



SAP Ariba 

Invoice Against a Limit Purchase Order (PO)

CP

Invoice Against a Limit PO – Process Overview

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Invoice Against a Limit PO – Select and Review PO

- A Canadian Pacific Limit PO will typically be for Services and will not contain any specific part numbers.
- Begin by selecting correct PO and PO Version. **Obsoleted** status indicates that a new PO version exists. Obsoleted versions will not allow invoice entry.
- All PO versions can be located via **Search Filters** → **Exact number** search.

▼ Search Filters

Customer:

Order Number: * Partial number Exact number

Type	Order Number	Ver	Ship To Address	Amount	Date	Order Status ↓
▼ Customer: Canadian Pacific Railway (CP Rail) - TEST (3)						
<input type="radio"/> Order	7000011200	2	CPR - Canadian Pacific Railway Attn IS Deskside Support Bldg 7 Wininpeg, MB Canada	\$20,000.00 CAD	16 Dec 2021	Partially Serviced
<input type="radio"/> Order	7000011200	1	CPR - Canadian Pacific Railway Attn IS Deskside Support Bldg 7 Wininpeg, MB Canada	\$20,000.00 CAD	12 Nov 2021	Obsoleted

- Open valid PO version by clicking on PO number and verify following information:
 - PO scope is relevant to invoice (correct project reference, province/state of operation, scope breakdown per PO line items).
 - Remaining PO budget is sufficient to cover invoice value.
*Remaining PO budget is the difference between the **Sub-Total** and **Total Serviced** value.*

Line Items Show Item Details

Line #	No. Schedule Lines	Change	Part # / Description	Type	Return	Qty (Unit)	Need By	Price	Subtotal
1			Not Available	Service		1 (EA)	11 Dec 2021	\$20,000.00 CAD	\$20,000.00 CAD
Service Description /Scope is provided here									

Order submitted on: Thursday 16 Dec 2021 3:54 PM GMT-07:00
 Received by Ariba Network on: Thursday 16 Dec 2021 3:55 PM GMT-07:00
 This Purchase Order was sent by Canadian Pacific Railway (CP Rail) - TEST AN01469267434-T and delivered by Ariba Network.

Service Sheet Required.

Sub-total: \$ 20,000.00 CAD
 Total Serviced: \$ 2,552.50 CAD
 Total Invoiced: \$ 2,552.50 CAD

Invoice Against a Limit PO – Select and Review PO

- Obsolete PO versions, Invoice and Service Sheet history are located in **Related Documents** section.
- Available PO budget is PO-line specific. Click on **Show/Hide Item Details** to confirm remaining amounts per line.

Purchase Order
 (→ Partially Serviced)
 7000011200
 Amount: \$20,000.00 CAD
 Version: 2 (Previous Version)

[Track Order](#)

Routing Status: Acknowledged
 Related Documents: [7000011200-5_SS_1](#)
[7000011200-5](#)
[7000011200-IMS_SS_1](#)
[More\(4\) >](#)

Line Items [Show Item Details](#)

Line #	No.	Qty (Unit)	Need By	Price	Subtotal	
1		1 (EA) ⓘ	11 Dec 2021	\$45,000.00 CAD	\$45,000.00 CAD	Details
2		1 (EA) ⓘ	8 Jan 2022	\$5,000.00 CAD	\$5,000.00 CAD	Details

Line Items [Hide Item Details](#)

Line #	No. Schedule Lines	Change	Part # / Description	Type	Return	Qty (Unit)	Need By	Price	Subtotal	
1			Not Available	Service		1 (EA) ⓘ	11 Dec 2021	\$45,000.00 CAD	\$45,000.00 CAD	Summary

