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SHARAKAT

Vendors User Manual

Vendor Portal – Invoicing & Account Statement | Microsoft Dynamics 365

May 2026

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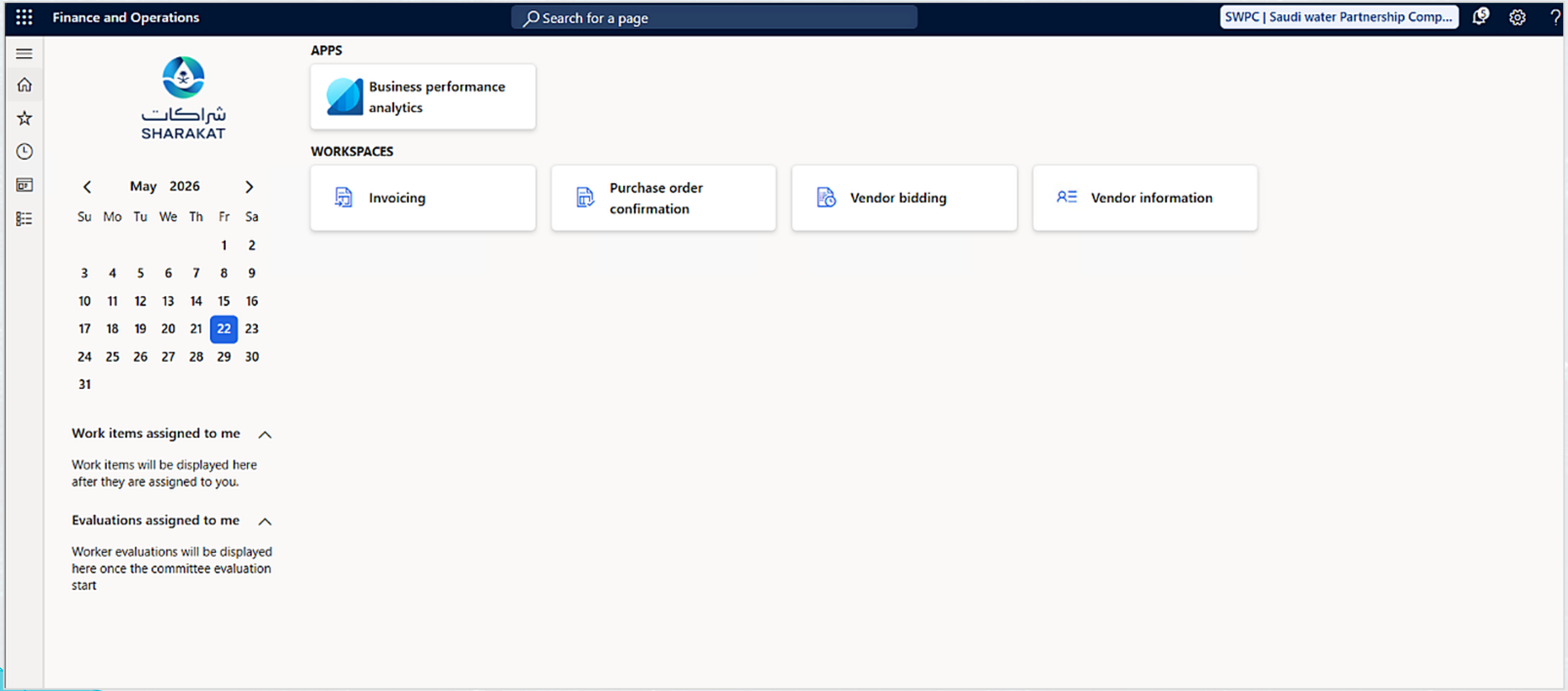
Invoicing from Vendor Portal

