

# Ariba Network Service Order Guide

SAP Ariba 

 SAP



# Introduction

The purpose of this document is to provide the information suppliers need to effectively transact with BHP via the Ariba Network. This document provides step by step instructions, procedures and hints to facilitate a smooth flow of procurement between BHP and supplier.



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## Resources Available:

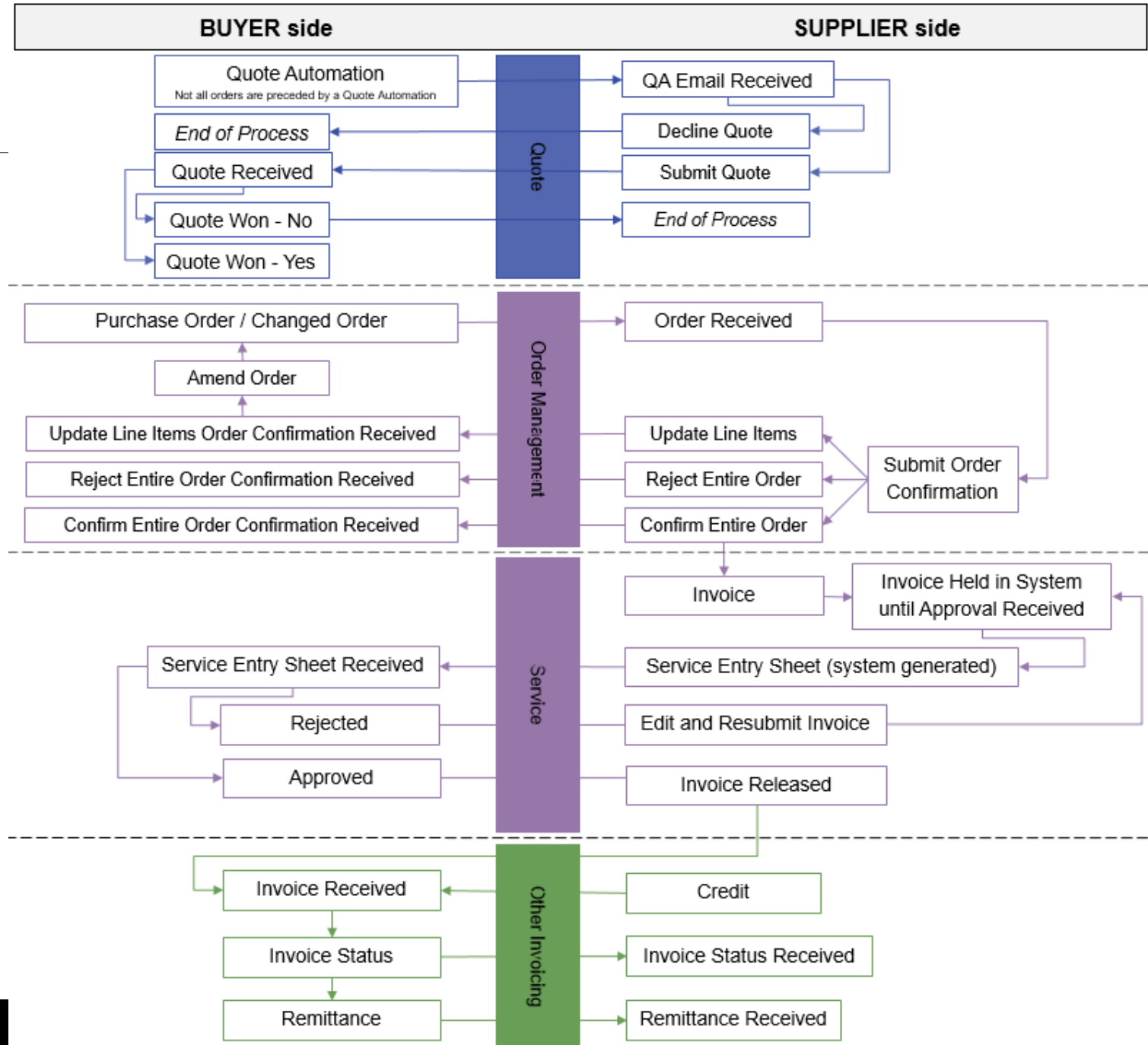
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# Process Workflow

**Quote** – Covered in the Quote Automation Guide

**Order Management and Service** – Covered in the Service Order Guide

**Other Invoicing** – Covered in the Material Invoice Guide



# Inbox – Orders and Releases

The **Orders and Releases** category displays a summary of all the purchase orders sent from buyers.

**Note (N):** The columns can be sorted into alphabetical (A-Z or Z-A) or numerical (0-9 or 9-0) order by clicking on the column heading.

The screenshot shows the Ariba Network interface. The 'INBOX' tab is selected in the top navigation bar. Below the navigation bar, there are several tabs: 'Orders and Releases', 'Time & Expense Sheets', 'Early Payments', 'Scheduled Payments', 'Remittances', 'Inquiries', 'Notifications', and 'More...'. The 'Orders and Releases' section is active, displaying a table of orders. A search bar is visible above the table. The table has columns for Type, Order Number, Ver, Ship To Address, Amount, Date, Order Status, Settlement, Amount Invoiced, Revision, and Actions. Two callouts explain the 'Ver' and 'Amount Invoiced' columns. Another callout explains the 'Order Number' column. A callout explains the 'Order Status' column. A callout explains the 'Actions' dropdown menu. A callout explains the 'Actions' dropdown menu.