Service Description / Scope is provided here

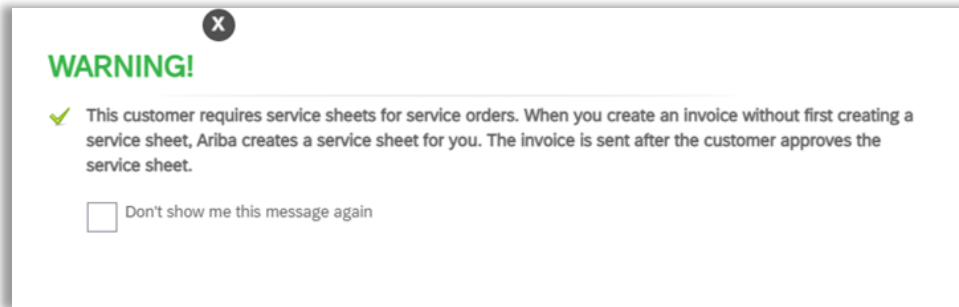
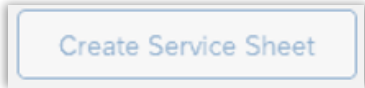
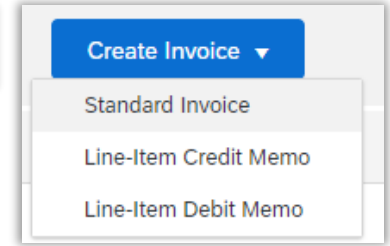
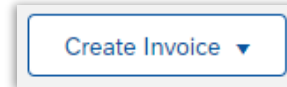
Status

Invoiced Amount: \$2,552.50 CAD

Serviced Amount: \$2,552.50 CAD

Invoice Against a Limit PO – Create Invoice (Single Line Item)

- To Invoice against a Limit PO, click on the **Create Invoice** button within the Purchase Order form.
- Select **Standard Invoice** option. This is preferred invoicing method. It is recommended to avoid using other shortcuts, such as landing page menu.
- The **Create Service Sheet** button is typically inactive in CP layout. The default process assumes that Service Sheets are created automatically based on Invoice content. Do **not** use the Create Service Sheet button to invoice, even if it is active.
- A warning may pop up, confirming automated Service Sheet setup. This is expected and not an error. Close the warning to continue. The message may be removed by clicking on the **Don't show me this message again** box.



- Note:** An invoice can be saved at any time of entry, should work be interrupted. The invoice draft will stored in the **Related Documents** section of the Purchase Order.



Invoice Against a Limit PO – Create Invoice (Multiple Line Items)

- If the Limit PO has multiple lines, after clicking **Create Invoice**, select the Line Item of the PO against which the Invoice is to be created. An invoice can only be submitted against one PO Line Item at a time.
- Select the radio button next to the required Line Item, then click **Next** to proceed.

Note: A PO Line Item may be invoiced multiple times up to the Subtotal limit, but invoices can only be created against one Line Item at a time. Only one radio button can be clicked at a time in the screen below.

The screenshot shows the 'Line Items' table with 5 rows. Each row has columns for Line #, Part # / Description, Type, Return, Qty (Unit), and Need By. All 'Type' values are 'Service' and 'Qty (Unit)' is '1 (EA)'. The 'Need By' date is '15 Nov 2020'. At the bottom, there are four buttons: 'Create Order Confirmation', 'Create Ship Notice', 'Create Service Sheet', and 'Create Invoice'. The 'Create Invoice' button is highlighted with a red box.

Line #	Part # / Description	Type	Return	Qty (Unit)	Need By
1	Not Available	Service		1 (EA)	15 Nov 2020
2	Not Available	Service		1 (EA)	15 Nov 2020
3	Not Available	Service		1 (EA)	15 Nov 2020
4	Not Available	Service		1 (EA)	15 Nov 2020
5	Not Available	Service		1 (EA)	15 Nov 2020

Order submitted on: Tuesday 3 Nov 2020 3:03 PM GMT-05:00
Received by Ariba Network on: Tuesday 3 Nov 2020 3:03 PM GMT-05:00
This Purchase Order was sent by Canadian Pacific Railway (CP Rail) AN01469267434 and delivered by Ariba Network.

Buttons: Create Order Confirmation, Create Ship Notice, Create Service Sheet, **Create Invoice**

The dialog box title is 'Select Item to Create Invoice with Auto-Generated Service Sheet'. It contains a 'Line Items' table with 5 rows. Each row has columns for Line # and Part ID / Description. The 'Part ID / Description' is 'Not Available'. To the left of each row is a radio button. The radio button for Line 1 is highlighted with a red box. At the bottom right, there are two buttons: 'Next' and 'Exit'. The 'Next' button is highlighted with a red box.

