Quick Reference Guide

Creating an Invoice with an Enterprise Account

1. Overview

1.1. **Purpose**

The Ariba Network allows suppliers to easily submit an invoice to request payment after goods have been shipped or services completed, and the purchase order has been fulfilled.

The steps below provide suppliers (with an enterprise account) with instructions on how to create an invoice against a purchase order through their supplier Ariba Network account.

How to create an invoice from your dashboard

How to create an invoice from supplier Ariba Network

How to view invoice status

How to save an invoice

Troubleshooting

2. How to create an invoice from your dashboard

The easiest way to manage your invoicing is through the interactive dashboard that appears when you log into your Ariba account. Provided our accounts are linked, then your Transgrid orders and invoices will be visible on the interactive dashboard.

If Transgrid isn't showing up for selection, then all you need to do to link our accounts is click on the Process Order button on any of the interactive Purchase Order emails that you've received from Transgrid. Sign in with your Ariba log-in (noting it needs to be the same log-in that you used when registering as a supplier to Transgrid) and that's it, our accounts are linked.

After clicking on the Orders to Invoice tile, you'll see all of your Transgrid orders, and simply click on the blue Purchase Order number to open the order and commence the Invoice Creation process as per step 3.4 below onwards.

3. How to create an invoice from supplier Ariba Network

3.1. Go to **supplier.ariba.com** and enter your **User Name** and **Password**. Click **Login.**
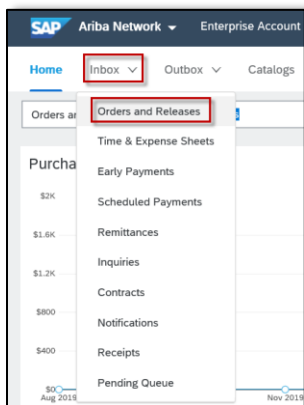
3.2. The Ariba Network Supplier home page displays.
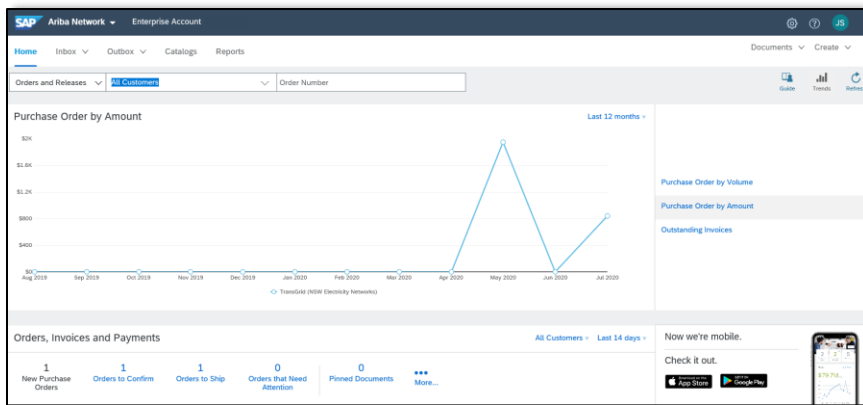
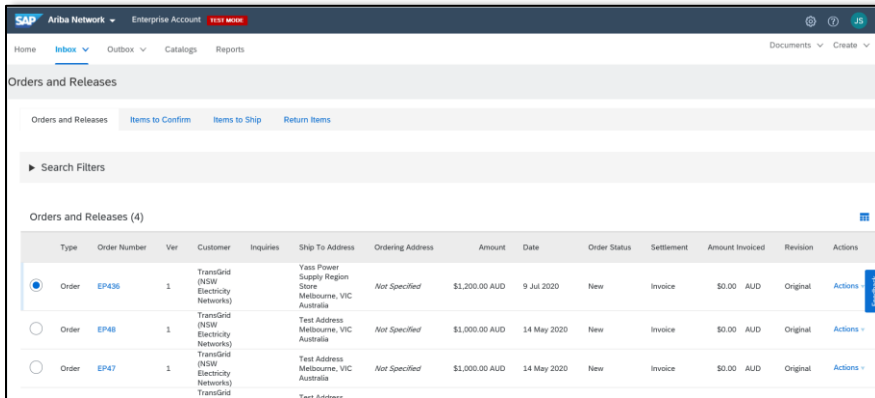## 3.3. Click the dropdown arrow next to Create in the top-right corner, then select **PO Invoice**.
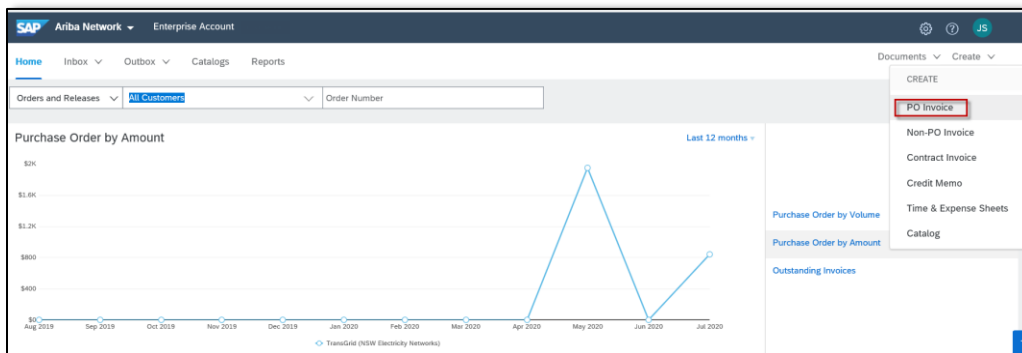
3.4. Alternatively, click the dropdown arrow next to Inbox, then select **Orders and Releases**.

