Ariba Network
Standard Account Guide
Introduction

- The purpose of this document is to provide generic information for suppliers to setup and manage their Standard Account.

- This document is specific to Standard Account suppliers only.

- Standard Account is an email based method of responding to your Buyer’s Purchase Orders.

- The available selections are based on the transaction rules set by your Buyer, where a button or selection is greyed out or does not appear as described indicates that your Buyer has chosen that this process is not available, for example Invoicing cannot occur unless an Order Confirmation has been completed.

Guide Key

- This indicates an Instructional steps
- An additional step is indicated by
- Note: Functionality specific notes
- Information: other useful information
Table of Contents

Select by clicking on the links:

- **Partial Invoicing**
  - Completing a Partial Invoice
  - Commence Partial Invoice – Header Level
  - Completing a Partial Invoice – Line Level

- **Contract Invoice**
  - Contract Invoicing – General Information
  - Begin a Contract Invoice
  - Contract Invoice – Header Level
  - Contract Invoice – Add Line Items
  - Contract Invoice – Line Level Tax
  - Contract Invoice – Change Item
  - Finalising a Contract Invoice

- **Line Item Credit Memo**
  - Line Item Credit Memo – General Information
  - Begin the Line Item Credit Memo – Via a Purchase Order
  - Line Item Credit Memo – Header Level – Quantity Adjustment
  - Finalising a Line Item Credit Memo – Quantity Adjustment
  - Line Item Credit Memo – Header Level – Price Adjustment
  - Finalising a Line Item Credit Memo – Price Adjustment

- **Edit and Re-Submit Invoices**
  - Open and Review Rejected Invoice

- **Support**
General Information

- All actions must begin with the Email containing the purchase order, including invoicing
- Contract Invoicing can be performed using Standard Account, the Buyer maintains the catalog and pricing
- Ensure all set up processes have been completed and that the email address Purchase Orders are being sent is current
- When the invitation email is sent from your Buyer ensure that an account is not created by someone other than your businesses System Administrator
- Once an Invoice has been sent it cannot be recalled, where there is an error contact the Buyer Requester and ask for the Invoice to be rejected in the Buyer Ordering system or ERP, then follow the Edit and Resubmit invoice process
Unit of Measure

The Units of Measure (UOM) provide suppliers with the information about the required materials or Services requested by your Buyer. When entering or selecting a UOM, it must be Upper Case, for example, hours must be HRS not hrs.

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1I</td>
<td>Fixed Rate</td>
</tr>
<tr>
<td>A9</td>
<td>Rate</td>
</tr>
<tr>
<td>DAY</td>
<td>Day</td>
</tr>
<tr>
<td>EA</td>
<td>Each</td>
</tr>
<tr>
<td>IE</td>
<td>Person</td>
</tr>
<tr>
<td>LH</td>
<td>Labour Hour</td>
</tr>
<tr>
<td>MIN</td>
<td>Minute</td>
</tr>
<tr>
<td>MON</td>
<td>Month</td>
</tr>
<tr>
<td>OT</td>
<td>Overtime hour</td>
</tr>
<tr>
<td>RH</td>
<td>Running or operating hour</td>
</tr>
</tbody>
</table>
Standard Account Dashboard

- The Dashboard/Homepage for Standard Accounts users is limited
- Greyed out tabs, sections or selections cannot be accessed
- Use the Dashboard to resend the Purchase Order Email, set up your Ariba Network, create users, assign permissions and maintain routing information
- Real time invoice status notifications
- Email notification and online download provide access to invoices for local archiving
Standard Account Dashboard – General Information

• The Dashboard shows information about Purchase Orders from your Buyer.

• A Buyer sets up a Standard Account and the amount of information shown on a Standard Account Dashboard is determined by the setup from the Buyers Ordering System or ERP.

• Support accessed using a Standard Account can only access the Help Centre via Email.

• The Dashboard/Homepage is restricted for Standard Account users, some may see the Inbox, Outbox, Catalogs and Reports tabs but these will be greyed out.

Standard Account users can use the Dashboard to resend a Standard Account email, set up routing information, accessing Company Profile information and the Supplier Information Portal.

Examples of Standard Account Dashboards
Sections of the Dashboard – Example 1

1) Tabs
2) Company Settings
3) Trends displays –
   • Purchase Order by Volume
   • Purchase Order by Amount
   • Outstanding Invoice
4) Orders Invoices and Payments
5) More….for display selection
6) Upgrade from Light account Option
7) Number of Documents to display section
8) Select Button to resend emails
Sections of the Dashboard – Example 2

1) Home Tab
2) Upgrade from Standard Account Option
3) Company Settings
4) Orders Invoices and Payments
5) Help Centre
6) Search and Help Pane
7) Access Standard Account level Support Options
Note: There is a maximum of four tiles that can be displayed.

From the Dashboard

1. Click on More….
   - Screen displays the Tiles available box

2. Click on Manage Default Tiles
   - Screen displays Manage Action Tiles on the Home Dashboard

3. Click on Remove to allow space for new tiles

4. Click on Select of the tile that you
   - Select the required tiles

5. Click on Done

Setting the Orders, Invoices and Payments Display (if available)
Orders, Invoices and Payments – Resend Purchase Order Email

- Screen returns to the Dashboard
- The tiles selected are now display

Clicking on Select within the tiles will display the Send me a copy to take action

### Orders, Invoices and Payments

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Customer</th>
<th>Status</th>
<th>Amount</th>
<th>Date</th>
<th>Amount Invoiced</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4200476213</td>
<td>Name of Buyer</td>
<td>Confirmed</td>
<td>$8,000.00 AUD</td>
<td>27 Sep 2017</td>
<td>$0.00 AUD</td>
<td>Select</td>
</tr>
<tr>
<td>4200957040</td>
<td>Name of Buyer</td>
<td>Changed</td>
<td>$468.80 AUD</td>
<td>2 Jun 2017</td>
<td>$0.00 AUD</td>
<td>Select</td>
</tr>
<tr>
<td>4200957038</td>
<td>Name of Buyer</td>
<td>New</td>
<td>$468.80 AUD</td>
<td>2 Jun 2017</td>
<td>$0.00 AUD</td>
<td>Select</td>
</tr>
<tr>
<td>4200957024</td>
<td>Name of Buyer</td>
<td>Partially Invoiced</td>
<td>$2,653.56 AUD</td>
<td>30 May 2017</td>
<td>$1,769.00 AUD</td>
<td>Select</td>
</tr>
</tbody>
</table>

### Orders, Invoices and Payments

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Customer</th>
<th>Status</th>
<th>Amount</th>
<th>Date</th>
<th>Amount Invoiced</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4200476213</td>
<td>Name of Buyer</td>
<td>Confirmed</td>
<td>$8,000.00 AUD</td>
<td>27 Sep 2017</td>
<td>$0.00 AUD</td>
<td>Select</td>
</tr>
<tr>
<td>4200957040</td>
<td>Name of Buyer</td>
<td>Changed</td>
<td>$468.80 AUD</td>
<td>2 Jun 2017</td>
<td>$0.00 AUD</td>
<td>Select</td>
</tr>
<tr>
<td>4200957038</td>
<td>Name of Buyer</td>
<td>New</td>
<td>$468.80 AUD</td>
<td>2 Jun 2017</td>
<td>$0.00 AUD</td>
<td>Select</td>
</tr>
<tr>
<td>4200957024</td>
<td>Name of Buyer</td>
<td>Partially Invoiced</td>
<td>$2,653.56 AUD</td>
<td>30 May 2017</td>
<td>$1,769.00 AUD</td>
<td>Select</td>
</tr>
</tbody>
</table>
Drop Down Box – Company Settings