**The Ver.** is the version number of the order. 1 = the original order, 2 = changed order and so on

**The Amount Invoiced** is the total amount invoiced to date

**The Order Number** is the buyers Purchase Order Number

**The Order Status** is the current status of the order, e.g. New, Confirmed, Invoiced

**The Actions** dropdown allows document creation without opening the order

Type	Order Number	Ver	Ship To Address	Amount	Date	Order Status	Settlement	Amount Invoiced	Revision	Actions
▼ Customer: Demo Buyer - TEST (14)										
Order	PO12351	1	Some Department of My Company , sydney, NSW , Australia	\$70,470.00 AUD	15 Aug 2016	New	Invoice	\$0.00 AUD	Original	Actions
Order	PO12343	1	Some Department of My Company Sydney, NSW Australia	\$8,000.00 AUD	4 Apr 2016	New	Invoice	\$0.00 AUD	Original	Actions



# Service Order

- The Order is the source document and all subsequent documents are created from the order
- The Order 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
- All Service Invoices require an attachment of supporting documentation (e.g. signed time sheet, invoice, service report)
- Can only be created from 'Confirmed' Service Order lines
- Multiple Invoices can be created against the same Order line up to the quantity/value available on that PO line
- Ariba keeps a track of outstanding order balances (Balance Tracking)
- Maximum of 200 lines (including the Parent Line)
- Supplier Part Number – not required, if entered max. 18 characters
- Services – Header Dates only need be entered
- Contract/Catalogue add item – use original PO currency
- Tax Editable (USA) – limited to specific Petroleum suppliers who will not receive tax on the PO and can add their own tax category and rate to the invoice
- Tax – supplied on PO and will show as VAT for all regions but with the correct rate for that country
- Edit & Resubmit function – Can we explain that where a document has failed it can be edited to remove errors but will require a new number otherwise cannot be resubmitted.
- Bulk INV Upload – this is a limited feature only available on approval

# Open the Purchase Order

1. Click **Inbox** tab on the Dashboard.
  - Screen displays: Orders and Releases
2. Click the **Order Number** to open the order.
  - Screen displays: Purchase Order
3. View the Purchase Order.


The screenshot shows the Ariba Network dashboard. The 'INBOX' tab is highlighted with a red circle containing the number '1'. Below the dashboard, the 'Orders and Releases' section is visible. A search filter is expanded. A table of orders is shown, with the first row highlighted by a red circle containing the number '2'. The highlighted row is for an order with the number PO12351.

Type	Order Number	Ver	Ship To Address	Amount	Date ↓	Order Status	Settlement	Amount Invoiced	Revision	Actions
Order	PO12351		Some Department of My Company , sydney, NSW , Australia	\$70,470.00 AUD	15 Aug 2016	New	Invoice	\$0.00 AUD	Original	Actions


# View Service Order Details – Header Level


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) **BHP Contact Information.**
  - 5) **Ship To** details.
  - 6) **Bill To** details.
- Scroll down to Line Items


Purchase Order: 4505741426-S  Done

Create Order Confirmation  Create Service Sheet  Create Invoice Hide | Print | Download PDF | Export cXML | Download CSV | Resend


Order Detail Order History 

**From:**  
Kirin Abbasi  


**To:**  
BHPB AU test supplier  
123 Albert Street  
Brisbane 4001  
Australia  
Phone:  
Fax:  
Email:

 **Purchase Order (Confirmed)**  
4505741426-S  
Amount: \$606.00 AUD  
Version: 1

**Payment Terms** ⓘ  
Within 60 days Due net


**Contact Information**   
Purchasing Agent

**Supplier Address**


**Other Information**

**Incoterms Information**  
Incoterm Code: CPT ( DETERMINED BY CONTRACT )

Order Type: Service  
PO  
Supplier Number: 30009731

**Ship All Items To** 

Ship To Code: PN9D  
Location Code: PN9D

**Bill To** 

Phone: +1 ( ) PN00  
buyerID: PN00

Routing Status: Acknowledged  
Related Documents:  4505741426-S





# Planned Service Order

- BHP knows the details and value of the service carried out and will provide line details
- Contain one or more parent line/s and child line/s
- The child line values will correspond to the parent line total amount

# View Planned Service Details – Line Item Level

- 7) Click **Show Item Details** to see all line item details.
- 8) Click **Details** to see individual Line Level details.
- 9) Click **Done** to return to the Inbox.

## Reviewing a Purchase Order

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

- Validate the information contained within the PO
- Ensure that the details of the order are correct

**Line Items**

7 [Show Item Details](#)

Line #	Part #	Customer Part #	Type	Return	Revision Level	Qty (Unit)	Need By	Price	Subtotal	Tax	
▼ 10	Parent Line		Service				16 Oct 2017		\$606.00 AUD	\$0.00 AUD	<a href="#">Details</a> <span style="border: 1px solid blue; padding: 2px 5px; font-weight: bold; color: blue;">8</span>
Description: Test Service 1											
10.10	Child Line		Service			100.0 (EA)		\$6.00 AUD	\$600.00 AUD	\$0.00 AUD	<a href="#">Details</a>
Description: Cost,Material,Chemicals & Additives											
10.20	Child Line		Service			1.0 (EA)		\$6.00 AUD	\$6.00 AUD	\$0.00 AUD	<a href="#">Details</a>
Description: Free Text Service											
<b>Terms and Conditions:</b>			<p>All correspondence, including invoices and packages, must reference the above Purchase Order number All commercial enquires relating to this Purchase Order must be addressed with the listed BHP Purchasing contact. For more information regarding our invoicing guidelines and requirements, please visit (<a href="http://www.bhpbilliton.com/info/suppliers">http://www.bhpbilliton.com/info/suppliers</a>) If unable to meet the specified delivery date, promptly notify the BHP Contact person noted on page one of this document. Values above reflect the calculated taxes (as applicable) based on the Supplier provided unit pricing. Should Supplier identify any discrepancies between the expected taxation of the Goods/ Services and the taxes as calculated herein, you are requested to reach out to the BHP Purchasing contact for this Purchase Order to resolve prior to submittal of any invoices. Failure to do so may result in rejection of invoices, or delays in payment. This order is issued by Petrohawk Energy Corporation () pursuant to and subject to the applicable terms and conditions referred to below: (i) where there is an executed written agreement in force between the Supplier and BHP which relates to goods and/or services the subject of this Order, then this Order is issued pursuant to and subject to the terms and conditions of the relevant agreement; (ii) where there is no other written agreement in force between the Supplier and BHP, then this Order is issued subject to the BHP Purchase Order Terms and Conditions in force at the date of this Order. The BHP Purchase Order Terms and Conditions can be accessed from the BHP website (<a href="http://www.bhpbilliton.com/info/suppliers">http://www.bhpbilliton.com/info/suppliers</a>) or alternatively, can be obtained by contacting the BHP contact on this document. By acceptance of this Order, the Supplier accepts the terms and conditions stated herein, the Service and Purchase Order Terms and Conditions and, if applicable, the terms and conditions of any additional agreements with the Supplier relevant to this Order.</p>								
Order submitted on: Friday 27 Oct 2017 10:00 PM GMT+10:00 Received by Ariba Network on: Tuesday 31 Oct 2017 5:07 PM GMT+10:00 This Purchase Order was sent by BHP Group Operations - TEST AN01015189973-T and delivered by Ariba Network.							<span style="color: green;">📄</span> Service Sheet Required.				
Sub-total: \$ 606.00 AUD Est. Total Tax: \$ 0.00 AUD Est. Grand Total: \$ 606.00 AUD											
<span style="color: green;">📄</span> Create Order Confirmation ▼			<span style="color: green;">📄</span> Create Service Sheet			<span style="color: green;">📄</span> Create Invoice ▼			<a href="#">Hide</a>   <a href="#">Print</a>   <a href="#">Download PDF</a>   <a href="#">Export cXML</a>   <a href="#">Download CSV</a>   <a href="#">Resend</a>		
<span style="border: 1px solid blue; padding: 5px 15px; font-weight: bold; color: blue;">9</span> Done											



