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## Initial Login

OpenInvoice URL: <https://www.openinvoice.com/docp/public/OILogin.xhtml>

You will need your username and password from initial account set up

OpenInvoice

Sign In | Join Now | Need Help?

Username: **A** [Forgot Username?](#)

Bryan.howe@supplier

Password: **B** [Forgot Password?](#)

.....

Remember username  Keep me signed in

[Sign In](#)

**!** Mind your device, Mind your data!  
If others have access to this device, clear all of your temporary browsing data after you sign out.

[About](#) | [Privacy](#) | [Terms](#) | [Browsers](#)

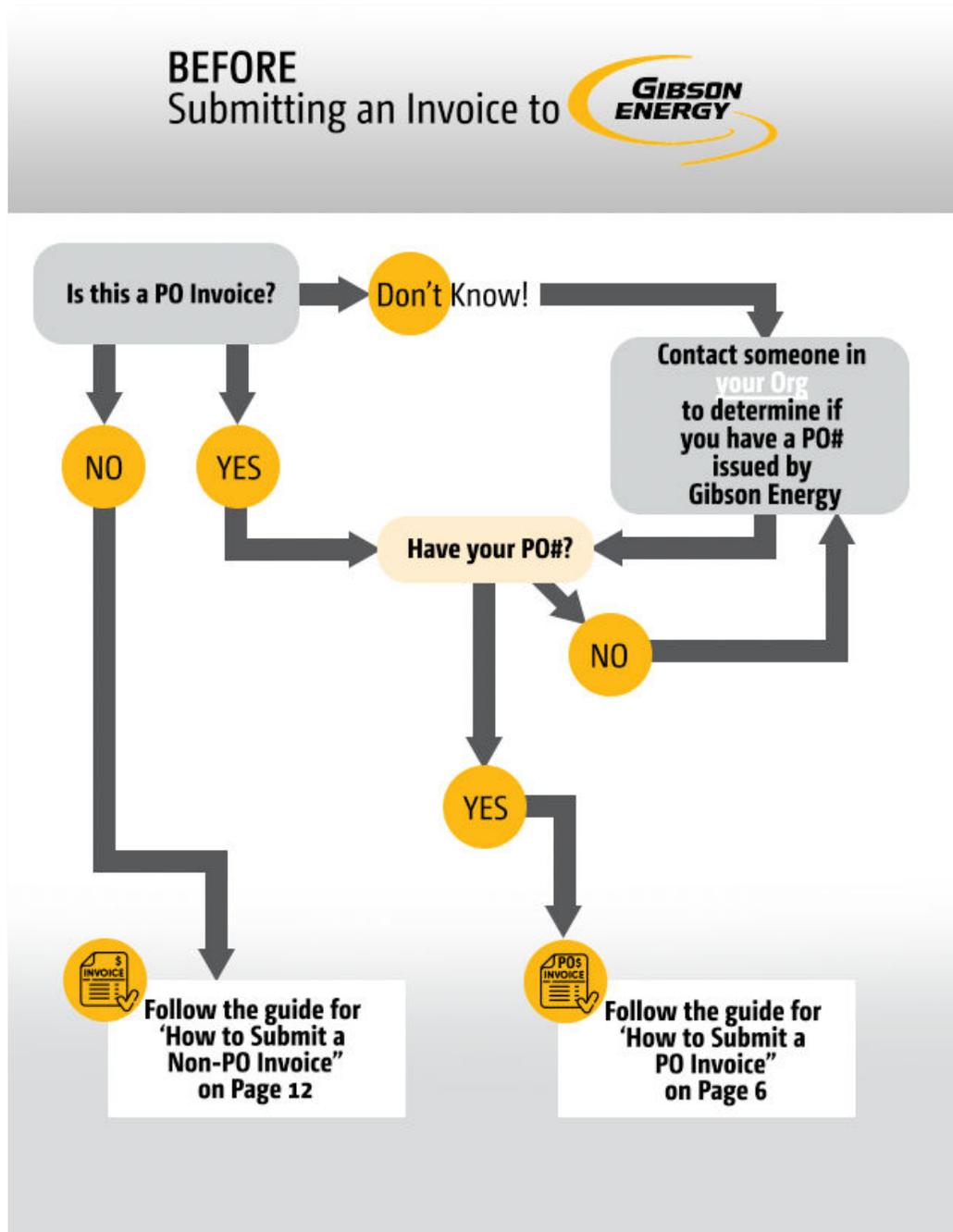
Copyright © 2022 Enverus

Fill in the fields as follows:

- Username:** would have been provided by Enervus at initial login. Typically in the format of 'john.smith@supplier'
- Password:** unique password you created at login

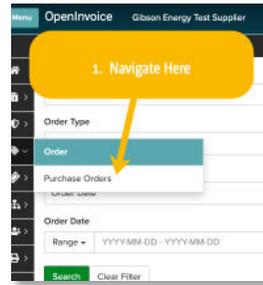
## Before you Start

- Follow the basic decision path below. You **MUST** know if you are submitting a PO-Invoice, or non-PO invoice, as the instructions are different. Ensure you have an electronic copy (PDF) of your invoice before beginning this process, as it will be used for comparison and submission.
- For PO invoices: you **MUST** have a valid PO issued by Gibson Energy. This is typically administered by the Gibson Supply Chain group. Our Accounts Payable **WILL NOT** have this information.