1. Click on Company Settings
   ➢ The drop down box is displayed, the main selections user within Standard Account are:

   1) Company Profile
   2) Customer Relationships
   3) Users
   4) Electronic Order Routing
   5) Electronic Invoice Routing
Setting Up, Maintaining & Creating Standard Account Users

- Greyed out tabs, sections or selections indicate that you are no able to access
- Use the Dashboard to resend the Purchase Order Email
- Real time invoice status notifications
Users– General Information

There is a limited range of Account Settings that a supplier can use within the User’s selection. Supplier can Enable assignment of orders to users with limited access to the Ariba Network. However, in order to perform this assignment of tasks Roles must be created first, then Users created. Only your organisation Ariba Network System Administrator will have the Users selection in the drop down box and can create roles and users.
Creating and Assigning Roles

- From the Account Settings page accessed via Company Settings, then Users

1. Click on Create Role

- Screen displays the Create Role

2. Enter the Name of the role you are creating

3. Select all the relevant Permissions for the role

Note: As you are working within a Standard Account there will be a number of permissions that cannot be selected and are greyed out

4. Click Save

Note: Screen adds the role to the list, repeat for other roles if required
Creating Users

1. Click on Create User

2. Enter a Username for the user

3. Enter the Email Address of the user

4. Enter their First Name

5. Enter their Last Name

➢ Scroll down to Role Assignment

From the Account Settings page accessed via Company Settings, then Users

1. Click on Create User

Screen displays the Create User

2. Enter a Username for the user

3. Enter the Email Address of the user

4. Enter their First Name

5. Enter their Last Name

➢ Scroll down to Role Assignment
6. Select the Role for the User

**Note:** The roles that you have created will be displayed, only one can be one System Administrator so the selection will not appear.

7. Click on **Done**

**Note:** Remembering that a User name has to be in an email format but not necessarily the actual email, you may get the Confirm Domain message:

1) Click on **Yes**

- Screen displays the **User** in the list
Enable Assignment of Order of Users

➢ From the Account Settings page accessed via Company Settings, then Users

1. Click on Enable assignment of orders to users with limited access to Ariba Network

2. Click on the relevant user

3. Click on Save

Note: A green ribbon indicates that the information or changes entered have been successful.

4. Click on Close

➢ Screen displays the Dashboard
Customer relationships is the selection that allows Suppliers to access the Buyers Supplier Education Materials Portal. The Supplier Information Portal is accessed to locate the Supplier Education Materials Portal and contain Reference Documents from your buyer and the Transaction Rules assigned by you Buyer for transacting using the Ariba Network.

Be aware that unless otherwise specified the documents contained within the portal are for Full Use Accounts. Although the process once you have opened you emailed Purchase Order is similar you do not have the ability to access other processes or tabs, these will all be greyed out.
Accessing the Supplier Information Portal

➢ From the Dashboard
1. Click on Company Settings
2. Select Customer Relationships
➢ Screen displays Account Settings
3. Click on Supplier Information Portal
➢ System message is displayed
Accessing the Supplier Information Portal cont.

The Supplier Information Portal is displayed

1) Portal Content – Displays the link to access the Supplier Education Materials Portal and other information required from your Buyer

2) Reference Documents – Information specific to transacting with your Buyer, documents are uploaded by your Buyer

3) Transaction Rules – Lists the parameters for how processes should work and based on what the Buyer has set up in the Ariba Network
Accessing the Supplier Education Materials Portal

➢ The Supplier Information Portal is displayed
1. Click on **Click Here**

➢ The Supplier Education Materials Portal is displayed
2. Click on the link of the information you require

**Note:** You Supplier Education Materials Portal may not look as the one shown
Reference Documents Tab

➢ The Supplier Information Portal is displayed

1. Click on the Reference Documents tab

➢ Screen displays Reference Documents

2. Documents are displayed when you Buyer adds documents

Note: Suppliers may receive an email indicating that a document has been uploaded when the Buyer selects the applicable option
# Transaction Rules Tab

- The Supplier Information Portal is displayed.
- Screen displays transaction rules.

**Note:** The transaction rules cannot be changed and are based on the settings selected by your buyer.

## Ariba Network

![Ariba Network Image](https://example.com/ariba-network.png)

**This is an example ONLY**

<table>
<thead>
<tr>
<th>Transaction Rules</th>
<th>Supplier Information Portal of Ariba Network</th>
<th>Company Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal Content</td>
<td>Reference Documents</td>
<td>Transaction Rules</td>
</tr>
<tr>
<td><strong>Attachment Filename Rule</strong></td>
<td>Do not allow these characters in filename of attachments:</td>
<td>- <code>@#$%^&amp;*()</code> +=&lt;&gt;</td>
</tr>
<tr>
<td><strong>Order Confirmation and Ship Notice Rules</strong></td>
<td>Allow suppliers to confirm an order multiple times.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Confirm only once at the line-item level.</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Allow suppliers to send order confirmations for material orders.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Allow suppliers to send order confirmations for material orders at the line-item level.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Allow suppliers to reject quantities for material orders at the line-item level in order confirmations.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Allow suppliers to send order confirmations for service orders.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Allow suppliers to send order confirmations for service orders at the line-item level.</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Entering information for Electronic Order Routing

➢ From the Account Settings page accessed via Company Settings, then **Electronic Order Routing**

1. Enter the required **Email Address** using a comma to separate the email addresses

Notes:
1) The System Administrators email will already be displayed
2) Only up to 3 separate email addresses can be entered
3) Use a Distribution email if there are more than three or a team will received the email
4) Remember if you appear in the Distribution List and are entered to receive an email you will received the Purchase Orders more than once
5) Email is the only selection available
Entering information for Electronic Order Routing cont.

2. Click on Include document in the email message (if required)

Note: Leave the other New Order types as Same as new catalog orders without attachments (this is a default)

➢ Scroll down to Notifications

3. Confirm or enter To email addresses for Order (the System Administrator should already be entered)

4. Confirm or enter To email addresses for Purchase Order Inquiry

5. Confirm or enter To email addresses for Time Sheet

Note: There is no requirement to tick any of the associated boxes

6. Click on Save

7. Click Done
# Entering information for Invoice Routing

You can select Electronic Invoice routing from the Dashboard, click on company settings, select Electronic Invoice Routing

1. Confirm or enter To email addresses for **Invoice Failure** (the System Administrator should already be entered)

2. Confirm or enter To email addresses for **Invoice Status Change**

3. Confirm or enter To email addresses for **Invoice Created Automatically**

**Note:** Actions will a tick indicate you have selected the option

The sending method for invoices is defaulted to Online and should not be changed

### Network Settings

<table>
<thead>
<tr>
<th>Electronic Order Routing</th>
<th>Electronic Invoice Routing</th>
<th>Accelerated Payments</th>
<th>Settlement</th>
</tr>
</thead>
</table>

### Network Settings - General

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Routing Method</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoices</td>
<td>Online</td>
<td></td>
</tr>
<tr>
<td>Customer Invoices</td>
<td>Online</td>
<td></td>
</tr>
</tbody>
</table>

### Network Settings - Notifications

<table>
<thead>
<tr>
<th>Type</th>
<th>Send notifications when...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Failure</td>
<td>![Tick] Send a notification when invoices are undeliverable or rejected.</td>
</tr>
<tr>
<td>Invoice Status Change</td>
<td>![Tick] Send a notification when invoice statuses change.</td>
</tr>
<tr>
<td>Invoice Created Automatically</td>
<td>![Tick] Send a notification when an invoice is created automatically on behalf of your company.</td>
</tr>
</tbody>
</table>
4. Click **Send notification when invoices undeliverable or rejected**

Selecting this option ensures that an email will be sent when an invoice has been rejected by the Buyer.