# Unplanned Service Order

- BHP may not know the details and value of the service carried out. The order will have a bucket of money to draw down on. Lines are added to the Invoice to allocate the funds of the order
- An Unplanned Service Order, is an order with a bucket of money to allocate draw down on
- A limit is placed on the service order, which allows the supplier to draw down on the value on the service order up to the limit set
- Consist of one or more parent lines with no associated child lines.
- Use the **Add/Update** button to add a new line to the Service Invoice
- If a contract in place for the order the **Add Contract/Catalog Item** option, from the Add/Update drop down box
- Only the Parent Line will copy across to the Invoice, child lines must be added to draw down on the order

# View Unplanned Service Details – Line Item Level

7) Click **Show Item Details** to see all line item details.

8) Click **Details** to see individual Line Level details.

9) Click **Done** to return to the Inbox.

## Reviewing a Purchase Order

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

- Validate the information contained within the PO
- Ensure that the details of the order are correct

**Line Items**
Page 1
 Show Item Details

Line #	Part #	Customer Part #	Type	Return	Revision Level	Qty (Unit)	Need By	Price	Subtotal	Tax	Customer Location
10			Service			1.0 (PCE)	3 Nov 2017	\$2,000.00 AUD	\$2,000.00 AUD	\$200.00 AUD	FX1A

Description: On Contract Limit PO

**No Child Lines**

*Terms and Conditions:* All correspondence, including invoices and packages, must reference the above Purchase Order number. All commercial enquires relating to this Purchase Order must be directed to the Purchasing contact. For more information regarding our invoicing guidelines and requirements, please visit the BHP website (http://www.bhpbilliton.com/info/suppliers). If unable to meet the specified delivery date, promptly notify the BHP Purchasing contact. Values above reflect the calculated taxes (as applicable) based on the Supplier provided unit pricing. Should Supplier identify any discrepancies between the expected taxation of the Goods/ Services and the taxes as calculated herein, you are requested to reach out to the BHP Purchasing contact for this Purchase Order to resolve prior to the submission of any invoices. Failure to do so may result in rejection of invoices, or delays in payment. This order is issued by Petrohawk Energy Corporation () pursuant to and subject to the applicable terms and conditions referred to below: (i) where there is an executed written agreement in force between the Supplier and BHP which relates to goods and/or services the subject of this Order, then this Order is issued pursuant to and subject to the terms and conditions of the relevant agreement; (ii) where there is no other written agreement in force between the Supplier and BHP, then this Order is issued subject to the BHP Purchase Order Terms and Conditions in force at the date of this Order. The BHP Purchase Order Terms and Conditions can be accessed from the BHP website (http://www.bhpbilliton.com/info/suppliers) or alternatively, can be obtained by contacting the BHP contact on this document. By acceptance of this Order, the Supplier accepts the terms and conditions stated herein, the Service and Purchase Order Terms and Conditions and, if applicable, the terms and conditions of any additional agreements with the Supplier relevant to this Order.

Order submitted on: Friday 3 Nov 2017 10:00 PM GMT+10:00  
 Received by Ariba Network on: Monday 6 Nov 2017 10:52 AM GMT+10:00  
 This Purchase Order was sent by BHP Group Operations - TEST AN01015189973-T and delivered by Ariba Network.

Service Sheet Required.  
 Sub-total: \$ 2,000.00 AUD  
 Est. Total Tax: \$ 200.00 AUD  
 Est. Grand Total: \$ 2,200.00 AUD

Create Order Confirmation
 Create Service Sheet
 Create Invoice

Hide | Print | Download PDF | Export cXML | Download CSV | Resend

Done



# Mixed Service Order

- A combination of both Planned and Unplanned line items
- The total of the Parent line will exceed the total of the child lines

# View Mixed Service Details – Line Item Level

- 7) Click **Show Item Details** to see all line item details.
- 8) Click **Details** to see individual Line Level details.
- 9) Click **Done** to return to the Inbox.

## Reviewing a Purchase Order

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

- Validate the information contained within the PO
- Ensure that the details of the order are correct

**Line Items** 7 Show Item Details

Line #	Part #	Customer Part #	Type	Return	Revision Level	Qty (Unit)	Need By	Price	Subtotal	Tax	
▼ 10			Service				25 Sep 2017		\$2,510.00 AUD	\$1.00 AUD	Details
Description: test											
	10000010		Service			1.000 (EA)		\$10.00 AUD	\$10.00 AUD	\$1.00 AUD	Details
Description: test											

Order submitted on: Friday 22 Sep 2017 10:00 PM GMT+10:00  
Received by Ariba Network on: Saturday 23 Sep 2017 7:12 AM GMT+10:00  
This Purchase Order was sent by BHP Group Operations - TEST AN01015189973-T and delivered by Ariba Network.

The total of the Parent line will exceed the total of the child lines

Service Sheet Required.