Sign in as a vendor user

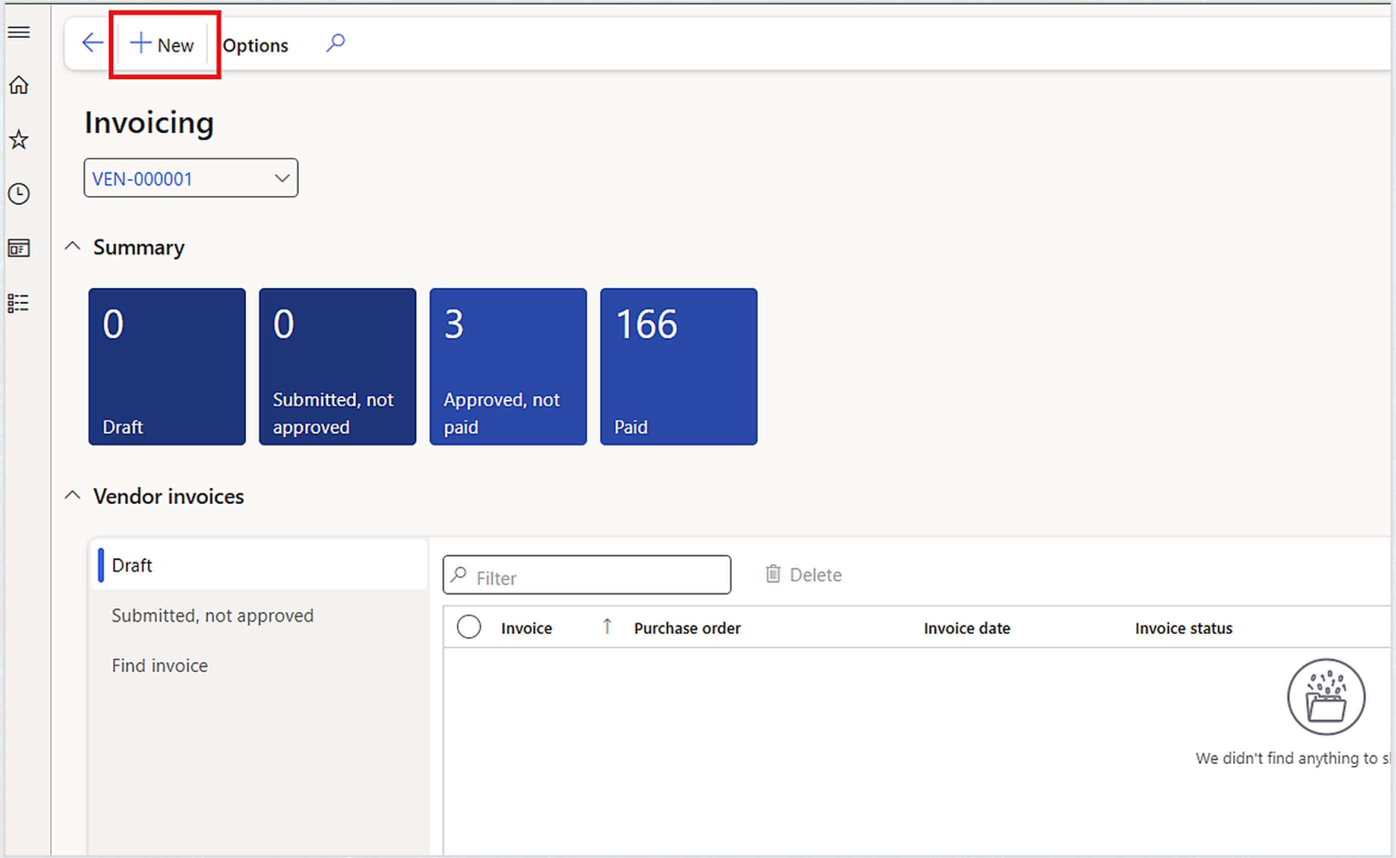
- Now you sign in as a vendor user.
- In the vendor portal home page, the vendor can find the first cube named invoicing.
- Click on Invoicing workspace.