5. Click on **Save**

6. Click on **Close**

Entering information for Invoice Routing cont.
Adding your ABN – Using Company Profile

From the Dashboard
1. Click on Company Settings
2. Select Company Profile
3. Click on the Business Tab
4. Scroll down to Tax Information
5. Enter your ABN into the TAX ID
6. Enter your ABN into the Vat ID
7. Click on Save
8. Click on Close

Entering your ABN will alleviate the need to enter your ABN when completing Invoices
Adding your ABN – Using Electronic Invoice Routing

From the Dashboard
1. Click on Company Settings
2. Select Electronic Invoice Routing
3. Click on the Tax Invoicing and Archiving tab
4. Enter your ABN Number
5. Click on Save
6. Click on Close

Entering your ABN will alleviate the need to enter your ABN when completing Invoices
Transacting Setup

- Standard Account is an email process account only
- All Purchase Orders are sent from the Buyer to the Supplier using email
- The email address entered during the setup process is the account that your Buyer will continue to send all Purchase Orders to
An email will be sent to the email address from your Buyer

1. Click **Process Order**

This will take you to the one-off registration process, follow the prompts
Ariba Standard Account Setup – Once off Process

- You need to Sign Up for a free Standard Account before the purchase order can be actioned

1. Click on Sign Up

- If you already have a Standard Account click on Log in

- Screen displays the Register Company Information name

Ariba Network

Join your customer on Ariba Network!

Sign up

Already have an account? Log in

Strengthen relationships
Collaborate with your customer on the same secure network.

Connect faster
Exchange documents electronically and streamline communications.

Reach more customers worldwide
Sign up with Ariba Discovery and increase sales leads.

Ariba Network light account is Free

Learn more
1. Enter your **Company Name**
2. Click on the drop down arrow and select the **Country**
3. Enter the **Address**
4. Enter the City (Suburb)
5. Click on the drop down arrow and select the **State**
6. Enter the **Postcode**
   - Scroll down to User Account Information

### Adding Standard Account Company Information

#### Register

**Company information**

- **Company Name**: ABC Company
- **Country**: Australia
- **Address**: 123 ABC Drive
- **City**: Somewhere Town
- **State**: State
- **Zip**: 1234

*Indicates a required field*
Adding User Account Information – Once off Process

➢ The account that is being created is your businesses Ariba Network Administrator account. Only the Administrator can create new users.

1. Enter your first and last Name

2. Enter your Email address

3. Click on Use my email as my username

4. Enter a Password

5. Re-enter your password

6. Confirm the correct language is displayed

7. Confirm or enter Email orders to

8. Click on Register
Standard Account – Accept Terms of Use and Register

Note: After you Standard Account is registered, all future Purchase Orders will be sent to your designated user account email.

1. I have read and agree to the Terms of Use
2. I have read and agree to the SAP Ariba Privacy Statement
3. Register

© 2019 SAP Ariba. All rights reserved.
The Upgrade from Standard Account to full account – learn more Button provides Suppliers with a list of the benefits

To upgrade to a Full Account click on Upgrade to learn about any fees or charges and what process you are required to follow

Note: Upgrading to a full Account may incur fee’s. Please make yourself aware of fees and charges before upgrading

1. Click on Close to return to the Dashboard

By the way, you can use these with any account.
View/Edit Addresses

- View/Edit Addresses should be used when goods or services are provided from a different location than that shown on documents going back to the buyer.
1. From the Dashboard click on **Company Settings**

2. Select **Company Profile**

   **Note:** If the Company Profile selection is not available ask your businesses Ariba Network System Administrator to add Additional Company Addresses

3. Select the **Basic** tab, scroll down to **Additional Company Addresses**

4. Click on **Edit**

5. Click on **Create**

   ➢ Screen displays **Configure Supplier Addresses Served by This Account**

---

**Configuring Remittance Addresses**

![Ariba Network interface](image)

**Company Profile**

**Additional Company Addresses**

- **Address Name**
- **Address ID**
- **VAT ID**
- **Tax ID**
- **Address**
- **Country**
- **Legal Profile Status**

Click **Create** to add new addresses.
Standard Invoice – Configuring Remittance Addresses cont.

6. Enter the **Address Name**

7. Enter the **Address 1**

8. Enter the **City**

9. Enter the **Postal Code**

10. Select the correct **Country**

11. Click on **Save**

- The entered information is displayed
- Repeat to add more addresses (if required)
- All addresses entered will be displayed

Configure Supplier Addresses Served by This Account

* Indicates a required field

**Address Name**

- **Address Name**: Retail Solutions

**Address**

- **Address 1**: 1 Kangaroo Way
- **City**: Melbourne

**Country**: Australia [AUS]

Additional Company Addresses

<table>
<thead>
<tr>
<th>Address Name</th>
<th>VAT ID</th>
<th>Tax ID</th>
<th>Address 1</th>
<th>Address 2</th>
<th>City</th>
<th>State</th>
<th>Postal Code</th>
<th>Country</th>
<th>Legal Profile Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Solutions</td>
<td></td>
<td></td>
<td>1 Kangaroo Way</td>
<td></td>
<td></td>
<td></td>
<td>3000</td>
<td>Australia</td>
<td>-</td>
</tr>
</tbody>
</table>

**Save**  **Close**

© 2019 SAP Ariba. All rights reserved.
12. Click on **Save**

**Note:** A Green ribbon indicates that the changes have been saved successfully, where the ribbon is red, locate the error and correct.

13. Click on **Close**

➤ Screen returns to the Dashboard

---

### Additional Company Addresses

<table>
<thead>
<tr>
<th>Address Name</th>
<th>Address ID</th>
<th>VAT ID</th>
<th>Tax ID</th>
<th>Address</th>
<th>Country</th>
<th>Legal Profile Status**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brackets are Us</td>
<td></td>
<td></td>
<td></td>
<td>1 Wombat St</td>
<td>Sydney, Australia</td>
<td>-</td>
</tr>
<tr>
<td>Retail Solutions</td>
<td></td>
<td></td>
<td></td>
<td>1 Kangaroo Way</td>
<td>Melbourne, Australia</td>
<td>-</td>
</tr>
</tbody>
</table>

#### Example of Multiple Entries

---

### Company Profile

- Your profile has been successfully updated.

<table>
<thead>
<tr>
<th>Basic</th>
<th>Business</th>
<th>Marketing (2)</th>
<th>Contacts</th>
<th>Certifications (1)</th>
<th>Additional Documents</th>
</tr>
</thead>
</table>
Purchase Order

- The Purchase Order (PO) is the source document for the order and all subsequent documents are created from the PO screen.
- A PO is a commercial document issued by a Buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the Buyer. Receiving an Order from your Buyer constitutes an offer to buy products or services.
- Any field with an * is a mandatory field and a value is required to be entered.
- A Standard Account Supplier will always receive their PO via email.
- If you misplace your Standard Account email you can resend from the Dashboard.
- You Ariba Network will only display the last 50 documents, documents exceeding this will “drop” off the screen and can only be opened from the original email send from.
The Purchase Order Header displays the:

1) Purchase Order Number.

2) Order History.

3) Purchase Order Status (Status will change as the order is actioned. E.g. Once an invoice is created the Order Status will say Invoiced).

4) From and To information

5) Payment Terms

6) Supplier and Buyer contact information

7) Other Information

8) Ship To, Bill To and Deliver To details.