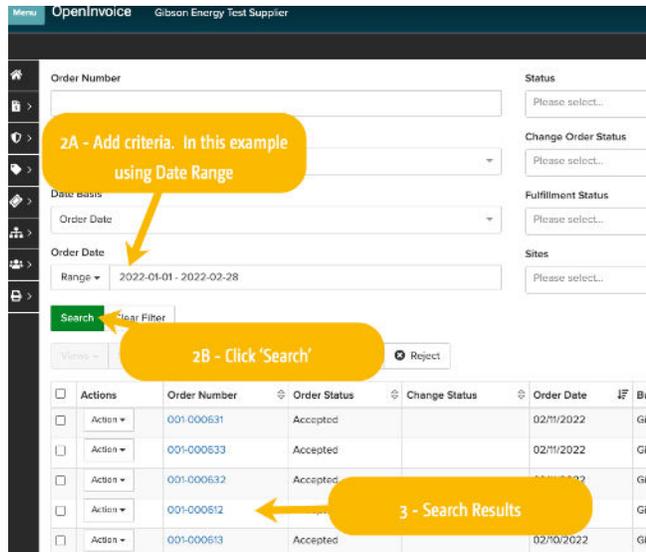
# Searching for a Purchase Order (PO#)

1- Navigate to the PO dashboard



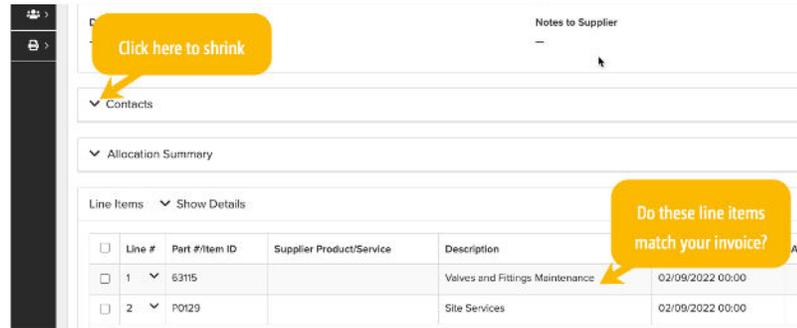
2A – Enter specific filters to narrow the search

2B - click the Search button.

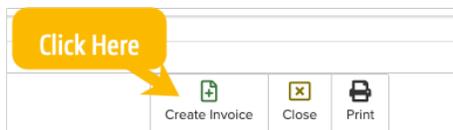


3 – Items within the criteria will populate on the lower half of the screen

4 – click on of the Order #s to pull up its details. Scroll to the bottom, or collapse the chevrons to view the lines



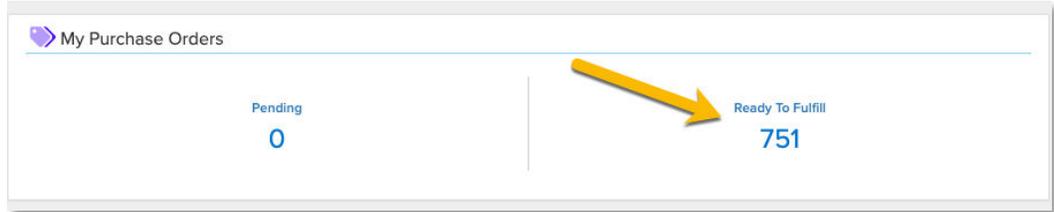
5 – Is this the correct PO? If NO, return to the Order page and search for a different Order. If YES, click “Create Invoice” at the bottom



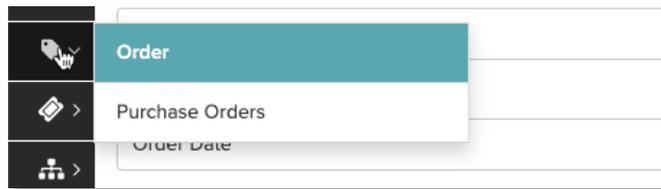
# Submitting a PO Invoice

## Step 1 – Finding a PO

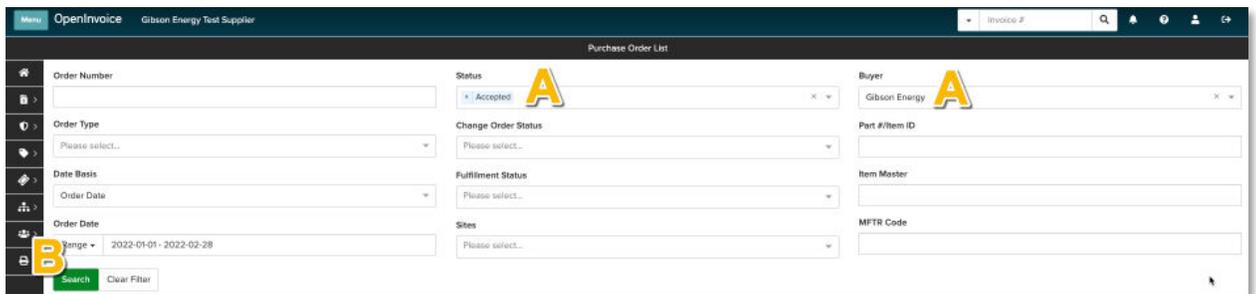
1. You can access your Purchase Orders in 2 ways:
  - A. Click in on the links from the Home Screen under “My Purchase Orders”