3.5. A list of Purchase Orders displays. For a PO Invoice, select the radio button next to required PO number.


3.6. At the bottom of the screen, click the dropdown arrow next to **Create Invoice**, then select **Standard Invoice**.
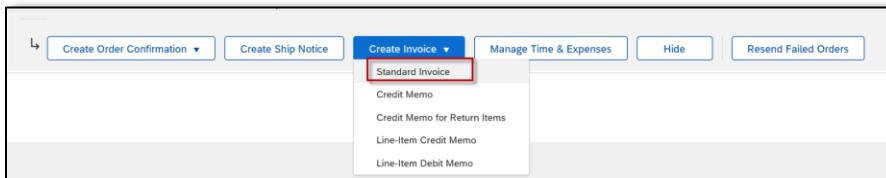
- **All suppliers** have the option of creating an order confirmation or creating an invoice.
- In addition to creating a standard invoice, suppliers have an option to create a Credit Memo or a Line-Item Credit Memo. Please refer to QRG - Supplier - Creating a Credit Memo with an Enterprise Account for further information.
- **Network Equipment Suppliers** are required to create a Shipping Notice prior to the creation of an invoice. Please refer to the QRG – Supplier - Creating a Ship Notice with an Enterprise Account for further information.
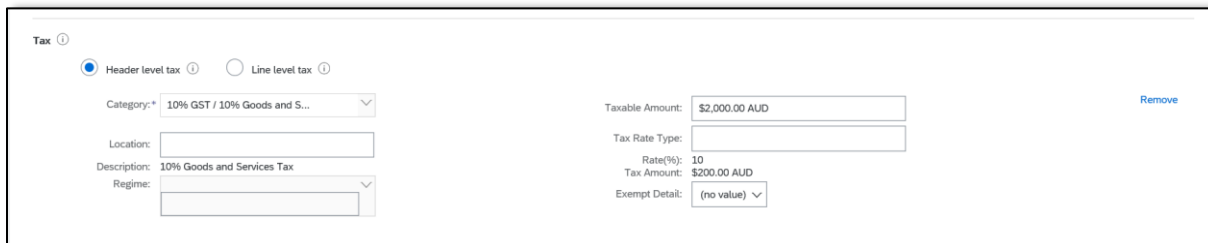
3.7. The *Create Invoice* screen displays.
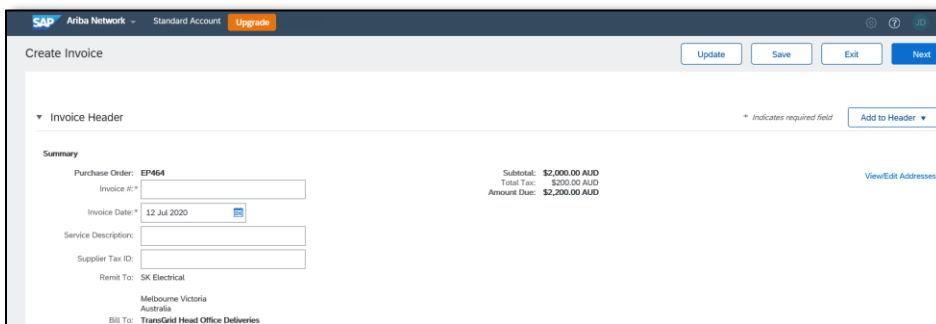
3.8. The invoice is automatically pre-populated with the purchase order data. In Ariba Network, this is referred to as a **"PO Flip".**