9) Done to close the Purchase Order

➢ Scroll down to Line Items
View Purchase Order Details – Line Item Level

1) **Show Item Details**, to open further information on all line items at once

2) **Details**, to open further information for one line item at a time

3) Click **Done** to return to the Inbox

**Reviewing a Purchase Order**

Each Purchase Order that comes into the system should be reviewed to:

- Identify the items requested
- Determine whether the items are in stock
- Validate the information contained within the PO
- Review the shipping address
- Ensure that the details of items in the order are correct
- Check fields required by the business and any Comments
When reviewing a Purchase Order use Show Item Details to identify any comments or further information from your Buyer:

- To see all Line Items details click on Show Item Details.
- To hide all line item details click on Hide Item Details.
- To see specific line item details click on Details.
- To hide specific line item details click on Summary.

### Line Items

<table>
<thead>
<tr>
<th>Line #</th>
<th>Part / Description</th>
<th>Type</th>
<th>Qty (Unit)</th>
<th>Need By</th>
<th>Unit Price</th>
<th>Subtotal</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Not Available</td>
<td>Material</td>
<td>50 (EA)</td>
<td>6 Sep 2019</td>
<td>$10.00 AUD</td>
<td>$500.00 AUD</td>
<td>60 Unconfirmed</td>
</tr>
</tbody>
</table>

**Other Information**

- Req. Line No.: 1
- Requester: Carl Ayers
- PR No.: PR12345
- Classification Domain: unspsc
- Classification Code: 43191001

Order submitted on: Monday 5 Aug 2019 12:50 PM GMT+10:00

Sub-total: $500.00 AUD

---

© 2019 SAP Ariba. All rights reserved.
Order History

Use Order History to identify:
- Who created a document
- What occurred with the document
- The date and time stamps of the various processes that have affected a document
- Line Item level information

Purchase Order: APO253

<table>
<thead>
<tr>
<th>Status</th>
<th>Comments</th>
<th>Changed By</th>
<th>Date and Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The order was queued</td>
<td>PropagationProcessor-128558079</td>
<td>1 Sep 2017 10:45:12 PM</td>
</tr>
<tr>
<td>Sent</td>
<td>Email order was sent to</td>
<td>ANPODispatcher-120579032</td>
<td>1 Sep 2017 10:45:57 PM</td>
</tr>
<tr>
<td></td>
<td>Email order was sent to</td>
<td>OrderDispatcher - Email</td>
<td>1 Sep 2017 10:45:57 PM</td>
</tr>
</tbody>
</table>

Line Items

<table>
<thead>
<tr>
<th>Line #</th>
<th>Part # / Description</th>
<th>Qty (Unit)</th>
<th>Price</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7722882</td>
<td>20 (EA)</td>
<td>$40.00 AUD</td>
<td>$800.00 AUD</td>
</tr>
</tbody>
</table>

Wireless keyboard
Status
29 Unconfirmed

Sub-total: $800.00 AUD
Accessing a Purchase Order

➢ You will receive a Purchase Order via email from through the Ariba Network

1. Locate and open the email

   - Click on **Continue** to access the order or click on **Process Order**

   **Note:** You cannot access the Purchase Order via the Ariba Network **ONLY** via the email

➢ Accessing the order will allow you to perform the required tasks, for example and Order Confirmation, a Ship Notice or Invoice
Re-sending a Lost Purchase Order through the Ariba Network

➢ Log onto your Ariba Network Standard Account, from the Dashboard/Homepage

1. Click on the number of documents to display, select Last 50 Documents

2. Locate the required Purchase Order

3. Click on Select

4. Select Send me a copy to take action

➢ Screen displays a system confirmation message
Re-sending a Lost Purchase Order through the Ariba Network cont.

5. Click on Resend
   - Screen displays the Dashboard/Homepage

6. Click on your User Name

7. Select Logout
   - The Purchase Order will be sent to the email address/es entered into Order Routing
Order Confirmation

- Some Buyers require an Order Confirmation prior to either Shipping or Invoicing or even both
- Locate the email with the Purchase Order you require
- There are 3 types of Order Confirmation; a Confirmation can be created to either confirm, update or reject the order:
  1) Confirm Entire Order: used to confirm all line item details of the order
  2) Update Line Item: used to advise your Buyer there is incorrect information on the Purchase Order, this includes price updates, unit of measure queries, backorders, line item rejections and need by date updates
  3) Reject Entire Order: used to reject the order if it cannot be fulfilled

Note where an Order Confirmation is optional it may not be responded to by your Buyer
**Order Confirmation – General Information**

- A Purchase Order is your document of truth and cannot be adjusted or changed, some Buyers use the Order Confirmation process to trigger a Change Purchase Order, other Buyer require the Supplier to contact the requester to change or adjust the Purchase Order and send to your Standard Account email.

- To determine whether a Buyer requires an Order Confirmation is primarily based on what tabs are inactive or active, see the tables below:

<table>
<thead>
<tr>
<th>Name of Action</th>
<th>Is it Active</th>
<th>Is it Active</th>
<th>What does this mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Order Confirmation</td>
<td>YES</td>
<td></td>
<td>You are <em>Required</em> to Create an Order Confirmation</td>
</tr>
<tr>
<td>Ship Notice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>Create Invoice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of Action</th>
<th>Is it Active</th>
<th>Is it Active</th>
<th>What does this mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Order Confirmation</td>
<td>YES</td>
<td></td>
<td><em>An Order Confirmation is NOT required</em></td>
</tr>
<tr>
<td>Ship Notice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>Create Invoice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

© 2019 SAP Ariba. All rights reserved.
Creating an Order Confirmation - Overview

- With the Purchase Order Open
- 1. Click Create Order Confirmation.
- Drop down box displays available options:
  - Confirm Entire Order
  - Update Line Item
  - Reject Entire Order
- Make the applicable selection
- Complete all fields with an asterisks at header level
- Enter the required information for items being confirmed
- Click on Next and review, then Submit
- Order status shows Confirmed or partially confirmed. Partially confirmed remains until all items have been confirmed
Order Confirmation Update Line Level – General Information

Order Confirmation-Update Line Level is used when there are variations to the items requested by your Buyer such as short supply and rather than waiting until all the goods are available to create an order confirmation, this process allows suppliers to provide the goods that are available. An Order Confirmation in Partially Confirmed Status can have multiple Order Confirmations until all items within the purchase order have been confirmed.

Also use Order Confirmation–Update Line Items when there is a price discrepancy on the purchase order received from your Buyer on an item/s as only your Buyer can permanently change a purchase order and may send a Change Order with the new Unit Price.

The total quantity for each line item in the required variations must not exceed the total amount requested by your Buyer.

When confirming at Line Item Level you are providing confirmation on the items requested in the purchase order

1) Use **Confirm** where a portion of the goods requested are being confirmed
2) When the items requested need to be backordered before supply can occur use **Backorder**
3) Where full supply on one item within the purchase order can occur but you are not confirming other lines use **Confirm**
4) To reject either the full amount of a line item or the full amount of an item but not the entire purchase order use **Reject**

If you have a line item with a Backorder or Rejection quantity, you must provide further information using the **Details** button.

