:** A section titled 'Select additional contact type(s) to apply' contains five checkboxes: 'Takes Orders (fulfillment)' (checked), 'Receives Payment (remittance)' (checked), 'Corporate', 'Sales', and 'PO Failure'. A callout box states: 'Select Contact Roles by ticking the appropriate contact type.'
- Contact Information:** Fields include 'Contact Label \*', 'First Name \*', 'Last Name \*', 'Position Title', 'Email \*', 'Phone \*', 'Toll Free Phone', and 'Fax'. A callout box notes: 'PRO Tip: "Contact Label" identifies the contact's role, such as "Billing Contact." This helps quickly clarify the contact's function at the address.'
- Validation and Submission:** A callout box points to the form fields: 'Complete the required fields for the primary contact.' At the bottom, a yellow 'Save Changes' button is highlighted with a callout: 'Once done, click "Save Changes"'. A legend indicates that fields with an asterisk (\*) are 'Required to Complete Registration'.

Figure 2.4 Add Primary Contact for this Address

- a. **Choose Contact Type:** Select whether to **Enter New Contact** or mark the contact as **Not Applicable** for this address.
- b. **Select Contact Roles:** Tick the appropriate contact types for this address:
  - Takes Orders (Fulfillment)
  - Receives Payment (Remittance)
  - Corporate
  - Sales
  - PO Failure

c. **Fill in Contact Details:** Complete the required fields for the primary contact:

- Contact Label (e.g., “Billing Office Contact”)
- First Name
- Last Name
- Position Title
- Email
- Phone (including international dialing code if applicable)
- Optional fields include **Toll-Free Phone** and **Fax** if available.

**PRO Tip:** You can also update and add Contacts later from the Contacts page.

Once done, click **‘Save Changes’**.

After completing the three steps of adding **Basic Information**, **Address Details**, and **Primary Contact for This Address**, you’ll return to the Addresses page displaying the address information you just entered.

The screenshot shows the 'Addresses' management page for 'Rafa HFX'. The page includes a sidebar with navigation options like 'Welcome', 'Company Overview', 'Business Details', 'Addresses', 'Contacts', 'Insurance', 'Payment Information', and 'Supplier Diversity'. The main content area shows a table of addresses with columns for 'Address Label', 'Address Types', and 'Address'. A callout box points to the 'Add Address' button, stating: 'Click 'Add Address' to add more locations if your organization has multiple addresses'. Another callout points to the 'Edit' button, stating: 'Click the 'Edit' button to update any part of the information.'. A third callout points to the 'Next' button, stating: 'Click this button to proceed.'. The page also features a 'Show Inactive Addresses' link and navigation buttons for 'Previous' and 'Next'.

Figure 2.5 Add Primary Contact for this Address

In this page, you can also,

- **Edit an address:** If you need to make changes, click the **‘Edit’** button. This allows you to update any part of the address and contact information.
- **Add Additional Addresses:** If your organization has more than one address, click the **‘Add Address’** button to repeat the process for additional locations.

Once you’ve reviewed all address details and ensured they’re accurate, click the **‘Next’** button to continue with the registration process.

## Step 4: Contacts

In this section, you will be required to enter information about your contact details.

**PRO Tip:** The contact details and their associated addresses entered in the 'Addresses' section earlier will also appear in this section.

The screenshot shows the 'Manage Registration Profile' page. The sidebar on the left lists various sections: Welcome, Company Overview, Business Details, Addresses, **Contacts**, Insurance, Payment Information, Supplier Diversity, Supplier Code of Conduct, and Certify & Submit. The 'Contacts' section is highlighted in yellow. The main content area features a 'Required Information' box stating that 'Sales' is a required contact type. Below this is a table with one contact: 'Billing Office Contact' (Angela Rasay) with email 'gelacamacho@yahoo.com'. An 'Add Contact' dropdown menu is open, showing options: Corporate, Fulfillment, PO Failure, Remittance, and Sales. Callout boxes provide instructions: 'Click the Edit button to update any part of the information.', 'Click Add Address to add contact persons.', and 'Click this button to proceed.' Navigation buttons for 'Previous' and 'Next' are at the bottom.

Contact Label	Contact Types	Name	Email
Billing Office Contact	Fulfillment (Primary) Remittance (Primary)	Rasay, Angela	gelacamacho@yahoo.com

Figure 2.6 Contacts Page

**PRO Tip:** A 'Sales' contact, if not already added in Step 3 must be added in this section to move on to Step 5.

- Review Required Contact Information:** At the top of the page, under **Required Information**, you'll see the contact types that must be added to complete registration (e.g., Sales).
- Edit Existing Contacts:** To update any part of an existing contact's information, click the '**Edit**' button next to the contact's details.
- Add a New Contact:** Click the '**Add Contact**' button and select the appropriate contact type(s) from the dropdown menu (e.g., Corporate, Fulfillment, Sales).

Figure 2.7 Add a Sales Contact

- i) **Label the Contact:** In the **Contact Label** field, enter a descriptive name for this contact (e.g., "Primary Sales Contact"). This helps identify the contact's role within your organization.
- ii) **Fill out Contact Information:** Complete the required fields marked with an asterisk (\*):
  - First Name
  - Last Name
  - Email
  - Phone

**PRO Tip:** You can add multiple contacts for the same type, such as multiple Sales or Corporate Contacts.

Please check to ensure that all your contact information you provided are accurate. If you are satisfied, click '**Next**'.