- B. From the quick navigation menu



2. In the Buyer dropdown, select Gibson Energy. Select any other pertinent filters to narrow the search, and click 'Search'



3. Find the PO you would like to invoice from the search results

Actions	Order Number	Order Status	Change Status	Order Date	IF Buyer	Buyer Site	Description	Currency	Amount	Invoice Fulfillment	Receipt Fulfillment
Action	001-000641	Accepted		02/14/2022	Gibson Energy	Gibson Energy		CAD	130,000.00	Unfulfilled	Unfulfilled
Action	001-000631	Accepted		02/11/2022	Gibson Energy	Gibson Energy		CAD	65,000.00	6,500.00 (Partial)	Unfulfilled
Action	001-000633	Accepted		02/11/2022	Gibson Energy	Gibson Energy		CAD	1,000,000.00	Unfulfilled	Unfulfilled
Action	001-000632	Accepted		02/11/2022	Gibson Energy	Gibson Energy		CAD	10,520.00	Unfulfilled	Unfulfilled
Action	001-000602	Accepted		02/10/2022	Gibson Energy	Gibson Energy		CAD	15,000,000.00	19,000.00 (Partial)	Unfulfilled
Action	001-000603	Accepted		02/10/2022	Gibson Energy	Gibson Energy		CAD	15,835.00	Unfulfilled	Unfulfilled
Action	001-000621	Accepted		02/10/2022	Gibson Energy	Gibson Energy		CAD	315,000.00	251,670.00 (Partial)	Unfulfilled
Action	001-000605	Accepted		02/10/2022	Gibson Energy	Gibson Energy		CAD	-5,300.00	Unfulfilled	Unfulfilled
Action	001-000611	Accepted		02/10/2022	Gibson Energy	Gibson Energy		USD	9,300.00	Unfulfilled	Unfulfilled

## Step 2 – Creating the PO-Invoice Header

1. You can begin the creation process in 2 ways:

A. From your Order Search results, by choosing “Create Invoice” from the Action drop down menu

Action	Order Number	Order Status	Change Status	Order Date	Buyer	Buyer Site	Description	Currency	Amount	Invoice Fulfillment	Receipt Fulfillment
▼	001-000941	Accepted		02/14/2022	Gibson Energy	Gibson Energy		CAD	150,000.00	Unfulfilled	Unfulfilled
▼	001-000931	Accepted		03/17/2022	Gibson Energy	Gibson Energy		CAD	65,000.00	6,000.00 (Partial)	Unfulfilled
▼	001-000933	Accepted		02/17/2022	Gibson Energy	Gibson Energy		CAD	1,000,000.00	Unfulfilled	Unfulfilled
▼	001-000935	Accepted		02/17/2022	Gibson Energy	Gibson Energy		CAD	10,520.00	Unfulfilled	Unfulfilled
▼	001-000932	Accepted		03/10/2022	Gibson Energy	Gibson Energy		CAD	10,000,000.00	10,000.00 (Partial)	Unfulfilled

B. When inside the Order itself, at the bottom of the page and clicking “Create Invoice”

Line #	Part #/Item ID	Supplier Product/Service	Description	Delivery Start	AFE	Cost Center
1	6315		Valves and Fittings Maintenance	02/09/2022 00:00		
2	P0129		Site Services	02/09/2022 00:00		

**Click here**

2. Enter the following information:

- Invoice Number = unique number on the invoice you are submitting
- Invoice Date = the date indicated on the Invoice, NOT the date you are submitting the invoice
- Currency

Click Next>>

**Buyer**  
Gibson Energy

Customer Site: Gibson Energy

Department: Accounts Payable

**Supplier**  
Gibson Energy Test Supplier

Calgary  
1234 Test Street  
Calgary, Alberta  
Canada  
T2P 1H5

---

**General Information**

<p>Invoice Number: <b>A</b> 218357</p> <p>Submission Type: Original Invoice</p> <p>Status: New</p> <p>Routing Code: <input type="text"/></p>	<p>Invoice Date: <b>B</b> 02/14/2022</p> <p>Currency: <b>C</b> CAD - Canadian Dollar</p> <p>Invoice Amount: 1,000,000.00</p> <p>Remit Amount: 1,000,000.00</p>
--	--

Description:

Price Book, Order & Payment Terms

### Step 3 – PO-Invoice Line Items

There may be error messages on the page.



These will disappear once the line items are updated properly

1. Fill in the details for the line items by clicking on the link under “Description”. Here you may also remove the line items clicking in the Trash can icon under “Delete”.