Sub-total: \$ 2,510.00 AUD  
Est. Total Tax: \$ 1.00 AUD  
Est. Grand Total: \$ 2,511.00 AUD

9 Done

8



# Order Confirmation

- When a new order is received into Ariba, you will be required to create an Order Confirmation
- **The Order Confirmation is Mandatory**
- The Confirmation Number (#) is your reference number, it can be any word number or combination of your choice. Max length is 20 characters
- 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 as is.
  - 2) **Update Line Item:** used to update details of the order prior to invoicing, e.g. price, date etc.
  - 3) **Reject Entire Order:** used to reject the order if it cannot be fulfilled
- Any field with an \* is a mandatory field and a value is required to be entered

# Create the Order Confirmation

1. Click **Inbox** tab on the Dashboard.
  - Screen displays: Orders and Releases
2. Located and click the **Order Number** to open the order.
  - Screen displays: Purchase Order
3. View the Purchase Order.
4. Click **Create Order Confirmation** and select option.
  - Drop down box displays available options:
    - **Confirm Entire Order**
    - **Update Line Items**
    - **Reject Entire Order**
  - Screen displays: Order Confirmation

HOME **INBOX** 1 CATALOGS REPORTS CSV Documents Create

Orders and Releases Time & Expense Sheets Early Payments Scheduled Payments Remittances Inquiries Notifications More...

Orders and Releases

Orders and Releases Items to Ship

Search Filters

Orders and Releases (14)

Type	Order Number	Ver	Ship To Address	Amount	Date ↓	Order Status	Settlement	Amount Invoiced	Revision	Actions
Order	PO12351		Some Department of My Company , sydney, NSW , Australia	\$70,470.00 AUD	15 Aug 2016	New	Invoice	\$0.00 AUD	Original	Actions
Order	PO96743	1	Some Department of My Company Sydney, NSW Australia	\$8,000.00 AUD	4 Apr 2016	New	Invoice	\$0.00 AUD	Original	Actions

Create Order Confirmation 4 Create Ship Notice Create Invoice Hide Print Download PDF Export cXML Download CSV Resend

- Confirm Entire Order
- Update Line Items
- Reject Entire Order



# Order Confirmation – Type 1 – Confirm Entire Order

5. Enter **Confirmation#**.

6. Click **Next**.

➤ Screen displays: Review Order Confirmation

7. **Review** Confirmation and click **Submit**.

➤ Screen returns - Purchase Order. Order Status has changed to Confirmed

Exit
Next

1

Confirm Entire Order

2

Review Order Confirmation

Confirming PO
\* Indicates required field

5

Confirmation #:\* 845645645

Associated Purchase Order #: 4505626094

Customer: BHP Group Operations - TEST
 

⚠ BHP Group Operations - TEST requires that you fully confirm line items before you can add them to ship notices, service sheets, or invoices. If you change or reject a line item, it cannot be added to another document.

Supplier Reference:

ADDITIONAL INFORMATION

Est. Completion Date:

Comments:

**Line Items**

Line #	Part #	Customer Part #	Revision Level	Qty (Unit)	Need By	Unit Price	Subtotal	Tax	Customer Location
▼ 10					31 Oct 2017			\$3,603.59 AUD	FX1A
Description: Shock Absorbers									
▶ Schedule Lines									
Current Order Status: Confirmed As Is									
10.10				8.0 (EA)		\$1,744.12 AUD	\$13,952.96 AUD	\$1,395.30 AUD	FX1A
Description: Shock Absorber Rebuilds - CD5									
Current Order Status: 8.0 Confirmed As Is									

6

Next

# Order Confirmation – Type 2 – Update Line Item

5. Enter a **Confirmation #**.
  6. Enter the corresponding quantity into the appropriate fields - **Confirm/ Reject**.
  7. Click **Details** to edit details and add comments.
- Screen displays: Line Item Details screen

Confirming PO

1 Update Item Status

▼ Order Confirmation Header \* Indicates required field

2 Review Confirmation

5

Confirmation #\*

Associated Purchase Order #: 4505626094

Customer: BHP Group Operations - TEST

Supplier Reference:

⚠ BHP Group Operations - TEST requires that you fully confirm line items before you can add them to ship notices, service sheets, or invoices. If you change or reject a line item, it cannot be added to another document.

**ADDITIONAL INFORMATION**

Est. Completion Date:

Comments:

**Line Items**

Line #	Part #	Customer Part #	Revision Level	Qty (Unit)	Need By	Unit Price	Subtotal	Tax	Customer Location
▼ 10					31 Oct		\$3,603.59 AUD		FX1A
Description: Shock Absorbers					2017				
<div style="display: flex; justify-content: center; align-items: center;"> <span style="font-size: 0.8em; margin-right: 5px;">▶ Schedule Lines</span> <input type="button" value="Confirm Based on Schedule Lines"/> </div>									
10.10				8.0 (EA)		\$1,744.12	\$13,952.96	\$1,395.30 AUD	FX1A
Description: Shock Absorber Rebuilds - CD5						AUD	AUD		

**Current Order Status**

8.0 Unconfirmed

6

Confirm:

Reject:

7

# Order Confirmation – Type 2 – Update Line Item cont...

8. Enter updated information.

9. Click **Ok**.

➤ Screen returns – Order Confirmation

10. Click **Next**.

➤ Screen displays: Review Order Confirmation

11. Click **Submit**.

➤ Screen returns - Purchase Order. Order Status has changed to Partially Confirmed

New Order Status **4 Rejected**

Comments:

New Order Status **4 Confirmed**

Est. Completion Date:

Unit Price:

Price Unit Quantity:\*

Unit Conversion:\*

Price Unit:\*

Supplier Part:

Auxiliary Part ID:

Manufacturer Part ID:  
Manufacturer Name:

Comments:

Description: Shock Absorber Rebuilds - CD5  
Pricing Description:

Subtotal: ⓘ \$6,976.48 AUD

**9**

## Rejected:

Use to Reject a portion or a line of a multi-lined order. Enter a Rejection Reason and a Comment

## Confirmed:

Use for all other updates/changes required to the order:

- Unit Price
- Comments

# Order Confirmation – Type 3 – Reject Entire Order

5. Enter **Confirmation #**.
  6. Enter **Comments** for the rejection. (Include detailed notes advising reason for rejection).
  7. Click **Reject Order**.
    - Screen returns - Purchase Order. Order Status has changed to Rejected
- Use the Reject if;
    - You can no longer fulfil the order
    - The order was not intended for your company

REJECT ENTIRE ORDER

Order Confirmation Number:

5 Confirmation #.\* 756451

6 Comments.\* Comments regarding the rejection

7 Reject Order Cancel

METSO AUSTRALIA LIMITED  
Email: minerals.credit.aus@metso.com



# Service Claims

- The Service Entry Sheet is the claim for the service work carried out
- Once submitted to BHP the Service Sheet will be reviewed and either Approved or Rejected
- There are 2 methods to begin the payment process for Service Orders, 1. Create the invoice first or 2. Create the Service Sheet first
  - 1) **Method 1** - Create the **Invoice** first; the invoice will be held until the service is completed and approved by BHP and then released. Once the invoice is released to BHP, your Ariba account will create an Auto-Flipped Service Sheet
  - 2) **Method 2** - Create the **Service Sheet** first; the Service Sheet will be submitted to the buyer for review. Once the Service Sheet has been approved an Invoice will need to be manually created in Ariba. If a Service Sheet is created before an Invoice, this process must be followed for the entire life of the order (any subsequent claims against the order).

**NB.** Only selected suppliers will be able to create manual Service Sheets in Ariba. If the Service Sheet button is greyed out (not active) in your Ariba Order you will only be able to use method 1 (Invoice first).



# Method 1 – Invoice First

Once a service has been carried out the invoicing process can begin one of two ways.

**Please Note: Whichever option you use will need to be continued throughout the life of the order**

[Option 1 – Create an Invoice first](#)

Step 1: Receive and confirm Service Order

Step 2: Provide service

Step 3: Create & Submit Service Invoice (the system will hold this, until the Service Entry is Approved)

Step 4: Service Entry Sheet is Approved

Step 5: Once approved, the Ariba Network will release the Invoice (Status of Pending Approval) & send to BHP to progress through the invoice reconciliation process.



# Service Invoice

- A Service Invoice is a claim for the services carried out and is created and held in the system until approval is received from BHP
- An Invoice requires an attachment of supporting documentation (e.g. signed time sheet, invoice, service report)
- Can only be created from 'Confirmed' Service Order lines
- Multiple invoices can be created against the same PO line up to the quantity/value available on that PO line
- Maximum of 200 lines (including the Parent Line) per Invoice

# Create the Invoice

1. Click **Inbox** tab on the Dashboard
  - Screen displays the list of Orders and Releases
2. Click the **Order Number** to open the order
  - Screen displays the Purchase Order
3. Click **Create Invoice & select Standard Invoice**
  - Screen displays the Select Item

The screenshot shows the SAP Ariba dashboard with the 'INBOX' tab selected. A red circle with the number '1' highlights the 'INBOX' tab. Below the navigation bar, there are tabs for 'Orders and Releases', 'Time & Expense Sheets', 'Early Payments', 'Scheduled Payments', 'Remittances', 'Inquiries', 'Notifications', and 'More...'. The 'Orders and Releases' section is active, showing a list of orders. A red circle with the number '2' highlights the order number 'PO12351' in the first row of the table.

Type	Order Number	Ver	Ship To Address	Amount	Date ↓	Order Status	Settlement	Amount Invoiced	Revision	Actions
Order	PO12351		Some Department of My Company , sydney, NSW , Australia	\$70,470.00 AUD	15 Aug 2016	New	Invoice	\$0.00 AUD	Original	Actions ▾
Order	PO96743	1	Some Department of My Company Sydney, NSW Australia	\$8,000.00 AUD	4 Apr 2016	New	Invoice	\$0.00 AUD	Original	Actions ▾