Where you have a unit pricing variation, you will need to enter the “different” unit price into Details for review by your Buyer.
Ship Notice

- The Ship Notice is the delivery information and is sent to Your Buyer to advise them of the ship date for the materials.
- The Ship Notice is an *optional* document for transacting with your Buyer
- 2 methods for creating a Ship Notice
  1. Full Ship Notice
  2. Partial Ship Notice
## Ship Notice – General Information

- A Ship Notice advises the Buyer of the goods that have been sent based on the Purchase Order.
- In some instances a Buyer receipts goods into their Ordering System or ERP before invoicing can occur.
- To determine whether a Buyer requires a Ship Notice is primarily based on what tabs are inactive or active, see the tables below:

<table>
<thead>
<tr>
<th>Name of Action</th>
<th>Is it Active</th>
<th>Is it Active</th>
<th>What does this mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Order Confirmation</td>
<td>YES</td>
<td></td>
<td>You are <strong>Required</strong> to Create a Ship Notice</td>
</tr>
<tr>
<td>Ship Notice</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Invoice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of Action</th>
<th>Is it Active</th>
<th>Is it Active</th>
<th>What does this mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Order Confirmation</td>
<td></td>
<td>YES</td>
<td>An Ship Notice is <strong>NOT</strong> required</td>
</tr>
<tr>
<td>Ship Notice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>Create Invoice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of Action</th>
<th>Is it Active</th>
<th>Is it Active</th>
<th>What does this mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Order Confirmation</td>
<td>YES</td>
<td></td>
<td>You are <strong>Required</strong> to Create a Ship Notice</td>
</tr>
<tr>
<td>Ship Notice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>Create Invoice</td>
<td></td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>
Creating a Ship Notice - Overview

- With the Purchase Order open
- 1. Click Create Ship Notice.
- Screen displays Create Ship Notice
- Complete all fields with an asterisks at header level
- Enter the Ship Qty for each order item
- For perishable items enter the Batch ID and Expiry
- Click on Next and review
- Click on Submit
- Order status shows Confirmed or partially confirmed. Partially shipped remains until all items have been shipped
All orders received via the Ariba Network require an invoice to be created in the Ariba Network.

The Invoice# refers to your internal invoice number.

Partial invoicing is allowed, however you will need to keep the email containing the Purchase Order.

The Ariba Network uses Balance Tracking.

Shipping Cost added at Line level will not cause GST to be calculated for shipping. If the order has multiple lines the shipping cost can be added to one line or split over the all lines. (The Cost does NOT need to be split up over the lines)

The Invoice number you provide to your Buyer is the number from out of your ordering system, ERP, excel spreadsheet or other invoice number generation process and each Invoice number must be unique.

Refer to Slide 78 for information about Contract Invoicing.
Invoicing– General Information

• Only Invoices that have been rejected can be Edited and Resubmitted

• Invoices cannot be recalled or adjusted once sent

• Refer to your Purchase Order when Invoices are rejected to ensure that any previously required documents (for example Order Confirmation) have been actioned

• GST may be added at Header or Line level, some Buyer require all Taxes to be added at Line item Level, some Buyers will trigger the taxes to be added based on the information on the Purchase Order

• Balance Tracking occurs on both the value of the Purchase Order and the Quantity

• Purchase Order values are shown GST exclusive

• You cannot invoice for a total greater than that shown on the Purchase Order

• Only add shipping where it is not already included as part of the cost price of the goods requested by your Buyer

• The date the invoice is created is when payment terms commence, payment terms are agreed between you and the Buyer and if shown on the Purchase Order are based on the agreed terms

• You cannot add costs or charges unless previously agreed with your buyer or if an Order Confirmation was mandatory and was included, for example Shipping Costs
Begin the Invoice

➢ Locate and open the email with the Purchase Order you wish to Invoice

➢ Screen displays the Purchase Order

1. Click Create Invoice

2. Select Standard Invoice.

➢ Screen displays Create Invoice

➢ The transaction rules in place by your Buyer will determine what selections are available in the drop down list
1. Enter the Invoice #

2. Check or enter the Invoice Date

3. Select either Header level Tax or Line Level Tax

   If all items on the Invoice have the same tax rate select Header Level Tax, however if there are items on the Invoice that attract different levels of tax then select Line level tax

4. Select Line level shipping (only if shipping is going to be added)

   Note: Your Buyer’s transaction rules will determine whether you can add tax at Header or Line level

   ➢ Remember that anything with an asterisks is a required field and must be completed

---

**Standard Invoice – Header Level**

**Create Invoice**

**Invoice Header**

**Summary**

- Purchase Order: APO253
- Invoice #: INV778998
- Invoice Date: 23 Oct 2017
- Supplier Tax ID:
- Remit To:
- **Bill To:**

**View/Edit Addresses**

- Subtotal: $800.00 AUD
- Total Tax: $0.00 AUD
- Total Shipping: $0.00 AUD
- Total Gross Amount: $800.00 AUD
- Total Net Amount: $800.00 AUD
- Amount Due: $800.00 AUD

**Tax**

- Header level tax
- Line level tax

**Shipping**

- Header level shipping
- Line level shipping
Adding Shipping at Header Level

Note: Only add shipping where it is a total charge against the purchase order and it is not already included.

- With the Invoice open
- 1. Select Header level shipping
- 2. Click on Add to Header
- 3. Select Shipping Cost
- ➢ The Shipping cost section will open
- 4. Enter the Shipping Amount
- 5. Click on Update
- ➢ Click again on Add To Header
- 6. Click on Shipping Tax
- ➢ The Shipping Tax section will be displayed
- 7. Confirm or select the correct tax Category
- ➢ The total for the tax rate selected is displayed
Adding an Attachment to Header Level

With the Invoice displayed
1. Click on Add to Header
2. Select Attachment
   ➢ The Attachments section will open
3. Click on Browse
4. Select the file required from your computer and select Open
5. Click on Add Attachment
   ➢ The selected document is added
Note: Repeat until all attachments are added up to a maximum of 10MB
➢ To delete a document:
   1) Click on the document
   2) Click on Delete
**Note:** Only add shipping where it is a total charge against the purchase order and it is not already included

- With the Invoice open
  1. Select **Header level shipping**
  2. Click on **Add to Header**
  3. Select **Shipping Cost**
     - The Shipping cost section will open
  4. Enter the **Shipping Amount**
  5. Click on **Update**
     - Click again on **Add To Header**
  6. Click on **Shipping Tax**
     - The Shipping Tax section will be displayed
  7. Confirm or select the correct tax **Category**
     - The total for the tax rate selected is displayed
Standard Invoice – Line Level (including add Shipping)

1. Click in Tax Category (only where line level tax was selected in the header)
2. Select the Tax Rate from the drop down box
3. Click on Add to Included Lines
   ➢ A Tax section will open for each Line Item (only for line item tax)
4. Confirm or enter the Quantity that will be invoiced
5. Confirm or update the Unit Price (only if applicable and authorisation has been obtained from your Buyer)
6. Tax level for the Line Item
7. Add Shipping (if required)
8. Repeat for all line items, click Next
Standard Invoice – Add Tax at Line Level

1. Click in Tax Category
2. Select the Tax Rate from the drop down box
3. Click on Add to Included Lines
   ➢ A Tax section will open for each Line Item
4. Confirm or enter the Quantity
5. Confirm or Select the correct tax Category
6. Repeat for all line items, click Next
   ➢ Refer to Slide 70, Finalise an Invoice
Adding an Attachment at Line Level

➢ Screen displays Line Items

1. Click on the Line that requires the Attachment
2. Click on Line Item Actions
3. Select Attachment
4. Click on Browse
5. Select the file from your computer and click on Open
6. Click on Add Attachment

➢ The attachment is added
➢ To delete an attachment:
  1) Click on the attachment
  2) Click on Delete

Note: You can add multiple attachments up to a maximum of displayed
Adding Country Tax Rates for Effective Invoicing (perform only if required)

1. Click on **Create**
2. Select the **tax type** that most represents your requirements
3. Enter the **Rate %**, this is the percentage rate that will be auto-populated when the tax type is selected
4. Add a **Tax Description**
5. Click on **OK**

**Note:** The Taxes list is updated with the created tax and will appear in the drop down list until removed using the configure tax menu and then delete function
Finalise Standard Invoice

➢ Review the Invoice.

