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Registration Complete





Dear Valued Supplier,

DalBuv

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



2





DalBuy

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.

Registration Checklist	Welcome to Supplier Registration	English 💌					
Registration FAQ	Welcome to Supplier Registration	1					
Registration Tutorial	You may need to have the following information on hand in order to complete the registration process:	Select your preferred language: English					
Helpful links are found here to assist you with the registration process.	 Addresses-Fulfillment/Remittance address information Contact information Insurance information and documents Bank information 						
	Please make sure that all requested/required fields are completed. Failure to provide the necessary information being requested may lead to a delay in approving your Supplier account.						
	You can bookmark <u>Supplier Login or Join JAGGAER Supplier Network</u> for future logins.						
	Continue With Registration						

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

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'

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



Note: Fields marked with \bigstar are mandatory.

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.

Supplier	Registration	Registration Tutorial	English
To begin you Account". You information.	registration, please cor I will be directed to Sup	nplete this page and click plier Management Portal	c "Create to enter your
Your Contact Ir	fo		
First Name ★	Last Name 🕯	k.	
Title			
	ext.		
Phone Number	ł.		

Figure 1.3 Contact Information in the Supplier Registration Page





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.





- 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 reenter 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.



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_	Registration Manage Registration	Yrofile
ĺ¢	Rafa HFX	Welcome to Supplier Registration ?
Q	Registration In Progress for: Dalhousie University 3 of 8 Steps Complete	Welcome to Supplier Registration You may need to have the following information on hand in order to complete the registration process:
Щ. ПГ	Welcome Company Overview	Addresses-Fulfillment/Remittance address information Contact information and documents Bank information
<mark>.</mark>	Business Details Addresses Contacts	Please make sure that all requested/required fields are completed. Failure to provide the necessary information being requested may lead to a delay in approving your Supplier account. You can bookmark Supplier Login or Join JAGGAER Supplier Network for future logins.
	Insurance	 Required to Start Registration
	Payment Information Supplier Diversity	Legal Company Name * Rafa HFX Confirm your legal company name, If correct Click this button to proceed
٩	Supplier Code of Conduct	Required to Complete Registration Next > Save Changes
→	,	Powered by JAGGAER Privacy Policy

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:





- Documents of Incorporation
- o Current Registry of Joint Stock
- o Utility Invoice
- o 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.