Please provide as **much information as possible** about your **company's contacts, including all applicable contact types**. This helps DalBuy Users **quickly identify the right personnel** for valuable information or assistance, ensuring seamless communication and a smooth experience for your customers.

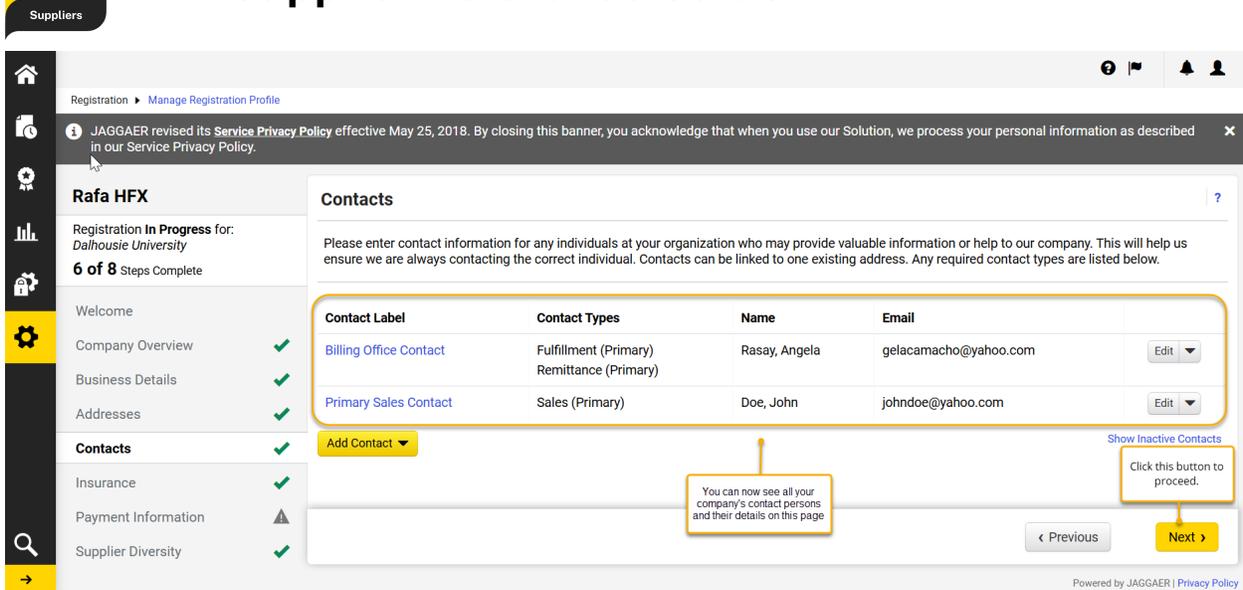


Figure 2.8 Updated Contacts Page

You can now see all your company's contact persons and their details on this page. You can **edit existing contacts**, **add new ones**, or **view inactive contacts**. Once everything is confirmed, click **'Next'** to proceed.

### Step 5: Insurance

This section captures your company's insurance details. We ask suppliers to maintain appropriate insurance coverage to meet our requirements. Adding your insurance details lets DalBuy send reminders before your policies expire.

**PRO Tip:** Adding your insurance policies helps us ensure you have the right level of coverage for future business needs.