1. Click Submit

2. Click on Exit

➢ Screen returns to the Purchase Order the Order Status has changed to Partially/Invoiced

3. Click on Done

➢ Screen displays the Orders and Releases

Create Invoice

Confirm and submit this document. It will be electronically signed according to the compliance map and your customer’s invoice rules. This transaction qualifies as Cross-Border trade. The document’s destination country is: Australia.

If you want your invoices to be stored in the Ariba long term document archiving, you can subscribe to an archiving service. Note that you will also be able to archive old invoices once you subscribe to the archiving service.

Standard Invoice / Tax Invoice

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal</td>
<td>$800.00 AUD</td>
</tr>
<tr>
<td>Total Tax</td>
<td>$200.00 AUD</td>
</tr>
<tr>
<td>Total Shipping</td>
<td>$2.00 AUD</td>
</tr>
<tr>
<td>Total Gross Amount</td>
<td>$800.00 AUD</td>
</tr>
<tr>
<td>Total Net Amount</td>
<td>$800.00 AUD</td>
</tr>
<tr>
<td>Amount Due</td>
<td>$800.00 AUD</td>
</tr>
</tbody>
</table>

REMIT TO:

Postal Address:
Somewhere
In Melbourne 2020
Australia

BILL TO:

SUPPLIER:

ABN number
Postal Address:
Somewhere
In Melbourne 2020
Australia

Purchase Order: APO253

Order Detail      Order History

From:             To:

Purchase Order

(Invoice) APO253
Amount: $800.00 AUD
Version: 1

Invoice INV778996 has been submitted.

➢ Print a copy of the invoice
   ➢ Exit invoice creation

Submit

Previous  Save  Submit  Exit

© 2019 SAP Ariba. All rights reserved.
Standard Invoice – Using View/Edit Addresses

➢ With the Create Invoice screen displayed
1. Click the required View/Edit Addresses
➢ Each View/Edit Address displays different required fields
2. Complete all fields with an Asterisks
Standard Invoice – Changing Remit To

1. Click the **Down Arrow**
2. Select the applicable address

**Note:** the selected information is displayed
Partial Invoicing

- Invoices will display as Partially Invoiced until all items on the original Purchase Order have been Invoiced.
- Partial invoicing on Partial invoices is allowed.
- Multiple Invoices can be created for a Purchase Order.
- Note that if a Purchase Order is not fully invoiced as goods were not fully supplied and invoiced it will remain in the Ariba Network as “Partially Invoiced”.
- Always locate and open the original Purchase Order Email, new Purchase Order emails will not be sent for remaining quantities that are outstanding.
Completing a Partial Invoice

- Locate and Open the Purchase Order, Partially Invoiced will be displayed.

Note: All previous documents are displayed under Related Documents.

1. Click on Create Invoice
2. Select Standard Invoice
3. Screen displays the Invoice
4. Enter the Invoice Number
5. Confirm or enter the Supplier Tax ID
6. Scroll down to Line Items

1. Click on Create Invoice
2. Select Standard Invoice
3. Enter the Invoice Number
4. Confirm or enter the Supplier Tax ID
5. Scroll down to Line Items
1. Enter the **Invoice #**

2. Check or enter the **Invoice Date**

3. Select either **Header level Tax** or **Line Level Tax**
   
   If all items on the Invoice have the same tax rate select Header Level Tax, however if there are items on the Invoice that attract different levels of tax then select Line level tax

4. Select **Line level shipping** (only if shipping is going to be added)

   **Note:** Your Buyer’s transaction rules will determine whether you can add tax at Header or Line level

   ➢ Remember that anything with an asterisk is a required field and must be completed

---

**Commence Partial Invoice – Header Level**

**Create Invoice**

**Invoice Header**

**Summary**

- Purchase Order: APO253
- Invoice #: INV778998
- Invoice Date: 23 Oct 2017
- Supplier Tax ID: [Field]

**View/Edit Addresses**

- Subtotal: $800.00 AUD
- Total Tax: $0.00 AUD
- Total Shipping: $0.00 AUD
- Total Gross Amount: $800.00 AUD
- Total Net Amount: $800.00 AUD
- Amount Due: $800.00 AUD

**Tax**

- Header level tax [ ]
- Line level tax [ ]

**Shipping**

- Header level shipping [ ]
- Line level shipping [ ]
Completing a Partial Invoice – Line Level

- Complete the header Details as per standard invoice:
  - Invoice Number
  - Tax Rate
  - Shipping
  - Attachments (if required)

- Scroll down to Line items
  1) Only outstanding totals will be displayed in the Quantity field
  2) Zero indicates that the total on the Purchase Order has been fully invoiced
  3) Slide the Include from green to grey

- Complete line items details by indicating the correct quantities for invoicing

3. Click on Update
4. Click on **Next**
   - Screen displays **Create Invoice**

5. Click on **Submit**

6. Click on **Exit**
   - Screen displays the Purchase Order with either:
     - **Invoiced** as all items have been invoiced that were on the original Purchase Order
     - **Partially Invoiced** as there are still items that have not yet been invoiced against the original Purchase Order
Contract Invoice

- Contract Invoices are created in the Ariba Network against Contracts that are in place between you and your Buyer.
- The catalog items contained within the Contract are uploaded and updated by your Buyer.
- Contracted services are typically where the supplier is performing recurring tasks as defined in a master agreement, where agreed pricing terms and rates exist and invoices are submitted at regular intervals (i.e. monthly).
- Please also note the following when creating invoices:
  - The Tax rate and category must be selected for each invoice.
  - Taxes can be added at the header level or at line level.
  - Partial invoicing is allowed.
Contract Invoicing – General Information

- All Contract Invoices display a zero value until you have added the required lines for invoicing

- Catalogs containing the contract items is maintained by the Buyer, where there is incorrect pricing or units of measure contact the requester

- The information contained within this guide may differ slightly in terms of fields that are required for completion, refer to the Supplier Education Materials Portal for information about Contract Invoicing (if this is your Buyer process) remembering that you access invoicing from the Dashboard or homepage

- You may or may not receive separate Purchase Orders when invoicing against a contract

- The total value of the contract is not displayed or shown

- Some Buyers will have Blanket Purchase Orders as part of their Contract process
Begin a Contract Invoice

- Log onto your Ariba Network
- The Dashboard or Homepage is displayed
  1. Click on the **Create**
  2. Select **Contract Invoice**.
- Screen displays **Create Contract Invoice: Select Customer**
1. Click on **Select**
   - Screen displays the **Choose value for Contract**

2. Select the contract required and click **Select**
   - The contract number selected is displayed

3. Enter the **Invoice Number**

4. Enter the **Invoice Date**

5. Click on **Next**
   - Screen displays **Create Invoice** header

---

**Create Contract Invoice: Select Contract**

Enter the information requested in the fields below. Required fields are indicated with an asterisk (*). Click Next to continue creating an invoice.

- **Contract**: (no value)
- **Invoice #**: 99877-1a
- **Invoice Date**: 29 Aug 2019
- **Sold To Email**: 
- **Payment Terms**: 
- **Purchasing Unit**: (no value)
- **Ship From**: 

---

Choose Value for Contract

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>Effective Date</th>
<th>Expiration Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BPD179 (CW3220958) BPO Ashta Cycle 2</td>
<td>Wed, 17 Jul 2019</td>
<td>Thu, 16 Jul 2020</td>
<td>Open</td>
</tr>
<tr>
<td>2</td>
<td>BPD249 (CW3221249) Test Blanket</td>
<td>Tue, 23 Jul 2019</td>
<td>Thu, 16 Jul 2020</td>
<td>Open</td>
</tr>
<tr>
<td>3</td>
<td>C237-V3 (CW3221194) Contract Based Supplier Level</td>
<td>Mon, 22 Jul 2019</td>
<td>Fri, 31 Jul 2020</td>
<td>Open</td>
</tr>
<tr>
<td>4</td>
<td>C254 (CW3221271) Supplier Level Attemp 2</td>
<td>Wed, 24 Jul 2019</td>
<td>Fri, 31 Jul 2020</td>
<td>Open</td>
</tr>
<tr>
<td>6</td>
<td>C287 (CW3221534) CSV Testing Contract</td>
<td>Thu, 1 Aug 2019</td>
<td>Sun, 2 Aug 2020</td>
<td>Open</td>
</tr>
</tbody>
</table>
The information entered into the previous screen is auto-populated.