Registration Manage Registration F	Profile		
Good Supply 3 Co	C	Company Overview	?
Registration In Progress for: Dalhousie University 2 of 7 Steps Complete	Т	The information entered on th	his page allows us to track general information about your company to ensure we have the most up-to-date information in our system.
Welcome		Doing Business As (DBA) * 😧	Good Supply Company Co
Company Overview	A	Country of Origin * 🛛 🕄	Canada
Addresses Contacts Insurance Supplier Diversity Supplier Code of Conduct Certify & Submit		Additional Questions Additional Questions Please provide at least one of Current registry of Julio Documents of Incorpo Utility invoice CRA Remittance Advic * Documents of Cocontana Data	Other
		 Required to Complete Reg 	(stration)
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Registration Manage Registration F Good Supply 3 Co Registration in Progress for: Dathousie University	Profile	Company Overview	?
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Registration Manage Registration I Good Supply 3 Co Registration in Progress for: Daihouse University 2 of 7 steps Complete Welcome Company Overview	Profile	Company Overview The information entered on th Doing Business As (DBA) * O Country of Origin * O	r r is page allows us to track general information about your company to ensure we have the most up-to-date information in our system. Good Supply Company Co Canada
Registration > Manage Registration / Good Supply 3 Co Registration In Progress for: Dathousie University 2 of 7 steps Complete Welcome Company Overview Business Details Addresses Contacts Insurance	Profile C T C C C C C C C C C C C	Company Overview The information entered on th Doing Business As DBA) * Country of Origin * Legal Structure * Tax ID Number * Website	? It's page allows us to track general information about your company to ensure we have the most up-to-date information in our system. Good Supply Company Co Canada Other If your business earns undercad \$30,000 yearly and doesn't collect HST/GST, type 'Tax Exempt'.
Registration I Manage Registration I Good Supply 3 Co Registration In Progress for: Daihousie University 2 of 7 Steps Complete Welcome Company Overview Business Details Addresses Contacts Insurance Supplier Diversity	Profile	Company Overview The information entered on th Doing Business As DDBA) * Country of Origin * Legal Structure * Website Additional Questions	? It spage allows us to track general information about your company to ensure we have the most up-to-date information in our system. Good Supply Company Co Canada Other If your business earns undercad \$30,000 yearly and doesn't collect HST/GST, type 'Tax Exempt'.
Registration I Manage Registration I Registration I Progress for: Dadinosis University 2 of 7 steps Complete Welcome Company Overview Business Details Addresses Contacts Insurance Supplier Diversity Supplier Code of Conduct Certify & Submit	Profile	Company Overview The information entered on th Ooing Business As DBA) * Country of Origin *	? his page allows us to track general information about your company to ensure we have the most up-to-date information in our system. Cood Supply Company Co Canada Other Image allows us to track general information about your company to ensure we have the most up-to-date information in our system. Image allows us to track general information about your company to ensure we have the most up-to-date information in our system. Image allows us to track general information about your business earns undercad S30,000 yearly and doesn't collect HST/GST, type Tax Exempt'. It block ration e
Registration Manage Registration I Good Supply 3 Co Registration In Progress for: Dathousie University 2 of 7 steps Complete Welcome Company Overview Business Details Addresses Contacts Insurance Supplier Diversity Supplier Diversity Supplier Code of Conduct Certify & Submit Registration FAQ View History	Profile	Company Overview The information entered on th Doing Business As DDBA) * Country of Origin * Country of Origin * Cas ID Number * Additional Questions Please provide at least one of Cas A Remittance Advic * * Required to Complete Reg	? his page allows us to track general information about your company to ensure we have the most up-to-date information in our system. Cond Supply Company Co Canada Other If your business earns undercad \$30,000 yearly and doesn't collect HST/GST, type 'Tax Exempt'.

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.

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_	Registration Manage Registration F	rofile		
ío	Rafa HFX		Business Details ?	
õ	Registration In Progress for: Dalhousie University 3 of 8 Steps Complete		The information on this page allows us to track important details about your company, such as the areas where you operate and the products and services that you provide. Additionally, this data is used to determine whether or not your business meets the small business driving its andards are based on your NAICS code and annual reverve, or number of employees.	
հղ	Welcome		Number of Pontouses	
a7	Company Overview	1	Numer of Engloyees	
	Business Details	A	Products and Services	
<u>0</u>	Addresses	▲	Commodity Codes *	
	Contacts	▲	Keywords	
	Insurance	1		
	Payment Information	▲	700 characters remaining	
	Supplier Diversity	1		
	Supplier Code of Conduct	A	★ Required to Complete Registration	1
~ ∢ →	Certify & Submit		Presented by LLCCATR Presented by	

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.

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

- a. Access the Search Box: In the Commodity Codes window, locate the search box at the top of the page.
- b. **Enter a Keyword:** Type a relevant keyword in the search box that describes your product or service (e.g., "office").
- c. **Click 'Search':** After typing your keyword, click the yellow 'Search' button.
- d. **Review the Search Results:** A list of applicable commodity codes will appear below the search box, displaying the Commodity Code and its corresponding Description.
- e. **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.

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



FINANCIAL SERVICES



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.



1 Selected Codes

Showing 1 - 4 of 4 results		
Results Per Page 20 🗸	Sort b	y: Commodity Code 🗸 💽 Page 1 of 1 💽 ?
Commodity Code	Description	
43231513	Office suite soft	ware
44000000	Office Equipment	nt 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.



Figure 1.9 Business Details: Commodity Codes and Keywords



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a. Verify or Add Commodity Codes:

- Review the Commodity Codes listed under the Products and Services section. These should reflect the codes you previously selected.
- 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.

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.