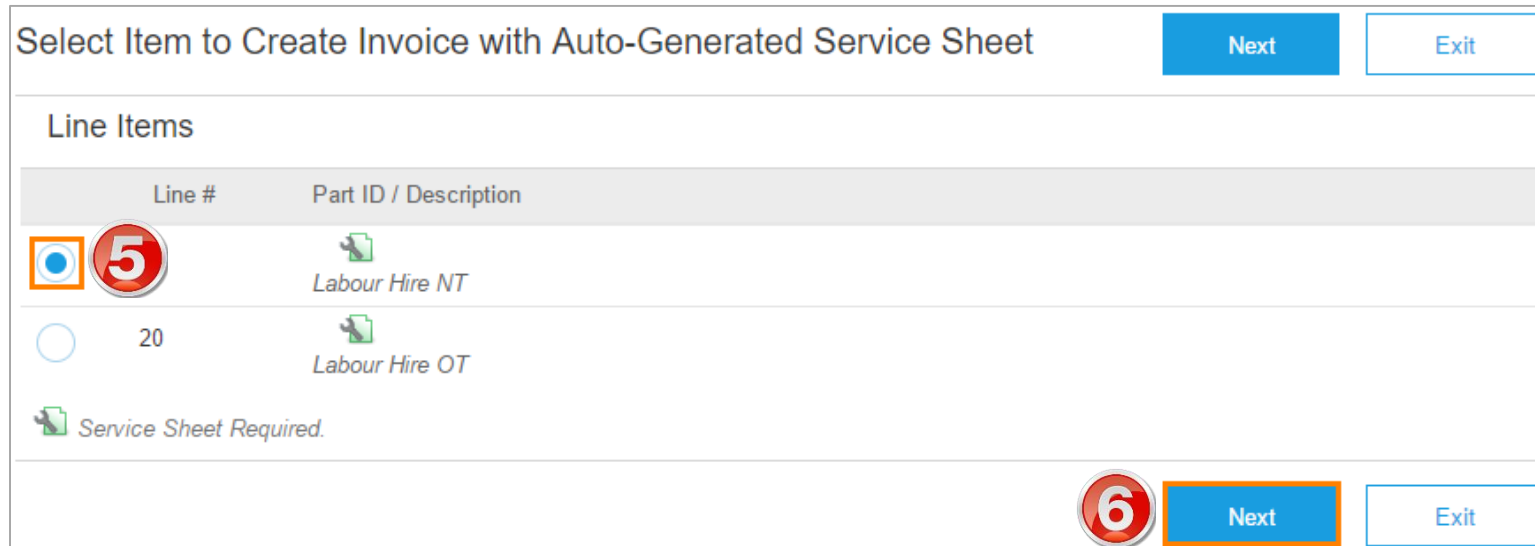
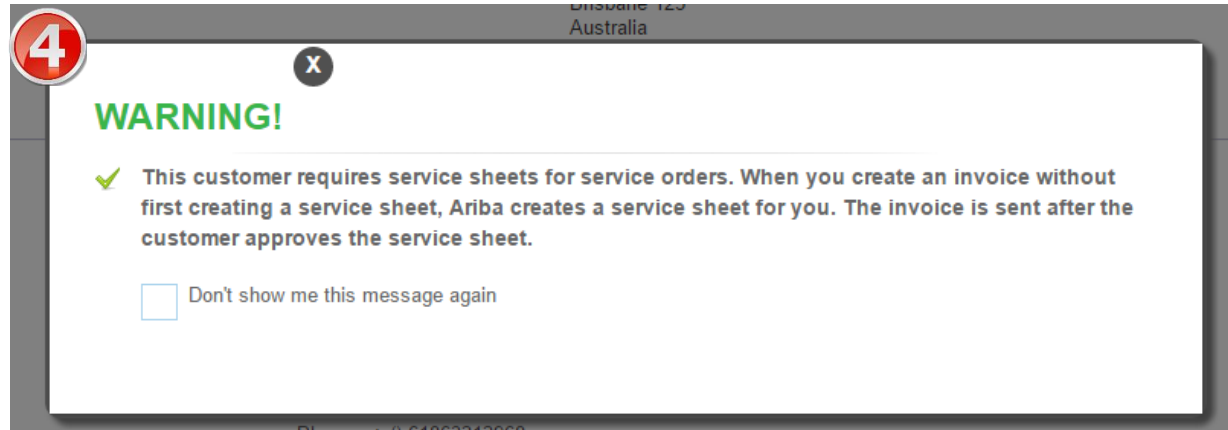
The screenshot shows the 'Create Invoice' dropdown menu. A red circle with the number '3' highlights the 'Standard Invoice' option. The menu also includes 'Create Order Confirmation', 'Create Service Sheet', and 'Line-Item Credit Memo'.

- ☑ Create Order Confirmation ▾
- 📄 Create Service Sheet
- 📄 Create Invoice ▾
  - Standard Invoice
  - Line-Item Credit Memo



# Invoice – Select Lines

4. The first time this option is selected a **WARNING! pop up** box will appear advising that once the Invoice is Approved by BHP it will flip into a SES. Tick the 'Don't show me this message again' box and close by clicking the X
  5. For multi-lined orders; select the parent line to be invoiced (reminder: only one parent line per claim)
  6. Click **Next** to take selected parent line and associated child lines into the invoice
- Screen displays: Create Invoice



# Invoice – Header Level

7. Enter your invoice number into the **Invoice#** field

8. **Attachments** for Service Invoices are **Mandatory**. See next page for instructions

➤ Error message if an Attachment is not added: This invoice auto-generates a service sheet. Your customer requires attachments for service sheets. You must upload at least one attachment before submitting this invoice

Create Invoice Update Save Exit Next

*! This invoice auto-generates a service sheet. Your customer requires attachments for service sheets. You must upload at least one attachment before submitting this invoice.*

▼ Invoice Header \* Indicates required field Add to Header ▼

**Summary**

Purchase Order: 4505395128	Subtotal: <b>\$1,578.72</b> AUD
Invoice #:* 54562154 <span>7</span>	Total Tax: \$157.87 AUD
Invoice Date: ⓘ 9 Nov 2017	Amount Due: <b>\$1,736.59</b> AUD
Remit To: BHPB AUS test supplier CUTOVER AN - TEST	
Brisbane Australia	

**Payment Term**

Discount or Penalty Term(days): 60 Percentage(%): 0.000  
Within 60 days Due net

Supplier: BHPB AUS test supplier CUTOVER AN - TEST	Customer: BHP Group Operations - TEST	<a href="#">View/Edit Addresses</a>
Brisbane Australia	Melbourne Victoria Australia	
Bill From: BHPB AUS test supplier CUTOVER AN - TEST	Email: <input type="text"/>	<a href="#">View/Edit Addresses</a>
Brisbane Australia		

Supplier ID Number: 30100717

**Supplier VAT** Customer VAT

Supplier VAT/Tax ID: 2 Customer VAT/Tax ID: 99 007 835 761

Add to Header ▼

# Invoice – Header Level cont.

9. An attachment is required for all Service Order Invoices

10. Click on **Add to Header** and select **Attachment**.

➤ The Attachments section is displayed;

- 1) Click on **Choose File**.
- 2) **Browse** your computer files.
- 3) Select and click on **Open**.
- 4) Click on **Add Attachment**.

- Multiple files can be attached
- Max **10mb** in total

Note: Do NOT attach a duplicate copy of the invoice.

**Add to Header** ▾

Comment

**Attachment**

10

1

**Attachments**

The total size of all attachments cannot exceed 10MB Remove

**Choose File** No file chosen **Add Attachment**

4

**Attachments**

The total size of all attachments cannot exceed 10MB Remove

**Choose File** No file chosen **Add Attachment**

Name	Size (bytes)	Content Type
<input type="checkbox"/> test.pptx	2775322	application/vnd.openxmlformats-officedocument.presentationml.presentation

↳ **Delete**

Please note that attachments must comply with these specifications:

- File must be < 10MB
- Filename must have less than 40 characters total
- Filename must not include special characters shown below:

Á á é É í Í ó Ó ú Ú Ñ ñ & -  
\_ ' o a \ / " \$ . ~ # ( ) û [ ] Ç

# Invoice – Line Level – Planned Service

11. Update **Quantity** (if required).

12. Enter **Service Start and End Dates**.

13. Tax will default to 10% GST

14. Click on **Next**.

➤ Screen displays: Create Invoice Summary

15. Review Invoice & **Submit**

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

➤ Note: For multi-lined order; if there are lines of the order that are not required on invoice (partial invoice), select line item and click Delete. NB. This will only delete the line from the Invoice, it will not be deleted from the order.