**Note:** The value of the Contract Invoice is zero, this is due to the items of the contract have not yet been added.

1. Enter or confirm the **Supplier Tax ID** (this is your ABN)

   - All taxes are required to be entered at Line item level by your Buyer

   - Scroll down to **Line Item Level**

---

**Contract Invoice – Header Level**

---

**Create Invoice**

**Invoice Header**

**Summary**

- **Contract Number:** C237
- **Invoice #:** S9877-1a
- **Invoice Date:** 21 Aug 2019
- **Subtotal:** $0.00 AUD
- **Total Tax:** $0.00 AUD
- **Total Gross Amount:** $0.00 AUD
- **Total Net Amount:** $0.00 AUD
- **Amount Due:** $0.00 AUD

**Additional Fields**

- **Information Only. No action is required from the customer.**
- **Supplier Account ID #:**

---

© 2019 SAP Ariba. All rights reserved.
1. **Click Add Items**
   - Screen displays Create Contract Invoice: Add Contract Item
   - All items that are part of the Contract will be displayed

2. **Enter the Qty based on the unit of measure**

3. **Click on Add Item**
   - **Note:** The number of items added appears in the cart
   - Repeat **Steps 2 and 3** until all items and their totals are added to the cart

4. **Click Done**
   - **Use View to change the view**
     - **List**
     - **Grid**
### Contract Invoice – Add Line Items cont.

- Screen displays Line Items with all the items added from the selection of Contract Items.

The items are displayed with the:
1) Quantity
2) Unit of Measure
3) Unit Price
4) Subtotal

5. Add Shipping where required (only add shipping at line level when shipping is not part of the total cost)

<table>
<thead>
<tr>
<th>No.</th>
<th>Include</th>
<th>Type</th>
<th>Part #</th>
<th>Description</th>
<th>Customer Part #</th>
<th>Quantity</th>
<th>Unit</th>
<th>Unit Price</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>✔️</td>
<td>MATERIAL</td>
<td>BADGE004</td>
<td>Name badge Pin</td>
<td></td>
<td>114</td>
<td>EA</td>
<td>$7.20 AUD</td>
<td>$820.80 AUD</td>
</tr>
</tbody>
</table>

**Shipping**

- Load “Shipping”
- **Shipping Cost**
  - Shipping Amount: $8.00 AUD
  - Shipping Date

<table>
<thead>
<tr>
<th>No.</th>
<th>Include</th>
<th>Type</th>
<th>Part #</th>
<th>Description</th>
<th>Customer Part #</th>
<th>Quantity</th>
<th>Unit</th>
<th>Unit Price</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>✔️</td>
<td>MATERIAL</td>
<td>BADGE006</td>
<td>Name badge Magnetic</td>
<td></td>
<td>67</td>
<td>EA</td>
<td>$7.20 AUD</td>
<td>$82.40 AUD</td>
</tr>
</tbody>
</table>

**Shipping**

- Load “Shipping”
- **Shipping Cost**
  - Shipping Amount: $8.00 AUD
  - Shipping Date
All taxes must be added at Line item Level when transacting with your Buyer using the Ariba Network.

1. Click Tax Category

2. Select the applicable tax value from the drop down list

**Note:** A Tax section will open for each item added onto the Contract Invoice.

- If there are Items that are GST exclusive only change that specific line, apply the tax rate that relates to the majority of the items in the invoice.

- Go to Slide ??, Finalising a Contract Invoice.
You have identified that you have either entered the incorrect total or line item and need to correct.

1. Click on **Change Item**

- Screen displays **Create Contract Invoice: Change Items**

2. To update an amount, click in the **Qty** field for the item you wish to change.

3. Update the **Unit** of Measure (only where it is incorrect and required):
   1. Click on the **Unit Down Arrow for the item**
   2. Click on **Select** to choose the required Unit of Measure.

4. Click on **Update Amount**

5. To add another item, click on **Add Item**, add the items.

**Note:** The price cannot be changed as it is based on the Contract Terms.

6. When all changes have been actioned, click on **Done**.
Finalising a Contract Invoice

➢ Screen displays Line Item Level

1. Click on **Next**

➢ Review the Contract Invoice

**Note:** Use **Previous** to return to Line Items to make changes if you have identified an error

2. Click **Submit**

3. Click on **Exit**

➢ Screen displays the screen where the selection for contract invoices was made

---

**Create Invoice**

Confirm and submit this document. It will not be electronically signed according to the countries of origin and destination of invoices. The document’s destination country is Australia. You may want your invoices to be stored in the Ariba long term document archiving, you can subscribe to an archiving service. Note that you will also be able to archive old invoices once you subscribe to the archiving service.

<table>
<thead>
<tr>
<th>Standard Invoice / Tax Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Invoice Number:</strong> 99877-1a</td>
</tr>
<tr>
<td><strong>Invoice Date:</strong> Wednesday, 21 Aug 2019 3:30 AM GMT-07:00</td>
</tr>
<tr>
<td><strong>Contract Number:</strong> C237</td>
</tr>
<tr>
<td><strong>Subtotal:</strong> $1,301.20 AUD</td>
</tr>
<tr>
<td><strong>Total Tax:</strong> $130.32 AUD</td>
</tr>
<tr>
<td><strong>Total Shipping:</strong> $0.00 AUD</td>
</tr>
<tr>
<td><strong>Total Gross Amount:</strong> $1,431.52 AUD</td>
</tr>
<tr>
<td><strong>Total Net Amount:</strong> $1,431.52 AUD</td>
</tr>
<tr>
<td><strong>Amount Due:</strong> $1,431.52 AUD</td>
</tr>
</tbody>
</table>

---

**Update**  **Save**  **Exit**  **Submit**  **Exit**
Line Item Credit Memo

- Line Item Credit Memos can be sent to your Buyer via the Ariba Network and do not need to be sent via a separate email

- A Line Item Credit Memo is raised against an Invoice

- A Line Item Credit Memo can be raised for Quantity Adjustments and Prices Adjustments, this is dependant on the Transaction Rules set by your Buyer

- Please also note the following when creating a Line Item Credit Memo:
  - Credits are supported against specific line items from a previously submitted invoice
  - Credits can be for full or partial amounts
Line Item Credit Memo— General Information

• Line Item Credit Memos are against an Invoice, Standard Account users can access the required Invoice by locating and accessing the email with the Purchase Order to identify the Invoice

• Credits can occur on quantity or price adjustment, although this is determined by you Buyer, some buyers may only allow for quantity Line Item Credit Memos

• Credits should not be used to adjust Invoice totals due to an error or invoice rejection. For errors contact the requester and request the invoice be rejected and use the Edit and Resubmit process for reject Invoices but locating and opening the Rejected Invoice email (refer to Slide 97, Edit and Resubmit)

• All Taxes are applied based on the original Invoice created

• Default Shipping and other additions will be auto-populated based on the original Invoice

• Price Adjustment Line Item Credit Memos may not be available for transacting with all Buyers