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.

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.





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Ó	 Registration ► Manage Registration JAGGAER revised its <u>Service</u> in our Service Privacy Policy 	Profile <u>Profile</u> <u>Profile <u>Profile</u> <u>Profile <u>Profile</u> <u>Profile <u>Profile</u> <u>Profile</u> <u>Profile <u>Profile </u> <u>Profile</u> <u>Profile <u>Profile </u> <u>Profile</u> <u>Profile <u>Profile </u> <u>Profile <u>Profile </u> <u></u></u></u></u></u></u></u></u>	tion a	is desc	cribed	×
Q 1.1.			ô	~		:
	Registration Manage Registration 4 of 8 Steps Complete	Profile				
₽ ₽	Welcome Company Overview Business Details	Required Information The following address types are required to complete registration: Fulfiliment Remittance				
a	Addresses Contacts Insurance Payment Information	Add Addresses have been entered Add Address Please click the 'Add Address' button Please click the 'Add Address' button	Hide	e Inactiv	e Addres	sses
→	Supplier Code of Conduct Certify & Submit					
	Registration FAQ View History	A Previous Construction	5		Next	<mark>></mark>

Figure 2.1 Add Address

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

*		€ ≈ 4
Registration Manage Registration	ofile	
Company Overview	✓ Add Address ×	
Business Details	×	
Addresses	Basic Information (Step 1 of 3) ?	
Contacts	What would you like to label this address?	Lide Insetive Add
Insurance	HFX Operation Enter a name that identifies this	Hide Inactive Add
Payment Information	Example: Headquarters, Houston Office	
Supplier Diversity	✓ Which of the following business activities take place at this address? (select all that apply) ★	
Supplier Code of Conduct	Select a business activity that	
Certify & Submit	Receives Payment (remittance)	
Registration FAQ View History	* Required to Complete Registration Next >	
		< Previous Nex
		Powered by JAGGAER Pri

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.

⋒								8 ⊨	4
4	Registration Manage Registration	Profile				×			
IQ.	Welcome	Reg	Add Address						
<u>ö</u>	Company Overview	✓ The	Address Details (Step 2	2 of 3)	?	^			
ul.	Business Details	✓ .	How would you like to	Email 🗸	Use the drop down to sele	ect 'Email' as the			
	Addresses	A	receive purchase orders for this fulfillment address?		oplion to receive purc	hase orders			
a t	Contacts	A No add	Email Address					Hide Inactive	e Addresses
ð	Insurance	Add	Confirm Email						
	Payment Information		Country *		~				
	Supplier Diversity	-	Address Line 1 *						
	Certify & Submit		Address Line 2						
			State/Province			· T	Make sure to fill in these fields	5.	
0	Registration FAQ View History	⊻	Postal Code				< Previous	;	Next >
			Phone *		ext.				
7		* **		International phone numbers	must begin with +		Powe	ered by JAGGAE	R Privacy Policy
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		A	Fay	International phone numbers	must begin with +				
				International phone numbers	must begin with +				
					, j	*			
			★ Required to Complete Registra	ation	Previous Next	<mark>></mark>	Once completed, click '	lext'	
						_			

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:





- o Email Address
- o Confirm Email
- \circ Country
- $\circ \quad \text{Address Line 1} \\$
- o City/Town
- \circ State/Province
- o Phone

Once completed, click 'Next'.

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

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_	Registration Manage Registratio	n Profile				
Íð	Company Overview	~	Req The	Add Address		×
Ċ.	Business Details	✓		Primary Contact For TI	his Address (Step 3 of 3)	?
	Addresses	A		You can also update and a	add Contacts later from the Contacts page.	
шь	Contacts		No add	 Enter New Contact 	O Not Applicable	Choose Contact Type. PRO Tip: You can also update and add Contacts later from the Contacts page.
at .	Insurance	~	Add /	Select additional contact	 Takes Orders (fulfillment) 	
\$	Payment Information	A		type(s) to apply	Receives Payment (remittance) Corporate Sales	Select Contact Roles by ticking the appropriate contact type.
\$ 0	PROTip 'Contact Label' identifie role, such as 'Billing Contact' Thi clarify the contact's function at t	s the contact's is helps quickly the address.	}-	Contact Label * First Name * Last Name * Position Title Email * Phone * Toll Free Phone Fax * Required to Complete Registre	Sales PO Failure ext. International phone numbers must begin with + ext. International phone numbers must begin with + International phone numbers must begin with +	Complete the required fields for the primary contact Complete the required fields for the primary contact Powered by JACGAERT Privacy Poll + + + + • • • • • • • • • • • • •

