Using Ariba for Ordering and Invoicing

Supplier User Guide

Introduction

To facilitate a streamlined ordering and invoicing process, Western Power utilises the Ariba Network to enable electronic transacting with suppliers for orders and invoices, providing real-time visibility of invoice status and remittance advice.

The purpose of this document is to provide suppliers with support in viewing orders and submitting invoices and other documents via Ariba.

This guide will provide instructions for both Standard and Enterprise Account types.

Ariba also provide support material at
https://support.ariba.com/Adapt/Ariba_Network_Supplier_Training/#/

Documents in Ariba

Western Power transacts with suppliers using the following documents in Ariba:

Document type	Format	Page Number	
Purchase Order	PO123456	View Order Submit Invoice	15-19 28-33
Order Confirmation	OC12345	Submit OC	23-27
Contract Order	C12345 or P12345	View Order Submit Invoice	20-22 34-42
Credit Memo	Supplier's format	Submit CM	43-48

Other Support Topics

See following slides in this pack for other support topics:

Managing your Ariba account

Managing your Ariba account

Before you get started on viewing orders and submitting invoices, you may need to set up your Ariba account.

See following slides for:

- Managing your account

- Managing users and user access

- Email notification options

For additional account configuration options click [here](#) to view Ariba support material.

Managing your account

If you want to change the username, password or email address for your account, click on your initials on the Ariba Network homepage -> My Account -> edit as required.

Managing Users and User Access

Ariba allows you to create additional users that will have specific roles/access within your Ariba Standard Account.

The following video walks you through how to create roles (access) and users in your Ariba Network account. Only an administrator user can take these actions:

https://support.ariba.com/Adapt/Ariba_Network_Supplier_Training/#/id/61b9f7d2dd5c4cd54f6bd87b

Note: you must create roles first, and then attach users to them. This can be done when creating a new user, or applied to an existing user.

Email Notification Options

To change your notifications and settings for orders, invoices and other documents:

In the main menu, select Settings and then update as required:

- Electronic Order Routing

- Electronic Invoice Routing

- Remittances

- Other settings as required

- Click here for more information

Ariba Network Account Type and Dashboard Options

Ariba Account Types

Depending on your Ariba account type, your Ariba Network dashboard will provide different actions – some actions are restricted in a Standard Account.

Your account type is visible at the top-left of your screen after logging in at supplier.ariba.com.
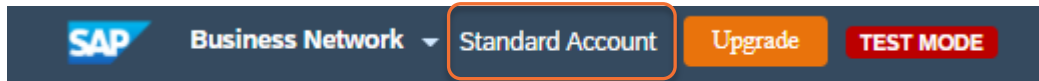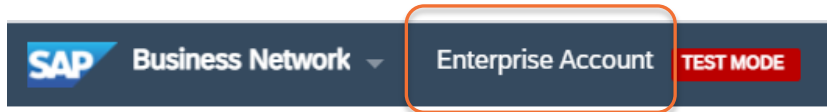
Ariba Network Dashboard

Your Ariba Network dashboard provides multiple tabs to get you where you need to go. If you have a Standard Account, some tabs will be greyed out / not available.

Actions available

Tabs available

Search for documents

Customisable widgets

Searching for Orders and Invoices

Use the **Workbench** to search for purchase orders and invoices.

Enterprise account only: use the **Orders** tab to search for contract orders, and the **Fulfillment** tab to search for Order Confirmations.

Accessing Purchase Orders

On the Workbench dashboard, if you have an **Enterprise** account you can action multiple POs from the dashboard page. If you have a **Standard** account, these options will not be available - click on the PO link to the left to open and action the PO, or access the PO via the original email received.

Click on PO link to open and action PO (both account types)

Enterprise account actions

Standard account actions

Viewing Purchase Orders

Logging into Ariba

When you receive an email notifying receipt of a new Purchase Order from Western Power, click on "Process Order" to log into Ariba and view the order.

You will be directed to supplier.ariba.com, where you can log in using your Ariba account details.

The Purchase Order will then display in full.

