

# 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

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# 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

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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.

Code	Name
1I	Fixed Rate
A9	Rate
DAY	Day
EA	Each
IE	Person
LH	Labour Hour
MIN	Minute
MON	Month
OT	Overtime hour
RH	Running or operating hour



# 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 you Buyer.
- A Buyer sets up a Standard Account and the amount of information shown on a Standard Account Dashboard is determined by the set up 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

The screenshot shows the Ariba Network Standard Account Dashboard. The top navigation bar includes 'HOME', 'INBOX', 'OUTBOX', 'REPORTS', and 'MESSAGES'. The main content area is divided into several sections: 'Purchase Order by Amount' (with a chart showing 'There is no data to show on charts.'), 'Orders, Invoices and Payments' (with a table showing 0 New Purchase Orders, 0 Orders to Confirm, 0 Orders that Need Attention, and 0 Invoices Pending Payment), and 'Now we're mobile.' (with a 'Check it out.' button and app store links). A 'Tasks' section is also visible with an 'Update Profile Information' button. A 'Help Center' sidebar on the right contains a search bar and a list of help topics.

The screenshot shows the Ariba Network Standard Account Dashboard. The top navigation bar includes 'HOME', 'INBOX', 'OUTBOX', 'REPORTS', and 'MESSAGES'. The main content area is divided into several sections: 'Orders, Invoices and Payments' (with a table showing 0 Pinned Documents), 'Now we're mobile.' (with a 'Check it out.' button and app store links), and 'Tasks' (with an 'Update Profile Information' button). A 'Help Center' sidebar on the right contains a search bar and a list of help topics.

# 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

The screenshot shows the Ariba Network dashboard interface. At the top, there is a navigation bar with tabs: HOME (1), INBOX, OUTBOX, CATALOGS, and REPORTS (1). On the right side of the navigation bar, there are links for 'Upgrade from light account', 'Learn More' (6), and 'Company Settings' (2). Below the navigation bar, there is a 'Trends' section with a line chart titled 'Purchase Order by Amount' (3) showing data from Feb 2017 to Jan 2018. To the right of the chart are links for 'Purchase Order by Volume', 'Purchase Order by Amount', and 'Outstanding Invoices'. Below the chart is a summary section for 'Orders, Invoices and Payments' (4) with metrics: 1 New Purchase Orders, 2 Orders that Need Attention, 0 Invoices Rejected, 0 Payments Received, and 0 Pinned Documents. A 'More...' button (5) is also present. To the right of this section is a 'Last 50 Documents' link (7). Below the summary is a table with columns: Order Number, Customer, Status, Amount, Date, Amount Invoiced, and Action. The first row shows Order Number 4200957039, Customer Name of Buyer, Status New, Amount \$468.80 AUD, Date 2 Jun 2017, Amount Invoiced \$0.00 AUD, and Action Select (8). On the far right, there is a mobile app promotion section and a 'Tasks' section with an 'Update Profile Information' button (8) showing a 35% progress bar.

# 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

The screenshot shows the Ariba Network dashboard interface. The top navigation bar includes the 'HOME' tab (1), an 'Upgrade from standard account' link (2), a 'Learn More' button (2), 'Company Settings' (3), and a 'Help Center' link (5). The main content area features a 'Orders, Invoices and Payments' section (4) with a table of documents, a mobile app promotion, and a 'Tasks' section. A right-hand 'Help Center' pane (6) contains a search bar and a list of help articles. The footer includes the SAP Ariba logo and copyright information (7).

Document #	Document Type	Customer	Status	Amount
No items				

# Setting the Orders, Invoices and Payments Display (if available)

**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**

Order Number	Customer	Status	Amount	Date ↓	Amount Invoiced	Action
4200957039	Name of Buyer	TEST	\$468.80 AUD	2 Jun 2017	\$0.00 AUD	Select

# Orders, Invoices and Payments – Resend Purchase Order Email

➤ Screen returns to the Dashboard

➤ The tiles selected are now display

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

Orders, Invoices and Payments All Customers ▾ Last 50 Documents ▾

1 New Purchase Orders
2 Orders that Need Attention
0 Invoices Rejected
4 Orders to Invoice
0 Pinned Documents
More...

Order Number	Customer	Status	Amount	Date	Amount Invoiced	Action
4200476213	♀ Name of Buyer	Confirmed	\$8,000.00 AUD	27 Sep 2017	\$0.00 AUD	Select ▾
4200957040	♀ Name of Buyer	Changed	\$468.80 AUD	2 Jun 2017	\$0.00 AUD	Select ▾
4200957039	♀ Name of Buyer	New	\$468.80 AUD	2 Jun 2017	\$0.00 AUD	Select ▾
4200957024	♀ Name of Buyer	Partially Invoiced	\$2,653.50 AUD	30 May 2017	\$1,769.00 AUD	Select ▾

Orders, Invoices and Payments All Customers ▾ Last 50 Documents ▾

1 New Purchase Orders
2 Orders that Need Attention
0 Invoices Rejected
4 Orders to Invoice
0 Pinned Documents
More...

Order Number	Customer	Status	Amount	Date	Amount Invoiced	Action
4200476213	♀ Name of Buyer	Confirmed	\$8,000.00 AUD	27 Sep 2017	\$0.00 AUD	Select ▾
4200957040	♀ Name of Buyer	Changed	\$468.80 AUD	2 Jun 2017	\$0.00 AUD	Select ▾
4200957039	♀ Name of Buyer	New	\$468.80 AUD	2 Jun 2017	\$0.00 AUD	Select ▾
4200957024	♀ Name of Buyer	Partially Invoiced	\$2,653.50 AUD	30 May 2017	\$1,769.00 AUD	Select ▾

# 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

The screenshot displays the Ariba Network user interface. At the top, the header includes 'Ariba Network', a navigation menu with 'HOME', 'INBOX', 'OUTBOX', 'CATALOGS', and 'REPORTS', and a 'Company Settings' dropdown menu highlighted with a yellow border. A red circle with the number '1' is placed over the 'Company Settings' button. The dropdown menu is open, showing a list of settings categories and options. A 'Company Profile' option is highlighted with a blue star and the number '1'. Under the 'Account Settings' section, 'Customer Relationships' is highlighted with a blue star and the number '2', and 'Users' is highlighted with a blue star and the number '3'. Under the 'Network Settings' section, 'Electronic Order Routing' is highlighted with a blue star and the number '4', and 'Electronic Invoice Routing' is highlighted with a blue star and the number '5'. Other options in the dropdown include 'ANID:', 'Notifications', 'Application Subscriptions', 'View All', 'Accelerated Payments', 'Remittances', and 'Network Notifications'.



# 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.

The screenshot shows the 'Ariba Network' interface with the 'Account Settings' section open. The 'Users' tab is selected, and the 'Manage Users' section is visible. Below this is a table with columns for Username, Email Address, First Name, Last Name, Ariba Discovery Contact, Role Assigned, and Customer Assigned. The table is currently empty, showing 'No items'. A 'Create User' button is present. Below the table is the 'Manage Assignments for Users with Limited Access' section, which includes a checkbox to 'Enable assignment of orders to users with limited access to Ariba Network.' The 'Manage User Roles' section is also visible, showing a table with columns for Name and Actions. The 'Administrator' role is listed with a 'Details' link. A 'Create Role' button is located at the bottom of the roles section.

Ariba Network Company Settings ▾

Account Settings Save Close

[Customer Relationships](#) [Users](#) [Notifications](#) [Application Subscriptions](#)

### Manage Users

Manage users for your Ariba account. If you enter an email alias, specify the alias owner's name and phone number.

<input type="checkbox"/>	Username ↑	Email Address	First Name	Last Name	Ariba Discovery Contact	Role Assigned	Customer Assigned
No items							

[Create User](#)

### Manage Assignments for Users with Limited Access

Enable assignment of orders to users with limited access to Ariba Network. ⓘ

### Manage User Roles

Create and manage roles for your account. You can view or edit the details of a role. The Administrator role can be viewed, but cannot be modified.

Role	Name	Actions
	Administrator	<a href="#">Details</a>

[Create Role](#)

# 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

Manage User Roles

Create and manage roles for your account. You can view or edit the details of a role. The Administrator role can be viewed, but cannot be modified.

Role

Name	Actions
Administrator	Details
<a href="#">Create Role</a>	

Ariba Network

Create Role Save Cancel

\* Indicates a required field

New Role Information

Name: \*  2

Description:

Permissions

Each role must have at least one permission.  
Upgrade your Ariba Network, light account to a full-use account to enable all permissions.

Page 1 »

Permission	Description
<input checked="" type="checkbox"/> Order Assignment for Users with Limited Access <span>3</span>	User can assign an order to a user with limited access to Ariba Network
<input checked="" type="checkbox"/> Contact Administration	Maintain information for account contact personnel
<input checked="" type="checkbox"/> Goods Receipt Report Administration	Access to Reporting, and Goods Receipt report type
<input type="checkbox"/> Invoice Report Administration	Access to Reporting, and Invoice Report type
<input type="checkbox"/> Purchase Order Report Administration <span>N</span>	Access to Reporting, Purchase Order and Order Summary report types
<input type="checkbox"/> Service Sheet Report Administration	Access to Reporting and Service Sheet Report types
<input type="checkbox"/> Tax Book Report Administration	Access to Reporting, and Tax Book Report type

Role

Name	Actions
Administrator	Details
Orders <span>N</span>	Details Edit Delete
<a href="#">Create Role</a>	

# Creating Users

➤ 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**

Manage Users

Manage users for your Ariba account. If you enter an email alias, specify the alias owner's name and phone number.

<input type="checkbox"/>	Username ↑	Email Address	First Name	Last Name	Ariba Discovery Contact	Role Assigned	Customer Assigned
No items							

**1**

Create User Done Cancel

Create a new user account and assign a role and if needed assign them to a business unit. Ariba will email a temporary password to the address provided for the new user account.

New User Information

Username: \*  **2**

**3** Email Address: \*

First Name: \*  **4**

**5** Last Name: \*

This user is the Ariba Discovery Contact ⓘ

Limited access ⓘ

Office Phone: Country:  Area:  Number:

# Creating Users cont.

## 6. Select the Role for the User

**Note:** The roles that you have created will be displayed, only can only 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

Role Assignment

Name	Description
<input checked="" type="checkbox"/> Orders 	

Customer Assignment

Assign to Customer:  All Customers  Select Customers

By entering this personal data, you acknowledge that you have authority to allow transfer of this personal data to Ariba for processing in the Ariba systems (hosted in various data centers globally) in accordance with the [Ariba Privacy Statement](#), the service agreement between your company and Ariba, and applicable law, and, if applicable, that any personal data from Russian citizens has been stored by your organization in a separate data repository residing within the Russian federation.



CONFIRM DOMAIN

The domain you specified does not match your company's domain. Do you still want to use it?



Manage Users

Manage users for your Ariba account. If you enter an email alias, specify the alias owner's name and phone number.

	Username ↑	Email Address	First Name	Last Name	Ariba Discovery	Role Assigned	Customer Assigned	
	<input type="checkbox"/> Test@ABCcompany.com	jane.doe@ABCcompany.com	Jane	Doe	No	Orders	All	

|

# 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**

Manage Users

Manage users for your Ariba account. If you enter an email alias, specify the alias owner's name and phone number.

<input checked="" type="checkbox"/>	Username ↑	Email Address	First Name	Last Name	Ariba Discovery Contact	Role Assigned	Customer Assigned	
<input checked="" type="checkbox"/>	Test@ABCcompany.com	jane.doe@ABCcompany.com	Jane	Doe	No	Orders	All	

**2**

Manage Assignments for Users with Limited Access

Enable assignment of orders to users with limited access to Ariba Network. ⓘ

**1** User Roles

Create and manage roles for your account. You can view or edit the details of a role. The Administrator role can be viewed, but cannot be modified.

Role	Actions
Administrator	<a href="#">Details</a>
Orders	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Delete</a>

**3**

Account Settings

**N** ✓ Your profile has been successfully updated. **4**

[Customer Relationships](#) [Users](#) [Notifications](#) [Application Subscriptions](#)

Manage Users

Manage users for your Ariba account. If you enter an email alias, specify the alias owner's name and phone number.