The screenshot shows the OpenInvoice application interface. At the top, there is a navigation bar with the title "OpenInvoice" and a "Back" button. Below this, the "Buyer" and "Supplier" information is displayed. The Buyer is "Gibson Energy" and the Supplier is "Gibson Energy Test Supplier".

General Information is shown below:

- Invoice Number: 218357
- Invoice Date: 02/14/2022 MM/DD/YYYY
- Invoice Type: Original Invoice
- Currency: CAD - Canadian Dollar
- Submission Type: Direct Entry
- Invoice Amount: 89.25
- Status: New
- Remit Amount: 89.25

Description: Measurement Services at Edmonton Terminal Gibson Contact: Bill Hawes

Buttons for "Edit Header" and "Contact" are visible.

Below the description, there are tabs for "Summary" and "Quick Edit".

The main table displays the following data:

Alert	Item	Service Date From	Service Date To	Part #	Description	Qty	Units	Rate	Subtotal	Discount	Total	Delete	
	1.	02/14/2022	02/14/2022	PRODUCT	Product - Measurement Services	1.00		85.00	85.00	(0.00%)	85.00		
									Subtotal:	85.00	0.00	85.00	
									Total GST (#12345678):			4.25	
									Total Amount:			<u>CAD 89.25</u>	

The line items on this screen MUST match the line items on your backup invoice. Line items cannot be added or consolidated.

2. You must UPDATE each line item by clicking on the hyperlink (yellow arrow above). This brings you to the following page:

Line Item 2 of 2 - Invoice # 218357 - 02/14/2022

Service Date From: 02/14/2022 **A** Service Date To: 02/14/2022 **B**

Product/Service: Product - PRODUCT **C**

Description: TEST Product **D**

Tickets:  Add

Pricing:

Source	Units	Currency	Rate	Adjustment Type	Adjustment	Adjusted Rate
Catalog		CAD	N/A	N/A	N/A	N/A

Details:

Quantity	Units	Rate	Subtotal	Discount(%)	Currency	Total
25 <b>E</b>		135.00 <b>G</b>	3,375.00	0.00 <b>H</b>	CAD	3,543.75

Taxes:

Tax Type	Tax Percent	Tax Amount	EP Eligible	Exempt Code	Tax Number	Tax Description
GST	<input checked="" type="checkbox"/> 5.00	168.75 <b>i</b>	<input type="checkbox"/>		12345678	Goods and Services Tax

Enter the following mandatory information:

- Service Date From**
- Service Date To**  
The service dates are the dates on which the service was rendered or product was delivered. The From field must be BEFORE the To fields. The To field must be on or before the invoice date
- Product or Service: Selectable based on the product catalog within OpenInvoice**
- Description: Free-form field. Please include a basic description of the Product or Service**

#### Details Section

Enter the number of units as outline in the Gibson Energy Purchase Order. Enter the rate per unit of each line item. Units should default to whatever was selected in the Product menu. However, units are case sensitive, and must match exactly. (Changing the **RATE** to a # higher than 1 or increasing the **QUANTITY** will cause errors. If you are partially invoicing, you can decrease the **QUANTITY** or **RATE** to match your invoice)

- Quantity:** Enter the quantity for the product or service rendered. If this is a credit item, put a Minus (-) in front of the quantity.
- Units: DO NOT ALTER THIS FIELD.** This item was set up based on the terms of the Purchase Order. Alteration will result in invoice rejection or errors
- Rate: DO NOT ALTER THIS FIELD.** This item was set up based on the terms of the Purchase Order. Alteration will result in invoice rejection or errors
- Discount:** Enter the percentage (if applicable)

CONTINUED ON PAGE 10

i. **Taxes:**

**For US invoices:** There will be a separate line item for US Taxes (State/County/Parish/other). If it is missing, contact your Gibson rep, or someone in Gibson Energy Supply chain

**For CA Invoices:** Add PST/HST and GST by clicking the applicable boxes on screen

Tax Type	Tax Percent	Tax Amount	EP Eligible	Exempt Code	Tax Number	Tax Description
HST-NB	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Harmonized Sales Tax New Brunswick
HST-NF	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Harmonized Sales Tax Newfoundland
HST-NS	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Harmonized Sales Tax Nova Scotia
HST-BC	<input checked="" type="checkbox"/>	12.00	<input type="checkbox"/>		12345678	Harmonized Sales Tax British Columbia
HST-ON	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Harmonized Sales Tax Ontario
HST-PE	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Harmonized Sales Tax P.E.I.
PST-BC	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Provincial Sales Tax British Columbia
PST-MB	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Provincial Sales Tax Manitoba
PST-ON	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Provincial Sales Tax Ontario
PST-PE	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Provincial Sales Tax P.E.I.
PST-QC	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Provincial Sales Tax Quebec
PST-SK	<input type="checkbox"/>		<input type="checkbox"/>		12345678	Provincial Sales Tax Saskatchewan
Federal	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - Federal Tax
State	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - State Tax
County	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - County Tax
Parish	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - Parish Tax
StateandLocal	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - Combined State and Local Tax
Municipal	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - Municipal Tax
WellServiceTax	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - Well Services Tax
ValueAdd	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - Value Add Tax
TransitAuthority	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - Transit Authority Tax
GrossReceipt	<input type="checkbox"/>		<input type="checkbox"/>		12345678	US - Gross Receipts Tax
GST	<input checked="" type="checkbox"/>	5.00	<input type="checkbox"/>		12345678	Goods and Services Tax

Click “Next>>” to return to main Invoice screen

3. **Validate** the line items on this screen match the line items on your backup invoice. If the key information between the backup invoice and header and line item totals and taxes do not match, the invoice will be returned to you for correction.