Create a New Invoice

Invoicing workspace

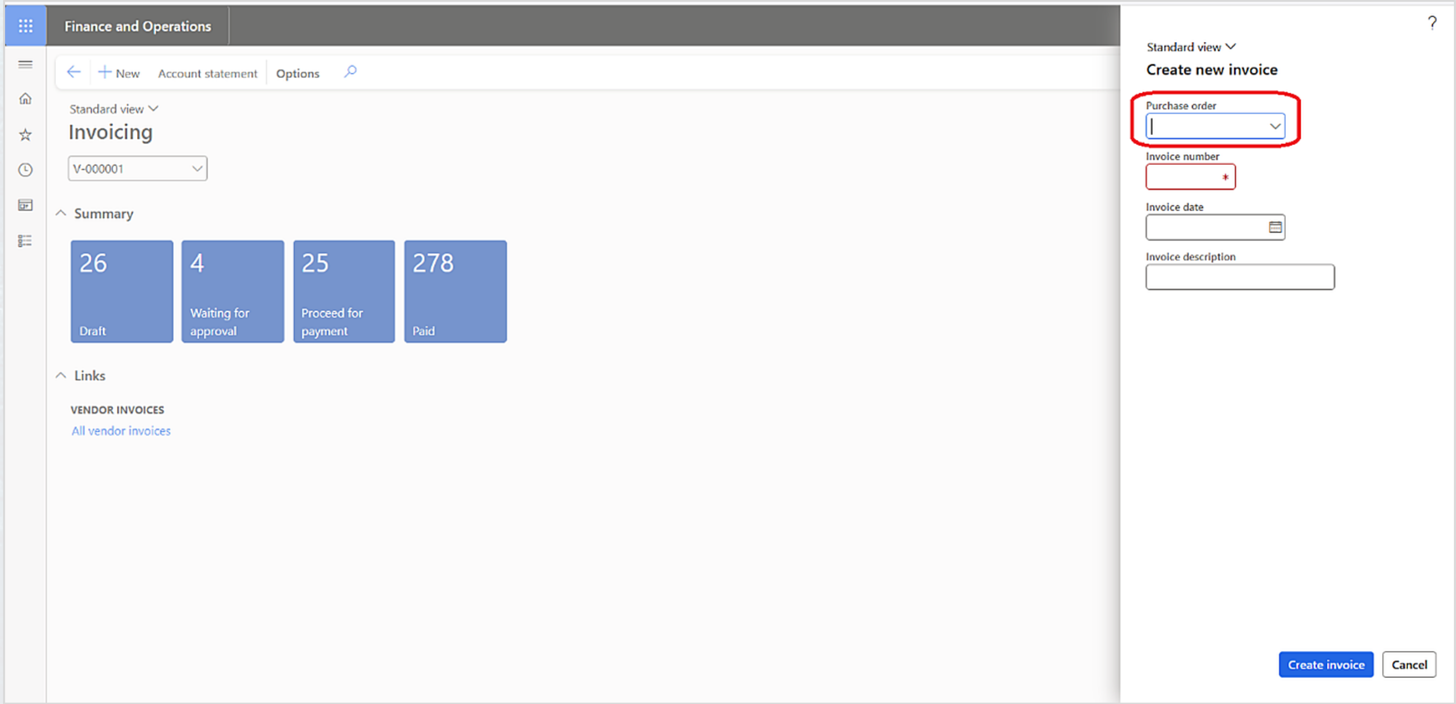
- Click New. (To upload a new invoice in the portal)
- In the Purchase order field, enter or select a value. (The Purchase order, which is delivered, and you want to make an invoice for it)



Enter the Invoice Details

Create new invoice

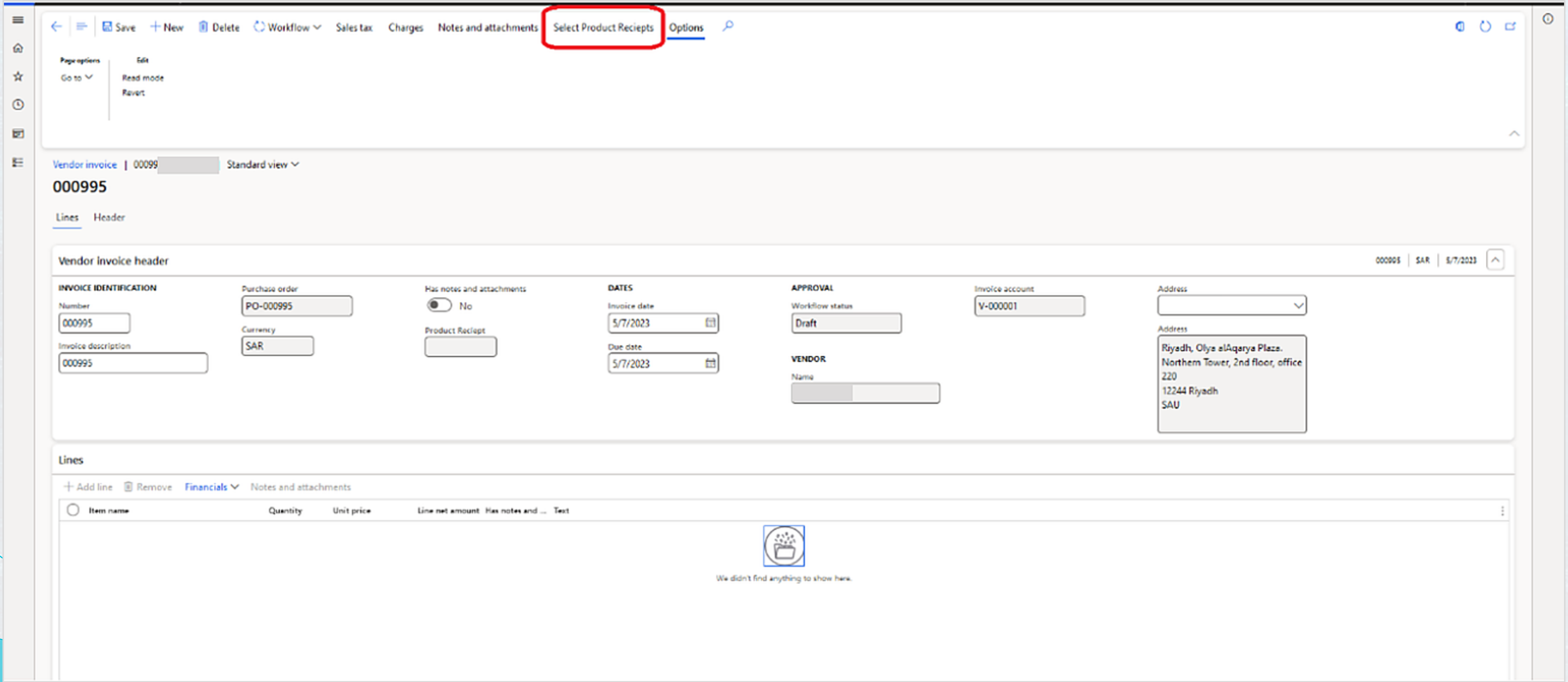
- In the Invoice number field, type the invoice number that will be issued and sent to SWPC.
- In the Invoice date field, enter the invoice issuance date.
- In the Invoice description field, type a value.
- Click Create Invoice.



