



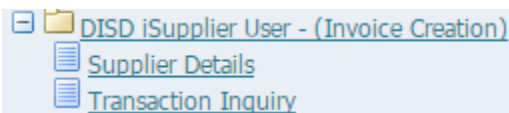
Quick Reference Card

(Supplier Guide to Creating Invoices in the DISD iSupplier Portal)

Navigation Tips

- Use the tabs and links on the screens to navigate between pages.
- Do not use your browser's back button as it may cause errors.
- When performing searches, try to enter as much as search criteria as possible before pressing the **Go** button. This will reduce the time it takes for search results to return.
- When searching, partial values can be entered with the wildcard (%). Example: Invoice Search for INN% will return all invoices that begin with INN.
- Use **Export** button to export results to Excel

- The Dallas ISD iSupplier Portal allows a supplier to create invoices related to a Dallas ISD Purchase Order. Entering invoices in the iSupplier Portal is a quick method to submit invoices directly to Dallas ISD.
- To access, login to the Dallas ISD iSupplier system <https://portal.dallasisd.org> using the username and password previously provided to you in an email.
- Forgot Password - If you forgot the password you previously set, click on **Login Assistance** on the Login page to reset your password.
- Once logged in, click 'DISD iSupplier User – (Invoice Creation) ' and then click on **Transaction Inquiry** to go to the Transaction Inquiry Home page.



- Please make sure you have your Dallas ISD Purchase Order # available before starting to create an invoice. You can inquire on your Purchase Orders in the **Orders** tab to see all Purchase Orders.



Dallas ISD iSupplier Portal will not allow the creation of invoices against POs that are already fully invoiced.

- Click on the 'Finance' tab and then click 'Create Invoices'
- Click on the **Go** button next to **Create Invoice With a PO** **Go**



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- **Purchase Order Number** - Enter the DISD PO # for which you want to create an invoice and press the **Go** button. You will see all PO lines and invoicing status against it.



You are only allowed to create invoices against existing Dallas ISD Purchase Orders. Dallas ISD does not allow creating invoices without referencing an approved Purchase Order Number.

- Select lines in the checkbox on the left **Select** you want to invoice. Press **Next** button.

Note that the search is case insensitive

Purchase Order Number: 615144
Purchase Order Date: (example: 25-Oct-2016)
Buyer: (empty)
Organization: (empty)
Advances and Financing: Excluded

Select Items: **Add to Invoice**

Select	PO Number	Line	Shipment	Advances or Financing	Item Description	Item Number	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization	Packing Slip	Waybill
<input checked="" type="checkbox"/>	615144	1	1	<input type="checkbox"/>	Sharpie Accent Tank Highlighters, Chisel Tip, Assorted Colors, 6/Pack		224303	50	50	0	PACKAGE	3.13	USD	117-BURLESON ES	DISD		
<input checked="" type="checkbox"/>	615144	2	1	<input type="checkbox"/>	Sharpie Fine Point Permanent Markers, Black, Dozen Box		125328	5	5	0	DOZEN	1.77	USD	117-BURLESON ES	DISD		
<input checked="" type="checkbox"/>	615144	3	1	<input type="checkbox"/>	Sharpie Fine Point Permanent Markers, Blue, Dozen		125401	5	5	0	DOZEN	4.77	USD	117-BURLESON ES	DISD		
<input type="checkbox"/>	615144	4	1	<input type="checkbox"/>	Sharpie Fine Point Permanent Markers, Red, Dozen		125369	5	5	0	DOZEN	4.77	USD	117-BURLESON ES	DISD		
<input type="checkbox"/>	615144	5	1	<input type="checkbox"/>	Staples 37959 One-Touch Electric 3-Hole Punch, 30 Sheets/20 lb., Silver		808021	1	1	0	Each	66.19	USD	117-BURLESON ES	DISD		



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- This is the main Invoice Entry screen.
- **Invoice Number** - Enter Invoice Number. Make sure it is a unique Invoice number for your supplier or the system will generate an error.
- **Invoice Description** - Optionally enter an Invoice Description.
- **Remit To** - Select a different 'Remit to' if you want your payment to go to a different address.
- **Quantity** - The PO lines will show total quantity available to invoice for the lines selected. If required, reduce the quantity invoiced accordingly.
- **Unit Price** - The PO will show the Unit Price from the DISD Purchase Order. You can optionally decrease the price, however the system does not allow increasing the price above the PO agreed price.

Create Invoice: Details
* Indicates required field

Supplier

* Supplier
Tax Payer ID
* Remit To CHICAGO4
Address PO BOX 63689 CHICAGO IL 60696-3689
Remit To Bank Account

Invoice

* Invoice Number IA343
Invoice Date 25-Oct-2016
Invoice Type Invoice
Currency USD
Invoice Description Invoice for School Supplies

Customer

* Customer Tax Payer ID SYS11977
Customer Name DISD
Address 3700 ROSS AVENUE Dallas 75204 US

Items

PO Number	Line	Shipment	Item Number	Item Description	Supplier Item Number	Ship To	Available Quantity	*Quantity	Unit Price	UOM	Amount
615144	1	1		Sharpie Accent Tank Highlighters, Chisel Tip, Assorted Colors, 6/Pack	224303	117-BURLESON ES	50	50	3.13	PACKAGE	156.5
615144	2	1		Sharpie Fine Point Permanent Markers, Black, Dozen Box	125328	117-BURLESON ES	5	5	1.77	DOZEN	8.85

Cancel Back Step 2 of 4 Next

- Press the **Next** button to continue. The next page will show you the summary of the invoice that was entered. If everything looks good, press the **Submit** button to submit the invoice to Dallas ISD. You will see a confirmation message like the one below which means the invoice is in the DISD Finance system!!

Confirmation

Invoice IA343 was submitted to our Accounts Payable department on 26-Oct-2016. The confirmation number for this invoice is the invoice number. You can query its status by using Search by navigating to the Home page.