# Customer Relationships – Supplier Information Portal to Access the Supplier Education Materials for your Buyer

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

The screenshot displays the 'Supplier Education Materials Portal' interface. At the top, a dark blue header reads 'Welcome to the Supplier Education Materials Portal for Suppliers'. Below this, a white banner contains a welcome message: 'Welcome to the Supplier Education Materials Portal for [Name of Buyer] Suppliers!!! This portal provides information for all suppliers that are conducting business with [Name of Buyer] via the Ariba Network (AN). Click on the link to access the information that you are looking for.'

The main content area is a grid of nine light blue boxes, each representing a category of educational materials:

- Administration**: Includes links for 'Administration Guide' and 'Administration Training Clip (MP4)'. Icon: Code editor.
- Introduction Clips**: Includes links for 'Introduction to the Ariba Network Clip (MP4)', 'A Day in the Life of a Supplier (MP4)', and 'A Day in the Life of Accounts Payable (MP4)'. Icon: Cloud with play button.
- Integration**: No links listed. Icon: Lightbulbs.
- Functionality**: Includes links for 'General Functionality Guide' and 'General Functionality Clip (MP4)'. Icon: Circuit board.
- Standard Account**: Includes links for 'Standard Account Self Help Portal', 'Standard Account Information Pack', and 'Standard Account Generic Guide'. Icon: Cloud with three nodes.
- ON24 Session Recordings**: States 'There are currently no sessions available'. Icon: Presentation screen.
- Reference Guides**: Includes a link for 'Quick Start Guide'. Icon: Document with arrow.
- BUYER Specific Guides**: No links listed. Icon: Building.
- General Guides**: Includes links for 'General Info Training Clip (MP4)' and 'Generic Intro\_Ship Notice & Invoices (MP4)'. Icon: Computer monitor.

# 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

The screenshot shows the Ariba Network dashboard. At the top, there is a navigation bar with 'HOME', 'INBOX', 'OUTBOX', 'CATALOGS', and 'REPORTS'. A 'Purchase Order by Amount' chart is visible. In the top right corner, there is a 'Company Settings' dropdown menu. A red circle with the number '1' highlights the 'Company Settings' dropdown. A yellow box highlights the 'Company Settings' dropdown, and a red circle with the number '2' highlights the 'Customer Relationships' option within the dropdown.

The screenshot shows the 'Account Settings' page. The 'Customer Relationships' tab is selected. Under 'Current Relationships', there is a table with the following columns: 'Customer', 'Relationship Type', 'Approved Date', and 'Routing Type'. A red circle with the number '3' highlights the 'Supplier Information Portal' link in the 'Relationship Type' column. Below the table, there is a 'Reject' button.

Customer	Relationship Type	Approved Date	Routing Type
<input type="checkbox"/>	Trading	30 May 2017	Default

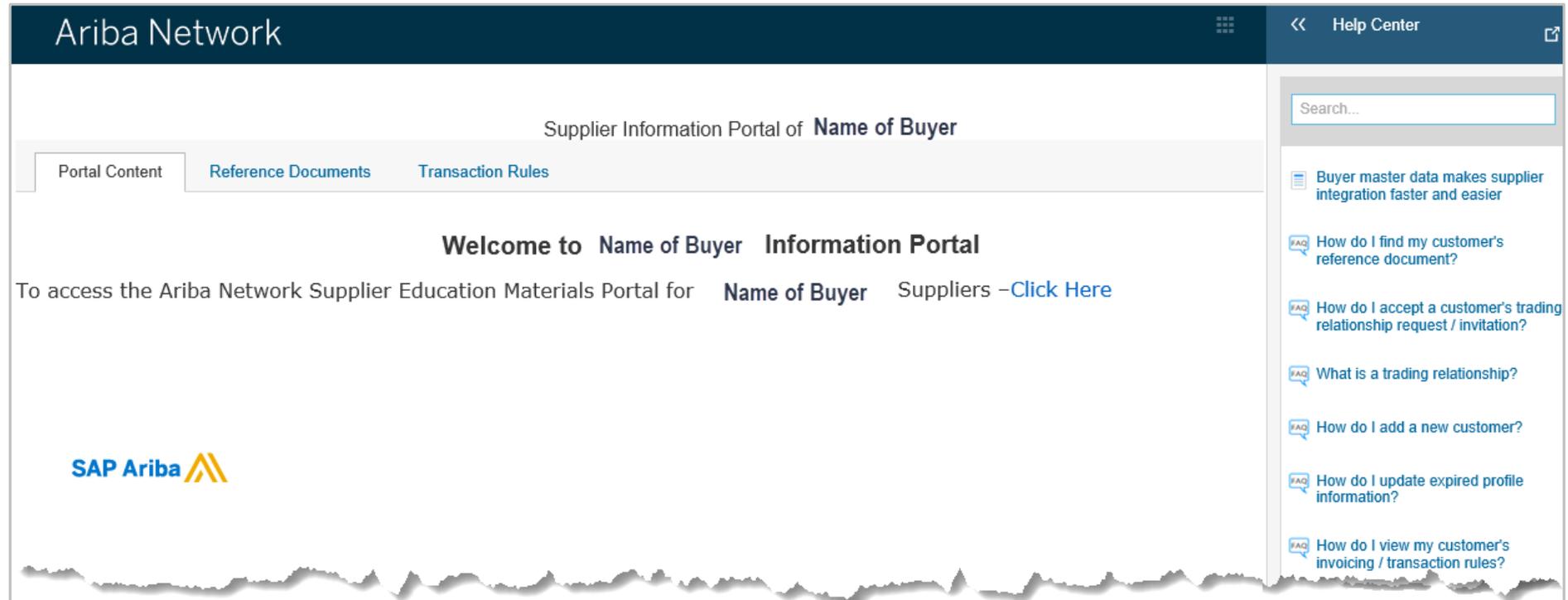
# Accessing the Supplier Information Portal cont.

➤ 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



The screenshot shows the Ariba Network interface. At the top, the header reads "Ariba Network" on the left and "Help Center" on the right. Below the header, the page title is "Supplier Information Portal of Name of Buyer". There are three tabs: "Portal Content", "Reference Documents", and "Transaction Rules". The main content area displays a welcome message: "Welcome to Name of Buyer Information Portal". Below this, it says "To access the Ariba Network Supplier Education Materials Portal for Name of Buyer Suppliers -Click Here". The SAP Ariba logo is visible at the bottom left. On the right side, there is a "Help Center" sidebar with a search bar and a list of FAQ items, including "Buyer master data makes supplier integration faster and easier", "How do I find my customer's reference document?", "How do I accept a customer's trading relationship request / invitation?", "What is a trading relationship?", "How do I add a new customer?", "How do I update expired profile information?", and "How do I view my customer's invoicing / transaction rules?".

# 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:** Your Supplier Education Materials Portal may not look as the one shown

Portal Content Reference Documents Transaction Rules

Welcome to Name of Buyer Information Portal

To access the Ariba Network Supplier Education Materials Portal for Name of Buyer Suppliers - [Click Here](#) 1

Welcome to the Supplier Education Materials Portal for Name of Buyer Suppliers

Welcome to the Supplier Education Materials Portal for Name of Buyer Suppliers!!! This portal provides information for all suppliers that are conducting business with Name of Buyer via the Ariba Network (AN). Click on the link to access the information that you are looking for.

	<b>Administration</b> <a href="#">Administration Guide</a> <a href="#">Administration Training Clip (MP4)</a>		<b>Introduction Clips</b> <a href="#">Introduction to the Ariba Network Clip (MP4)</a> <a href="#">A Day in the Life of a Supplier (MP4)</a> <a href="#">A Day in the Life of Accounts Payable (MP4)</a>		<b>Integration</b>
	<b>Functionality</b> <a href="#">General Functionality Guide</a> <a href="#">General Functionality Clip (MP4)</a>		<b>Standard Account</b> <a href="#">Standard Account Self Help Portal</a> <a href="#">Standard Account Information Pack</a> <a href="#">Standard Account Generic Guide</a>		<b>ON24 Session Recordings</b> There are currently no sessions available
	<b>Reference Guides</b> <a href="#">Quick Start Guide</a> <a href="#">Quote At a Glance Guide</a>		<b>BUYER Specific Guides</b>		<b>General Guides</b> <a href="#">General Info Training Clip (MP4)</a> <a href="#">Generic Intro Ship Notice &amp; Invoices (MP4)</a> <a href="#">Intro to Supplier Self Service (MP4)</a>

2

# 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

The screenshot shows the SAP Ariba Supplier Information Portal interface. At the top, there are three tabs: "Portal Content", "Reference Documents" (highlighted with a red circle and the number 1), and "Transaction Rules". Below the tabs, a red circle with the number 1 is positioned above the heading "Welcome to Name of Buyer Information Portal". The text below the heading reads: "To access the Ariba Network Supplier Education Materials Portal for Name of Buyer Suppliers -Click Here".

Below this is a dark blue header for "Ariba Network" with a "Company Settings" dropdown menu. Underneath, it says "Supplier Information Portal of Name of Buyer". There are three sub-tabs: "Portal Content", "Reference Documents", and "Transaction Rules".

The main content area features a table with the following columns: "Name ↑", "Created", and "Buyer Comments". The table is currently empty, displaying "No items" in the center. A red circle with the number 2 is located to the right of the table.

# Transaction Rules Tab

- The Supplier Information Portal is displayed
- 1. Click on the **Transaction Rules** tab
- Screen displays transaction Rules

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

Attachment Filename Rule	
Do not allow these characters in filename of attachments:	~`!@#\$\$%^&*()+=<>/,?;:''[{}]\
Order Confirmation and Ship Notice Rules	
Allow suppliers to confirm an order multiple times. ⓘ	No Confirm only once at the line-item level. ⓘ
Allow suppliers to send order confirmations for material orders. ⓘ	Yes
Allow suppliers to send order confirmations for material orders at the line-item level. ⓘ	Yes
Allow suppliers to reject quantities for material orders at the line-item level in order confirmations. ⓘ	Partially
Allow suppliers to send order confirmations for service orders. ⓘ	No
Allow suppliers to send order confirmations for service orders at the line-item level. ⓘ	No

# 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

### Network Settings

[Electronic Order Routing](#) [Electronic Invoice Routing](#) [Accelerated Payments](#) [Settlement](#)

\* Indicates a required field

#### Capabilities Preferences

#### New Orders

Document Type	Routing Method	Options
Catalog Orders without Attachments	Email	Email address: <input type="text" value="jane@abccompany.com, john@abccompany.com"/>  ⓘ <input type="checkbox"/> Attach cXML document in the email message <input checked="" type="checkbox"/> Include document in the email message <input type="checkbox"/> Leave attachments online and do not include them with email message. This applies to all orders with attachments that have the routing method "Same as new catalog orders without attachments".
Catalog Orders with Attachments	Same as new catalog orders without attachments	Current Routing method for new orders: Email ▲ Attachments will be included in the order.
Non-Catalog Orders without Attachments ⓘ	Same as new catalog orders without attachments	Current Routing method for new orders: Email
Non-Catalog Orders with Attachments ⓘ	Same as new catalog orders without attachments	Current Routing method for new orders: Email ▲ Attachments will be included in the order.

# Entering information for Electronic Order Routing cont.

- 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**

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

- Confirm or enter To email addresses for **Purchase Order Inquiry**

- Confirm or enter To email addresses for **Time Sheet**

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

- Click on **Save**

- Click **Done**

New Orders

Document Type	Routing Method	Options
Catalog Orders without Attachments	Email	Email address: jane@abccompany.com, john@abccompany.com <input type="checkbox"/> Attach cXML document in the email message <input checked="" type="checkbox"/> Include document in the email message <input type="checkbox"/> Leave attachments online and do not include them with email message. This applies to all orders with attachments that have the routing method "Same as new catalog orders without attachments".