Select Product Receipts

Vendor invoice

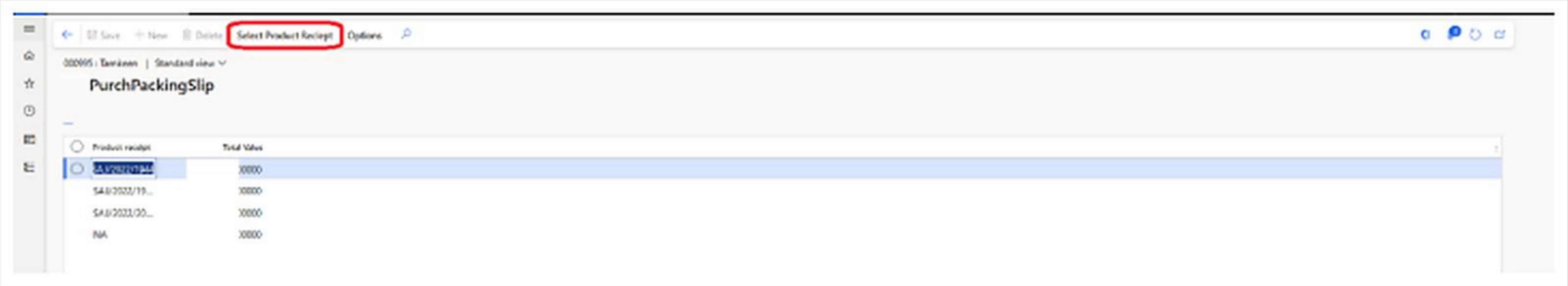
- Then, Click Select Product Receipts.