Line #	Part ID / Description
1	Not Available
2	Not Available
3	Not Available
4	Not Available
5	Not Available

Buttons: **Next**, Exit

- To invoice against each line of the PO, after submitting the invoice for one line, return to the PO and create another invoice.

Invoice Against a Limit PO – Complete Invoice Header Detail

- Enter your **Invoice #**, **Service Description**, **Supplier Tax ID**, and **Remit To**.

Create Invoice

▼ Invoice Header

Summary

Purchase Order: 7000011200

Invoice #:*

Invoice Date: ⓘ 16 Dec 2021

Service Description:

Supplier Tax ID:* 12345678

Remit To 71 TH SREET ▼

Invoice Number must be unique. Duplicates are not permitted.

If previously rejected invoices requires re-submission, best practice is to append original invoice number with additional character (a, b or c) for easier sorting and tracking of replacements. It is best to avoid addition of special characters like dots or apostrophes.

Service Description may include references to serviced areas, equipment, project codes or other useful information as agreed with CP project manager.

Supplier Tax ID is a free-text entry. It can be also be saved in AN account profile with default value.

Prior to starting the invoice, ensure that the CP Remittance ID is configured in your remittance Address in the Remittances page of your Ariba Network account per the initial email from AribaSupplier@cpr.ca or the CP Accounts Payable department, if your CP contracts are operated by more than one business unit.

Invoice Against a Limit PO – Complete Invoice Header Detail

- Enter **Service Start Date** and **Service End Date**.

Service Start Date:

Service End Date:

- Enter **Approver Name** and **Email**. **Note:** Approver details can be copied from Ship-To detail of the Purchase Order display and pasted into relevant field.

Ship All Items To

CPR - Canadian Pacific Railway Attn IS Deskside
Support Bldg 7
478 McPhillips Street
Winnipeg MB R2X 2G8
Canada
Ship To Code: 1011IT01

Email:

Bill To

Canadian Pacific Railway company
7550 Ogden Dale Road SE
Calgary AB T2C 4X9
Canada

Approver

Name:

Email:

- Back-up files can be added at this stage of invoice entry, or before submission.

a) click on the **Add to Header** button. **Attachments** section will open just above the Line Items section

b) click on **Choose File**. This will allow you to search on your local computer for the file to attach. After clicking on the local file, click on the **Add Attachment** button.

The file will upload and appear in the Attachments section with an option to **Delete** if needed.

Add to Header ▾

Shipping Documents

Additional Reference Documents and Dates

Comment

Attachment

Important: Attachments are expected on **Add to Header** level only. Do not add attachment via other shortcuts.

Attachments

The total size of all attachments cannot exceed 10MB

Choose File No file chosen **Add Attachment**

Add to Header ▾

Line Items

Insert Line Item Options

Tax Category:

See [Appendix 1](#) for more information on uploading attachments (filename and content restrictions, size limits).

Invoice Against a Limit PO – Complete Service Line Items Detail

- Line items can be entered with the **Add/Update** button.
- Select dropdown option that applies depending on the item type.

The screenshot displays the SAP 'Line Items' interface. At the top right, it shows '0 Line Items, 0 Included, 0 Previously Fully Invoiced'. Below this is the 'Insert Line Item Options' section with checkboxes for 'Tax Category' and 'Discount', and a dropdown menu for 'Tax Category'. A table with columns for 'No.', 'Include', 'Type', 'Part #', 'Description', 'Customer Part #', 'Quantity', 'Unit', 'Unit Price', and 'Subtotal' is visible. A red box highlights the 'Add/Update' button, which has a dropdown menu open. The dropdown menu options are: 'Add Contract/Catalog Items', 'Add General Service', 'Add Labor Service', and 'Add Material'. Below the table, there are buttons for 'Line Item Actions' and 'Delete'.

2 types of line items are allowed:

- 1) Contract based rates, which can be selected from the rates catalog maintained by CP:
→ Select **Add Contract/Catalog Items**
- 2) Approved variable costs and lump sums not included in catalogs (3rd party charges, additional expense, material costs, etc.):
→ Select **Add General Service**

Note: Do not use **Add Labor Service** or **Add Material** options.