1 Line Items, 1 Included, 0 Previously Fully Invoiced

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
10				sentry for repairs					
10.10	<input checked="" type="checkbox"/>	SERVICE		Labour,Assistant,Trades,DS		2	LH	\$65.78 AUD	\$131.56 AUD

**11** Quantity

**12** Service Start Date: \* 1 Nov 2017  
Service End Date: \* 8 Nov 2017

**13** Tax Category: \* VAT  
Taxable Amount: \$131.56 AUD  
Rate(%): 10.000  
Tax Amount: \$13.16 AUD

Additional Fields lineItemReferenceNumber:

Line Item Actions Delete

Update Save Ex **14** Next

# Invoice – Line Level – Unplanned Service

➤ Unplanned Service Invoice requires 'Child Lines' to be added to claim the service item

12. To add Child Lines to the Invoice; click **Add/Update** & select **Add Contract/Catalog Item**

13. Click **Create a Non-Catalog Item**

Line Items 0 Line Items, 0 Included, 0 Previously Fully Invoiced

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit	Unit Price	Subtotal
	10				On Contract Limit PO						

**12** Add/Update ▾  
Add Contract/Catalog Items

↳ Line Item Actions ▾ Delete

Update Save Exit Next

Create Service Sheet: Add Item Done Cancel

Part No: null, Description: On Contract Limit PO Contract ID: 5600076719

Browse By Category Search by part #, supplier name, or keyword ▾ 🔍 🛒 +

No results found for , please revise your search


- or -

**13** Create a Non-Catalog item

# Invoice – Line Level – Unplanned Service

14. Enter **Full Description** of service

15. Select a Commodity Code

1) Click the dropdown arrow 

2) Select **Search More**

3) Locate commodity code

4) Click **Select**

16. Update the **Price**

17. Click **Save and Done**

Create Service Sheet: Add Non-Catalog Item

---

14

1

16

USD

Amount: \$200.00 USD

**Supplier Information**

Supplier Part Number:

Supplier Auxiliary Part ID:

17

Choose Value for Commodity Code
3

Name ↑	ID	4
▼ All Commodities	All	<input type="button" value="Select"/>
▶ Apparel and Luggage and Personal Care Products	53	<input type="button" value="Select"/>
▶ Building and Construction and Maintenance Services	72	<input type="button" value="Select"/>
▶ Building and Construction Machinery and Accessories	22	<input type="button" value="Select"/>
▶ Chemicals including Bio Chemicals and Gas Materials	12	<input type="button" value="Select"/>

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30

# Invoice – Line Level – Unplanned Service cont.

18. Add **Service Start** and **End Dates**

19. Click on **Next**.

➤ Screen displays: Create Invoice Summary

20. **Review** Invoice & click **Submit** to send the Invoice.

1 Line Items, 1 Included, 0 Previously Fully Invoiced

Line Items										
<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
▼	10				On Contract Limit PO					<a href="#">Add/Update</a> ▼
<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	10	<input checked="" type="checkbox"/>	SERVICE		Description		1	EA	\$200.00 USD	\$200.00 USD
Contract #: 5600076719										
<b>18</b>	Service Start Date:*		1 Nov 2017							
	Service End Date:*		7 Nov 2017							
<b>Tax</b>						Category:*	VAT			
						Location:				
						Description:				
<b>Additional Fields</b>						lineltemReferenceNumber:				
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>↳</span> <div style="display: flex; gap: 10px;"> <span><a href="#">Line Item Actions</a> ▼</span> <span><a href="#">Delete</a></span> </div> </div>										
							<a href="#">Update</a>	<a href="#">Save</a>	<a href="#">Exit</a>	<b>19</b> <a href="#">Next</a>



# Method 2 – Service Sheet First

Once a service has been carried out the invoicing process can begin one of two ways.

**Please Note: Whichever option you use will need to be continued throughout the life of the order**

[Option 2 – Create a Service Sheet first](#)

Step 1: Receive and Confirm Service Order

Step 2: Provide Service

Step 3: Create & Submit Service Sheet

Step 4: Approval Received from BHP

Step 5: Locate PO and Create & Submit Invoice



# Create the Service Sheet

1. Click **Inbox** tab on the Dashboard.
  - Screen displays: Orders and Releases
2. Click the **Order Number** to open the order.
  - Screen displays: Purchase Order
3. Click **Create Service Sheet**.
  - For multi-lined orders; select the parent line to be invoiced (reminder: only one parent line per claim)
4. Click **Next** to take selected parent line and associated child lines into the invoice
  - Screen displays: Create Service Sheet

HOME **INBOX** 1 CATALOGS REPORTS CSV Documents Create

Orders and Releases Time & Expense Sheets Early Payments Scheduled Payments Remittances Inquiries Notifications More...

Orders and Releases

Orders and Releases Items to Ship

Search Filters

Orders and Releases (14)

Type	Order Number	Ver	Ship To Address	Amount	Date ↓	Order Status	Settlement	Amount Invoiced	Revision	Actions
Order	PO12351	2	Some Department of My Company , sydney, NSW , Australia	\$70,470.00 AUD	15 Aug 2016	New	Invoice	\$0.00 AUD	Original	Actions

Create Order Confirmation Create Service Sheet 3 Create Invoice

Order Detail Order History

4

Select Item to Create Service Sheet 5 Next

Line Items

Line #	Part ID / Description
10	PIMA Wireless bus expander extra
20	Power Cable
30	Power Supply

Service Sheet Required.