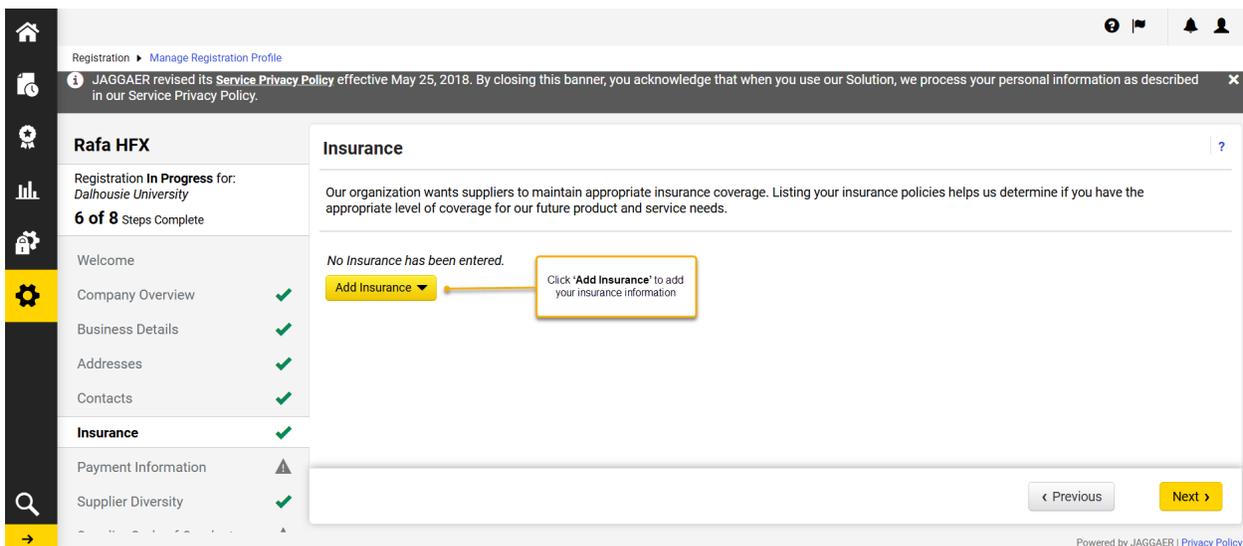


Figure 2.9 Insurance Page

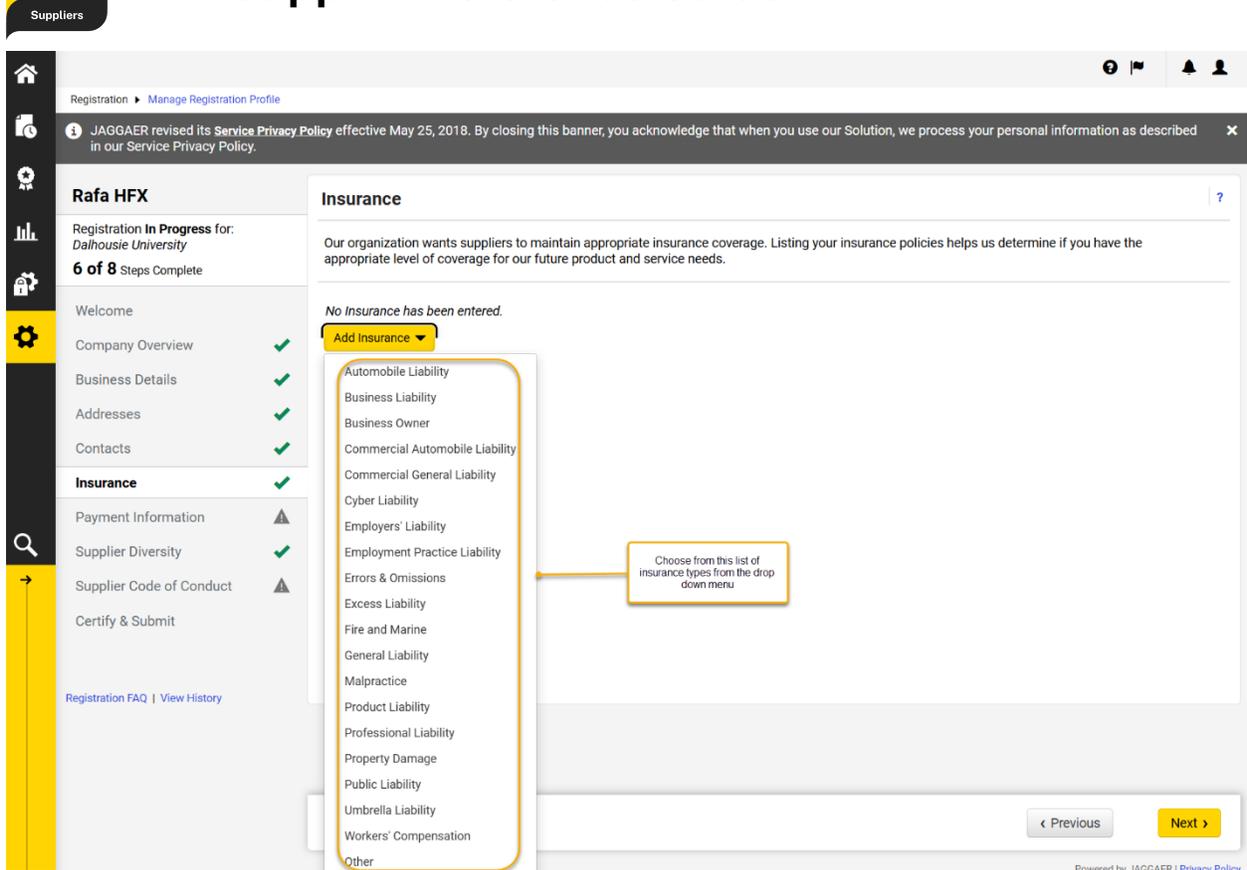


Figure 3.0 Insurance List Dropdown Page

Please select as many applicable options as possible under the 'Add Insurance' dropdown.