Invoice Against a Limit PO – Complete Service Line Items Detail (Add Contract/Catalog Items)

- Once the **Add Contract/Catalog Items** option is selected, Ariba will push you into **Create Service Sheet: Add Item** screen with a list of available rates.
 - Click on **Browse By Category** or search by **Part # (SMR)**, **Keyword**, or **Contract Number** to find rates. If no contract rates are found, or found with incorrect details (price, description, etc.), contact your respective Contract/Sourcing Specialist at CP to update.
1. Select the appropriate part from the Contract/Catalog, input a **Qty**, then click **Add to Cart**. Multiple items can be added in the same page. Note that multiple pages may be available to select from.
 2. Optional: Click on the **Shopping Cart** icon to view rates and adjust quantity to be added to invoice.
 3. Click **Done** to return to the invoice. The rates and quantities selected will be populated on the invoice.

The screenshot shows the 'Create Service Sheet: Add Item' interface. At the top right, a blue 'Done' button is circled with a '3' and highlighted with a red box. Below it, a search bar contains 'All Categories' and 'Search by part #, supplier name, or keyword'. To the right of the search bar is a shopping cart icon with a '1' inside a circle and a red box around it, labeled '2'. Below the search bar, there are 'Add to Cart' and 'Compare Items' buttons. On the left, a 'Browse By Category' sidebar is visible. In the main area, '26 item(s) found' is displayed. Below this, a list of items is shown. The first item is selected with a checkmark. To its right, the price is 'CAD / hour'. Below the price, a 'Qty: 3' input field and an 'Add to Cart' button are circled with a '1' and highlighted with a red box. At the bottom right, there are page navigation buttons '1' and '2'.

Invoice Against a Limit PO – Complete Service Line Items Detail (Add General Service)

- Once the **Add General Service** option is selected, Ariba will generate an additional sub-line with blank fields.
- To add non-Contract/Catalog entries to an Invoice Line Item, enter a **Description**, **Quantity**, **Unit** and **Unit Price** fields. **Part #** and **Customer Part #** is optional.
- **IMPORTANT:** Correct **Unit** (unit of measure) entry is extremely important for successful invoice processing in automated workflows. Sending an invalid **Unit** will cause your invoice to be rejected.
 - For correct entry, start typing the name of a unit of measure into the **Unit** field and click on **Search for more...** to select a valid unit from the picklist. Units codes are case-sensitive (all capitals) and language-sensitive.
- **Note:** It is recommended that invoiced quantities and prices are rounded to 2 decimal places (ie. \$X.XX). Subtotals exceeding 2 decimal places may result in invoicing errors.

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

Insert Line Item Options


Tax Category: Discount Add to Included Lines

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input type="checkbox"/>								
1	<input checked="" type="checkbox"/>	SERVICE							\$0.00 CAD

Service Period: Service Start Date: * Service End Date: *

See [Appendix 2](#) for more information on selecting a valid unit (unit of measure).

Invoice Against a Limit PO – Complete Service Line Items Detail

- Line items can be excluded from the invoice submission (If entered in error) by switching “Include” indicator off: 
- All invoice lines require **Service Start Date** and **Service End Date** entry per line item.

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

Insert Line Item Options

Tax Category: 0% Sales Tax / Tax Exempt Discount Add to Included Lines

1

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input checked="" type="checkbox"/>			Not Available					
1	<input checked="" type="checkbox"/>	SERVICE	3000998	SUPERVISOR		3	HUR ⓘ	\$79.49 CAD	\$238.47 CAD
Contract Number: C2147									
Service Period		Service Start Date:*			Service End Date:*				

Tax

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
2	<input checked="" type="checkbox"/>	SERVICE	3001172	FOREMAN OT		2	HUR ⓘ	\$100.50 CAD	\$201.00 CAD
Contract Number: C2147									
Service Period		Service Start Date:*			Service End Date:*				

Tax

2 Line Item Actions Delete

- Edit
- Add
- Tax
- Shipping Documents
- Special Handling
- Discount
- Allowance
- Charge
- Comments
- Attachment

You can mass edit Service Start and End dates on multiple line items:

- Select all line items via the first check box on the left side of the screen.
- Choose **Line Item Actions** → **Edit**.
- On the next screen, enter Service Start and End Dates.

