

Vendors User Manual

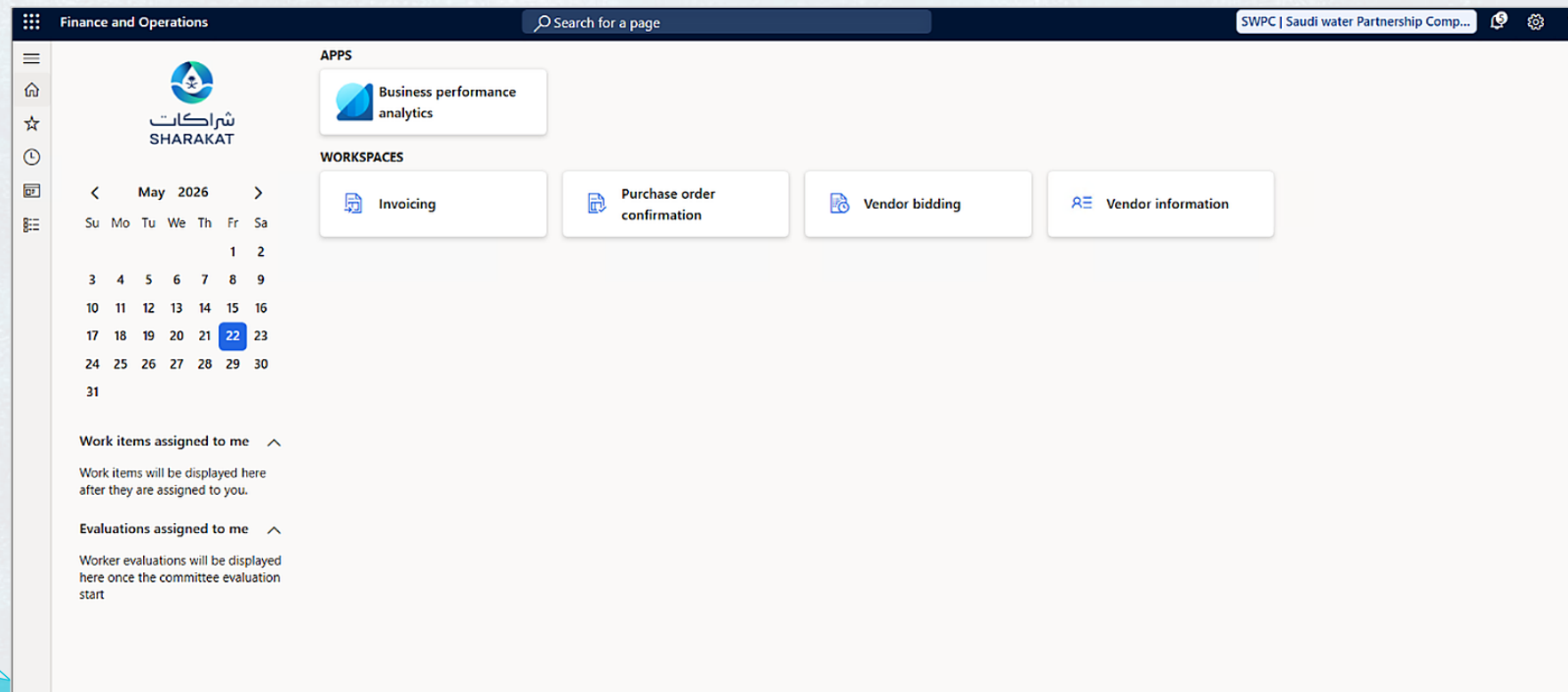
Vendor Portal – Invoicing &
Account Statement | Microsoft
Dynamics 365



Invoicing from Vendor Portal

Sign in as a vendor user

- Now you sign in as a vendor user.
- In the vendor portal home page, the vendor can find the first cube named invoicing.
- Click on Invoicing workspace.



Create a New Invoice

Invoicing workspace

- Click New. (To upload a new invoice in the portal)
- In the Purchase order field, enter or select a value. (The Purchase order, which is delivered, and you want to make an invoice for it)

The screenshot displays the 'Invoicing' workspace interface. At the top, there is a navigation bar with a back arrow, a '+ New' button (highlighted with a red box), and an 'Options' link. Below this, the main heading 'Invoicing' is followed by a dropdown menu showing 'VEN-000001'. The 'Summary' section features four blue boxes representing different invoice statuses: 0 Draft, 0 Submitted, not approved, 3 Approved, not paid, and 166 Paid. The 'Vendor invoices' section is visible below, with a 'Draft' tab selected. It includes a search filter and a table with columns for 'Invoice', 'Purchase order', 'Invoice date', and 'Invoice status'. The table is currently empty, and a message at the bottom right states 'We didn't find anything to show'.



Enter the Invoice Details



Create new invoice

- In the Invoice number field, type the invoice number that will be issued and sent to SWPC.
- In the Invoice date field, enter the invoice issuance date.
- In the Invoice description field, type a value.
- Click Create Invoice.