Alert	Item	Service Date From	Service Date To	Part #	Description	Qty	Units	Rate	Subtotal	Discount	Total	Delete
	1	02/14/2022	02/14/2022	PRODUCT	Product - Measurement Services	1.00		85.00	85.00	(0.00%)	85.00	
	2	02/14/2022	02/14/2022	PRODUCT	TEST Product	25.00		136.00	3,395.00	(0.00%)	3,395.00	
									Subtotal		3,480.00	
									Total GST (F12345678)		173.00	
									Total Amount		CAD 3,653.00	

OpenInvoice screen

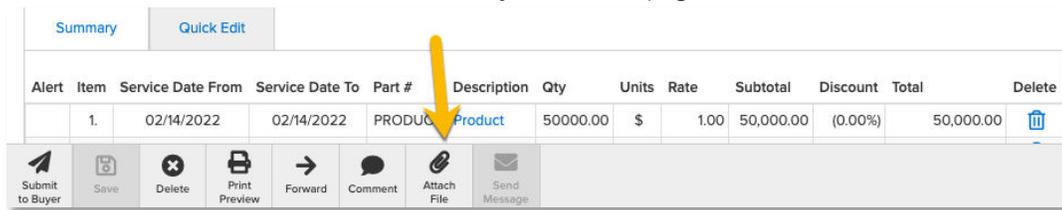


your invoice

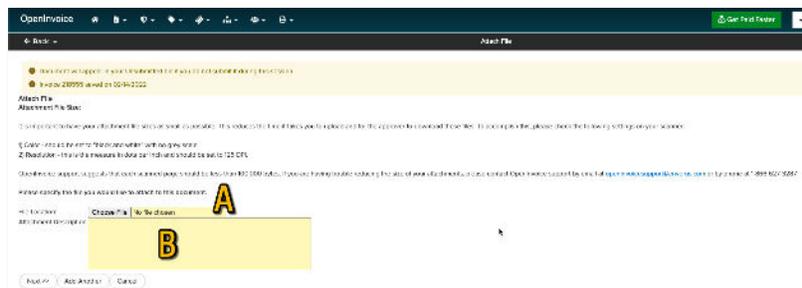
## Step 4 – Attaching YOUR file

An attached PDF is mandatory for successful submission. It must contain a copy of your backup invoice and supporting documentation such as tickets, packing slips, third party-invoices, milestone completion certificates, as applicable. Multiple attachments can be submitted, but it must be clear which attachment is the backup invoice. Invoice will refer to one Gibson Legal entity, and must adhere to the “Supplier Invoice Requirements” guidelines.

1. Click the “Attach file” icon at the bottom of your invoice page:



2. Enter the following mandatory information:
  - a. Choose digital file from your computer **NOTE:** you can only attach files up to **9MB**
  - b. Enter a description of the attachment (ex: Invoice 24513)
  - c. Click Next>>



## Step 5 – Review and Submit

The pending invoice will be shown on screen. Review all the details:

- a. The invoice number and date
- b. There is an attached copy of your invoice
- c. Line items
- d. Subtotal
- e. Currency
- f. Total
- g. Click “Submit to Buyer”

← Back

Invoice # 218555 - 02/14/2022

A

Supplementary Information

Invoice Journal

Current Owner

Site: Calgary  
User: Bryan Howe

Saved on 02/14/2022 at 02:22:24 PM MST - by Bryan Howe

Attached Documents

MS Word 192k  
invoice12345  
2230002.docx  
Attached on 02/14/2022 at 02:30:51 PM MST - by Bryan Howe

B

Buyer

Gibson Energy

Gibson Energy  
Attn: Accounts Payable  
440 2 Ave Sw Suite 1700  
Calgary, Alberta  
Canada  
T2P 5E9

Supplier

Gibson Energy Test Supplier

Calgary  
1234 Test Street  
Calgary, Alberta  
Canada  
T2P 1H5

General Information

Invoice Number: 218555 Invoice Date: 02/14/2022 MM/DD/YYYY  
Invoice Type: Original Invoice Invoice Due Date: 03/31/2022 MM/DD/YYYY  
Submission Type: Direct Entry Currency: CAD - Canadian Dollar  
Status: Saved Invoice Amount: 130,000.00  
Remit Amount: 130,000.00

Description: test invoice

Price Book, Order & Payment Terms

Edit Header Contact

Summary Quick Edit

Alert	Item	Service Date From	Service Date To	Part #	Description	Qty	Units	Rate	Subtotal	Discount	Total	Delete
	1.	02/14/2022	02/14/2022	PRODUCT	Product	50000.00	\$	1.00	50,000.00	(0.00%)	50,000.00	
	2.	02/14/2022	02/14/2022	PRODUCT	Product	80000.00		1.00	80,000.00	(0.00%)	80,000.00	
									Subtotal:		130,000.00	
										Total Amount:	CAD 130,000.00	