Viewing a PO in Ariba

Actions available

Related documents e.g. invoices and credit memos submitted against this order

Purchase order header details

Viewing a PO in Ariba

Comments
- by JULIE SMITH, on Wednesday 18 Aug 2021 3:32 PM GMT+08:00

Refer to quote #A1402

Routing Status: Sent

Western Power comments

Other Information

Terms and Conditions:	Payment Terms:
	A): Within 30 days of the date of the invoice or,
	B): If this purchase order (Order) is subject to a Contract (as indicated by a Contract Number being specified on this Order or notified to the Supplier) then, within the time specified in the Contract.

View more »

Attachments

📎 Quote_A1402.docx (application/vnd.openxmlformats-officedocument.wordprocessingml.document)

Western Power attachments sent with PO

Ship All Items To	Bill To	Deliver To
Head Office 11th Floor East	ACCOUNTS PAYABLE,WESTERN POWER	JULIE SMITH
363 Wellington Street PERTH WA 6000	PERTH BC, LOCKED BAG 2503 PERTH WA 6849	Head Office 11th Floor East
	PERTH WA	
Australia	Australia	
Ship To Code: HO11E		
Phone:		
Email:		

Line Items

Show Item Details ▦

Line #	No. Schedule Lines	Part # / Description	Type	Return	Qty (Unit)	Need By	Unit Price	Subtotal	
1		CRPH1	Material		5 (HUR)	30 Oct 2021	$100.00 AUD	$500.00 AUD	Details
		Contractor rate per hour							

Item details

Order submitted on: Wednesday 18 Aug 2021 3:32 PM GMT+08:00
Received by Ariba Network on: Wednesday 18 Aug 2021 3:32 PM GMT+08:00
This Purchase Order was sent by Western Power - TEST AN01009088014-T and delivered by Ariba Network.

Sub-total: $500.00 AUD

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Revised Purchase Orders

When Western Power submits a revised Purchase Order, you can see the changes highlighted in the new version of the PO.

If you access the original version of the PO, it will display as "obsoleted" and you will no longer be able to take action against it (i.e. you cannot invoice an obsoleted version of a PO).

Purchase Order
(→ Changed)
PO48190
Amount: $600.00 AUD

Amount: $500.00 AUD

Version: 2 (Previous Version)

Purchase Order
(Obsoleted)
PO43328
Amount: $275.00 AUD
Version: 1

Viewing Contract Orders

Viewing Contract Orders

Viewing Contract Orders in the Ariba Network is available in Standard and Enterprise Accounts.

Select **Orders** -> **Contracts** -> **View Contracts**. Select Western Power as the Customer.

Viewing Contract Orders

Select the relevant **Contract**. You can then review contract item details as required.

Contracts

You have created or been given edit access to the contracts listed below. Click an ID to display the associated contract details.

| Title | ▼ | | Search |

ID ↑	Term Type	Supplier	Title	Expiration Date	Invoiceable	Status
BPO40853-WSXYZ-V2	Item Level	SURF LIFE SAVING WEST AUST INC	(CW1981347) BPO test LA supplier	Thu, 30 Nov, 2017	Yes	Inactive

C41128-WS6789 - (CW1988075) Contractor Job 1234

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your reque

| Contract Workspace | Print |

Summary | Pricing Terms

Materials and Services

| Id ↑	Description	Pricing Summary
1	Junior Contractor hourly rate	$100.00 AUD Negotiated Price
2	Senior Contractor rate per hour	$200.00 AUD Negotiated Price

Creating Order Confirmations

Creating Order Confirmations

Where you have been advised by Western Power that it is required, Order Confirmations are to be submitted against Purchase Orders on provision of requested goods/services.

Open the PO and select **Create Order Confirmation**. Select appropriate OC option:

- **Confirm Entire Order** as-is

- **Update Line Items** (change quantities or other details for some items)

- **Reject Entire Order** – please do not use. Confirm items with zero quantity instead.

