Ariba Invoicing US Vendors

Updated September 2024

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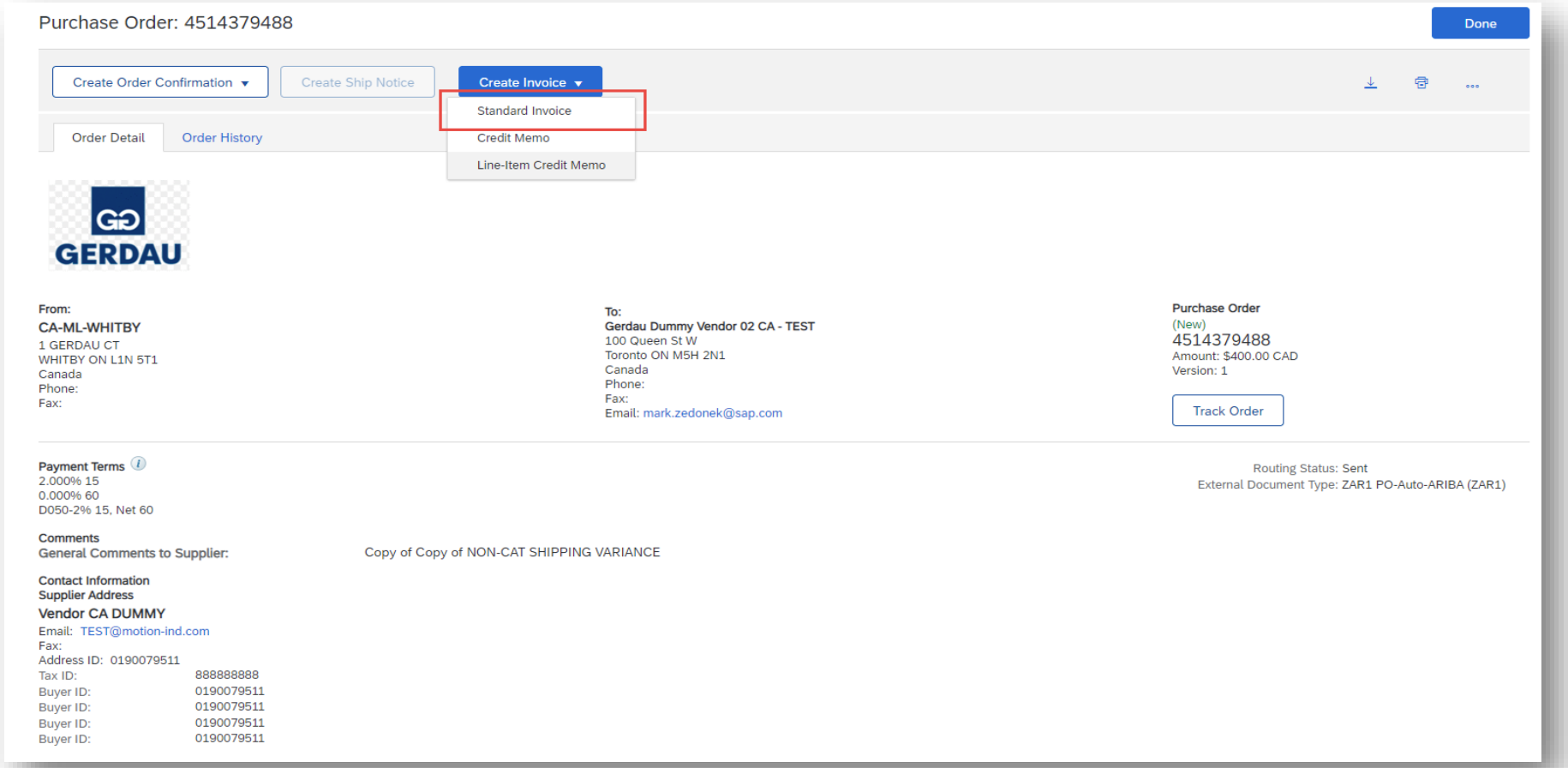
Creating an Invoice

To create your invoice for a non-service order, you must go to the Orders tile from the Workbench screen or click on the Orders tab at the top of the screen and select “Purchase Orders” from the drop down. Click on the Order number that you want to invoice. Then click on the “Create Invoice” button and then select “Standard Invoice” from the drop-down menu to get started.