Notifications

Type	Send notifications when...	To email addresses (one required)
Order	<input type="checkbox"/> Send a notification when orders are undeliverable.	* janedoe@abccompany.com
	<input type="checkbox"/> Send a notification when a new collaboration request against an existing order is received.	
Purchase Order Inquiry	<input type="checkbox"/> Send a notification when purchase order inquiries are received.	* janedoe@abccompany.com
	<input type="checkbox"/> Send a notification when purchase order inquiries are undeliverable.	
Time Sheet	<input type="checkbox"/> Send a notification when time sheets are undeliverable.	* janedoe@abccompany.com

Extended Profile Settings and Information

▶ Extended Profile Information

Network Settings

Save Close

Save Close

✓ Your profile has been successfully updated.

# 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 Save Close

[Electronic Order Routing](#) **Electronic Invoice Routing** [Accelerated Payments](#) [Settlement](#)

Network Settings Save Close

[Electronic Order Routing](#) **Electronic Invoice Routing** [Accelerated Payments \[Settlement\]\(#\)](#)

General **Tax Invoicing and Archiving**

Capabilities & Preferences

Sending Method

Document Type	Routing Method	Options
Invoices	Online	Return to this site to create invoices
Customer Invoices	Online	Save in my online inbox

Notifications

Type	Send notifications when...	To email addresses (one required)
Invoice Failure	<input checked="" type="checkbox"/> Send a notification when invoices are undeliverable or rejected.	<b>1</b> <input type="text" value="janedoe@abccompany.com"/>
Invoice Status Change	<input checked="" type="checkbox"/> Send a notification when invoice statuses change.	<b>2</b> <input type="text" value="janedoe@abccompany.com"/>
Invoice Created Automatically	<input type="checkbox"/> Send a notification when an invoice is created automatically on behalf of your company.	<b>3</b> <input type="text" value="janedoe@abccompany.com"/>

# Entering information for Invoice Routing cont.

## 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**

Network Settings Save Close

Electronic Order Routing **Electronic Invoice Routing** Accelerated Payments Settlement

General **Tax Invoicing and Archiving**

Capabilities & Preferences

Sending Method

Document Type	Routing Method	Options
Invoices	Online <input type="text"/>	Return to this site to create invoices
Customer Invoices	Online <input type="text"/>	Save in my online inbox

Notifications

Type	Send notifications when...	To email addresses (one required)
Invoice Failure	<input checked="" type="checkbox"/> Send a notification when invoices are undeliverable or rejected.	* janedoe@abccompany.com
Invoice Status Change	<input type="checkbox"/> Send a notification when invoice statuses change.	* janedoe@abccompany.com
Invoice Created Automatically	<input type="checkbox"/> Send a notification when an invoice is created automatically on behalf of your company.	* janedoe@abccompany.com

Network Settings Save Close

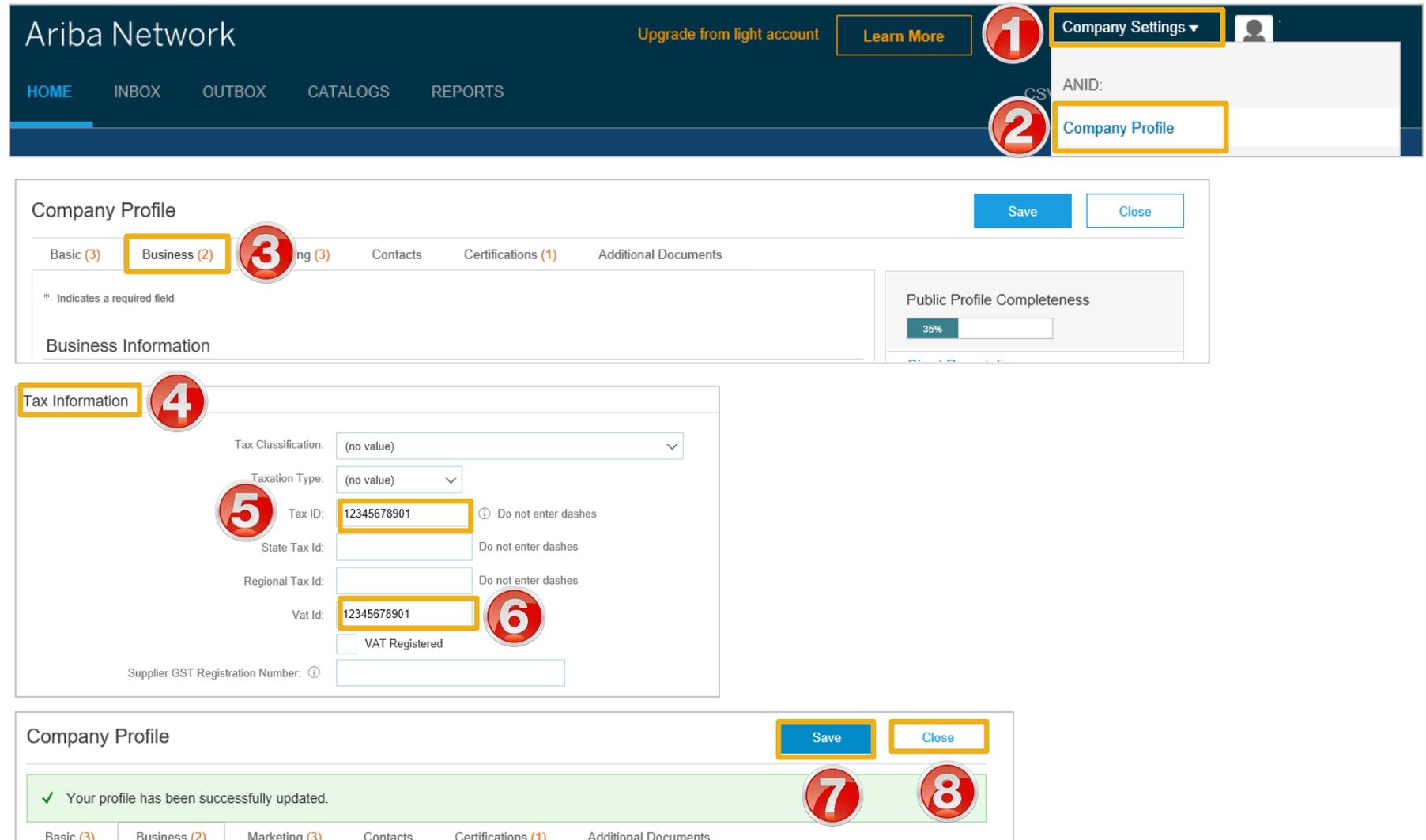
✓ Your profile has been successfully updated. 6 ×

# 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



The screenshot shows the Ariba Network interface with the following elements:

- Header:** Ariba Network logo, navigation links (HOME, INBOX, OUTBOX, CATALOGS, REPORTS), and user options (Upgrade from light account, Learn More, Company Settings, Company Profile).
- Company Profile Page:** Tabs for Basic (3), Business (2), Marketing (3), Contacts, Certifications (1), and Additional Documents. A "Save" and "Close" button is visible.
- Tax Information Section:** Fields for Tax Classification, Taxation Type, Tax ID (12345678901), State Tax Id, Regional Tax Id, and Vat Id (12345678901). A "VAT Registered" checkbox is also present.
- Success Message:** A green banner at the bottom states "Your profile has been successfully updated." with "Save" and "Close" buttons.

Numbered callouts (1-8) indicate the sequence of actions: 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.

# 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

The screenshot shows the 'Company Settings' dropdown menu with 'Electronic Invoice Routing' selected. The 'Network Settings' page is open, with the 'Tax Invoicing and Archiving' tab selected. The 'Tax Information' section contains the following fields:

Tax Classification:	(no value)	
Taxation Type:	(no value)	
ABN Number:	123456789	Do not enter dashes
State Tax ID:	123456789	Do not enter dashes
Regional Tax ID:	123456789	Do not enter dashes
Vat ID:	123456789	
<input type="checkbox"/> VAT Registered		

The screenshot shows the 'Network Settings' page with a green success message: 'Your profile has been successfully updated.' The 'Close' button is highlighted.



# Transacting Setup

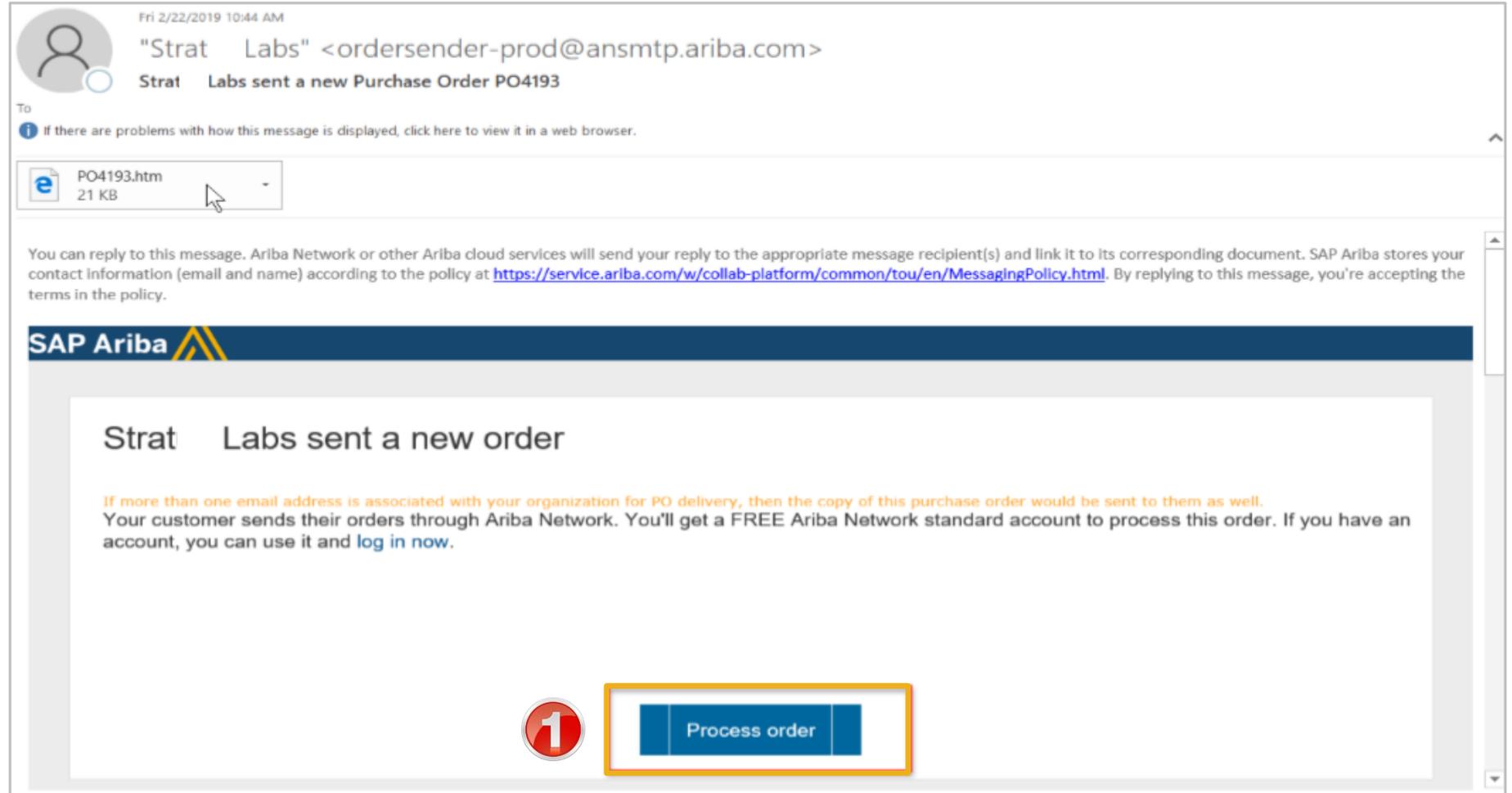
- Standard Account is an email process account only
- All Purchase Orders are sent from the Buyer to the Supplier using email
- The email address entered during the setup process is the account that your Buyer will continue to send all Purchase Orders to

# Initial Purchase Order Email from your Buyer

➤ 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



The screenshot shows an email interface. At the top, it says "Fri 2/22/2019 10:44 AM" and the sender is "Strat Labs" with the email address "<ordersender-prod@ansmtp.ariba.com>". The subject line is "Strat Labs sent a new Purchase Order PO4193". Below the header, there is a "To" field with a link: "If there are problems with how this message is displayed, click here to view it in a web browser." A file attachment is shown: "PO4193.htm" (21 KB). The main body of the email contains the following text: "You can reply to this message. Ariba Network or other Ariba cloud services will send your reply to the appropriate message recipient(s) and link it to its corresponding document. SAP Ariba stores your contact information (email and name) according to the policy at <https://service.ariba.com/w/collab-platform/common/tou/en/MessagingPolicy.html>. By replying to this message, you're accepting the terms in the policy." Below this is the SAP Ariba logo. The main heading is "Strat Labs sent a new order". A note in orange text says: "If more than one email address is associated with your organization for PO delivery, then the copy of this purchase order would be sent to them as well." The main text reads: "Your customer sends their orders through Ariba Network. You'll get a FREE Ariba Network standard account to process this order. If you have an account, you can use it and [log in now](#)." At the bottom, there is a red circle with the number "1" and a blue button labeled "Process order" which is highlighted with an orange border.