Purchase Order: PO48190
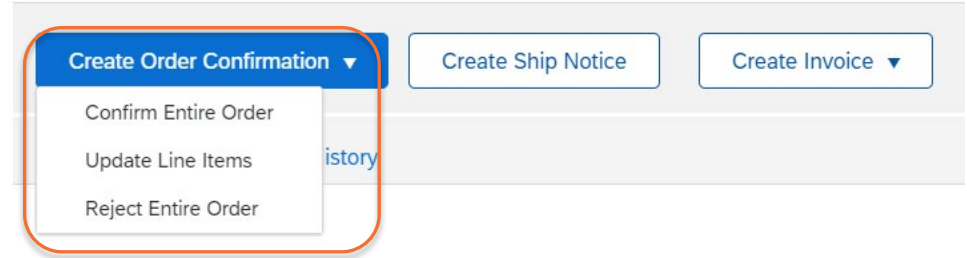
Creating Order Confirmations

All Header fields are optional, however it is recommended to fill in **Confirmation #** with a reference applicable to both supplier and Western Power. Add **Comments** and **Attachments** to support your Order Confirmation.

Updating Line Items

If you have selected the "Update Line Items" option you can enter quantities for each item, revising upwards or downwards as required.

**Do not attach documents to line items at item-level. Please add attachments at header-level only (see previous slide).

Revised Purchase Order

Western Power order requester will review the Order Confirmation and attached supporting documentation.

If appropriate a 'Changed' Purchase Order will be sent.

Once a changed Purchase Order is received suppliers may proceed to invoicing. **If you are accessing the PO via email, ensure you use the email containing latest version of the PO.**

Purchase Order: PO48190

Create Order Confirmation ▼   Create Ship Notice   Create Invoice ▼

Order Detail   Order History

western power

From:
ACCOUNTS PAYABLE,WESTERN POWER
PERTH BC, LOCKED BAG 2503 PERTH WA 6849
PERTH WA
Australia

To:
Western Power - TEST
110 East St
Perth Western Australia 6000
Australia
Phone:
Fax:
Email:

Purchase Order
(→ Changed)
PO48190
Amount: $600.00 AUD
Amount: $500.00 AUD
Version: 2 (Previous Version)

Creating Invoices against Purchase Orders
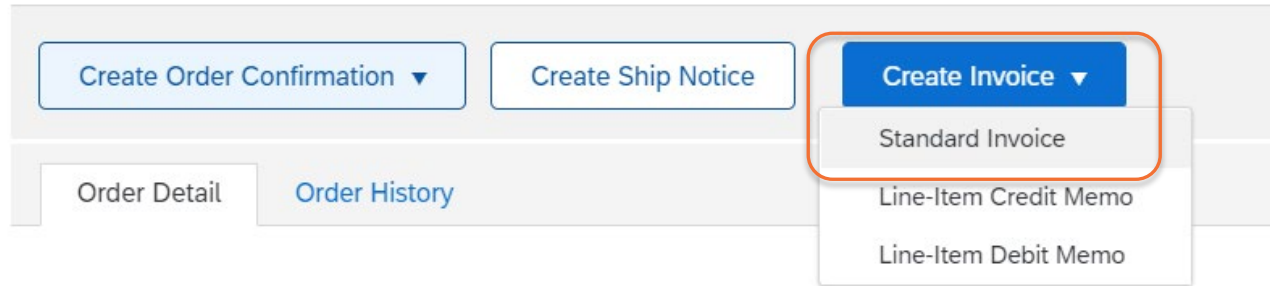
Creating Invoices – Purchase Orders

Purchase Orders follow the format "PO12345" in the order number. If you want to invoice a Contract Order (format C12345-WS6789), see slide 34.

Once you have opened your PO (see slide 15), select **Create Invoice** -> **Standard Invoice**.

Creating Invoices – Purchase Orders

Once the invoice template is displayed you will then be required to populate the following fields:-

- **Invoice #** - please submit exactly as appears on your invoice. Duplicate invoice numbers are not allowed.

- **Invoice Date** - Western Power only allows invoice date to be back-dated by 2 weeks, and cannot be future-dated.

- **ABN** - click [here](#) for instructions on how to set this as default value

- Add mandatory **Attachment** (PDF copy of your invoice) at header-level, and optional **Comments**

Creating Invoices – Purchase Orders

Tax on the invoice will default to 10% at header level (applies to all items).