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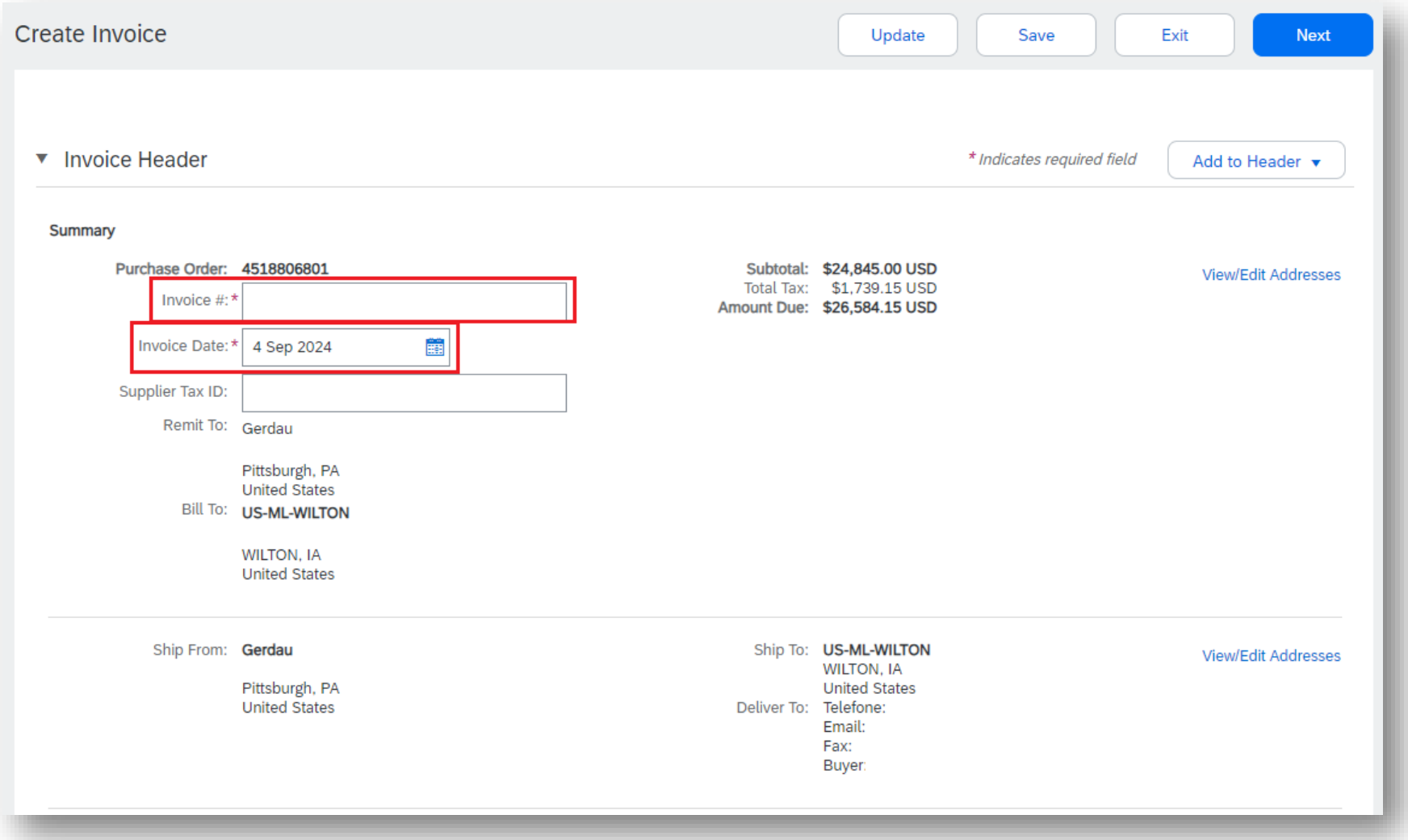
Creating an Invoice

Enter the invoice number that you want to use (max. 16 characters) and enter the invoice date.