# 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](#) **1**

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](#)

# Adding Standard Account Company Information

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

Register

---

Company information

\* Indicates a required field

Company Name\*  1

Country\*  2

Address\*  3

City\*  4

State\*  5

Zip\*  6

If a company has more than one office, enter the main office address. You can enter more addresses such as your shipping address, billing address or other addresses later in your company profile.

# 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**

User account information

Name: \*   1

Email: \*  2

Use my email as my username 3

Username: \*

Password: \*  4

5

Language:  6

Email orders to: \*  7

8

# 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

I have read and agree to the SAP Ariba Privacy Statement

**2**

**3**

Register Cancel

# Upgrade From Standard Account to Full Account – Learn More Button

- 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**

Close

Upgrade to realize the full value of Ariba Network! 1

	LIGHT ACCOUNT <small>Your current account</small>	FULL-USE ACCOUNT <span style="background-color: #0070C0; color: white; padding: 2px 5px;">Upgrade</span>
<b>FULFILLMENT</b>		
<ul style="list-style-type: none"> <li> Orders and invoices</li> </ul>	<ul style="list-style-type: none"> <li>Respond to emailed orders using features that your customer requests, like order confirmations, ship notices and invoices</li> <li>✓ Check invoice status and create non-PO invoices, if supported by your customer</li> </ul>	<ul style="list-style-type: none"> <li>✓ Skip the emails. Get and manage orders and invoices all on Ariba Network.</li> <li>✓ Use CSV uploads to manage large documents.</li> </ul>
<ul style="list-style-type: none"> <li> Catalogs</li> </ul>		<ul style="list-style-type: none"> <li>✓ Publish catalogs that detail your products and services</li> </ul>
<ul style="list-style-type: none"> <li> Integration</li> </ul>		<ul style="list-style-type: none"> <li>✓ Integrate with your backend systems through CXML or EDI</li> </ul>
<ul style="list-style-type: none"> <li> Legal Archive</li> </ul>		<ul style="list-style-type: none"> <li>✓ Access to long-term invoice archiving (regional restrictions apply)</li> </ul>
<ul style="list-style-type: none"> <li> Reporting</li> </ul>		<ul style="list-style-type: none"> <li>✓ Get reports to track transactions and sales activities</li> </ul>
<ul style="list-style-type: none"> <li> Support</li> </ul>	<ul style="list-style-type: none"> <li>Help Center</li> </ul>	<ul style="list-style-type: none"> <li>✓ Help Center, phone, chat, and web form</li> </ul>
<ul style="list-style-type: none"> <li> Fees</li> </ul>	<ul style="list-style-type: none"> <li>Free</li> </ul>	<ul style="list-style-type: none"> <li>Based on usage</li> </ul>
By the way, you can use these with any account.		
<ul style="list-style-type: none"> <li> Ariba Discovery</li> </ul>	<ul style="list-style-type: none"> <li>✓ Join our business matchmaking service to get high quality sales leads. <a href="#">Fees may apply</a></li> </ul>	
<ul style="list-style-type: none"> <li> Sourcing, Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>✓ Attract potential customers with your profile and get invited to auctions and other events.</li> </ul>	



# View/Edit Addresses

- View/Edit Addresses should be used when good or services are provided from a different location than that shown on documents going back to the buyer

# Configuring Remittance Addresses

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**

**Ariba Network**

HOME INBOX OUTBOX CATALOGS REPORTS

Orders and Releases All Customers Order Number

Purchase Order by Amount Last 12 m

**Company Settings**

ANID:

**Company Profile**

Account Settings

Customer Relationships

**Ariba Network** Company Settings

**Company Profile** Save Close

Basic **3** Marketing (2) Contacts Certifications (1) Additional Documents

**Additional Company Addresses** **4**

Address Name ↑	Address ID	VAT ID	Tax ID	Address	Country	Legal Profile Status**
No items						

**Create** **5**

# 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 Save Close

\* Indicates a required field

Address Name

Address Name: \* Retail Solutions **6**

Address ID:

VAT ID:

Tax ID:

Address

Address 1: \* 1 Kangaroo Way **7**

Address 2:

City: \* Melbourne **8**

State:

Postal Code: \* 3000 **9**

Country: \* Australia [AUS] **10**

Additional Company Addresses

Address Name ↑	Address ID	VAT ID	Tax ID	Address	Country	Legal Profile Status**
<input type="radio"/> Retail Solutions				1 Kangaroo Way	Melbourne Australia	-

↳ Edit Delete | Create

**11**

# Standard Invoice – Configuring Remittance Addresses cont.

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

**Example of Multiple Entries**

	Address Name ↑	Address ID	VAT ID	Tax ID	Address	Country	Legal Profile Status**
<input type="radio"/>	Brackets are Us				1 Wombat St	Sydney Australia	-
<input type="radio"/>	Retail Solutions				1 Kangaroo Way	Melbourne Australia	-

↳   |

## Company Profile

✓ Your profile has been successfully updated.

12

13 x

Basic

Business

Marketing (2)

Contacts

Certifications (1)

Additional Documents



# 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

# View Purchase 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) 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

Purchase Order: 4505955966 Done

---

Create Order Confirmation
Create Service Sheet
Create Invoice
Hide
Print
Download PDF
Export cXML
Download CSV
Resend
9

---

Order Detail
Order History

---

**From:** Name and Address Details of the Buyer **To:** Name and Address Details of the Supplier Receiving the Purchase Order  
**Purchase Order (New)**  
4505955966  
Amount: \$34.50 USD

Phone: \_\_\_\_\_

---

**Payment Terms** Routing Status: Sent  
**Comments**

---

**Contact Information**  
**Supplier Address** Address Details of the Supplier providing the Goods  
**Buyer Headquarter Address** Buyer Corporate Headquarters or Head Office Address

Email: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Fax: + \_\_\_\_\_  
**Other Information** View more »

---

<b>Ship All Items To</b>  Name of the Business and Address of where the Material/s or Service/s are to be shipped or provided to	<b>Bill To</b>  Name and Address of the Buyer/Business being Billed for the Material or Service being provided	<b>Deliver To</b>  Name and Business function within a Buyer where the goods or services are to be delivered or provided
--	--	--

# 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

Line Items Show Item Details

Line #	Part # / Description	Type	Qty (Unit)	Need By	Unit Price	Subtotal
1	Not Available	Material	50 (EA)	6 Sep 2019	\$10.00 AUD	\$500.00 AUD
	Test					

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

Sub-total: \$500.00 AUD

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

Done

# View Purchase Order Details – Line Item Level Show Item Details



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

Hide Item Details

Line #	Part # / Description	Type	Qty (Unit)	Need By	Unit Price	Subtotal	
1	Not Available	Material	50 (EA) ⓘ	6 Sep 2019	\$10.00 AUD	\$500.00 AUD	<a href="#">Summary</a>

Test

Status

50 Unconfirmed

Other Information

Req. Line No.: 1

Requester: Carl Ayers

PR No.: PR12177

Classification Domain: unspsc

Classification Code: 43191501

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

Sub-total: \$ 500.00 AUD

Create Order Confirmation ▾

Create Ship Notice

Create Invoice ▾

Print ▾

Export cXML

Download CSV

Resend

Done

# 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

Done

Order Detail

Order History



Purchase Order: APO253  
 Order Status: New  
 Submitted On: 1 Sep 2017 10:45:01 PM GMT+10:00

From Customer:  
 Routing Status: Sent

## History

Status	Comments	Changed By	Date and Time
	The order was queued.	PropogationProcessor-128558079	1 Sep 2017 10:45:12 PM
	Email order was sent to	ANPODispatcher-128579032	1 Sep 2017 10:45:57 PM
Sent	Email order was sent to	OrderDispatcher - Email	1 Sep 2017 10:45:57 PM

## Line Items

Line #	Part # / Description	Qty (Unit)	Price	Subtotal
1	2772882 Wireless keyboard	20 (EA)	\$40.00 AUD	\$800.00 AUD
<b>Status</b>				
20 Unconfirmed				

Sub-total: \$ 800.00 AUD

Done

# Accessing a Purchase Order

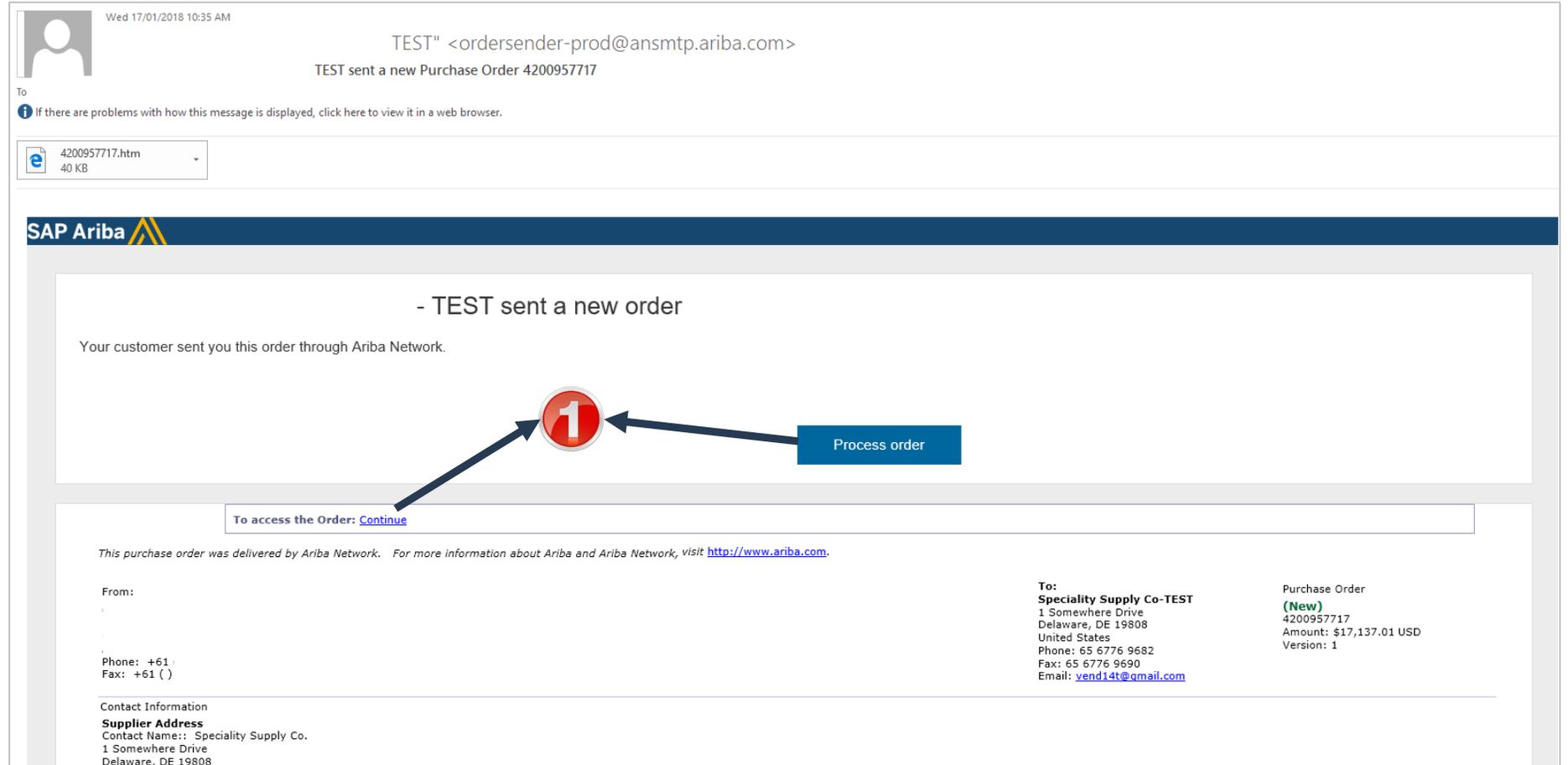
- You will receive a Purchase Order via email from through the Ariba Network