3.9. Complete the **Invoice Header** – Summary section.

Field	Description
Invoice #	Enter an invoice # which is your unique number for invoice identification. *Please note invoice number format accepts alpha or numeric values with no spaces and no special characters, and no hyphens and must be all caps. Date format must represent ddmmyy e.g. 210720. (limited to 20 characters)*

	Please note in the instance an invoice is rejected, the same invoice number cannot be used.
Invoice Date	Invoice data will automatically populate with the invoice creation date. *Please note invoice can be back dated by 7 days.*
Service Description	Enter the type of service being invoiced.
Supplier Tax Id	Enter tax id if applicable. This is an optional field.

3.10. Scroll down to the **Tax section.**

3.11. Select the **Header level** or **Line level** tax radio button.

3.12. Select correct tax category by clicking on drop down arrow next to **Category field.**
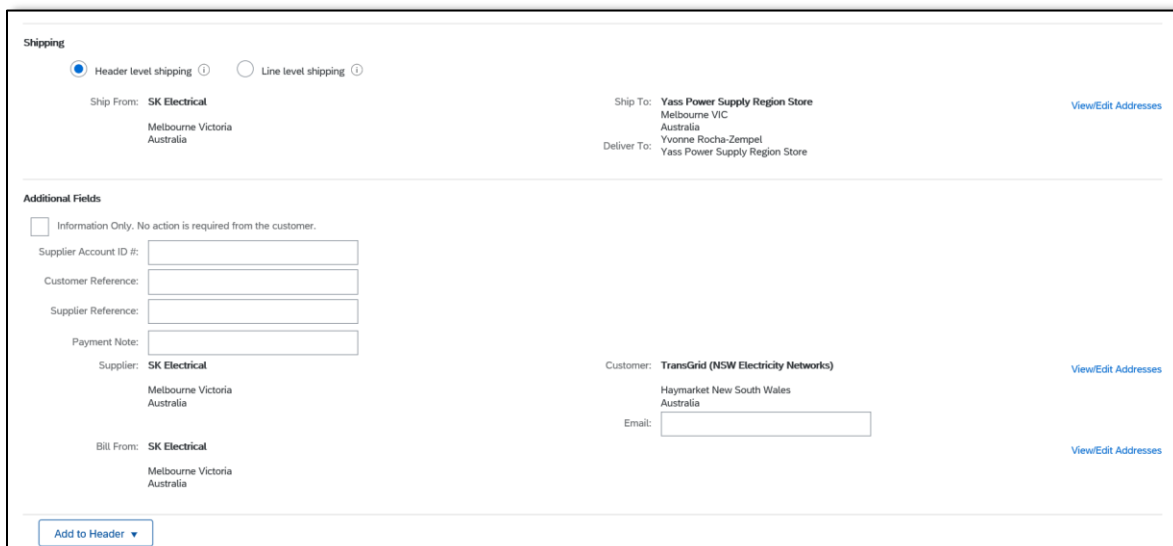
- You can only select one category type for each line item either 10% GST or 0% GST.