Link the Product Receipt

Select product receipt

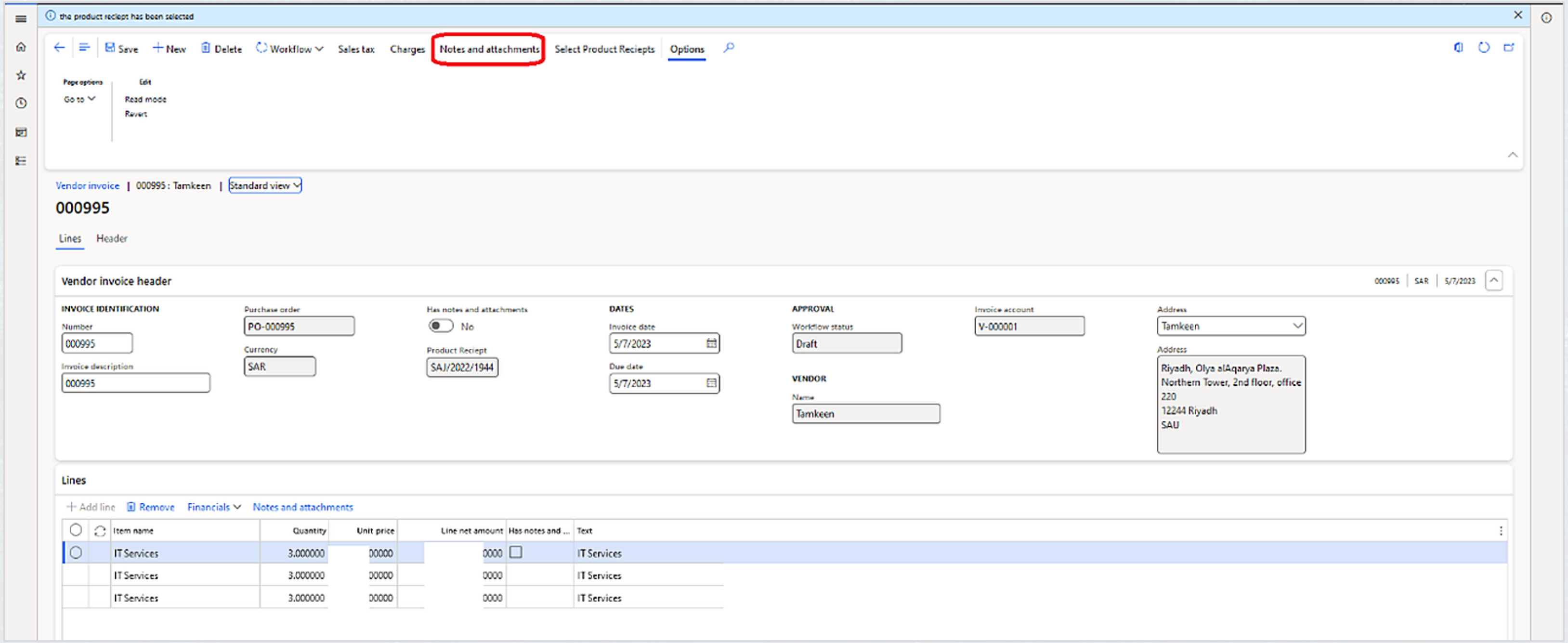
- In the list, mark the selected product receipt that will be linked with the invoice.
- On the Action Pane, click Select Product Receipt.
- Click Select.



Attach the Invoice PDF

Notes and attachments

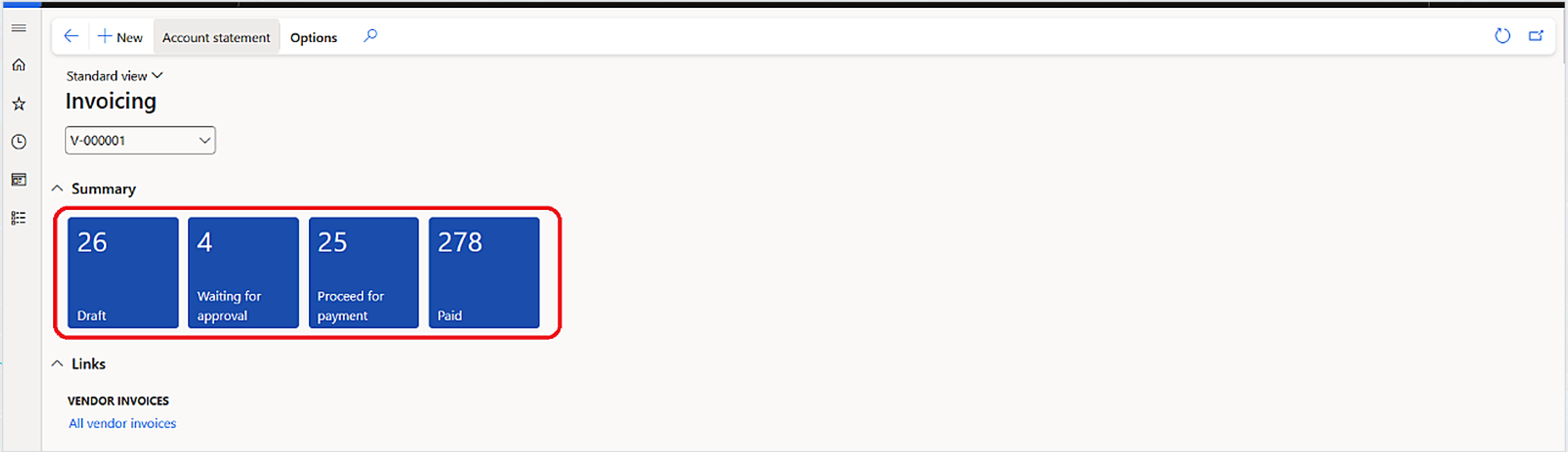
- Click Notes and attachments. (You must upload the invoice PDF attachment to your invoice to be accepted)
- Click New.
- Click File.
- Close the page.
- Then click save.
- Close the page.



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.”



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