Locate and open the email

1. 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



The screenshot shows an email interface. At the top, it says 'Wed 17/01/2018 10:35 AM' and 'TEST" <ordersender-prod@ansmtp.ariba.com>'. Below that, it says 'TEST sent a new Purchase Order 4200957717'. There is a 'To' field with a link to view the message in a web browser. Below the email header, there is a file attachment '4200957717.htm' (40 KB). The main content of the email is a message from SAP Ariba: '- TEST sent a new order'. Below this, it says 'Your customer sent you this order through Ariba Network.' There is a red circle with the number '1' and a blue button labeled 'Process order' with an arrow pointing to the red circle. Below the main content, there is a box with the text 'To access the Order: [Continue](#)'. At the bottom, there is a footer with contact information for Speciality Supply Co-TEST and details about the purchase order.

Wed 17/01/2018 10:35 AM

TEST" <ordersender-prod@ansmtp.ariba.com>  
TEST sent a new Purchase Order 4200957717

To  
If there are problems with how this message is displayed, click here to view it in a web browser.

4200957717.htm  
40 KB

SAP Ariba

- TEST sent a new order

Your customer sent you this order through Ariba Network.

1

Process order

To access the Order: [Continue](#)

This purchase order was delivered by Ariba Network. For more information about Ariba and Ariba Network, visit <http://www.ariba.com>.

From:  
.  
.  
.  
Phone: +61  
Fax: +61 ( )

Contact Information  
**Supplier Address**  
Contact Name:: Speciality Supply Co.  
1 Somewhere Drive  
Delaware, DE 19808

To:  
**Speciality Supply Co-TEST**  
1 Somewhere Drive  
Delaware, DE 19808  
United States  
Phone: 65 6776 9682  
Fax: 65 6776 9690  
Email: [yend14t@gmail.com](mailto:yend14t@gmail.com)

Purchase Order  
**(New)**  
4200957717  
Amount: \$17,137.01 USD  
Version: 1

# Re-sending a Lost Purchase Order through the Ariba Network

➤ Log onto you 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

Ariba Network

Upgrade from light account [Learn More](#) Company Settings CSV Documents [Create](#)

HOME INBOX OUTBOX CATALOGS REPORTS

Purchase Order by Amount Last 12 months

Orders, Invoices and Payments All Customers Last 14 days Now we mobile.

0 New Purchase Orders 0 Orders that Need Attention 0 Invoices Rejected 0 Orders to Invoice 0 Pinned Documents More...

Order Number Customer Status Amount Date ↓ Amount Invoiced

You do not have any Orders and Releases.

Last 24 hours  
Last 7 days  
✓ Last 14 days  
Last 31 days  
Last 50 Documents

Orders, Invoices and Payments All Customers Last 50 Documents Now we mobile.

1 New Purchase Orders 2 Orders that Need Attention 0 Invoices Rejected 4 Orders to Invoice 0 Pinned Documents More...

Order Number	Customer	Status	Amount	Date ↓	Amount Invoiced	Action
4200957039	Name of Buyer	New	\$468.80 AUD	2 Jun 2017	\$0.00	Select Send me a copy to take action

# 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

The screenshot shows the Ariba Network dashboard. A modal dialog box is open in the center with the title "SEND ME A COPY TO TAKE ACTION". The dialog contains the text "Email the document to" and "You can change this email address in My Account". Below the text are two buttons: "Resend" (highlighted with a yellow border) and "Cancel". A red circle with the number "5" is overlaid on the "Resend" button. The background shows a line chart for "Last 12 months" and a table of purchase orders. The table has columns for Status, Amount, Date, Amount Invoiced, and Action. One row is visible for "Pty Ltd - TEST" with a status of "New", amount of "\$468.80 AUD", date of "2 Jun 2017", and amount invoiced of "\$0.00 AUD".

The screenshot shows the Ariba Network navigation bar. The "Ariba Network" logo is on the left. In the center, there are links for "HOME", "INBOX", "OUTBOX", "CATALOGS", and "REPORTS". On the right, there are links for "Upgrade from light account" and "Learn More". The user menu is open, showing "Logout" (highlighted with a yellow border and a red circle with the number "6"), "My Account", and "My Community Profile". A red circle with the number "7" is overlaid on the "Logout" link.



# 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:

Name of Action	Is it Active YES	Is it Active NO	What does this mean
Create Order Confirmation			You are <b>Required</b> to Create an Order Confirmation
Ship Notice			
Create Invoice			

Name of Action	Is it Active YES	Is it Active NO	What does this mean
Create Order Confirmation			An Order Confirmation is <b>NOT</b> required
Ship Notice			
Create Invoice			

Name of Action	Is it Active YES	Is it Active NO	What does this mean
Create Order Confirmation			An Order Confirmation is <b>NOT</b> required
Ship Notice			
Create Invoice			

# 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

Purchase Order: 4200000012 Done

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

Confirm Entire Order  
 Update Line Items  
 Reject Entire Order

From: To: Purchase Order

Confirming PO **Header fields** Exit Next

1 Confirm Entire Order  
 2 Review Order Confirmation

Order Confirmation Header

Confirmation #:

Associated Purchase Order #: 4200000012

Customer:

Supplier Reference:

**SHIPPING AND TAX INFORMATION**

Est. Shipping Date:

Est. Delivery Date:

Comments:

\* Indicates required field

Line Items **Update Line Items fields**

Line #	Part # / Description	Qty (Unit)	Unit Price	Subtotal	Tax
1	3772967 Ergonomic Chair	3 (EA)	\$200.00 AUD	\$600.00 AUD	\$60.00 AUD

Current Order Status:  3 Unconfirmed

Confirm:  Backorder:  Reject:  Details

Attachments:

Name	Size (bytes)	Content Type
No Items		

The total size of all attachments cannot exceed 10MB

Exit Next

# 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.

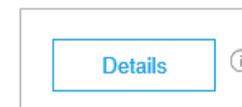
Line #	Part # / Description	Qty (Unit)	Need By	Unit Price	Subtotal	Tax
1	YDCTLG-0	100 (MTK)	13 Sep 2017	\$1.00 AUD	\$100.00 AUD	00 AUD
	Current Order Status					
	<input checked="" type="radio"/>	100 Unconfirmed				
	Confirm:	50	Backorder:	20	Reject:	5
						<a href="#">Details</a> ⓘ

Example only of variations

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 receives 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:

Name of Action	Is it Active YES	Is it Active NO	What does this mean
Create Order Confirmation			You are <b>Required</b> to Create a Ship Notice
Ship Notice			
Create Invoice			

Name of Action	Is it Active YES	Is it Active NO	What does this mean
Create Order Confirmation			An Ship Notice is <b>NOT</b> required
Ship Notice			
Create Invoice			

Name of Action	Is it Active YES	Is it Active NO	What does this mean
Create Order Confirmation			You are <b>Required</b> to Create a Ship Notice
Ship Notice			
Create Invoice			

# 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

Purchase Order: 4200000012

Create Order Confirmation
  Create Ship Notice
 1
 Invoice

### Create Ship Notice Header fields

\* Indicates required field

<b>SHIP FROM</b> Australia <span style="float: right;"><input type="button" value="Update Address"/></span>	<b>DELIVER TO</b> Australia <span style="float: right;"><input type="button" value="Update Address"/></span>
--	---

▼ Ship Notice Header

<b>SHIPPING</b> Packing Slip ID: <input type="text"/> Invoice #: <input type="text"/> Requested Delivery Date: -- Ship Notice Type: <input type="text" value="Select"/> Actual Shipping Date: <input type="text"/> Actual Delivery Date: <input type="text"/> Gross Volume: <input type="text"/> Unit: <input type="text"/> Gross Weight: <input type="text"/> Unit: <input type="text"/>	<b>TRACKING</b> Carrier Name: <input type="text"/> Service Level: <input type="text"/>
---	--

### Order Items Order Items fields

Order #	Item	Part # / Description	Customer Part #	Qty	Unit	Need By	Ship By	Unit Price	Subtotal	
4200000012	10	BRUSH,WIRE,BLR TUBE,3/8IN DIA,CNDR CLEAN	1007305	2.0	EA	14 Aug 2018		\$23.00 AUD	\$46.00 AUD	<input type="button" value="Remove"/>
<b>Shipment Status</b> Total Item Due Quantity: 2.0 EA										
<b>Confirmation Status</b> Total Confirmed Quantity: 0 EA      Total Backordered Quantity: 0 EA										
		Line	Ship Qty	Batch ID	Production Date	Expiry Date				
		1	<input type="text" value="2.0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add Details"/>			
		<input type="button" value="Add Ship Notice Line"/>								
		<input type="button" value="Add Order Line Item"/>								



# Invoice

- 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

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- 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

Purchase Order: APO253 Done

Create Order Confirmation  Create Standard Invoice **1**  **Create Invoice**  Hide |  Print  | [Export cXML](#) | [Download CSV](#) | [Resend](#)

Order Detail [Order History](#)

From: Standard Invoice **2**  
Credit Memo  
Line-Item Credit Memo

To: **Purchase Order (New) APO253**  
Amount: \$800.00 AUD  
Version: 1

# Standard Invoice – Header Level

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

Create Invoice Update Save Exit Next

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

**Summary** View/Edit Addresses

Purchase Order: APO253

Invoice #: \* INV778996 1

Invoice Date: \* 23 Oct 2017 2

Supplier Tax ID:

Remit To:

Bill To:

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 ⓘ N  Header level tax ⓘ  Line level tax ⓘ 3

Shipping  Header level shipping ⓘ  Line level shipping ⓘ 4

# 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

Shipping

Header level shipping ①  Line level shipping ①

Ship From: \_\_\_\_\_ Ship To: \_\_\_\_\_ View/Edit Addresses

Deliver To: \_\_\_\_\_

Create Invoice ⑤ Update Save Exit Cancel ②

▼ Invoice Header ③ Indicates required field Add to Header ▼

Summary

Purchase Order: 0000220925 Subtotal: \$499.00 AUD  
 Invoice #: 555466-1 Total Tax: \$0.00 AUD  
 Invoice Date: 26 Nov 2018 Amount Due: \$499.00 AUD  
 Service Description: \_\_\_\_\_  
 Supplier Tax ID: 12345678

Shipping Cost  
 Shipping Tax  
 Shipping Documents  
 Special Handling  
 Special Handling Tax  
 Additional Reference Documents and Dates  
 Comment  
 Attachment ⑥

Shipping

Header level shipping ①  Line level shipping ①

Ship From: \_\_\_\_\_ Ship To: \_\_\_\_\_ View/Edit Addresses

Deliver To: \_\_\_\_\_

Shipping Cost

Shipping Amount: \$34.67 AUD ④ Shipping Date: \_\_\_\_\_ Remove

Shipping Tax

Category: 10% GST / Inclusive ⑦ 0% GST / Free  
 0% GST / Exempt  
 10% GST / Inclusive

Location: \_\_\_\_\_  
 Description: Inclusive  
 Regime: \_\_\_\_\_

Taxable Amount: \$34.67 AUD Remove  
 Tax Rate Type: \_\_\_\_\_  
 Rate(%): 10  
 Tax Amount: \$3.47 AUD  
 Exempt Detail: (no value) ▼