Add Line Item

G

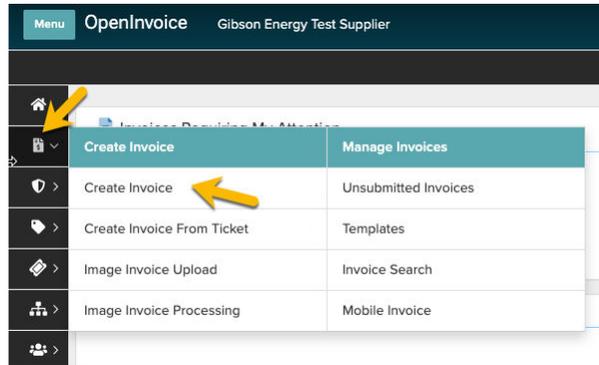
Submit to Buyer Save Delete Print Preview Forward Comment Attach File Send Message

## Submitting a non-PO invoice

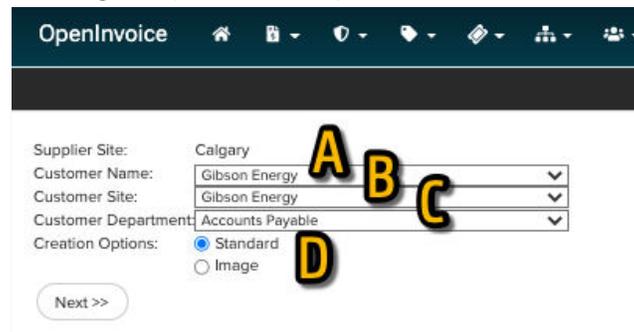
### Step 1 – Starting a new Invoice

Navigate to the OpenInvoice home page.

Click on the Invoice Icon and select “Create Invoice”



The OpenInvoice screen will change. Populate the dropdowns:



- Customer Name:** Select Gibson Energy
- Customer Site:** Select Gibson Energy
- Customer Department:** Select Accounts Payable
- Creation Options:** Choose “Standard”

Click “Next>>”

## Step 2 – Creating the Invoice Header

Populate the following Mandatory information

The screenshot shows a 'General Information' form for creating an invoice header. The form contains the following fields and values:

Invoice Number:	2153847 (A)	Invoice Date:	02/10/2022 (B) MM/DD/YYYY
Invoice Type:	Original Invoice	Currency:	CAD - Canadian Dollar (C)
Submission Type:	Direct Entry	Invoice Amount:	0.00
Status:	New	Remit Amount:	0.00
Routing Code:			
Description:	Measurement Services at Edmonton Terminal (D)		
	Gibson Contact: Bill Hawes (E)		

- Invoice Number:** the unique Invoice number on YOUR invoice
- Invoice Date:** this must be the same date on YOUR invoice, not the date which you are submitting
- Currency:** The currency must match YOUR invoice
- Brief Description:** A description of the product or work performed
- Gibson Contact:** your Gibson contact who requested the work

Click "Next>>"

### Step 3 – Create Invoice Line item

Since this is a non-PO invoice, you can enter your invoice subtotal before tax. **YOU DO NOT NEED TO ENTER** line-by-line detail as this will be shown on your PDF invoice attachment.

1. Populate the following Mandatory information

Line Item 1 of 1 - Invoice # 2153847 - 02/10/2022

Service Date From: 02/10/2022 Service Date To: 02/14/2022

Product/Service: Product - PRODUCT

Description: Measurement Inspection Services

Tickets: Add

Source	Units	Currency	Rate	Adjustment Type	Adjustment	Adjusted Rate
Catalog		CAD	N/A	N/A	N/A	N/A

Quantity	Units	Rate	Subtotal	Discount(%)	Currency	Total
25	Hours	135.00	3,375.00	0.00	CAD	3,543.75

Tax Type	Tax Percent	Tax Amount	EP Eligible	Exempt Code	Tax Number	Tax Description
HST-NB					12345678	Harmonized Sales Tax New Brunswick

a. Service Date From

b. Service Date To

The service dates are the dates on which the service was rendered, or product was delivered. The **From** field date must be **BEFORE** the **To** field date. The **To** field date must be on or before the invoice date

c. Product or Service

d. Description

Since this is a non-PO invoice, you can enter your invoice subtotal before tax. **YOU DO NOT NEED TO ENTER** line-by-line detail as this will be shown on your PDF invoice attachment.

e. **Quantity:** Enter the quantity for the product or service rendered

f. **Units:** Enter the value to have OpenInvoice calculate the subtotal properly

g. **Rate:** Enter the value to have OpenInvoice calculate the subtotal properly

h. **Taxes:** Click on the appropriate taxes shown on your PDF invoice

GrossReceipt	<input type="checkbox"/>				12345678	US - Gross Receipts Tax
GST	<input checked="" type="checkbox"/>	5.00	168.75		12345678	Goods and Services Tax

