



Feature at a Glance

Links to eForms in invoice documents

Johan Holm, Solution Manager SAP Ariba
Roger Nyberg, Product Manager SAP Ariba
Target GA: May 2019

CONFIDENTIAL

Feature at a Glance

Introducing: Links to eForms in invoice documents

Ease of implementation  High-touch
Geographic relevance  Global

Customer challenge

Customers may have the need to process additional information related to the settlement of an invoice in a separate document that can be referenced from the invoice. For example: implementing a balance document eForm in SAP Ariba to track the amount that has not/will not be paid for an invoice.

Today, however, there's no way to link an invoice or IR to an eForm, whereas that capability exist already on the requisition and purchase order.

Solution area

- SAP Ariba Buying and Invoicing
- SAP Ariba Invoice Management

Meet that challenge with SAP Ariba

With this feature, organizations using eForms can customize invoices and invoice reconciliation documents so users can link to a related eForm. Approvers reviewing the invoice can then click the eForm link to view the eForm, giving them the information they need for informed approval.

Similar ability already exist on the requisition and purchase order documents.

Implementation information

To have this feature enabled, please have your Designated Support Contact (DSC) submit a Commercial Request with your SAP Ariba Customer Engagement Executive or Account Manager.

Experience key benefits

This feature allows customers to link invoices to supporting documents (eForms), making the processing of invoices.

Prerequisites and Limitations

- This feature requires a customization on your site with SAP Ariba Services.
- This feature is for eForms, not forms created in the forms builder.
- You can have eForm links added in the header of invoices and IR documents but not at the line level.
- You can use this feature with invoices and IR documents created after eForm linking is implemented on your site.
- eForm ID fields are not included in cXML IR documents sent to Ariba Network.

Feature at a Glance

Overview: Links to eForms in invoice documents

- SAP Ariba technical resource can add a link to the invoice and IR header that reference a defined eForm.
- When creating or editing an invoice or IR, the eForm field is displayed and an instance of the eForm can be linked to the invoice which brings the user to a search page that allows the user to pick an instance of an eForm based on the fields that were created for the eForm.
- Example: “Balance Document” eForm search field added to the IR
- The status of the eForm referenced can be configured to be either fully approved/processed documents, or also to include approving/processing status.
- Up to two eForm fields for invoice documents can be carried over to SAP Ariba Analysis and made available for reporting.

You can continue to edit the invoice before submitting it for approval.

[Submit](#)

[Exceptions](#) [Line View](#) [Approval Flow](#) [Reference](#) [History](#)

IR123-63

Invoice ID: INV123-63
Invoice From: JCN Technologies (AN - Fulfillment FT) on Wed, 07 Nov, 2018
Invoice Type: Purchase Order
Purchase Order(s): PO10
Ship Notice Title:

Header Information [↗](#)

Supplier: 000000100 (JCN Technologies (AN - Fulfillment FT)) [select]
On Behalf Of: Arnold Davis
Supplier Contact: 000000100 [select]
Pay Via: Default
Supplier Invoice #: 123
Invoice Submission Method: Paper Invoice
Invoice Origin: Supplier
Payment Terms: 0002 [select]
Company Code: 3000 (IDES US INC)
Deliver To: Arnold Davis

Balance Document: (no value)
My Labels:

Feature at a Glance

Configuring: Links to eForms in invoice documents

- A normal field can be created in Customization Manager -> Field Configuration for classes Invoice and InvoiceReconciliation
- A published eForm can now be the Type of a Normal Field. In the image to the left, the type 'Balance Document' is an eForm

The screenshot shows the SAP Customization Manager interface. On the left, the navigation tree includes 'Customization Manager' > 'Field Configuration'. The main area is titled 'Field Configuration' and shows a list of 'Browse Classes' under the 'Invoicing' category, including 'Invoice', 'InvoiceCart', 'InvoiceCartLineItem', 'InvoiceException', 'InvoiceLineItem', 'InvoiceReconciliation', 'InvoiceReconciliationLineItem', and 'InvoiceTransactionEntry'. A 'Create Normal Field' dialog is open, showing the 'General' tab. The 'Field Name' is 'Balance Document' (highlighted with a red box in the original image). The 'Type' is 'Balance Document'. The 'Available on Reports' and 'Respect User Value' options are checked. The 'Show in Views' section has 'Print' and 'Edit' checked. The 'Behavior' section has 'Required' unchecked. A list of field types is shown on the right, with 'Balance Document' highlighted. The list includes: Address, Asset, Boolean, Commodity Code, Company Code, Cost Center, Country, Currency, Date, Date (Calendar), Decimal Number, FMD 1, FMD 1 Multiple Select, FMD 2, FMD 2 Multiple Select, FMD 3, FMD 3 Multiple Select, FMD 4, FMD 4 Multiple Select, General Ledger, Integer, Internal Order, Item Category, Long, Money, Multiline Text, NTestEForm, Network, PCard. A 'Cancel' button is visible at the bottom right of the dialog.

Feature at a Glance

Configuring: Links to eForms in invoice documents

- Checkbox Chooser Not Restricted Based on Status has been added for fields that are of an eForm type to allow the buyer to link an invoice document to an eForm that have not been Processed and Approved yet*.

Create Normal Field

General Conditions Advanced

Label: Balance Document Reset

Field Name: * cus_BalanceDocument Edit ⓘ

Type: * Balance Document ▾

Help Tip:

Chooser Not Restricted Based on Status: ⓘ

Chooser Not Restricted Based on User:

Cannot View Object from Chooser Results:

Available on Reports:

Respect User Value:

Default Value: [3e3f76fa: -- Ñôñè --] ▾

Show in Views

Print ⓘ Details ⓘ Search ⓘ

Edit ⓘ

Behavior

Required ⓘ

! = Indicates modified

OK Cancel

* Requisitions can only be linked to eForms that have been Processed and Approved