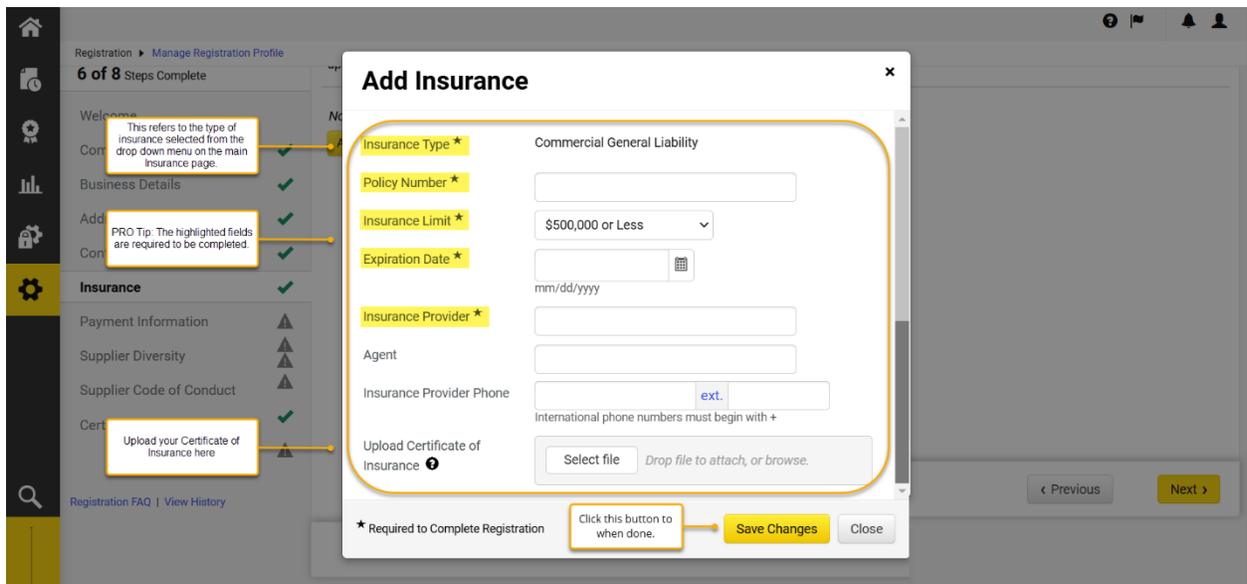


Figure 3.1 Insurance Details Page

When adding your insurance details, please provide the following required information:

- **Insurance Type:** Select the type of insurance you are entering this is the type of insurance you want to input
- **Policy Number:** Enter the policy number for your insurance record.
- **Insurance Limit-** Choose from the available cover range that applies: \$500,000 or less to more than \$2,000,000.
- **Expiration Date:** Provide the expiration date of the policy.
- **Insurance Provider:** Enter the name of your insurance company.
- **Upload Certificate of Insurance -** You can upload a copy of your insurance document here.

Once all the required details are entered, click on **'Save Changes'**.

**PRO Tip:** You can add as many insurance policies as you need.

You will be directed to the Insurance Main page where you can see the insurance details inputted including the insurance type (e.g., Commercial General Liability), the coverage limit, and the policy expiration date.

In this page, you can add additional insurance policies using the **'Add Insurance'** button or edit existing entries by clicking the **'Edit'** button.

Once all required information is reviewed, click **'Next'** to proceed.

Different types of businesses require different types of insurance. Here's a list of the most common types of insurance per business type:

**SAAS:** Commercial General Liability, Cyber Liability, Professional Liability

**Consulting Services:** Automobile Liability, Commercial General Liability, Fire and Marine, Professional Liability, Workers Compensation

**Goods & Manufacturing:** Commercial General Liability, Product Liability

**Construction Services:** Automobile Liability, Commercial General Liability, Cyber Liability, Errors and Omissions, Excess Liability, Professional Liability, Property Damage, Workers Compensation

**Construction Job Specific:** Automobile Liability, Commercial General Liability, Errors and Omissions, Excess Liability, Product Liability, Professional Liability, Workers Compensation, Builders Risk, Wrap Up Liability



Figure 3.2 Updated Insurance Details Page

## Step 6: Payment Information

This section is where you enter your payment information to specify where and how you'll receive payments.

Providing complete and accurate bank details speeds up the onboarding process by avoiding delays from missing or incorrect information. This ensures payments are processed smoothly and allows you to start working with DalBuy Users faster.

**PRO Tip:** Dalhousie's standard payment terms as **net 45** unless stated otherwise in a contract

- Click on the **'Add Payment Information'** dropdown
- Select EFT.

**PRO Tip:** Dalhousie University's preferred mode of receiving payment is via Electronic Funds Transfer (EFT) because it is a faster, safer and more efficient way to get paid.