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input checked="" type="checkbox"/>	SERVICE	3000998	SUPERVISOR		3	HUR ⓘ	\$79.49 CAD	\$238.47 CAD
2	<input checked="" type="checkbox"/>	SERVICE	3001172	FOREMAN OT		2	HUR ⓘ	\$100.50 CAD	\$201.00 CAD

Line Details

Accounting Reference Reference ID: Description:

3 Service Period Service Start Date: * Service End Date: *

Invoice Against a Limit PO – Add Tax

- To add Tax to one or many Line Items:
 - Place a **check** in the box to the left of the item(s).
 - Check the **Tax Category** box and select the applicable Tax Category from drop-down menu (GST, PST, HST, Other).
 - Click the **Add to Included Lines** button. A **Tax** section will appear under each line item checked off.
 - Enter the **Rate(%)** value. If services are not subject to Sales Tax, enter 0 for the Rate (%). Withholding tax is entered as negative rate. Click the **Update** invoice button for Ariba to auto-calculate the **Tax Amount**.
- If incorrect tax category was added or duplicated, it can be corrected in the line items via the **Category** dropdown, or by clicking **Remove**.

The screenshot shows the 'Insert Line Item' form in SAP Ariba. It features a table with columns: No., Include, Type, Part #, Description, Customer Part #, Quantity, Unit, Unit Price, and Subtotal. A line item with No. 1, Type 'SERVICE', Part # '3000998', and Description 'SUPERVISOR' is highlighted. Below the table, there is a 'Tax' section with fields for 'Category:*' (set to 'GST'), 'Location', 'Description', and 'Regime'. To the right of the 'Tax' section, there are fields for 'Taxable Amount' (\$238.47 CAD), 'Rate(%)' (set to '5'), 'Tax Amount' (\$11.92 CAD), and 'Exempt Detail' (set to '(no value)'). Buttons for 'Add to Included Lines', 'Add/Update', and 'Remove' are visible. Red circles and arrows highlight specific elements: 1 (checkmark), 2 (Tax Category dropdown), 3 (Add to Included Lines button), and 4 (Rate(%) field).

See [Appendix 3](#) for more information on configuring the tax menu to save default tax categories and rate (%) values.

Invoice Against a Limit PO – Add Tax (Additional Rules on Tax Category Application)

1. All line items on an invoice for Services must have the tax rates applied consistently, and it needs to follow the same information, i.e.:

- a) If a line item has PST **and** GST, all lines will need to have PST **and** GST.
- b) If a line item has GST **or** HST, all line items will need to have GST **or** HST only.
- c) If a line items is exempt, all line items will need to be exempt.
- d) The same sales tax rate is applied to all line items for US Sales Taxes.
- e) If one line item has GST and Withholding tax included, all of them will have the same.