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:
 - o Takes Orders (Fulfillment)
 - o Receives Payment (Remittance)
 - o Corporate
 - o Sales
 - o PO Failure





- c. Fill in Contact Details: Complete the required fields for the primary contact:
 - Contact Label (e.g., "Billing Office Contact")
 - o First Name
 - o Last Name
 - o Position Title
 - o 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.

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	Registration Manage Registration Pr	rofile								
C	JAGGAER revised its <u>Service</u> in our Service Privacy Policy.	ersonal information	as desc	ribed	×					
<u>o</u>	Rafa HFX		Addresses						?	
ш	Registration In Progress for: Dalhousie University 5 of 8 Steps Complete		Please enter any physical or Any required address types	mailing addresses from which your o are listed below.	rgajization does business to help us route information	n and communicatio	n correc	tly.		
a 7	Welcome		Address Label	Address Types	Address	Click the any p	• 'Edit' but art of the in	ton to upo nformation	iate 1.	
\$	Company Overview		HFX Operation	Remittance (Primary)	6283 Alumni Crescent		Edit	-		
	Business Details			Fulfillment (Primary)	Halifax, Nova Scotia, B3H 4R2 Canada					
	Addresses	1		Click 'Add Address' to add		She	Show Inactive Addresses			
	Contacts	A	Add Address	more locations if your organization has multiple addresses			Click th	is huttor	to	
	Insurance	<	_				pr	oceed.		
	Payment Information	▲				C Dravious	-	North		
Q,	Supplier Diversity	1				(Previous		Next >		
→						Powered	by JAGGAE	R Privacy	y Policy	

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.

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	Deviated in a Manual Deviated in a	Des Cla					∀ ~ ↓ ⊥
	Registration Manage Registration	Profile					
	Welcome		Dequired Information		PRO Tip: This box highlights the		
0	Company Overview		The following contacts are	required to complete registration:	need to provide.		
414	Rueineee Deteile		- Sales				Click the 'Edit' button to
սև	Dusiness Detalls	×.					update any part of the information.
	Addresses	× .	Contact Label	Contact Types	Name	Email	
a ?	Contacts		Billing Office Contact	Fulfillment (Primary)	Rasay, Angela	gelacamacho@yahoo.com	Edit 💌
••	Insurance	 Image: A second s		Remittance (Primary)			
	Payment Information	A	Add Contact 👻	Click 'Add Address' to add contact persons.			Show Inactive Contacts
	Supplier Diversity	~	Corporate				
	Supplier Code of Conduct	A	Fulfillment				
	Oratify 8 Orabarit		PO Failure				
	Certify & Submit		Remittance				Click this button to
			Sales				proceed.
	Registration FAQ View History						
ح						< Pre-	Next >

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.

- a. **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).
- b. **Edit Existing Contacts:** To update any part of an existing contact's information, click the **'Edit'** button next to the contact's details.
- c. 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).





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õ	PRO Tip: 'Contact Label' identifies the contact's role. This helps quickly clarify the contact's function at the address.	Contact Label *	Primary Sales Contact	A	
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	Insurance 🗸	First Name *	John		
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q	Registration FAQ View History	* Required to Complete Registrat	on Click this button to proceed. Close Close)	
→					

Figure 2.7 Add a Sales Contact

- 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 (*):
 - o First Name
 - o Last Name
 - Email
 - o 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.