• When using Price Adjustment, the unit price should be the actual price reduction not the correct unit price, the Unit Price entered will be deducted from the invoice, for example the original unit price was $35.00, but the Unit price should have been $34.98 – multiply the quantity by $0.02 not $34.98
Begin the Line Item Credit Memo – Via a Purchase Order

1. Locate and open the email with the Purchase Order
2. Locate the Invoice that requires a Credit in Related Documents
3. Click to open the required Invoice
4. The Invoice is displayed
5. Click on Create Line-Item Credit Memo
6. The Create Line Item Credit Memo is displayed
7. Refer to Slide 91 for Quantity Adjustment Line Item Credit Memo process
8. Refer to Slide 94 for Price Adjustment Line Item Credit Memo process
The Invoice is displayed
1. Select **Quantity Adjustment**
2. Enter a **Credit Memo #**
3. Confirm the **Credit Memo Date**
4. Confirm or enter the **Supplier Tax ID**
   - Complete all fields with an Asterisks
   - All other information in the Summary, Tax, Shipping, Special Handling, Discount, and Additional Fields should default

**Note:** All totals are shown as a Negative and tax must be added at Line item level
5. Scroll down to locate **Reason for Credit memo**
6. Enter the **Reason for Credit Memo**

Scroll down to Line items
Finalising a Line Item Credit Memo – Quantity Adjustment

- Line Items is displayed

1. Locate and update the Quantity of the credit for each item
2. Remove items that are not required for credit using the Include Slide bar
3. Click on Update once all items have been actioned based on the Credit
4. Click on Next

- Screen displays the Confirm Line-Item Credit Memo
Finalising a Line Item Credit Memo – Quantity Adjustment cont.

5. Click on **Submit**
6. Click on **Exit**

**Note:** There is no requirement to print the Credit Memo or send a copy to your Buyer

7. Click on **Done** or **Previous**

➢ Screen displays the Invoice the Line Item Credit Memo was actioned from

**Previous** – Returns to the Purchase Order

**Done** – Returns to Email

---

Create Line-Item Credit Memo

Confirm and submit the line-item credit memo. It will not be electronically signed according to the countries of origin and destination of invoice. The document's originating country is Australia. The document's finalising country is Australia. If you want your invoices to be stored in the Ariba long-term document archiving, you can subscribe to an archiving service. Note that you will also be able to archive old invoices once you subscribe to the archiving service.

Line-Item Credit Memo

(Original Invoice No: 987654)

Credit Memo Number: CRN9987
Credit Memo Date: Thursday 12 Sep 2019 8:48 AM GMT+10:00
Original Invoice Number: 987654
Original Invoice Date: Thursday 6 Aug 2019 2:16 PM GMT+10:00
Original Purchase Order: 4950316347

<table>
<thead>
<tr>
<th>Subtotal</th>
<th>$4,320.00 AUD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Tax</td>
<td>$452.04 AUD</td>
</tr>
<tr>
<td>Total Gross Amount</td>
<td>$4,772.04 AUD</td>
</tr>
<tr>
<td>Total Net Amount</td>
<td>$4,726.20 AUD</td>
</tr>
<tr>
<td>Amount Due</td>
<td>$4,752.00 AUD</td>
</tr>
</tbody>
</table>

---

Invoice CRN9987 has been submitted.

- Click to view the Invoice
- Exit invoice creation

---

Invoice: 987654

Create Line-Item Credit Memo | Copy This Invoice | Print | Download PDF | Export oXML

- Detail
- Scheduled Payments
- Remittance
- History

Standard Invoice / Tax Invoice
Line Item Credit Memo – Header Level – Price Adjustment

- Line Item Credit Memo is displayed
- 1. Select Price Adjustment
- 2. Select Yes
- 3. Enter a Credit Memo #
- 4. Confirm the Credit Memo Date
- 5. Confirm or enter the Supplier Tax ID
- Complete all fields with an Asterisks
- All other information in the Summary, Tax, Shipping, Special Handling, Discount, and Additional Fields should default
- Scroll to locate Reason for Credit Memo
Finalising a Line Item Credit Memo – Price Adjustment

6. Enter the **Reason for the Credit Memo** specifically in relation to price adjustments

- Scroll down to **Line Items**

7. Locate and update the **Quantity** of the credit for each item

8. Locate and update the **Unit Price** for line item that requires a Price Adjustment

Note: The unit price should be the actual price reduction not the correct unit price, the Unit Price entered will be deducted from the invoice

9. Remove items that are not required for credit using the Include Slide bar

10. Click on **Update** once all items have been actioned based on the Credit

11. Click on **Next**

- Screen displays the Confirm Line-Item Credit Memo
Finalising a Line Item Credit Memo – Price Adjustment cont.

12. Click on Submit
13. Click on Exit

**Note:** There is no requirement to print the Credit Memo or send a copy to your Buyer

14. Click on Done or Previous

➢ Screen displays the Invoice the Line Item Credit Memo was actioned from

**Previous** – Returns to the Purchase Order

**Done** – Returns to Email

---

Create Line-Item Credit Memo

Confirm and submit the line item credit memo. It will not be electronically signed according to the countries of origin and destination of invoice. The document’s originating country is Australia. The document’s destination country is Australia.

If you want your invoices to be stored in the Ariba long term document archiving, you can subscribe to an archiving service. Note that you will also be able to archive old invoices once you subscribe for an archiving service.

Line-Item Credit Memo

(Original Invoice No: 987654)

<table>
<thead>
<tr>
<th>Credit Memo Number: CRN9987</th>
<th>Subtotal</th>
<th>$ 4,320.00 AUD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Memo Date: Thursday, 12 Sep 2019 8:25 AM GMT+10:00</td>
<td>Total Tax</td>
<td>$ 432.00 AUD</td>
</tr>
</tbody>
</table>

---

**Invoice CRN9987 has been submitted.**

- Print a copy of the invoice
- Exit Invoice creation

---

Invoice: 987654

Create Line-Item Credit Memo  Copy This Invoice  Print  Download PDF  Export cXML

<table>
<thead>
<tr>
<th>Detail</th>
<th>Scheduled Payments</th>
<th>Remittance</th>
<th>History</th>
</tr>
</thead>
</table>

Standard Invoice  /  Tax Invoice
Edit and Re-Submit Invoices

- Invoices that are rejected by your Buyer and have been rejected

- Invoices can be rejected due to:
  - Missing information - for example a required attachment
  - Incorrect information
  - Added information to invoice – freight added but was not provided on the Order Confirmation
  - Requested by the Supplier due to Invoicing errors
Open and Review Rejected Invoice

1. Locate and Open the email indicating that an Invoice has been rejected
2. Open the Invoice
   - The Rejection Reason is displayed
3. Click on Edit and Resubmit
   - The Invoice is displayed
   - Correct errors, these will usually have a red error message, refer to the relevant Invoicing Slide.
4. Finalise
# Support

<table>
<thead>
<tr>
<th>Support Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Help Centre</strong>&lt;br&gt;For all your support needs</td>
<td>Types of Support available:&lt;br&gt;1. User Community&lt;br&gt;2. Ask questions or view documentation&lt;br&gt;3. Email</td>
</tr>
<tr>
<td><strong>Supplier Information Portal</strong>&lt;br&gt;(Location of Training Guide/s and Video/s)</td>
<td>1. On the Home screen&lt;br&gt;2. Click on Company Settings&lt;br&gt;3. Click on Customer Relationships&lt;br&gt;4. Click on Supplier Information Portal</td>
</tr>
<tr>
<td><strong>Ariba Network Training Request</strong></td>
<td>E: <a href="mailto:an.sellertraining.aus@sap.com">an.sellertraining.aus@sap.com</a></td>
</tr>
</tbody>
</table>