# 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

# 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**

1 Line Items, 1 Included, 0 Previously Fully Invoiced

Line Items

Insert Line Item Options

Tax Category: 10% GST
 Shipping Documents
  Special Handling
  Discount
 Add to Included Lines

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	MATERIAL	2772882	Wireless keyboard	20	EA	\$40.00 AUD	\$800.00 AUD
			<b>Tax</b>	<span style="border: 1px solid orange; padding: 2px;">6</span> Category: * <span style="border: 1px solid orange; padding: 2px;">10% GST</span>		Taxable Amount: <span style="border: 1px solid gray; padding: 2px;">\$800.00 AUD</span>		<a href="#">Remove</a>	
				Location: <input type="text"/>		Rate(%): <span style="border: 1px solid gray; padding: 2px;">10</span>			
				Description: <input type="text"/>		Tax Amount: <span style="border: 1px solid gray; padding: 2px;">\$80.00 AUD</span>			
				Regime: <input type="text"/>					
			<b>Shipping</b>	Ship From: In Melbourne Australia	Ship To:			<a href="#">View/Edit Addresses</a>	
			<b>Shipping Cost</b>	Shipping Amount: * <span style="border: 1px solid orange; padding: 2px;">\$0.00 AUD</span>	Shipping Date: <input type="text"/>				
			<span style="border: 1px solid gray; padding: 2px;">Line Item Actions</span> <span style="border: 1px solid gray; padding: 2px; margin-left: 10px;">Delete</span> <span style="float: right; border: 1px solid orange; border-radius: 50%; padding: 5px; margin-left: 20px;">7</span>						
					<span style="border: 1px solid gray; padding: 2px; margin-right: 5px;">Update</span> <span style="border: 1px solid gray; padding: 2px; margin-right: 5px;">Save</span> <span style="border: 1px solid gray; padding: 2px; margin-right: 5px;">Exit</span> <span style="border: 1px solid orange; padding: 2px; border-radius: 5px;">Next</span> <span style="float: right; border: 1px solid orange; border-radius: 50%; padding: 5px; margin-left: 20px;">8</span>				

# 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**

Line Items 1 Line Items, 1 Included, 0 Previously Fully Invoiced

**Insert Line Item Options**

Tax Category: **0% GST / Exempt**  Special Handling  Discount **Add to Included Lines**

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input checked="" type="checkbox"/>	MATERIAL	3772899	Black		100	X	\$4.99 AUD	\$499.00 AUD

**Tax**

Category: \* **0% GST / Exempt** **Remove**

Location:

Description: **Exempt**

Regime:

Rate(%): 0  
Tax Amount: \$0.00 AUD  
Exempt Detail: (no value) ▾

Line Item Actions ▾ | **Delete** | **Add ▾**

**Update** | **Save** | **Exit** | **Next**

# 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

The screenshot displays the SAP Ariba interface for adding an attachment to a line item. The interface is divided into several sections:

- Line Items:** A table showing one line item: "Black Whiteboard Markers" (Part # 3772899, Quantity 100, Unit Price \$4.99 AUD, Subtotal \$499.00 AUD). A red circle with the number "1" highlights the line item.
- Line Item Actions:** A dropdown menu is open, showing options like "Edit", "Add", "Tax", "Shipping Documents", "Special Handling", "Discount", "Comments", and "Attachment". A red circle with the number "2" highlights the "Line Item Actions" dropdown, and a red circle with the number "3" highlights the "Attachment" option.
- File Selection Dialog:** A dialog box is open, showing a list of files (Doc3.docx to Doc8.docx) with columns for Name, Date modified, Type, and Size. A red circle with the number "5" highlights the "Open" button.
- Attachments:** A table at the bottom shows the added attachment: "281043\_Search\_R\_blue.png" (Size 26685 bytes, Content Type image/png). A red circle with the number "4" highlights the "Browse..." button, and a red circle with the number "6" highlights the "Add Attachment" button. A blue star with the number "1" highlights the attachment row, and a blue star with the number "2" highlights the "Delete" button.

# Adding Country Tax Rates for Effective Invoicing (perform only if required)

➤ Use only where your country's tax code does not default in the list and Configure Tax menu is available for selection

1. Click on **Create**

2. Select the **tax type** that most represents your requirements

➤ Enter the **Rate %**, this is the percentage rate that will auto-populated when the tax type is selected

3. Add a **Tax Description**

4. To add more than one type of tax rate

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

Configure Tax

* Tax Category	* Rate	Tax Description
No items		

Buttons: Create, OK, Cancel

Configure Tax

* Tax Category	* Rate	Tax Description
Sales Tax		

Buttons: Create, OK, Cancel

Category: \* Sales Tax

Location: [ ]

Description: [ ]

Regime: [ ]

Header level shipping  Line level shipping

Ship From: [ ]

Standard Tax Selections

- Taxes
  - 0% GST / Australian GST ...
  - 10% GST / Australian GST ...
- Sales
- VAT
- GST
- HST
- PST
- QST
- Usage
- Withholding Tax
- Other Tax
- Configure Tax Menu

Configure Tax

* Tax Category	* Rate	Tax Description
GST	0 %	Australian GST Exempt
GST	10 %	Australian GST Inclusive

Buttons: Delete, Create, OK, Cancel

# 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 Previous Save Submit Exit

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

Invoice # : INV778996	Subtotal : \$800.00 AUD
Invoice Date : Monday 23 Oct 2017 12:56 PM GMT+11:00	Total Tax : \$80.00 AUD
Original Purchase Order : APO253	Total Shipping : \$0.00 AUD
	Total Gross Amount : \$880.00 AUD
	Total Net Amount : \$880.00 AUD
	Amount Due : \$880.00 AUD

<b>REMIT TO:</b>	<b>BILL TO:</b>	<b>SUPPLIER:</b>
Postal Address: Somewhere In Melbourne 2020 Australia		ABN number  Postal Address: Somewhere In Melbourne 2020 Australia

Invoice INV778996 has been submitted.

- [Print a copy of the invoice](#)
- [Exit invoice creation.](#)



Purchase Order: APO253 Done

Create Order Confirmation  Create Ship Notice  Create Invoice Hide Print Export cXML Download CSV Resend 3

Order Detail Order History

From: To: N

Purchase Order (Invoiced)  
APO253  
Amount: \$800.00 AUD  
Version: 1

# 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

**Shipping**

Header level shipping ⓘ  Line level shipping ⓘ

Ship From: \_\_\_\_\_ Ship To: \_\_\_\_\_  
 Deliver To: \_\_\_\_\_

---

**Additional Fields**

Information Only. No action is required from the customer.

Supplier Reference: \_\_\_\_\_

Payment Note: \_\_\_\_\_

Supplier:  Customer: \_\_\_\_\_

Supplier: **Test Supplier** Customer: **Australia**

Bill From: **testsupplier\_4 - TEST** Email: \_\_\_\_\_  
 Dunedoo  
 Australia

**1**

View/Edit Addresses

View/Edit Addresses

View/Edit Addresses

**VIEW/EDIT ADDRESSES** \* Indicates required field

**Ship From**

Name:

Department Name: \_\_\_\_\_

Address 1:

Address 2: \_\_\_\_\_

City:

State: \_\_\_\_\_

Postal Code:

Country:

This selection will refresh the page content.

**Ship To**

Name: \_\_\_\_\_

Department Name: \_\_\_\_\_

Address 1:

Address 2: \_\_\_\_\_

City:

State:

Postal Code:

Country:

This selection will refresh the page content.

Email: \_\_\_\_\_

Deliver To: \_\_\_\_\_

**2**

OK Cancel

**VIEW/EDIT ADDRESSES** \* Indicates required field

**Bill From**

Name: \*

Department Name: \_\_\_\_\_

Address 1:

Address 2: \_\_\_\_\_

City:

State: \_\_\_\_\_

Postal Code:

Country:

This selection will refresh the page content.

OK Cancel

# Standard Invoice – Changing Remit To

1. Click the **Down Arrow**

2. Select the applicable address

**Note:** the selected information is displayed

**Additional Fields**

Information Only. No action is required from the customer.

Supplier Account ID #:

Customer Reference:

Supplier Reference:

Payment Note:

Supplier: **Test Supplier**  

Select...

Bill From: **Brackets are Us** 

Retail Solutions

Test Supplier

Customer: [View/Edit Addresses](#)

Dresden 14  
Australia

Email:

[View/Edit Addresses](#)

Supplier: **Retail Solutions**  

Melbourne  
Australia

Bill From: .

Dunedoo  
Australia

Customer: [View/Edit Addresses](#)

Dresden 14  
Australia

Email:

[View/Edit Addresses](#)



# 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**
- Screen displays the Invoice
3. Enter the **Invoice Number**
  4. Confirm or enter the **Supplier Tax ID**
- Scroll down to Line Items

Purchase Order: 0000220714 Done

[Create Order Confirmation](#) | [Create Ship Notice](#) | [Create Invoice](#) | [Hide](#) | [Print](#) | [Download PDF](#) | [Export cXML](#) | [Download CSV](#) | [Resend](#)

Order Detail | Order History

- Standard Invoice
- Line-Item Credit Memo
- Line-Item Debit Memo

**Purchase Order (Partially Invoiced)**  
0000220714  
Amount: \$499.50 AUD  
Version: 1

Routing Status: Acknowledged  
Related Documents: [714p2](#) [RC867](#)

Comments

Create Invoice [Update](#) [Save](#) [Exit](#) [Next](#)

▼ Invoice Header \* Indicates required field [Add to Header](#)

**Summary**

Purchase Order:	0000220714	Subtotal:	\$399.60 AUD	<a href="#">View/Edit Addresses</a>
Invoice #:	233332444-2	Total Tax:	\$0.00 AUD	
Invoice Date:	26 Nov 2018	Amount Due:	\$399.60 AUD	
Service Description:				
Supplier Tax ID:	12345678			
Remit To:	114 VICTORIA STREET			
Bill To:				

Shipping

# Commence Partial Invoice – Header Level

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

### Create Invoice

[Update](#) [Save](#) [Exit](#) [Next](#)

▼ Invoice Header \* Indicates required field [Add to Header ▼](#)

**Summary** [View/Edit Addresses](#)

Purchase Order: APO253

Invoice #: \* INV778996 **1**

Invoice Date: \* 23 Oct 2017 **2**

Supplier Tax ID:

Remit To:

Bill To:

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 ⓘ **3**

**Shipping**

Header level shipping ⓘ  Line level shipping ⓘ **4**

# 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**

3 Line Items, 2 Included, 1 Previously Fully Invoiced

**Line Items**

**Insert Line Item Options**

Tax Category: GST  Shipping Documents  Special Handling  Discount [Add to Included Lines](#)

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	MATERIAL	Item Partno1	Item Description Line 1		1	EA	\$1,500.00 AUD	\$1,500.00 AUD

**Classification** Domain: unspsc Code: 48102102 [Remove](#)

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	2	<input type="checkbox"/>	MATERIAL	Item Partno2	Item Description Line 2		0	EA	\$2,000.00 AUD	\$0 AUD

*Excluded line items cannot be modified.*

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	3	<input checked="" type="checkbox"/>	MATERIAL	Item Partno3	Item Description Line 3		2	EA	\$2,000.00 AUD	\$4,000.00 AUD

**Classification** Domain: unspsc Code: 48102102 [Remove](#)

↳ [Line Item Actions](#) [Delete](#)

Update
Save
Exit
Next

# Completing a Partial Invoice – Line level cont.

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

Or

**Partially Invoiced** as there are still items that have not yet been invoiced against the original Purchase Order

Line Items 2 Line Items, 2 Included, 0 Previously Fully Invoiced

Insert Line Item Options

Tax Category: GST  Shipping Documents  Special Handling  Discount Add to Included Lines

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/> 1	<input checked="" type="checkbox"/>	MATERIAL	Item Partno1	Item Description Line 1		1	EA	\$1,500.00 AUD	\$1,500.00 AUD
Classification				Domain: unspsc	Code: 48102102	Remove			
No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/> 3	<input checked="" type="checkbox"/>	MATERIAL	Item Partno3	Item Description Line 3		1	EA	\$2,000.00 AUD	\$2,000.00 AUD
Classification				Domain: unspsc	Code: 48102102	Remove			

Line Item Actions

Invoice TEST660009 has been submitted.