**Choosing Electronic Fund Transfer (EFT) comes with a lot of practical benefits:**

**Faster Payments:** Your money goes directly into your account, so you don't have to wait for cheques to clear.

**Convenience:** No need to visit the bank—EFT deposits are automatic and hassle-free.

**Reduced Risk:** EFT eliminates worries about lost or stolen cheques.

**Lower Costs:** You save on cheque-handling fees and reduce the admin work tied to processing paper cheques.

**Easier Tracking:** EFT provides clear payment records, making reconciliation quick and straightforward.

**Eco-Friendly:** It's a paperless, sustainable option that helps reduce your environmental footprint.



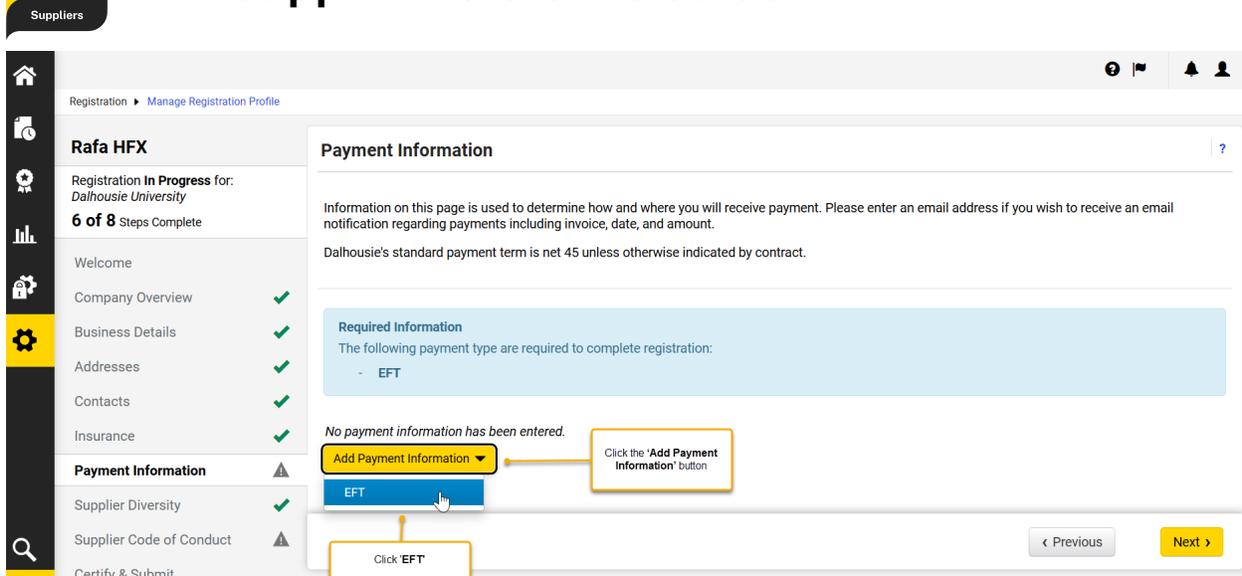


Figure 3.2 Payment Information Page

After clicking the 'EFT' option, you are directed to a page containing two key sections: **Payment Information** and **Bank Account Details**.

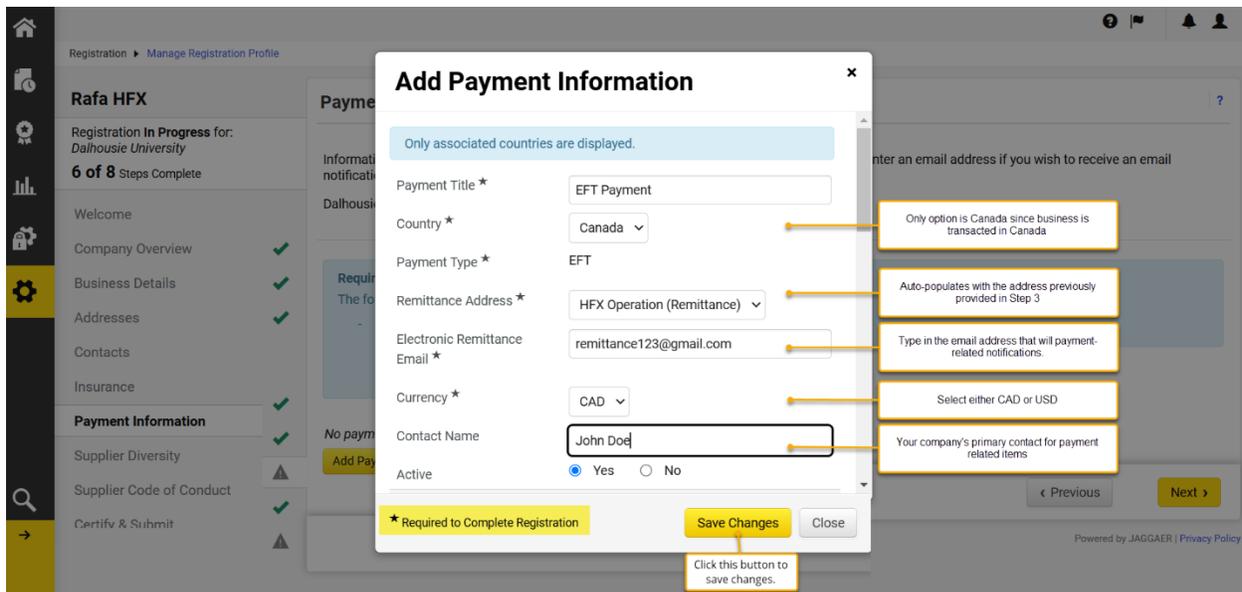


Figure 3.3 Add Payment Information Page

For **Payment Information**, input the required details for setting up your payment information, including:

- **Payment Title:** A label for the payment method.

**PRO Tip:** Choose a clear and relevant title that accurately describes the payment information you're adding. This helps users on DalBuy easily identify and understand your payment details.

# Supplier Reference Guide

- **Country:** The country associated with the payment.
- **Remittance Address:** The address where payments will be sent.
- **Electronic Remittance Email:** An email address for receiving payment notifications.
- **Currency:** The currency for transactions.
- **Contact Name:** The primary contact for this payment method.
- **Active:** Select 'Yes' as current payment information.