- If the entire invoice is GST-free, select Category as **0% GST / gstfree**.

- If GST applies to some items only, select **Line level tax** and add tax to individual items (see next slide).

- GST values other than 0% or 10% will be rejected.

Western Power does not allow header-level **Shipping** – if relevant an item will exist on the PO that can be invoiced instead.

Additional Fields are all optional.

Creating Invoices – Purchase Orders

The draft invoice will include all items on the PO by default. **Amend** item quantities and pricing if required, and use the **Include** toggle or **Delete** button to remove items from the invoice entirely. Click **Next** once complete.

If you selected **line level tax** in the Invoice header, you can add tax to relevant line items here.

Please do not include attachments at line level

Creating Invoices – Purchase Orders

Review invoice summary and **Submit** once ready. You can then **Print** your invoice, or **Exit** to return to the Purchase Order, which displays a link to the invoice for future reference.

Creating Invoices against Contract Orders

Creating Invoices – Contract Orders

Contract Orders are another type of order used by Western Power, and follow the format "C12345-ws6789 or P12345-WS6789" in the order number. If you want to invoice a Purchase Order (format PO12345), see slide 28.

An invoice can be produced for a Contract Order by selecting **Create** from your Ariba dashboard.

Creating Invoices – Contract Orders

Select Western Power and 'Next'.

Create Contract Invoice: Select Customer

[Next]   [Cancel]

Select a customer from the list below and click **Next** to continue the process. If the customer is not in the list displayed, you can search for them by entering the name in the Customer Name entry field.

Customer Name: [   ]   [Search]

Customer ↑
○   Western Power - TEST

[Next]   [Cancel]
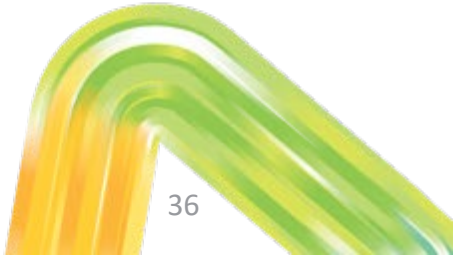
Creating Invoices – Contract Orders

Select Contract.

In the screen that then displays, change ID to Title.Enter your 'C12345 or P12345' Contract Order Number and select Search. Select your required record.

Creating Invoices – Contract Orders

Enter your **Invoice Number** exactly as per what is on your invoice. Duplicate invoice numbers are not allowed.

Enter **Invoice Date**. Western Power only allows invoice date to be back-dated by 2 weeks, and cannot be future-dated.

Customer Reference is an optional field.

Click **Next**.

Creating Invoices – Contract Orders

Once the invoice template is displayed you will then be required to populate the following fields:-

- ABN - click here for instructions on how to set this as default value

- Add mandatory **Attachment** (PDF copy of your tax invoice) at header level, and optional **Comments**

- Western Power does not allow header-level **Shipping** – if relevant an item will exist on the Contract Order that can be invoiced instead.

Creating Invoices – Contract Orders

Tax on the invoice will default to 10% at header level (applies to all items).

- If the entire invoice is GST-free, select Category as 0% GST / gstfree.

- If GST does not apply to all items, select Line level tax and add tax to individual items (see next slide).

- GST values other than 0% or 10% will be rejected.

Additional Fields are all optional.

Creating Invoices – Contract Orders

Select **Add Items** to add items to the draft invoice. **Search by description or part number** to find items.

Amend quantities / prices (if allowed) and **add items to invoice**. As you add each item, the shopping cart will display the number of items you have added. Once complete, select **Done** and you will be returned to the draft invoice.

Creating Invoices – Contract Orders

Select **Change Items** to amend details on any items already added to the invoice; or **Add Items** to add more items to the invoice. Click **Next** when the invoice details are finalised.

Creating Invoices – Contract Orders

Review invoice summary and **Submit** once ready. You can then **Print** your invoice, or **Exit** to return to the Ariba dashboard.