Print a copy of the invoice  
Exit invoice creation. **6**

Create Invoice Previous Save **Submit** Exit

Confirm and submit this document. It will not be electronically signed according to the compliance map and your customer's invoice rules. The document's originating country is: **5**. The document's destination country is: . The document's destination country is: .  
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 if you subscribe to the archiving service.

Standard Invoice / Tax Invoice

Invoice Number : TEST660009	Subtotal :	\$3,500.00 AUD
Invoice Date : Thursday 4 Jan 2018 11:45 AM GMT+11:00	Total Tax :	\$350.00 AUD
Original Purchase Order : 3700029909	Total Gross Amount :	\$3,850.00 AUD
	Total Net Amount :	\$3,850.00 AUD
	Amount Due :	\$3,850.00 AUD

**Purchase Order**  
(Invoiced)  
0000220677  
Amount: \$59.97 AUD  
Version: 1

**Purchase Order**  
(Partially Invoiced)  
0000220714  
Amount: \$499.50 AUD  
Version: 1



# 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**

The screenshot shows the Ariba Network dashboard. At the top, there is a navigation bar with 'Ariba Network' on the left, 'Company Settings' on the right, and a 'HOME' link. Below the navigation bar, there are filters for 'Orders and Releases', 'All Customers', and a search bar for 'Order Number'. A chart titled 'Purchase Order by Amount' is displayed, showing a peak in the last 12 months. On the right side, a 'Create' dropdown menu is open, listing options: 'PO Invoice', 'Non-PO Invoice', 'Contract Invoice', 'Credit Memo', 'Purchase Order by V', 'Purchase Order by A', and 'Outstanding Invoices'. The 'Contract Invoice' option is highlighted with a yellow box and a red circle with the number '2'. The 'Create' button itself is also highlighted with a yellow box and a red circle with the number '1'.

# Begin Contract Invoice

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 Prev Next Cancel

Enter the information requested in the fields below. Required fields are indicated with an asterisk (\*). Click Next to continue creating **5** invoice.

Contract: \* (no value)  **1**

Invoice #: \*  **3**

Invoice Date: \*  **4**

Sold To Email:

Payment Terms:

Purchasing Unit:

Ship From:

**Choose Value for Contract**

ID

ID ↑	Title	Effective Date	Expiration Date	Status	
BPO179	(CW2220988) BPO Ankita Cycle 2	Wed, 17 Jul, 2019	Thu, 16 Jul, 2020	Open	<input type="button" value="Select"/>
BPO249	(CW2221249) Test Blanket	Tue, 23 Jul, 2019	Thu, 16 Jul, 2020	Open	<input type="button" value="Select"/>
C237-V3	(CW2221194) Contract Based Supplier Level	Mon, 22 Jul, 2019	Fri, 31 Jul, 2020	Open	<input type="button" value="Select"/> <b>2</b>
C254	(CW2221271) Supplier Level Attemp 2	Wed, 24 Jul, 2019	Fri, 31 Jul, 2020	Open	<input type="button" value="Select"/>
C285-V5	(CW2221513) Test Contract - csv	Wed, 31 Jul, 2019	Sat, 1 Aug, 2020	Open	<input type="button" value="Select"/>
C287	(CW2221534) CSV Testing Contract	Thu, 1 Aug, 2019	Sun, 2 Aug, 2020	Open	<input type="button" value="Select"/>

# Contract Invoice – Header Level

 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**

### Create Invoice

[Update](#) [Save](#) [Exit](#) [Next](#)

▼ Invoice Header \* Indicates required field [Add to Header](#) ▼

---

**Summary**

Contract Number: C237 	Subtotal: \$0.00 AUD
Invoice #: 99877-1a	Total Tax: \$0.00 AUD
Invoice Date: 21 Aug 2019	Total Gross Amount: \$0.00 AUD
Service Description: <input type="text"/>	Total Net Amount: \$0.00 AUD
Sold To Email:	Amount Due: \$0.00 AUD
Payment Terms:	

 Edit Header

---

Remit To  [View/Edit Addresses](#)

Bill To: Australia

Supplier Tax ID:\*  

---

**Additional Fields**

Information Only. No action is required from the customer.

Supplier Account ID #:

# Contract Invoice – Add Line Items

## 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

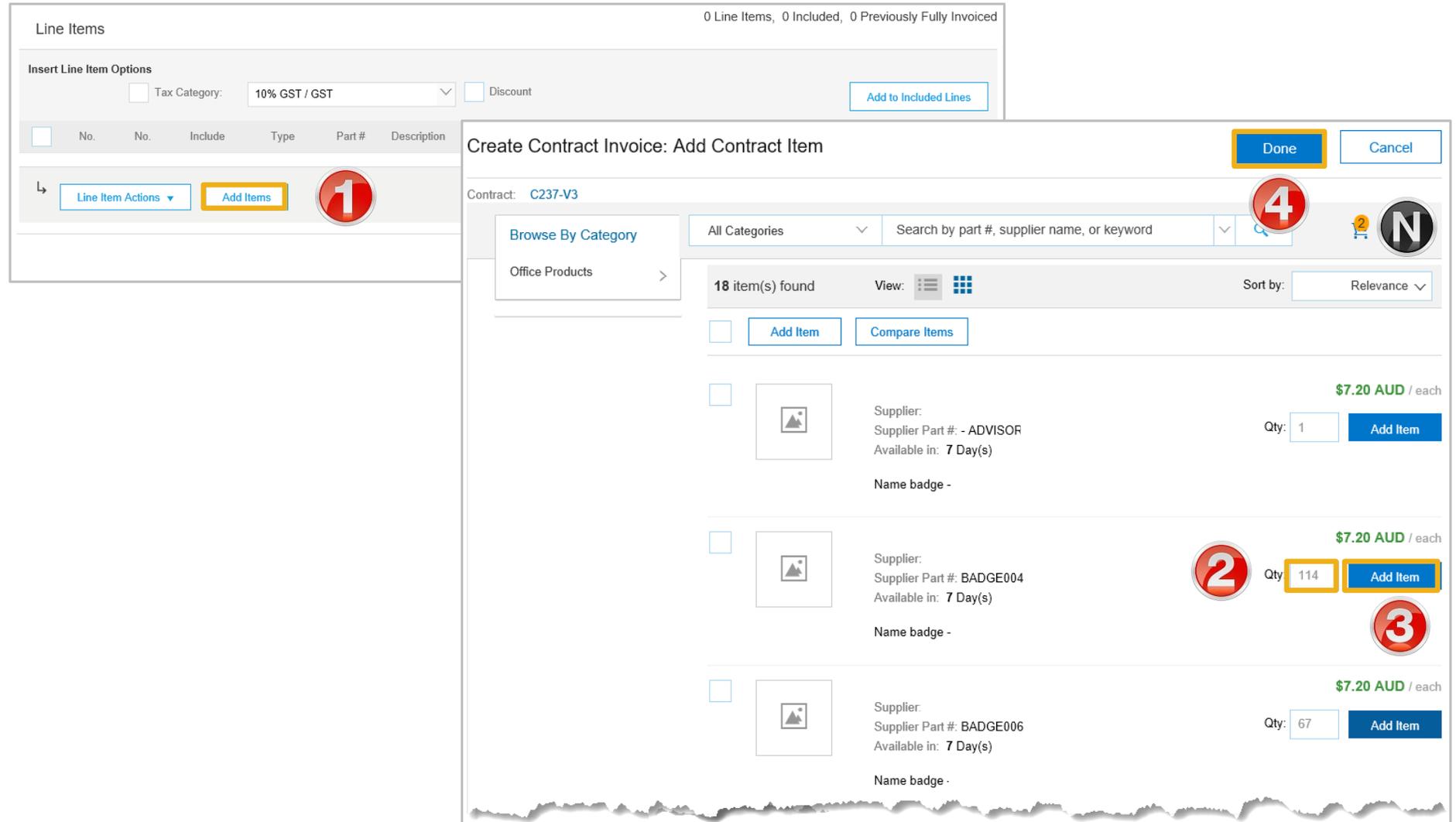
- Repeat **Steps 2 and 3** until all items and their totals are added to the cart

## 4. Click **Done**

- Use View to change the view

➤ List 

➤ Grid 



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

Insert Line Item Options  
 Tax Category: 10% GST / GST  Discount Add to Included Lines

<input type="checkbox"/>	No.	No.	Include	Type	Part #	Description
<span>Line Item Actions</span> <span>Add Items</span> <span>1</span>						

### Create Contract Invoice: Add Contract Item

Contract: C237-V3 Done Cancel

Browse By Category Office Products All Categories Search by part #, supplier name, or keyword 4 2 N

18 item(s) found View:   Sort by: Relevance

Add Item Compare Items

 Supplier: - ADVISOR Supplier Part #: - ADVISOR Available in: 7 Day(s) Qty: 1 \$7.20 AUD / each Add Item

 Supplier: - Supplier Part #: BADGE004 Available in: 7 Day(s) Qty: 114 \$7.20 AUD / each Add Item 2

 Supplier: - Supplier Part #: BADGE006 Available in: 7 Day(s) Qty: 67 \$7.20 AUD / each Add Item 3

# 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)

### Line Items

**Insert Line Item Options**

Tax Category: 10% GST / Tax Inclusive
  Shipping Documents
  Special Handling
  Discount
 Add to Included Lines

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part	Quantity	Unit	Unit Price	Subtotal	
<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	MATERIAL	BADGE004	Name badge Pin		114	EA ⓘ	\$7.20 AUD	\$820.80 AUD	
Shipping						Ship From:	Ship To:		<a href="#">View/Edit Addresses</a>		
Shipping						Deliver To:					
Shipping Cost			Shipping Amount: *		\$0.00 AUD	<span style="border: 1px solid red; border-radius: 50%; padding: 2px 5px; font-weight: bold; color: white;">5</span>		Shipping Date: <input type="text"/>			
<input type="checkbox"/>	2	<input checked="" type="checkbox"/>	MATERIAL	BADGE006	Name badge Magnetic		67	EA ⓘ	\$7.20 AUD	\$482.40 AUD	
Shipping						Ship From:	Ship To:		<a href="#">View/Edit Addresses</a>		
Shipping						Deliver To:					
Shipping Cost			Shipping Amount: *		\$0.00 AUD	Shipping Date: <input type="text"/>					

↳ Line Item Actions ▾
Add Items
Change Items

Update
Save
Exit
Next

# Contract Invoice – Line Level Tax

➤ 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

**i** ➤ 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

### Line Items

**Insert Line Item Options**

Tax Category: 10% GST / Tax Inclusive Taxes  Special Handling  Discount 3 Add to Included Lines

	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">1</span>	MATERIAL	BADGE004	Name badge Pin		114	EA ⓘ	\$7.20 AUD	\$820.80 AUD

**Tax** N

Category: \* 10% GST / Tax Inclusive Taxable Amount: \$820.80 AUD [Remove](#)

Location:   Rate(%): 10

Description: Tax Inclusive Tax Amount: \$82.08 AUD

Regime:   Exempt Detail: (no value)

---

Shipping From:   Ship To:   [View/Edit Addresses](#)

---

Shipping Cost Shipping Amount: \* \$0.00 AUD Shipping Date:

	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	<span style="border: 1px solid green; border-radius: 50%; padding: 2px;">2</span>	MATERIAL	BADGE006	Name badge Magnetic		67	EA ⓘ	\$7.20 AUD	\$482.40 AUD

**Tax** i

Category: \* 10% GST / Tax Inclusive Taxable Amount: \$482.40 AUD [Remove](#)

Rate(%): 10 Tax Amount: \$48.24

# Contract Invoice – Change Item

➤ 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**

This screenshot shows the 'Line Item Actions' menu at the top of the interface. The 'Change Items' button is highlighted with a yellow border and a red circle with the number '1' next to it. Other buttons in the menu include 'Line Item Actions', 'Add Items', 'Update', 'Save', 'Exit', and 'Next'.