The screenshot shows the 'Add Payment Information' form for 'Rafa HFX'. The form is titled 'Bank Account' and includes the following fields:

- Country \***: Canada (dropdown)
- Bank Name \***: CIBC
- Account Holder's Name \***: John Doe
- Account Type \***: Checking (dropdown)
- Account Number Type \***: Account Number (dropdown)
- SWIFT/BIC**: (empty)
- International Routing Code (IRC)**: (empty)
- Routing/Transit Number \***: (empty)
- Account Number \***: (empty)
- Confirm Account Number \***: (empty)

Annotations on the right side of the form provide additional instructions:

- Choose from the dropdown country where your bank is located
- Indicate whether the account is 'Savings' or 'Checking'
- For countries outside of Canada, indicate the Swift Code / BIC
- For countries outside of Canada, indicate the International Routing Code

Buttons for '< Previous' and 'Next >' are visible at the bottom right. The page is powered by JAGGAER | Privacy Policy.

The screenshot shows the 'Add Payment Information' form for 'Good Supply 3 Co'. The form is titled 'Payment Information' and includes the following fields:

- Account Holder's Name \***: (empty)
- Account Type \***: (dropdown)
- Account Number Type \***: (dropdown)
- SWIFT/BIC**: (empty)
- International Routing Code (IRC)**: (empty)
- Address Line 1 \***: (empty)
- Address Line 2**: (empty)
- Address Line 3**: (empty)
- City/Town \***: (empty)
- State/Province/Region \***: (empty)
- Postal Code**: (empty)

Buttons for 'Save Changes' and 'Close' are visible at the bottom right. The page is powered by JAGGAER | Privacy Policy.

Figure 3.4 Bank Account Information Page

For **Bank Account Information**, input the required details for setting up your bank account information, including:

## Supplier Reference Guide

- **Country:** Select the country where your bank account is registered from the dropdown menu.
- **Bank Name:** Enter the name of your bank (e.g., CIBC).
- **Account Holder's Name:** Provide the name of the person or business associated with the bank account.
- **Account Type:** Choose the type of account (e.g., Checking or Savings) from the dropdown menu.
- **Account Number Type:** Please select an account number type from the available options such as IBAN or just a regular account number
- **Routing/Transit Number:** Enter your bank account's routing or transit number.

### PRO Tip:

- Sample format for a routing/transit number for Canadian bank accounts: 0YYYYXXXX
- The Canadian routing/transit number must begin with a 0, making it 9 characters in total
- YYY: This is the three-digit Bank Institution Number
- XXXXX: This is the five-digit Branch Number

- **Account Number:** Provide your bank account number.
- **Confirm Account Number:** Re-enter your bank account number to ensure it's correct.
- **Address Line 1:** Enter the street address details for your local bank branch.
- **City/Town:** Enter the city or town where your local bank branch is situated.
- **State/Province/Region:** Finally, enter the province, state, or region where your local bank branch is situated.

Please check to ensure that all payment information you provided are accurate.

If you are satisfied, click '**Next**'.



Registration > Manage Registration Profile

**Rafa HFX**

Registration In Progress for: Dalhousie University  
7 of 8 Steps Complete

Welcome

Company Overview ✓

Business Details ✓

Addresses ✓

Contacts ✓

Insurance ✓

**Payment Information** ✓

Supplier Diversity ✓

Supplier Code of Conduct ⚠

Certify & Submit

### Payment Information

Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.

Dalhousie's standard payment term is net 45 unless otherwise indicated by contract.

Title	Payment Type	Currency	Active
EFT Payment	EFT	CAD	Yes

Add Payment Information

You can now see your EFT Payment details here.

Click this button to proceed.

← Previous   Next →

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Figure 3.5 Updated Payment Information Page

## Step 7: Supplier Diversity

This section is dedicated to recognizing and supporting businesses that contribute to a diverse and inclusive community. By identifying as a **Diverse Supplier**, your company helps Dalhousie University further its commitment to fostering equity and inclusion while opening doors to potential opportunities and collaborations.

Registration > Manage Registration Profile

JAGGAER revised its Service Privacy Policy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.

**Rafa HFX**

Registration In Progress for: Dalhousie University  
7 of 8 Steps Complete

Welcome

Company Overview ✓

Business Details ✓

Addresses ✓

Contacts ✓

Insurance ✓

Payment Information ✓

**Supplier Diversity** ✓

### Supplier Diversity

Diversity Statement: Inclusiveness and diversity are inherent in Dalhousie University's strategic plan. To support diverse businesses within our community, we kindly requests that you disclose if your company is owned and operated by marginalized or underrepresented groups. This will allow us to highlight your business and enable further opportunities within the organization.

To select your Diversity Category, please click on Edit below.

Diversity

Edit

Click 'Edit'

★ Required to Complete Registration

← Previous   Next →   Save Changes

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Figure 3.6 Supplier Diversity Page

Please indicate if your business falls under any **Diversity Classifications**. To provide this information, click **'Edit.'**