NOTE: if you have a Standard Account, you **cannot** save a Contract Order invoice and return to it later.
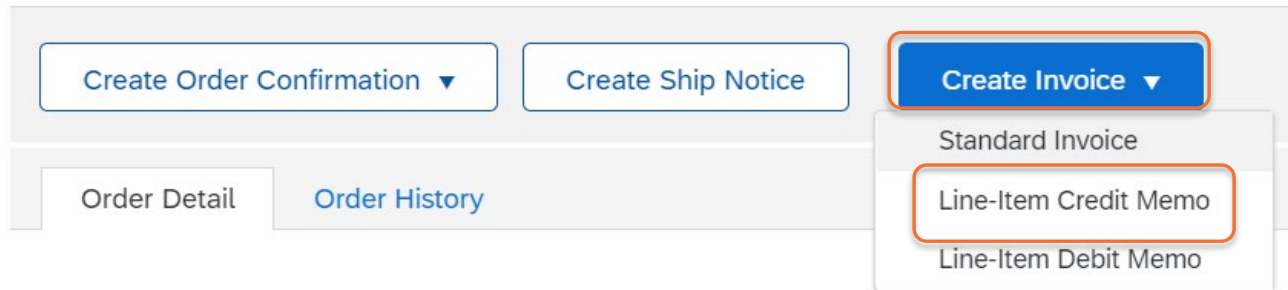
Creating Credit Notes

Creating Credit Notes

To submit a credit note, navigate to the original Purchase Order in the Ariba Network and select **Create Invoice -> Create Line Item Credit Memo**.

Note: you can also navigate to the invoice directly and select the same option.

Creating Credit Notes

Select the invoice the credit note applies to, and select **Create Line-Item Credit Memo**. On the next screen select **quantity adjustment** or **price adjustment** as required. Click **Next**.

Creating Credit Notes

Enter **Credit Memo #** and **Credit Memo Date**.

Amend **tax** details if required:

- If the entire credit memo is GST-free, select Category as **0% GST / gstfree**.

- If GST does not apply to all items, select **Line level tax** and add tax to individual items.

- Add mandatory **attachment** (PDF copy of your credit note) at header level.

Add to Header ▼

Tax

Attachment

▼ Invoice Header

Summary

Credit Memo #:*	
Credit Memo Date:*	31 Aug 2021
Original Invoice No:	Inv_123456
Original Invoice Date:	20 Aug 2021
ABN:*	1234567
Remit To	1 One street

Subtotal: **$-600.00 AUD**
Total Tax: $-60.00 AUD
Total Gross Amount: $-660.00 AUD
Total Net Amount: $-660.00 AUD
Amount Due: **$-660.00 AUD**

Perth WA
Australia
Bill To: ACCOUNTS PAYABLE,WESTERN POWER

PERTH WA
Australia

Tax ⓘ

⦿ Header level tax ⓘ   ⚬ Line level tax ⓘ

Category:* GST

Taxable Amount: $-600.00 AUD

Location:

Tax Rate Type:

Creating Credit Notes

Additional Fields are all optional.

Enter mandatory Reason for Credit Memo.

Additional Fields

Supplier Account ID #:	Service Start Date:
Customer Reference:	Service End Date:
Supplier Reference:	
Payment Note:	

Supplier: **Western Power - TEST**

Perth Western Australia
Australia

Bill From: **Western Power - TEST**
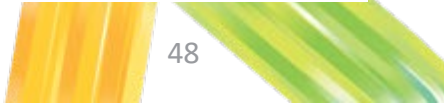
Perth Western Australia
Australia

Customer: **Western Power - T**

Perth Western Aus
Australia

Email:

Comment

Reason for Credit Memo: *

Default Credit Memo
Comment Text:

Creating Credit Notes

Amend quantities or prices as required. Remove items using the **Include** toggle button or **Delete** option.

Note: when submitting a credit memo you can only credit the entire invoice or an entire line; you cannot submit a credit for a partial line value.

Select **Next** and **Submit**.