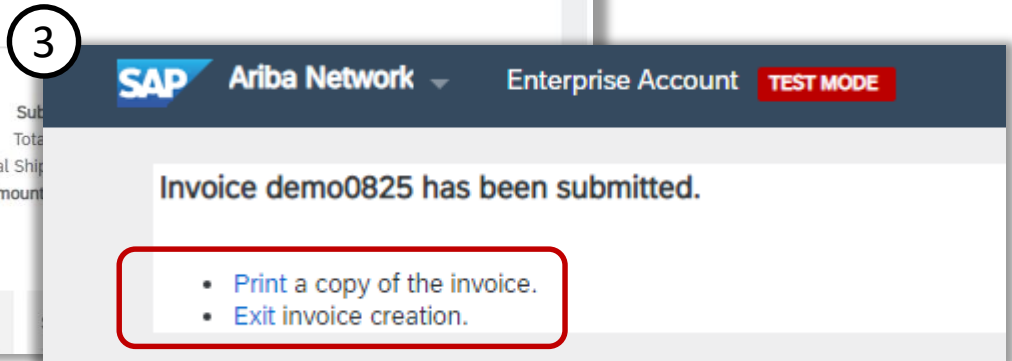
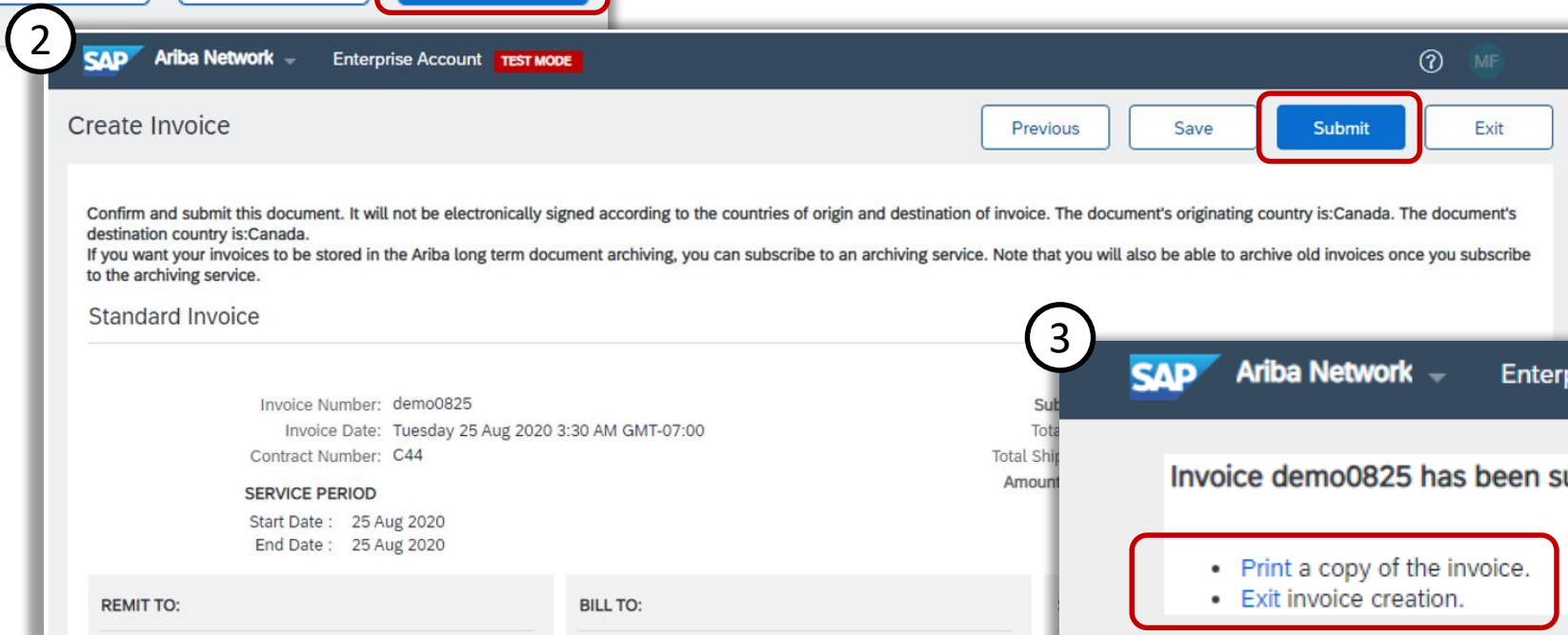
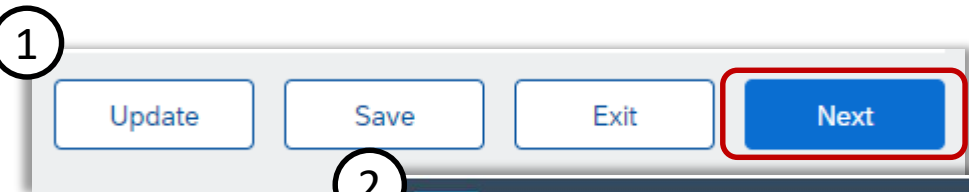
Inclusion of line items with different taxation rules (i.e. first line item GST, second line item 0%) may result in invoice rejection and re-work.