**PRO Tip:** If your company doesn't identify as a Diverse Supplier, simply proceed to the next step.

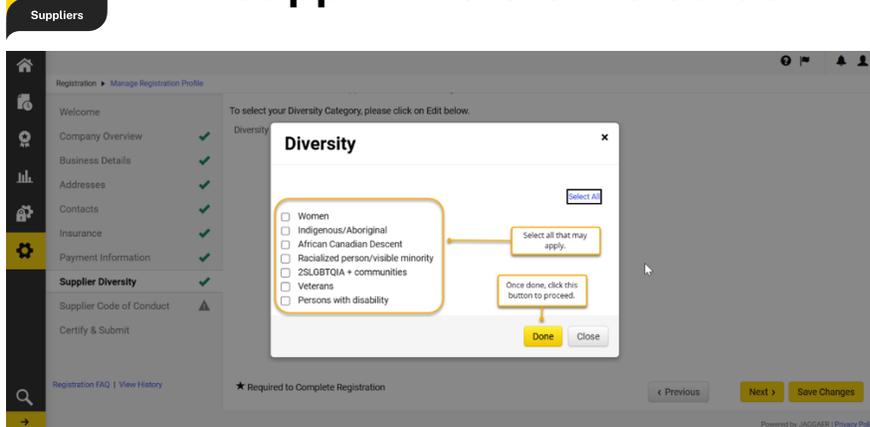


Figure 3.7 Supplier Diversity Options Page

Click 'Edit' to reveal a dropdown menu of Diversity Classifications. Select all options that apply to your business from the following:

- Women
- Indigenous/Aboriginal
- African Canadian Descent
- Racialized person/visible minority
- 2SLGBTQIA + communities
- Veterans
- Persons with disability

After selecting your business's Diversity Classifications, should you choose to do so, you may optionally upload the relevant Diversity Certificates for verification.

**PRO Tip:** Please merge all the Diversity Certificates into a single file before uploading.

At Dalhousie University, **inclusiveness and diversity** are at the heart of our strategic plan. We prioritize supporting diverse businesses within our community. To help us better achieve this, we encourage you to **disclose** if your company is **owned and operated by marginalized or underrepresented groups**. Qualifying as a Diverse Supplier helps us showcase your business and expand opportunities within our network.

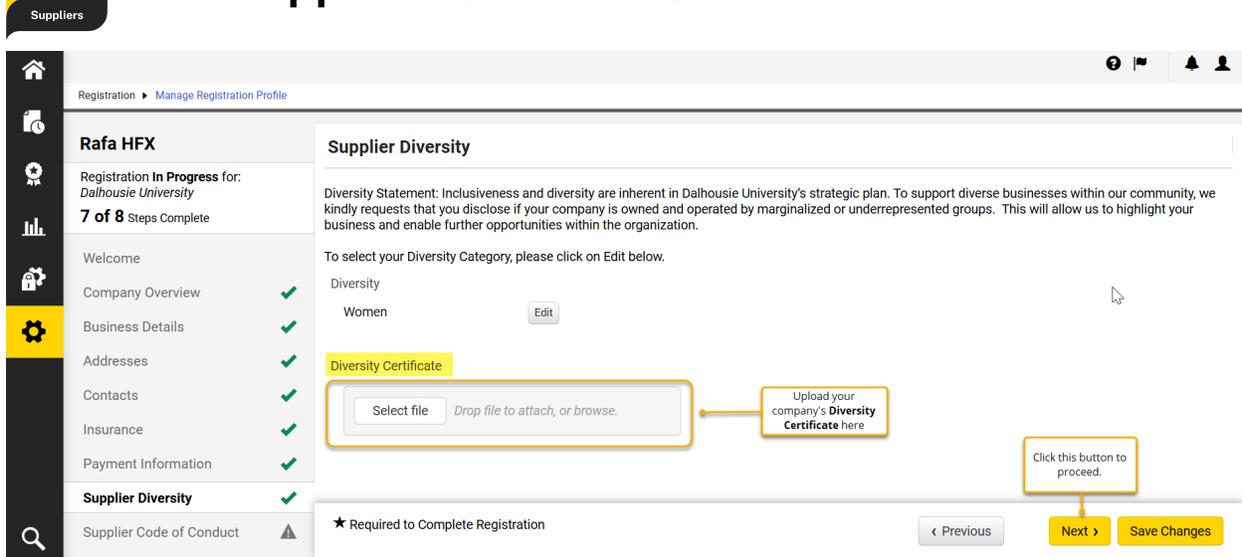


Figure 3.8 Uploading Supplier Diversity Certificate Page

Once completed, click **'Next'** to proceed.

## Step 8: Supplier Code of Conduct

This is the final step to complete your DalBuy Supplier registration.