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	Addresses	~	Primary Sales Contact	Sales (Primary)	Doe, John	johndoe@yahoo.com	Edit 💌
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0	Payment Information	A			and their details on this page	< Previous	Next >
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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





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Q	Rafa HFX	Insurance	?
ш	Registration In Progress for: Dalhousie University 6 of 8 Steps Complete	Our organization wants suppliers to maintain appropriate insurance coverage. Listing your insurance policies helps us determine if you have the appropriate level of coverage for our future product and service needs.	
₽, ₩	Welcome Company Overview	No Insurance has been entered.	
	Business Details Addresses Contacts	Business Liability Business Owner Commercial Automobile Liability	
a	Insurance Image: Comparison of the provided matrix of the pro	Commercial General Liability Cyber Liability Employers' Liability	
7	Supplier Diversity	Employment Practice Liability Errors & Omissions Excess Liability Fire and Marine General Liability Malpractice	
	Registration FAQ View History	Product Liability Professional Liability Property Damage Public Liability Umbrella Liability Workers' Compensation	Next >
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Figure 3.0 Insurance List Dropdown Page

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

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õ	Welcome This refers to the type of insurance selected from the drop down menu on the main	Ne Insurance Type * Commercial General Liability	
ш	Business Details	Policy Number *	
a)	Add PRO Tip: The highlighted fields are required to be completed.	Insurance Limit * \$500,000 or Less ~	
		Expiration Date *	
*	Payment Information	Insurance Provider *	
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0	Cert Upload your Certificate of Insurance here	International phone numbers must begin with + Upload Certificate of Insurance •	Previous Next >
	Registration FAQ View History	* Required to Complete Registration Click this button to when done. Close Close	

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





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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

- a. Click on the 'Add Payment Information' dropdown
- b. 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.



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0 ¹	Rafa HFX		Payment Information	•
Q 111.	Registration In Progress for <i>Dalhousie University</i> 6 of 8 Steps Complete	r:	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.	
ണ്. 	Welcome		Dalhousie's standard payment term is net 45 unless otherwise indicated by contract.	
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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**.:

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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.





- **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.

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Figure 3.4 Bank Account Information Page

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





- **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: 0YYYXXXXX
- 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'.



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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.

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S	Rafa HFX		Supplier Diversity
аў Ш	Registration In Progress for: Dalhousie University 7 of 8 Steps Complete		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.
•	Welcome		To select your Diversity Category, please click on Edit below.
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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.





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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.



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<u> </u>	Company Overview	×	Diversity	\searrow
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	Insurance	*	Certificate here	
	Payment Information	*		Click this button to proceed.
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٩	Supplier Code of Cond	uct 🔺	★ Required to Complete Registration	ious Next > Save Changes

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.

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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.

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O	Rafa HFX	Certify & Submit	?					
Ш	Registration In Progress for: Dalhousie University 8 of 8 Steps Complete	Please type your initials in the box below acknowledging that you are a company official and that all information is correct. It is the Supplier's responsibility to ensure company information is accurate and that company information is kept current. Inaccurate company information may result in payment delays.						
₽ ₽	Welcome	Additionally, by submitting this registration, you certify all information provided is true and accurate. Knowingly providing false in disqualifying you or your company from doing business with us.	nformation may result in					
•••	Business Details	Preparer's Initials * R C Type in your initials.						
	Addresses 🗸	Preparer's Name * Rafa Camacho Enter your full name.						
	Contacts 🗸	Preparer's Title						
	Insurance 🗸	Preparer's Email Address * rafaelaangelarcamacho+1@gmail.com Enter your company's email address.						
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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:
 - **Name**: Enter your full name.
 - Title: Specify your job title.
 - **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

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íc	Registration > Manage Registration Profile 3 JAGGAER revised its <u>Service Privacy Policy</u> 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.	×
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<mark>.</mark>	 You will receive a confirmation email with information on what to expect next. Bookmark this site in your browser so you can easily make updates to your business profile. Send new user request to an additional portal user. Return to the homepage and check for any other outstanding tasks. Return to Registration Profile 	
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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!