This screenshot shows the 'Create Contract Invoice: Change Items' screen. At the top right, there are 'Add Item' and 'Done' buttons. Below them, a 'Show Details' link is visible. The main area contains a table of 'Line Items' with columns for 'No.', 'Supplier Part #', 'Description', 'Contract', 'Qty', 'Unit', 'Price', and 'Amount'. The first row is highlighted with a yellow border and a red circle with the number '2' next to the 'Qty' field (containing '114') and a red circle with the number '3' next to the 'Unit' field (containing 'each'). A blue star with the number '1' is next to the 'Unit' field. Below the table, there are 'Delete' and 'Update Amount' buttons, with the 'Update Amount' button highlighted and a red circle with the number '4' next to it. A modal window titled 'Choose Value for Unit of Measure' is open, showing a list of units with 'Select' buttons next to each. A blue star with the number '2' is next to the 'Select' button for 'bundle'. At the top right of the modal, there are 'Add Item' and 'Done' buttons, with a red circle with the number '5' next to 'Add Item' and a red circle with the number '6' next to 'Done'.

No.	Supplier Part #	Description	Contract	Qty	Unit	Price	Amount
1	BADGE004	Namebadge-	Yes	114	each	\$7.20 AUD	\$820.80 AUD
2	BADGE006	Namebadge-	Yes	67		\$7.20 AUD	\$482.40 AUD

# 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

Shipping

Ship From: \_\_\_\_\_ Ship To: \_\_\_\_\_ [View/Edit Addresses](#)

Deliver To: \_\_\_\_\_

Shipping Cost    Shipping Amount: \* \$0.00 AUD    Shipping Date: \_\_\_\_\_

↳ [Line Item Actions](#) ▾    [Add Items](#)    [Change Items](#)

[Update](#)    [Save](#)    [Exit](#)    [Next](#)

Create Invoice 
[Previous](#)    [Save](#)    [Submit](#)    [Exit](#)

Confirm and submit this document. 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 to the archiving service.

Standard Invoice / Tax Invoice

Invoice Number: 99877-1a	Subtotal:	\$1,303.20 AUD
Invoice Date: Wednesday 21 Aug 2019 3:30 AM GMT-07:00	Total Tax:	\$130.32 AUD
Contract Number: C237	Total Shipping:	\$0.00 AUD
	Total Gross Amount:	\$1,433.52 AUD
	Total Net Amount:	\$1,433.52 AUD
	Amount Due:	<b>\$1,433.52 AUD</b>

REMIT TO: \_\_\_\_\_    BILL TO: \_\_\_\_\_    SUPPLIER: \_\_\_\_\_

Invoice 99877-1a has been submitted.

- [Print a copy of the invoice](#)
- [Exit invoice creation.](#)



# 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

- Locate and open the email with the Purchase Order
- 1. Locate the **Invoice** that requires a Credit in Related Documents
- 2. Click to open the required **Invoice**
- The Invoice is displayed
- 3. Click on **Create Line-Item Credit Memo**
- The **Create Line Item Credit Memo** is displayed
- Refer to **Slide 91** for Quantity Adjustment Line Item Credit Memo process
- Refer to **Slide 94** for Price Adjustment Line Item Credit Memo process

Purchase Order: 4900006347  Done

Create Order Confirmation  Create Ship Notice  Create Invoice Hide Print Download PDF Download CSV

Order Detail Order History

From: **Buyer Information** To: **Supplier Information** Purchase Order (Invoiced) 4900006347  
Amount: \$8,640.00 AUD  
Version: 1

Payment Terms  NET 0 Routing Status: Acknowledged  
Related Documents  

Comments  
Comment Type: Terms and Conditions

Invoice: 987654 Done Previous

Create Line-Item Credit Memo   Print Download PDF Export cXML

Detail Scheduled Payments Remittance History

Standard Invoice / Tax Invoice

# Line Item Credit Memo – Header Level – Quantity Adjustment

- 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
- Scroll down to locate **Reason for Credit memo**
- 5. Enter the **Reason for Credit Memo**
- Scroll down to Line items

Create Line-Item Credit Memo

Update
Save
Exit
Next

---

Credit Memo Type
5

Quantity Adjustment ⓘ

Price Adjustment ⓘ

---

▼ Invoice Header
1
\* Indicates required field

Add to Header ▼

---

**Summary**

Credit Memo #:\* CRN99987 2

Credit Memo Date:\* 12 Sep 2019 3

Original Invoice No: 987654

Original Invoice Date: 8 Aug 2019

Supplier Tax ID:\* 123456789 4

Remit To ▼

Bill To:

Subtotal: **\$-8,640.00 AUD**

Total Tax: **\$-864.00 AUD**

Total Gross Amount: **\$-9,504.00 AUD**

Total Net Amount: **\$-9,504.00 AUD**

Amount Due: **\$-9,504.00 AUD**

6

View/Edit Addresses

---

Comment

Reason for Credit Memo:\* Wrong Colour  
Goods Damaged inside carton

Default Credit Memo Comment Text:

N

# 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**

Line Items 2 Line Items, 2 Included, 0 Previously Fully Invoiced

Insert Line Item Options  Tax Category: 10% GST / Tax Inclusive  Special Handling  Discount Add to Included Lines

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input checked="" type="checkbox"/>	MATERIAL		Test Item		-600	EA ⓘ	\$7.20 AUD	\$-4,320.00 AUD
<p>Tax Category: * GST <input type="checkbox"/> Taxable Amount: \$-4,320.00 AUD <span style="float: right;">Remove</span></p> <p>Location: <input type="text"/> Rate(%): 10</p> <p>Description: Tax Inclusive Tax Amount: \$-432.00 AUD</p> <p>Regime: <input type="text"/> Exempt Detail: (no value) <span style="float: right;">1</span></p>									
2	<input checked="" type="checkbox"/>	MATERIAL		Test Item		-600	EA ⓘ	\$7.20 AUD	\$-4,320.00 AUD
<p>Tax Category: * GST <input type="checkbox"/> Taxable Amount: \$-4,320.00 AUD <span style="float: right;">Remove</span></p> <p>Location: <input type="text"/> Rate(%): 10</p> <p>Description: Tax Inclusive Tax Amount: \$-432.00 AUD</p> <p>Regime: <input type="text"/> Exempt Detail: (no value) <span style="float: right;">3</span></p>									

Line Item Actions  4

---

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
2	<input type="checkbox"/>	MATERIAL		Test Item		0	EA ⓘ	\$7.20 AUD	\$0 AUD

*Excluded line items cannot be modified.*

# 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 Previous **Submit** Save Exit

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 to the archiving service. **5**

Line-Item Credit Memo

(Original Invoice No: 987654)

Credit Memo Number: CRN99987	Subtotal: \$-4,320.00 AUD
Credit Memo Date: Thursday 12 Sep 2019 8:48 AM GMT+10:00	Total Tax: \$-432.00 AUD
Original Invoice Number: 987654	Total Gross Amount: \$-4,752.00 AUD
Original Invoice Date: Thursday 8 Aug 2019 2:16 PM GMT+10:00	Total Net Amount: \$-4,752.00 AUD
Original Purchase Order: 490006347	Amount Due: \$-4,752.00 AUD

**Invoice CRN99987 has been submitted.**

[Print a copy of the invoice](#)

**Exit invoice creation.** **6**

Invoice: 987654 Done Previous

[Create Line-Item Credit Memo](#) [Copy This Invoice](#) [Print](#) [Download PDF](#) [Export cXML](#) **7**

[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**

➤ Screen message displays

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**

Create Line-Item Credit Memo Update Save Exit Next

Credit Memo Type

Quantity Adjustment  Price Adjustment 1

**CREDIT MEMO TYPE**

If you change the credit memo type, the Line Items section will be reloaded. Do you want to continue anyway?

Yes 2 No

Create Line-Item Credit Memo Update Save Exit Next

Credit Memo Type

Quantity Adjustment  Price Adjustment

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

**Summary**

Credit Memo #:\* CRN9987 3

Credit Memo Date:\* 12 Sep 2019 4

Original Invoice No: 987654

Original Invoice Date: 8 Aug 2019

Supplier Tax ID:\* 123456789 5

Remit To

Subtotal: **\$-8,640.00 AUD**

Total Tax: **\$-864.00 AUD**

Total Gross Amount: **\$-9,504.00 AUD**

Total Net Amount: **\$-9,504.00 AUD**

Amount Due: **\$-9,504.00 AUD**

N [View/Edit Addresses](#)

# 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**

**Comment**

Reason for Credit Memo:\*  6

Default Credit Memo Comment Text:

[Add to Header](#) ▼

---

**Line Items** 2 Line Items, 1 Included, 0 Previously Fully Invoiced

**Insert Line Item Options**

Tax Category: 10% GST / Tax Inclusive  Shipping Documents  Special Handling  Discount [Add to Included Lines](#)

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	MATERIAL		Test		600	EA ⓘ	\$-7.20 AUD	\$-4,320.00 AUD

**Tax**

Category:\* GST

Location:

Description: Tax Inclusive

Regime:

Taxable Amount: \$-4 8

Rate(%): 10

Tax Amount: \$-432.00 AUD

Exempt Detail: (no value) ▼

[Remove](#)

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input type="checkbox"/>	2	<input checked="" type="checkbox"/>	MATERIAL		Test		0	EA ⓘ	\$-7.20 AUD	\$0 AUD

Excluded line items cannot be included.

10
11

Update
Save
Exit
Next

# 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

**i** **Previous** – Returns to the Purchase Order

**i** **Done** – Returns to Email

Create Line-Item Credit Memo Previous **Submit** Save Exit

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. **12** 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. The document's destination country is:Australia.

Line-Item Credit Memo

(Original Invoice No: 987654)

Credit Memo Number: CRN9987 Subtotal: \$4,320.00 AUD  
 Credit Memo Date: Thursday 12 Sep 2019 9:25 AM GMT+10:00 Total Tax: \$-432.00 AUD

**Invoice CRN9987 has been submitted.**

- Print a copy of the invoice
- Exit invoice creation.** **13**

Invoice: 987654 **Done** Previous **14**

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

Detail Scheduled Payments Remittance History

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

- Locate and Open the email indicating that an Invoice has been rejected

## 1. Open the Invoice

- The Rejection Reason is displayed

## 2. 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.

- Finalise

Invoice: 117655-A  Done

Edit [Create Line-Item Credit Memo](#) [Copy This Invoice](#) Print [Download PDF](#) Export cXML

Detail [Scheduled Payments](#) [History](#)

**Rejected Invoice:**  
Reasons:  
R06: Incorrect Quantities

Comment: please resubmit with adjusted quantity (Sarah Mingon, 2019-08-07T21:29:48-07:00)Line item: Line Number:1 Part Number:Not Available Description:Test Exc) Received Quantity The invoice item's quantity, 25, is greater than the order item's received quantity, 0. Part Number Not Available Description:Test Exceptions: PO Received Quantity Variance The invoice

[Edit & Resubmit](#) 

Standard Invoice / Tax Invoice

<b>Status</b>		<b>Subtotal:</b>	<b>\$250.00 AUD</b>
Invoice:	Rejected	Total Tax:	\$25.00 AUD
Routing:	Acknowledged	Total Gross Amount:	\$275.00 AUD
Invoice Number:	117655-A	Total Net Amount:	\$275.00 AUD
Invoice Date:	Thursday 8 Aug 2019 1:53 PM GMT+10:00	<b>Amount Due:</b>	<b>\$275.00 AUD</b>
Original Purchase Order:	<a href="#">4900006264</a>		
Submission Method:	Online		
Origin:	Supplier		
Source Document:	Order		

# Support

Support Type	Description
<b>Help Centre</b> 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</li></ol>
<b>Supplier Information Portal</b> (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>
<b>Ariba Network Training Request</b>	E: <a href="mailto:an.sellertraining.aus@sap.com">an.sellertraining.aus@sap.com</a>