Tax Category options

Tax Category	Description
10% GST	10% Goods and Services Tax
0% GST	0% Goods and Services Exempt
Header Level	Choose **Header level** tax if you want to add one or more tax categories at Invoice Header level. Tax details automatically default to **Header Level tax** and **10% GST**. The **Taxable Amount** is automatically calculated based on the items listed on the invoice. **Tax Rate Type** is an optional free text field applied to the header level e.g. GST or GST Free.
Line Level	Choose **Line level tax** if you want to enter line item specific tax information (i.e. if there are GST-exempt line items being invoiced).

## 3.13. Scroll down to the **Shipping** and **Additional Information** sections.

## 3.14. In the shipping section, select **Header level shipping** or **Line level shipping**

3.15. Complete fields in the **Additional Fields** section, as required.

3.16. Add the Supplier **Account ID #, Customer Reference**, etc.to the **Header** of the invoice**.**

3.17. You **MUST** add attachments to invoice **[MANDATORY for Transgrid].** Attach required supporting documentation, such as timesheets, detail of good/service items being invoiced, and/or invoice pdf.
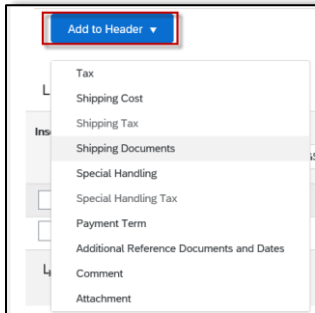

3.18. Scroll down to the **Line Items** section to display line items from the Purchase Order.
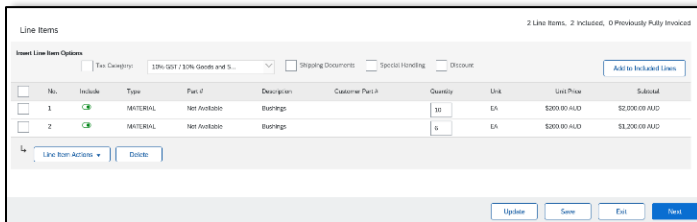
3.19. Review/ update the **Quantity** or **Dollar Amount** for each line item you are invoicing.

3.20. To delete a line item, select the checkbox next to the required line item(s) and click **Delete**

3.21. Click dropdown next to **Line Item Actions**, select Shipping Documents, Special Handling (notes), Discount, Comments, or Attachments to add these options to the invoice line item.
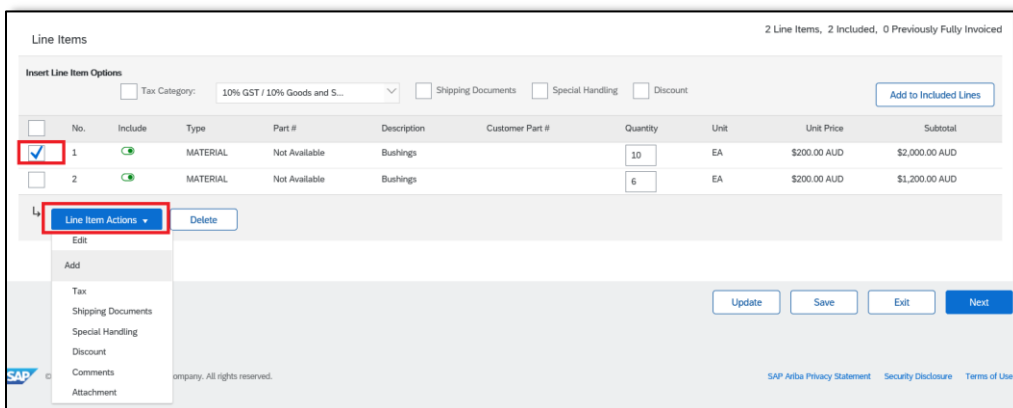
3.22. Alternatively select the checkbox next to the required line item (s), Click **Add to Included Lines.**

- The line item options are added to all line items on the invoice.