Click "Next>>" to return to main Invoice screen

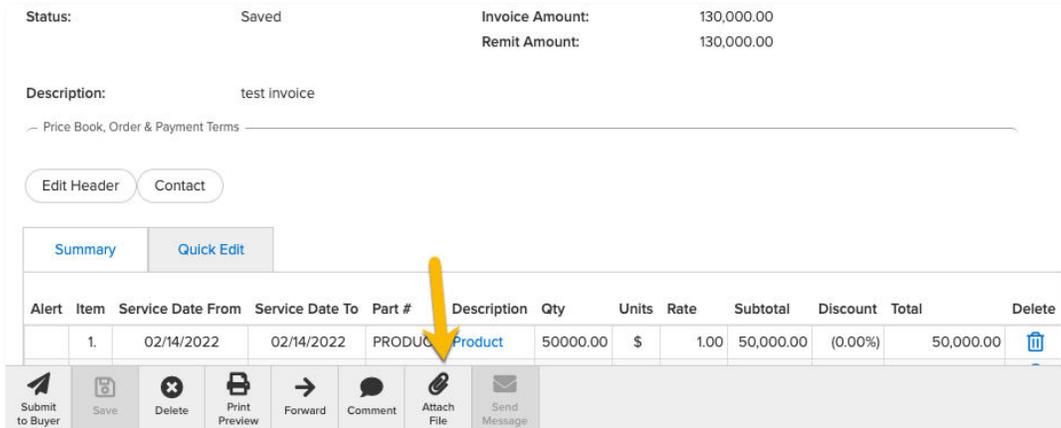
GrossReceipt  12345678 US - Gross Receipts Tax

Next >> Add Line Item Cancel

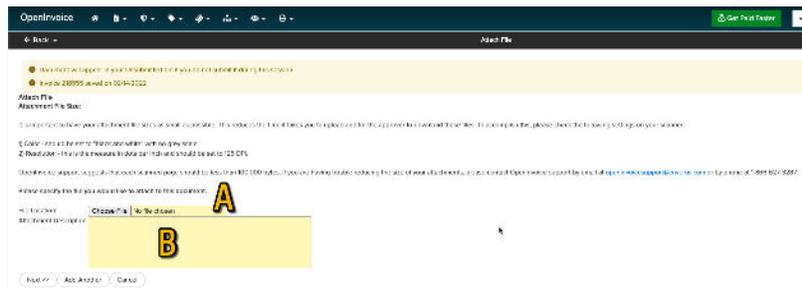
### Step 4 – Attaching YOUR file

An attached PDF is mandatory for successful submission. It must contain a copy of your backup Invoice and supporting documentation such as tickets, packing slips, third party-invoices, milestone completion certificates, as applicable.

3. Click the “Attach file” icon at the bottom of your invoice page:



4. Enter the following mandatory information:
  - a. Choose digital file from your computer **NOTE:** you can only attach files up to **9MB**
  - b. Enter a description of the attachment (ex: Invoice 24513)
  - c. Click Next>>

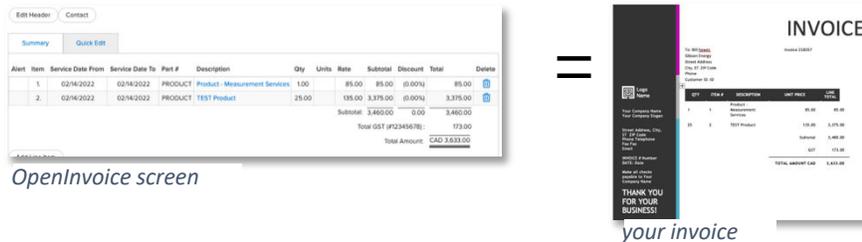


## Step 5 – Validation

**Validate** the header and the line items on this screen match the line items on your invoice.

Compare all the items on the Header and Line Item sections in OpenInvoice to your PDF invoice.

If the key information between the backup invoice and header and Line Item totals and taxes do not match, the invoice will be returned to you for correction.



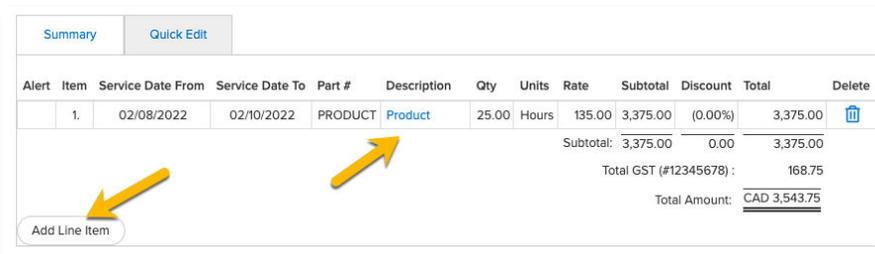
Items to check:

- The invoice number and date
- There is an attached copy of your invoice
- Line item
- Subtotal
- Currency
- Total
- Click “Submit to Buyer”

To make changes to the Header (Invoice Number & Date) Click “Edit Header”