**PRO Tip:** Carefully review the DalBuy Supplier Code of Conduct before proceeding.

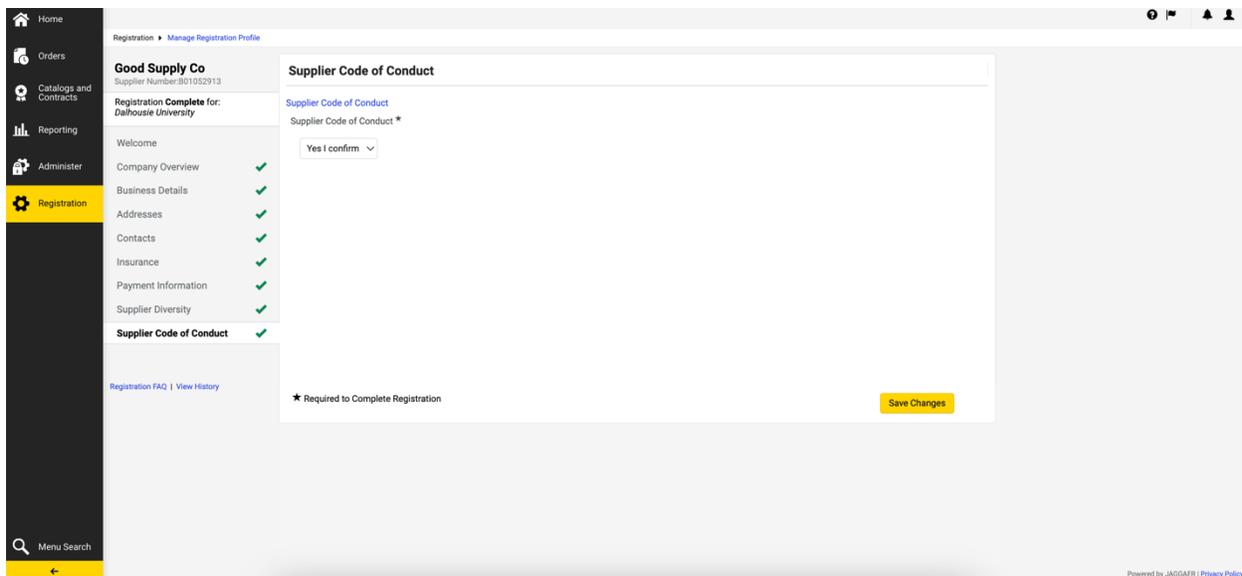


Figure 3.9 Supplier Code of Conduct Page

After reviewing the DalBuy Supplier Code of Conduct, select **'Yes I confirm'** from the dropdown to proceed.

- a. After selecting **'Yes, I confirm,'** a confirmation date field will appear. Enter the current date to proceed.

**PRO Tip:** Please note that agreeing to the DalBuy Supplier Code of Conduct is required to complete your registration and submit your profile for review and approval.

- b. Once completed, click '**Proceed to Certify and Submit**'.

## Certify & Submit

This is the final step to submit your DalBuy Supplier account for review and approval. Ensure all required fields are completed to successfully proceed with your submission.

Figure 3.10 Certify and Submit Page

- a. **Enter Your Initials:** Type your initials in the “Preparer’s Initials” box to confirm you are an authorized company representative.
- b. **Fill Out Your Details:** Provide the following information in the respective fields:
  - o **Name:** Enter your full name.
  - o **Title:** Specify your job title.
  - o **Email Address:** Enter your company’s official email address.
- c. **Add Today’s Date:** Ensure the current date is entered under “Today’s Date.”
- d. **Certify the Information:** Check the box next to “I certify that all information provided is true and accurate.” This confirms that all details submitted are correct.

- e. **Submit Your Registration:** Once all fields are complete, click the **Submit** button to finalize your registration.

## Registration Complete

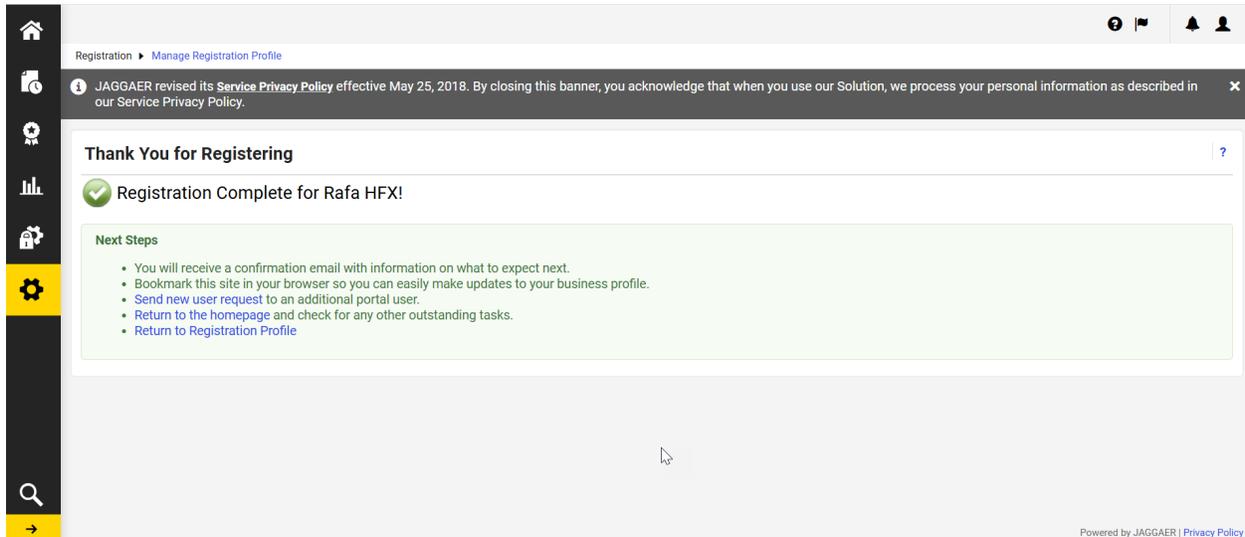


Figure 4.0 Registration Complete

Congratulations! You've successfully completed your registration. Your application is now under review for approval. Thank you for taking the time to complete this process.

We're excited to have you as part of the DalBuy community!