Finance and Operations

Standard view

← + New Account statement Options

Standard view

☆ Invoicing

V-000001

Summary

26	4	25	278
Draft	Waiting for approval	Proceed for payment	Paid

Links

VENDOR INVOICES

[All vendor invoices](#)

Standard view

Create new invoice

Purchase order

Invoice number *

Invoice date

Invoice description

Create invoice Cancel

Select Product Receipts

Vendor invoice

- Then, Click Select Product Receipts.



Vendor invoice | 00099 | Standard view

000995

Lines Header

Vendor Invoice header

000995 | SAR | 5/7/2023

INVOICE IDENTIFICATION

Number: 000995

Invoice description: 000995

Purchase order: PO-000995

Currency: SAR

Has notes and attachments: ☐ No ☐ Yes

Product Receipt:

DATES

Invoice date: 5/7/2023

Due date: 5/7/2023

APPROVAL

Workflow status: Draft

INVOICE ACCOUNT

Invoice account: V-000001

VENDOR

Name:

Address: Riyadh, Olaya alAqarya Plaza, Northern Tower, 2nd floor, office 220, 12244 Riyadh, SAU

Lines

+ Add line Remove Financials Notes and attachments

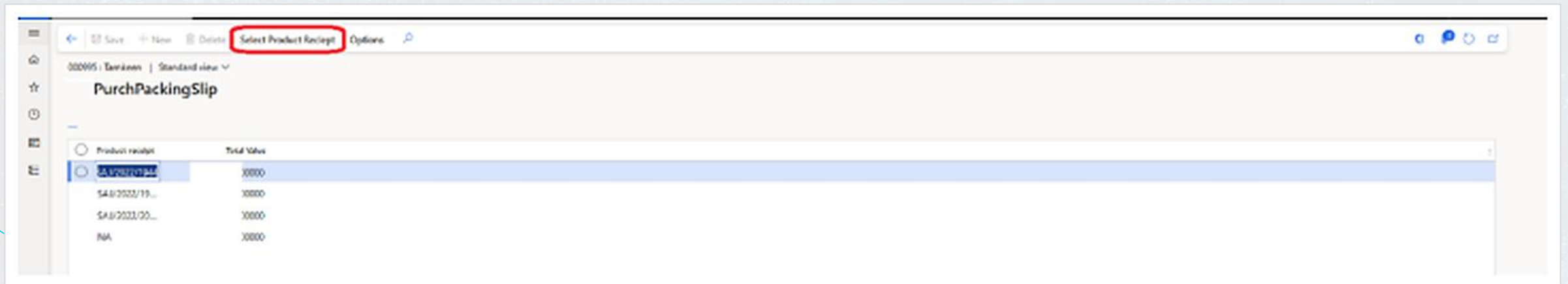
Item name	Quantity	Unit price	Line net amount	Has notes and ...	Test
 We didn't find anything to show here.					



Link the Product Receipt

Select product receipt

- In the list, mark the selected product receipt that will be linked with the invoice.
- On the Action Pane, click Select Product Receipt.
- Click Select.





Attach the Invoice PDF

Notes and attachments

- Click Notes and attachments. (You must upload the invoice PDF attachment to your invoice to be accepted)
- Click New.
- Click File.
- Close the page.
- Then click save.
- Close the page.

the product receipt has been selected

Save + New Delete Workflow Sales tax Charges **Notes and attachments** Select Product Receipts Options

Page options Edit
Go to Read mode Revert

Vendor invoice | 000995 : Tamkeen | Standard view

000995

Lines Header

Vendor invoice header

000995 | SAR | 5/7/2023

INVOICE IDENTIFICATION

Number: 000995
Invoice description: 000995

Purchase order: PO-000995
Currency: SAR

Has notes and attachments: ☒ No
Product Receipt: SAJ/2022/1944

DATES

Invoice date: 5/7/2023
Due date: 5/7/2023

APPROVAL

Workflow status: Draft

INVOICE ACCOUNT

Invoice account: V-000001

VENDOR

Name: Tamkeen

Address

Tamkeen
Riyadh, Olaya alAqarya Plaza,
Northern Tower, 2nd floor, office
220
12244 Riyadh
SAU

Lines

+ Add line Remove Financials Notes and attachments

	Item name	Quantity	Unit price	Line net amount	Has notes and ...	Text
1	IT Services	3.000000	00000	0000	☐	IT Services
2	IT Services	3.000000	00000	0000		IT Services
3	IT Services	3.000000	00000	0000		IT Services

Account Statement Report



Self-service reconciliation

- The vendor can open his account statement to decrease the headache of reconciliation, allowing the vendor to check his statement himself by clicking on “Account Statement.”

The screenshot displays the 'Account statement' interface. At the top, there are navigation tabs: '< + New', 'Account statement' (selected), and 'Options'. Below the tabs, the page is titled 'Invoicing' with a dropdown menu showing 'V-000001'. Under the 'Summary' section, four blue boxes represent different invoice statuses: '26 Draft', '4 Waiting for approval', '25 Proceed for payment', and '278 Paid'. These four boxes are enclosed in a red rectangular border. Below the summary, there is a 'Links' section with the heading 'VENDOR INVOICES' and a link 'All vendor invoices'.

Status	Count
Draft	26
Waiting for approval	4
Proceed for payment	25
Paid	278