3.23. Click **Next.**

3.24. Review the invoice summary.

3.25. Correct any issues, if required, then click **Next**

3.26. Review the invoice, then click **Submit**

4. How to view invoice status

4.1. To view **status of invoices**, login to your Ariba Network account.

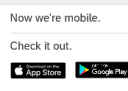4.2. In the **Orders, Invoices and Payments** section, select invoices.

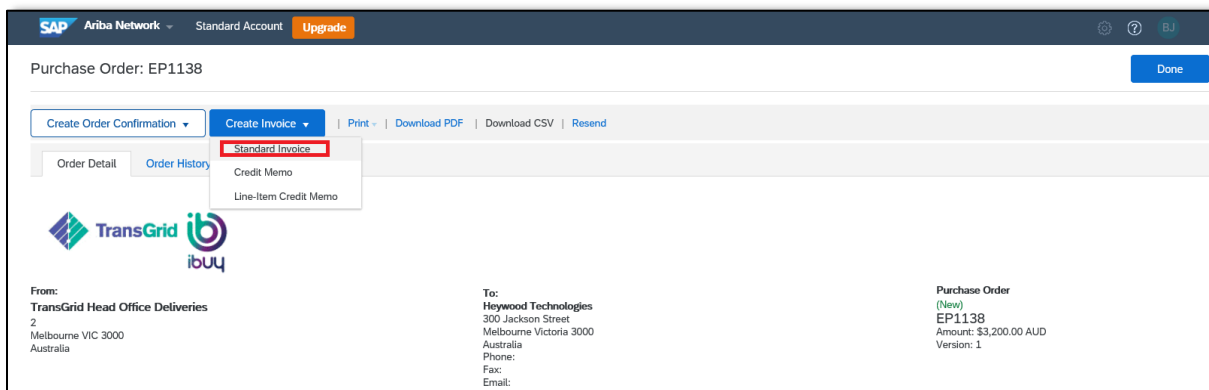**4.3.** You can view whether the invoice is sent, approved, rejected, or paid.