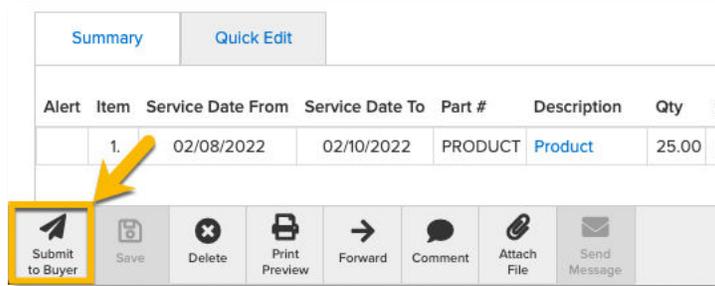


To make changes to line item and taxes, either click the Line Item Description, or “Add line Item”

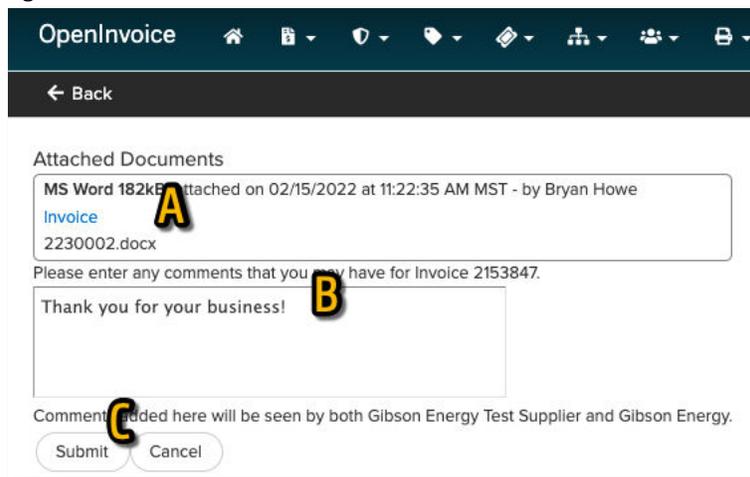


## Step 6 – Submission

Click the “Submit to Buyer” button

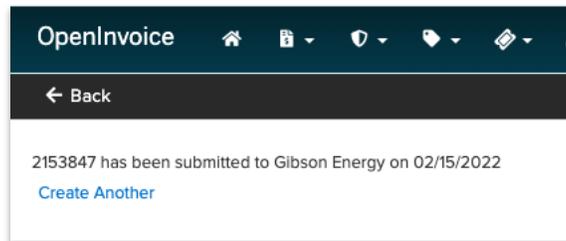


Complete the following items



- Validate there is an attached PDF
- Provide any other comments
- Click “Submit”

If Invoice is submitted successfully, you will be prompted with the following screen:



## FAQ – Frequently Asked Questions

### Does OpenInvoice work if I am using a Mac?

Yes. OpenInvoice is a browser-based application and is system agnostic. Please use the recommended browsers. PC = Edge or Chrome. Mac = Safari or Chrome

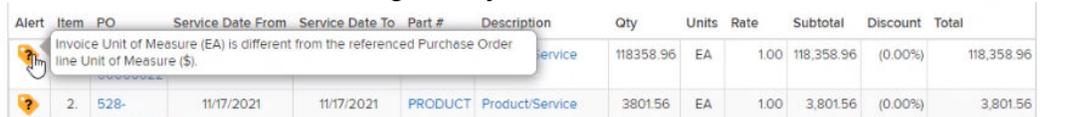
### What do I do if I cannot find my Purchase Order (PO#) in OpenInvoice?

Determine within your organization if a PO was issued by Gibson. If your organisation does not have a Gibson PO, please contact your Gibson contact, or Gibson Supply Chain

### What do I do if I cannot find my PO but I KNOW one was issued to my organization?

This could be due to a delay in set up in OpenInvoice, or Gibson Energy Supply Chain. Please contact your Gibson rep, or someone in Gibson Energy Supply chain

### What do I do if I see errors or flags on my line items?



Alert	Item	PO	Service Date From	Service Date To	Part #	Description	Qty	Units	Rate	Subtotal	Discount	Total
?	2	528-	11/17/2021	11/17/2021	PRODUCT	Product/Service	380156	EA	1.00	3,801.56	(0.00%)	3,801.56

You can hover over the line item to see the error message, which is often as a result of the wrong Unit of Measure being used according to how the PO was set up, or the UoM was entered incorrectly (HRS instead or HOURS – the UoM is case sensitive!). Please correct the line item units and re-submit

### Who do I contact if there are delays in payment?

A payment is only considered delayed if it is beyond the payment terms from date of submission. First, log in to OpenInvoice and determine if any of your invoices are REJECTED or ERROR status. If the invoice was submitted successfully and does not show an error in the system, please contact

[AccountsPayable@gibsonenergy.com](mailto:AccountsPayable@gibsonenergy.com)

### My OpenInvoice Account seems to be locked. What do I do?

Gibson Energy cannot reset your password or manage your account. Please contact Enverus directly at [openinvoicesupport@enverus.com](mailto:openinvoicesupport@enverus.com). Or call 1-866-627-3287