2. Withholding tax is applied with the negative rate as displayed.

Category	Location	Description	Regime	Taxable Amount	Tax Rate Type	Rate(%)	Tax Amount	Exempt Detail
5% GST				\$100.50 CAD		5	\$5.03 CAD	(no value)
Withholding Tax				\$100.50 CAD		-15	\$-15.08 CAD	

Invoice Against a Limit PO – Validate Invoice Content and Submit Invoice

1. Once the invoice entry is completed and is ready to submit, click on the **Next** button to move to the confirmation screen.
2. On the **Create Invoice** confirmation screen, review that the information on the invoice is correct and click on the **Submit** button.
3. A message will display indicating the Invoice was submitted. Click to **Print** a copy of the invoice or **Exit** invoice creation.



Invoice Against a Limit PO – Service Sheet/Invoice Rejection

Related Documents		
Document Number	Date	Type
INVOICE1_SS_1	29 Dec 2021 1:37 PM MST	Service Sheet
INVOICE1	29 Dec 2021 1:37 PM MST	Invoice

INVOICE1	CAD
Service Sheet INVOICE1_SS_1	
Service rate	100
Service rate	100
Incidentals	10
Subtotal	210
Tax amount: GST	10.5
PST	14.7
INVOICE TOTAL	235.2

- Each submitted Invoice generates two documents: a **Service Sheet** and an **Invoice**. The Service Sheet comprises a part of Invoice, net of taxes.
- Service Sheets and Invoices undergo own stages of approval. Document statuses are indicated on respective dashboards. Look for notes on Rejected documents to find the reason for rejection.
- **Note:** If a Service Sheet is Rejected, the Invoice is also always Rejected. If an Invoice is Rejected, the Service Sheet however may stay Approved.

Service Sheet may be rejected if:

- Wrong Purchase Order applied.
- Incorrect scope invoiced, or duplicate charge identified.
- Missing or incorrect Unit of Measure.
- Line item value rounding math resulted in sub-total going over PO amount (no tolerances allowed).
- Invalid attachment content.
- Already Rejected Service Sheet was edited for resubmission, not created anew. Edited Service Sheet may block PO from further charges.

DO NOT EDIT Rejected SERVICE SHEET. Create replacement invoice according to procedure (slide 7).

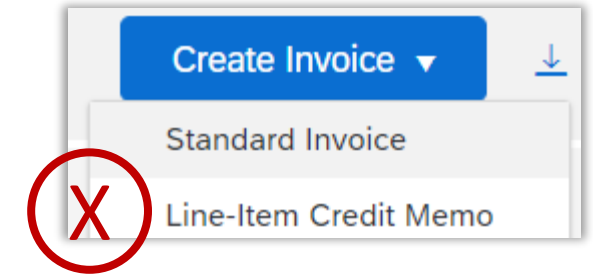
Invoice may be rejected for:

- Errors in tax calculation or applicable tax rate.
- Incorrect Remittance ID choice.
- Missing back-up attachment.
- Wrong Purchase Order application (identified after Service Sheet approval).
- Duplication.

Rejected INVOICE (while Service Sheet remains approved) can be edited for tax values only.

Invoice Against a Limit PO – Credit Memo

While the **Create Invoice/Line-Item Credit Memo** option is available in Ariba, it is first recommended to consult with CP (AribaSupplier@cpr.ca) to determine the appropriate invoicing route. Age and payment status of original invoice may impact available corrective actions.



Current setup does not allow partial negative entries in invoices.

Generally, two options are suggested:

- 1) If **PARTIAL** credit is required, notify both the CP Project Manager and AribaSupplier@cpr.ca, and await further instructions.
- 2) If **FULL** reversal of previously submitted invoice is required, you may submit a credit memo with appropriate reference to original invoice. CP will track the FULL credit memo to be cleared against original costs. Clearing will result in rejected original service sheet, original invoice and subsequent credit memo altogether. Upon reconciliation, “Serviced and Invoiced” values of applicable Purchase Order will be corrected to accommodate the proposed credit.

Appendix 1: Invoice Against a Limit PO – Add Attachment

1. To add an attachment, click on the **Add to Header** button just above **Line Items**. This will add the **Attachments** section to the Invoice.
2. Click on **Choose File**. This will allow you to search on your local computer for the file to attach. After clicking on the local file, click on the **Add Attachment** button.
3. The file will upload and appear in the **Attachments** section with an option to **Delete** if needed.