4.4. To view a copy of the invoice, click dropdown next to select and click **Send me a copy to take action.**
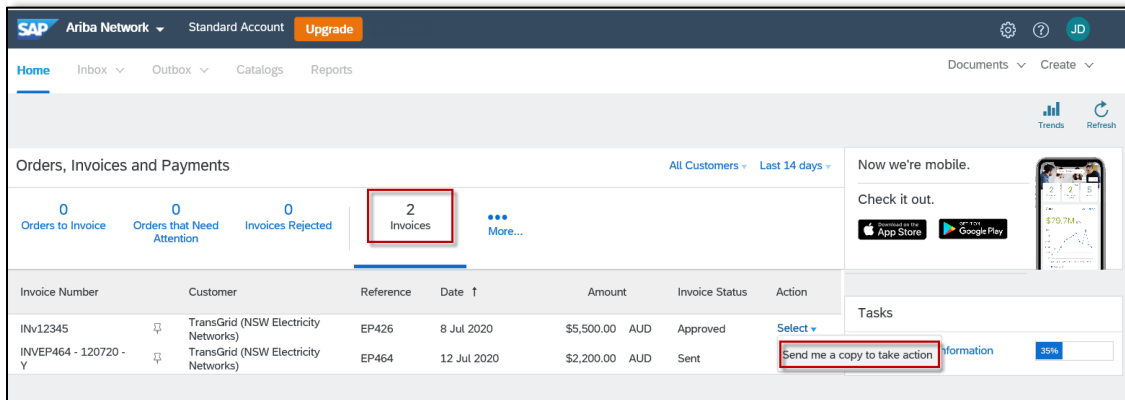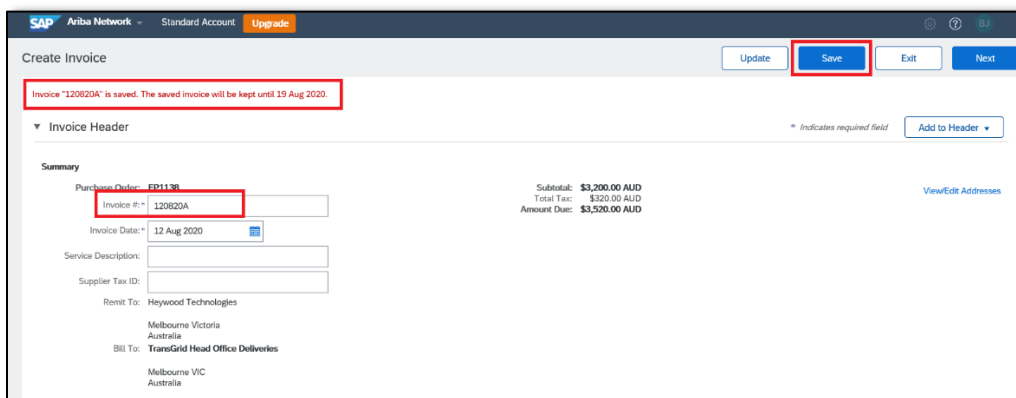

5. How to save an invoice

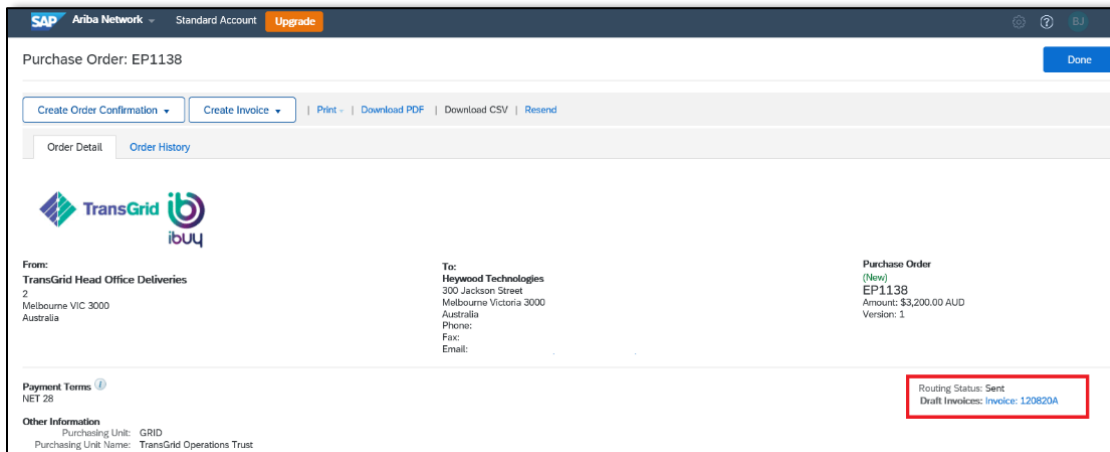**5.1.** Access the Purchase Order details screen

5.2. Click dropdown next to **Create Invoice**. Select **Standard Invoice**.

5.3. Enter invoice number, click **Save** then **Exit.**

5.4. To work on a saved invoice, click on **Draft Invoices** on the **Purchase Order** screen.

6. Troubleshooting

6.1. If you are having trouble logging in to Ariba, please ensure you're using either Microsoft Edge or Google Chrome.

1. If you still require assistance please do not hesitate to call Procurement Systems and Operations team on 02 9620 0140 or email Procurement.Enquiries@transgrid.com.au