# Service Sheet – Header Level

6. Enter **Service Sheet #**.
7. Enter **Service Start** and **End Dates**
8. Enter a **Location/Reference**
9. Add **Attachments**
  - 1) Click **Choose File** to browse your computer files.
  - 2) Select and click on **Open**.
  - 3) Click on **Add Attachment**.
  - Multiple files can be attached
  - Max **10mb** in total

Note: Do NOT attach a copy of the invoice

Create Service Sheet Previous Update Save Exit Next

▼ Service Sheet Header \* Indicates required field Add to Header ▼

**Summary**

Purchase Order: 4504898474CV9 Subtotal: \$0.00 AUD

**6** Service Sheet #: \* 84516 **7** Service Start Date: \* 1 Nov 2017

Service Sheet Date: \* 9 Nov 2017 Service End Date: \* 7 Nov 2017

**8** Location/Reference: ⓘ \* Pit100

**9** \*Attachments The total size of all attachments cannot exceed 10MB Remove

**1** Choose File No file chosen **3** Add Attachment

Add Comments





# Service Sheet Status

- Service Entry Sheets are system generated from the Invoice submitted
- The SES status changes based on the buyers response
  - Approved – The Invoice will be released by the system to BHP
  - Rejected – You need to Edit and Resubmit the Invoice and a new SES will be system generated and sent to BHP (the process will repeat)
- All Service orders require the Service Sheet Status of Approved, prior to the Invoice being released

# Service Sheet Status

To review submitted Service Sheets

1. Click **Outbox**.
2. Select **Service Sheets**.
3. Locate Service Sheet.

The Status of the Service Sheet:

- **Sent**: sent to the buyer
- **Approved**: Invoice released
- **Invoiced**: Invoice received into BHP system
- **Rejected**: has been Rejected

➤ To view Invoice Status, refer to the invoice guide

HOME INBOX **OUTBOX** 1 CATALOGS REPORTS UPLOAD/DOWNLOAD CSV Documents Create

Invoices Order Confirmations Ship Notices **Service Sheets** 2 Extended Collaboration Product Replenishment Drafts

### Service Sheets

▶ Search Filters

Service Sheets (5)

<input type="checkbox"/>	Service Sheet #	Customer	Related PO	Date	Amount	Routing Status	Status
<input type="checkbox"/>	00012121	BHP Group Operations - TEST	4504807669_S3	20 Jan 2017	\$1,161.04 AUD	Acknowledged	Invoiced
<input type="checkbox"/>	JIGG	BHP Group Operations - TEST	4504807669_S3	19 Jan 2017	\$184.62 AUD	Acknowledged	Sent
<input type="checkbox"/>	4504898474CV9SES	BHP Group Operations - TEST	4504898474CV9	18 Jan 2017	\$110.00 AUD	Acknowledged	Rejected
<input type="checkbox"/>	4504898474CV6T	BHP Group Operations - TEST	4504898474CV6	9 Jan 2017	\$20.00 USD	Acknowledged	Approved
<input type="checkbox"/>	4504898474CV6SES	BHP Group Operations - TEST	4504898474CV6	6 Jan 2017	\$200.00 USD	Acknowledged	Sent

↳ Create Invoice Edit

# Edit and Resubmit – Failed documents

1. A document status FAILED in Ariba may relate to validation in Ariba against BHP business rules or that BHP has rejected this from processing.
2. Go to the failed invoice and check if a reason is shown. This will allow you to understand what needs to alter when you resubmit.
3. It is important that you change the invoice number as BHP do not allow the re-use of the failed number.
  - Adjust all errors and then SUBMIT

Invoice: 11018201-04.A

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

Detail Scheduled Payments History

Rejected Invoice:  
Reasons:  
Invoice could be rejected due to buyer business rules. Check the History tab for the reason the buyer rejected this invoice, or not meet their business rules.

Edit & Resubmit **1**

Invoice: 11018201-04.A

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

Detail Scheduled Payments History

Invoice Status: Rejected  
Received By Ariba Network On: 8 Mar 2018 1:49:57 PM GMT+08:00  
Submitted By: Rose Nikodjevic

History

Status	Comments	Changed By	Date and Time	Stack Trace
	Invoice was modified. Original document at 20142008.	SCMSupplier-126483078	8 Mar 2018 1:50:04 PM	
	INV-64: The Supplier VAT ID is missing ?	PropogationDispatcher-126478040	8 Mar 2018 1:50:05 PM	
	INV-58: The tax information at invoice line 12 does not match the tax information in the PO. ?	PropogationDispatcher-126478040	8 Mar 2018 1:50:05 PM	

**2**

Edit Invoice

Please correct the following errors and resubmit

Invoice Header

Summary

Purchase Order: **11018201-04.A** **3**

Invoice #: 11018201-04.A  
! Invoice or Credit Memo # already exists.

Invoice Date: 27 Feb 2018

Supplier Tax ID: 11018201-04.A

Remit To: Dallas, TX United States

Subtotal: \$60,810.45 USD  
Total Tax: \$0.00 USD  
Amount Due: \$60,810.45 USD



# Support

Support Type	Description
Help Centre For all your support needs	Types of Support available: <ol style="list-style-type: none"><li>1. User Community</li><li>2. Ask questions or view documentation</li><li>3. Email/Live Chat</li><li>4. Request a call back</li></ol>
Supplier Information Portal (Location of Training Guide/s and Video/s)	<ol style="list-style-type: none"><li>1. On the Home screen</li><li>2. Click on Company Settings</li><li>3. Click on Customer Relationships</li><li>4. Click on Supplier Information Portal</li></ol>



## ➤ Editing Tax

- **Petroleum vendors who have been identified in the Tax Editable (USA) supplier group will no longer will receive a PO that has any tax category or rate included**
- **Upon creating an invoice, the supplier can edit and enter a Tax Category and a Tax Percentage Rate based on applicable local, state and federal taxes**
- **You must enter a tax category name and a percentage against each line item even if it has a 0% tax rate.**
- **For multi-line orders where different tax type is different for different lines the taxes must be changed at line level**

## ➤ Bulk INV Upload

- **In specific circumstances where large numbers of invoices are generated by a supplier, BHP will allow for a .csvfile to be used to create invoices.**
- **this is a limited feature only available on approval by BHP team in Petroleum.**
- **The supplier will still need to create a ASN for goods and it must be receipted by BHP before the invoices will be processed.**