1

A screenshot of a software interface showing a dropdown menu. The menu is open, and the 'Attachment' option is highlighted with a red box. Above the menu, the 'Add to Header' button is also highlighted with a red box. Other options in the menu include 'Shipping Documents', 'Additional Reference Documents and Dates', and 'Comment'. Below the menu, there are input fields for 'Ins...', 'Tax Category:', and a table with columns 'No.', 'Include', 'Type', and 'Part #'.

2

A screenshot of the 'Attachments' section in a software interface. It features a warning message: 'The total size of all attachments cannot exceed 10MB'. Below this, there are two buttons: 'Choose File' (with 'No file chosen' text next to it) and 'Add Attachment', both highlighted with red boxes. At the bottom, there is an 'Add to Header' button.

3

A screenshot of the 'Attachments' section showing a file that has been uploaded. The file name is 'Ariba Network Buyer Admin Guide 202003.pdf', which is highlighted with a red box. Below the file name, there is a 'Delete' button, also highlighted with a red box. The interface includes the same warning message and 'Choose File'/'Add Attachment' buttons as in the previous screenshot.

Important:

- Total files size can not exceed **100 MB**.
- Special characters in the filename are not allowed: **! @ # \$ % ^ & * () _ - + = , ? ' or "**
- Active components in file content will make whole submission invalid, resulting in rejection. The following is not recommended: macros in Excel files, email links or messages. **Flat print pdf forms work best.**
- Attachments are only expected through the **Add to Header** button. Do not add attachment via other shortcuts (line item level, etc).

Appendix 2: Invoice Against a Limit PO – Selecting Unit of Measure

- To select a valid **Unit** of measure, begin typing into the **Unit** field, then click on **Search for more...**.

Important: A Valid **Unit** is critical for you invoice to post. Sending an invalid **Unit** will cause your invoice to be rejected.

Quantity Unit Unit Price Subtotal

el \$0.00 USD

Search for more...

Direct input of the Code into the Invoice Line Item is allowed if a valid Code is known. Valid Codes include HUR for hour and EA for Each. If unsure, EA for Each is a valid Code.

SEARCH UNIT

Name e Search

Code Symbol Name

No items

Close

After clicking on **Search for more...**, input the first character of a desired unit of measure, then click **Search**.

SEARCH UNIT

Name e Search

Code ↑	Symbol ↑	Name ↑	Select
1E	1E	empty car	Select
EA	EA	each	Select
EC	EC	each per month	Select
P8	P8	eight pack	Select

Close

(May need to sort or move through multiple pages of valid Codes.)

Click **Select** for the desire unit of measure to return to the Invoice Line Item.

Unit Unit Price Subtotal

The selected **Unit** will be added into the Invoice Line Item and the Unit Price field will show a reminder that the Unit Price is also required.

EA \$0.00 USD

! Required if unit is specified

Appendix 3: Invoice Against a Limit PO – Configure Tax Menu

- Tax rates can be pre-set by supplier with standard or custom values to automate inputs and avoid entry errors.
- Use **Configure Tax Menu** option in Tax Category drop-down to enter and save % values along with texts.

1

2

3

The screenshot illustrates the SAP tax configuration process. It shows a 'Tax Category' dropdown menu with 'GST' selected. A secondary dropdown menu is open, listing 'Standard Tax Selections' such as Sales, VAT, GST, HST, PST, QST, Usage, Withholding Tax, Other Tax, and 'Configure Tax Menu'. The 'Configure Tax Menu' option is highlighted. The 'Configure Tax' dialog box is also shown, containing a table with columns for 'Tax Category', 'Rate', and 'Tax Description'. The table lists several tax entries, including GST (5%), Sales Tax (0%), QST (9.975%), Sales Tax (8.25%), and Other (Minnesota tax at 5.5% and Kansas tax at 7.5%).

* Tax Category	* Rate	Tax Description
<input type="radio"/> GST	5 %	
<input type="radio"/> Sales Tax	0 %	Tax Exempt
<input type="radio"/> QST	9.975 %	
<input type="radio"/> Sales Tax	8.25 %	Texas Tax
<input type="radio"/> Other	5.5 %	Minnesota tax
<input type="radio"/> Other	7.5 %	Kansas+county