Other topics about Invoices

Set up Default ABN for Invoices

To set up a default Tax Id (ABN) field for invoicing, take the following actions:

1. Click on **user initials (Account Settings)** in the upper right corner of the **Home** page.

2. Select **Company Profile** from the pull-down menu.

3. Access the **Business** tab.

4. Update the **ABN Number** field.

5. Click **Save**.

This will allow you to define a default ABN that will be automatically applied every time you create a new invoice.
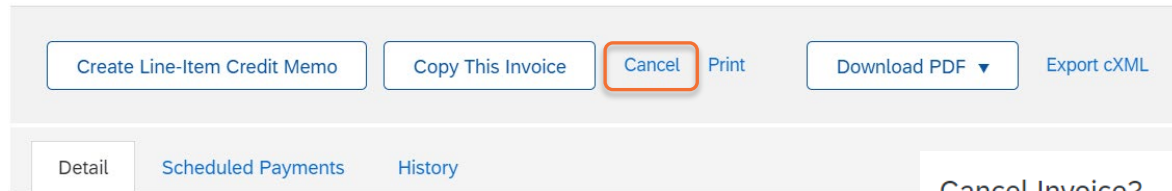

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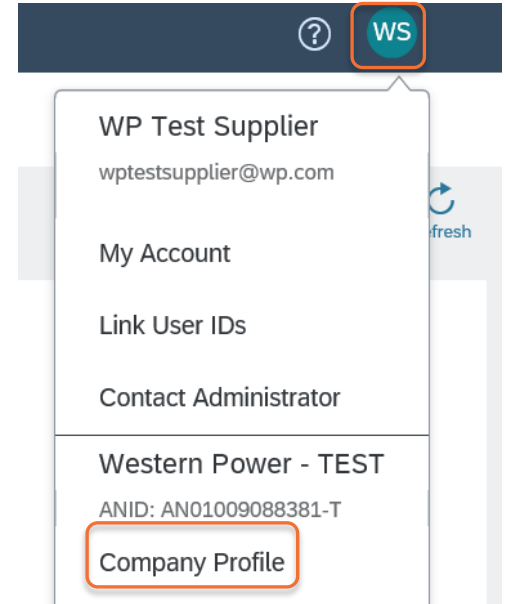
Cancelling an invoice

If you need to cancel a submitted invoice, this can only be done if it has not already been approved by Western Power.

Navigate to the invoice in Ariba, and select **Cancel**, and then **Yes**. A cancellation request will be sent to Western Power for approval.

Invoice: Inv_123456

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

Detail   Scheduled Payments   History

Cancel Invoice?

Are you sure you want to cancel this invoice?

Yes   No

Resubmitting a Rejected Invoice

If your invoice was rejected and you need to resubmit it, you can create a new invoice – see earlier sections in this pack.

Alternatively you can navigate to the rejected invoice (via Ariba dashboard, or email notification received), and select Copy this Invoice (if available) or Edit & Resubmit and follow the prompts.

Note: Western Power does not allow duplicate invoice numbers. When resubmitting a rejected invoice add an "A" to the end of the invoice number. E.g. "Inv_PO48085A".

Invoice: Inv_PO48085

Edit   Create Line-Item Credit Memo   Copy This Invoice

Detail   Scheduled Payments   History

Rejected Invoice:
Reasons:
INV-38: The invoice was successfully received.
INV-35: The invoice status has been successfully updated to Processi
DOC-1:
INV-35: The invoice status has been successfully updated to Rejected
07:00)

Comment: as (, 2021-03-31T23:54:03-07:00)

Edit & Resubmit

Invoice Notifications

You will receive notifications when invoices are approved or rejected in Ariba. If an invoice is rejected, the Western Power invoice approver who rejected the invoice will provide supporting comments. Please contact this person directly if follow-up is required in regards to the invoice rejection.

Ariba Support

Ariba Support

Ariba support topics are available directly within your Ariba account:

Ariba Support

Additional information regarding ordering and invoicing can be found [here](#).

For system or technical issues please contact Ariba directly. Please see the "Raising a Service call – Supplier Guide" in the **Related Information** section on this page for a guide on how to contact Ariba: https://www.westernpower.com.au/suppliers/using-ariba-as-a-western-power-supplier/

Additional support for the process can be provided by Western Power:

Email: ariba.specialist@westernpower.com.au

Invoice Payment Queries:

Email: am.accountspayable@westernpower.com.au