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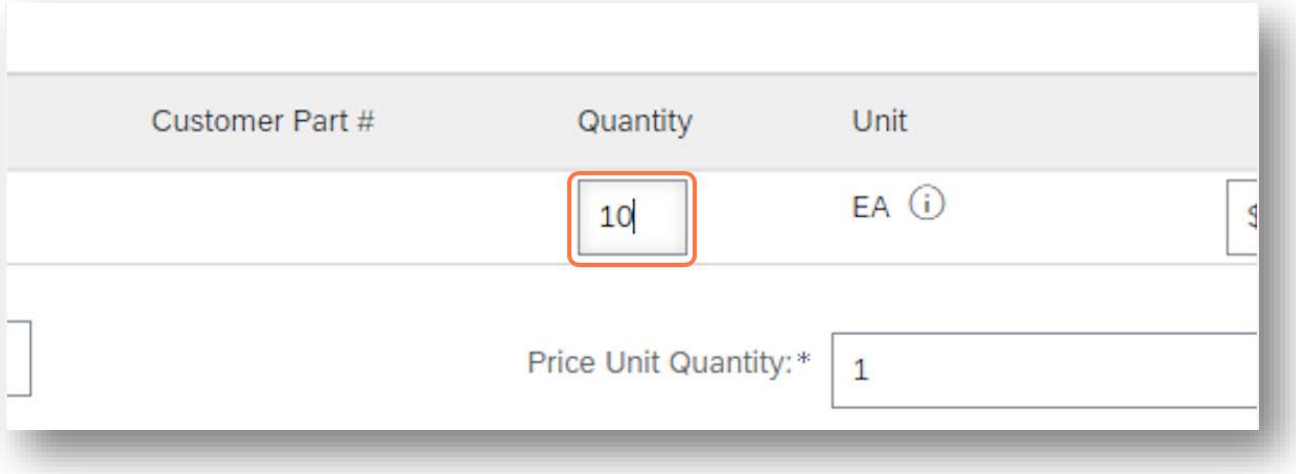
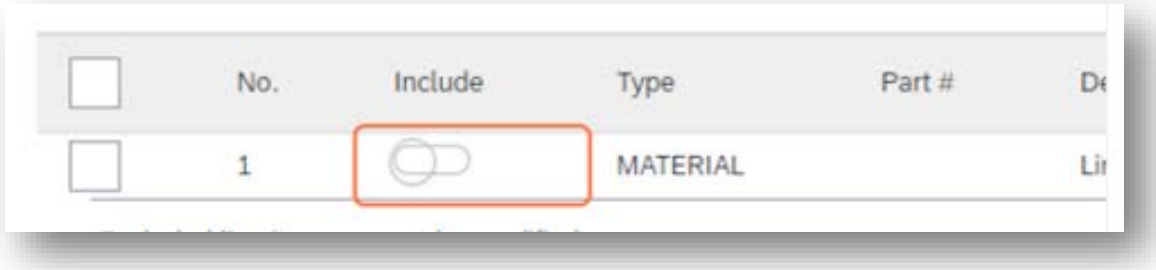
Creating an Invoice

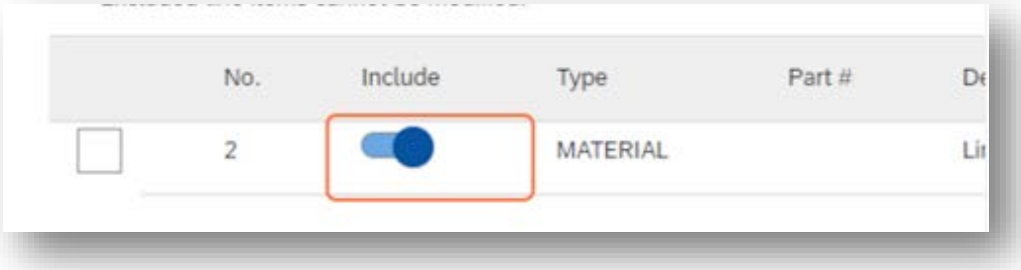
Adjust the invoice line-item information related to quantities to be invoiced and lines to be included or excluded, if necessary.



Excluded lines will have a toggle that looks like this:



Included lines will have a toggle that looks like this:



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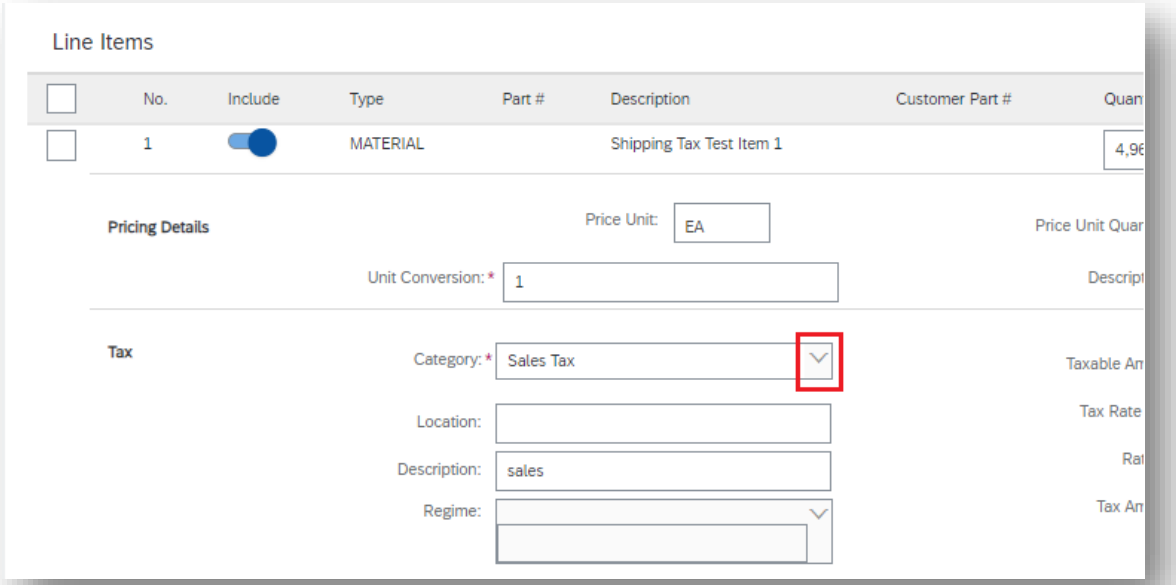
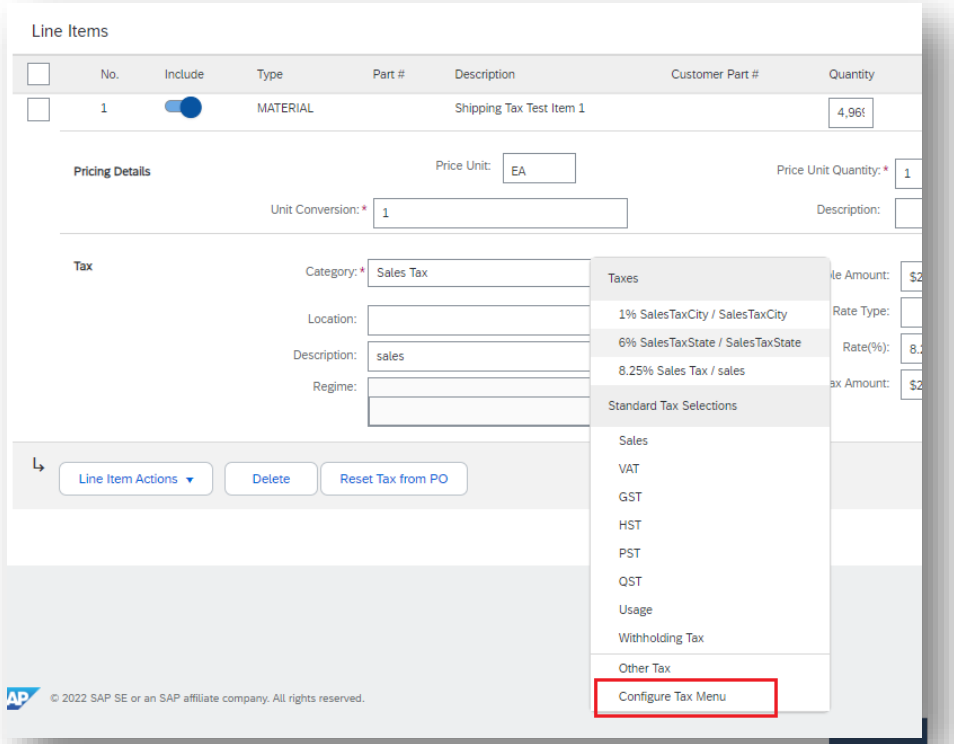
Configuring Tax Presets

***NEW* Taxes on invoiced lines must be added at the line-item level.**

If you are not going to be charging tax, you still need to enter a tax line at a $0 value with the correct tax categories selected.

To make this easy, we will configure a tax category preset by clicking on the drop down next to Category, then selecting Configure Tax Menu.





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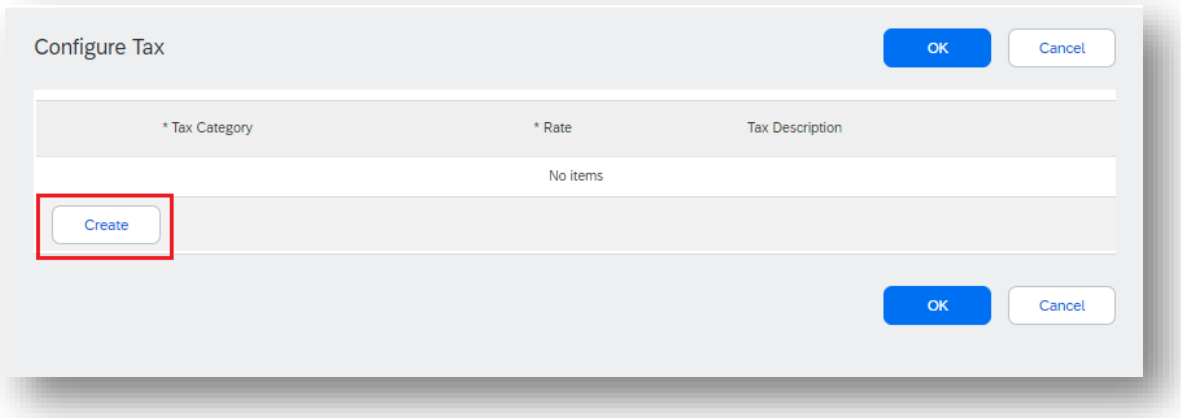
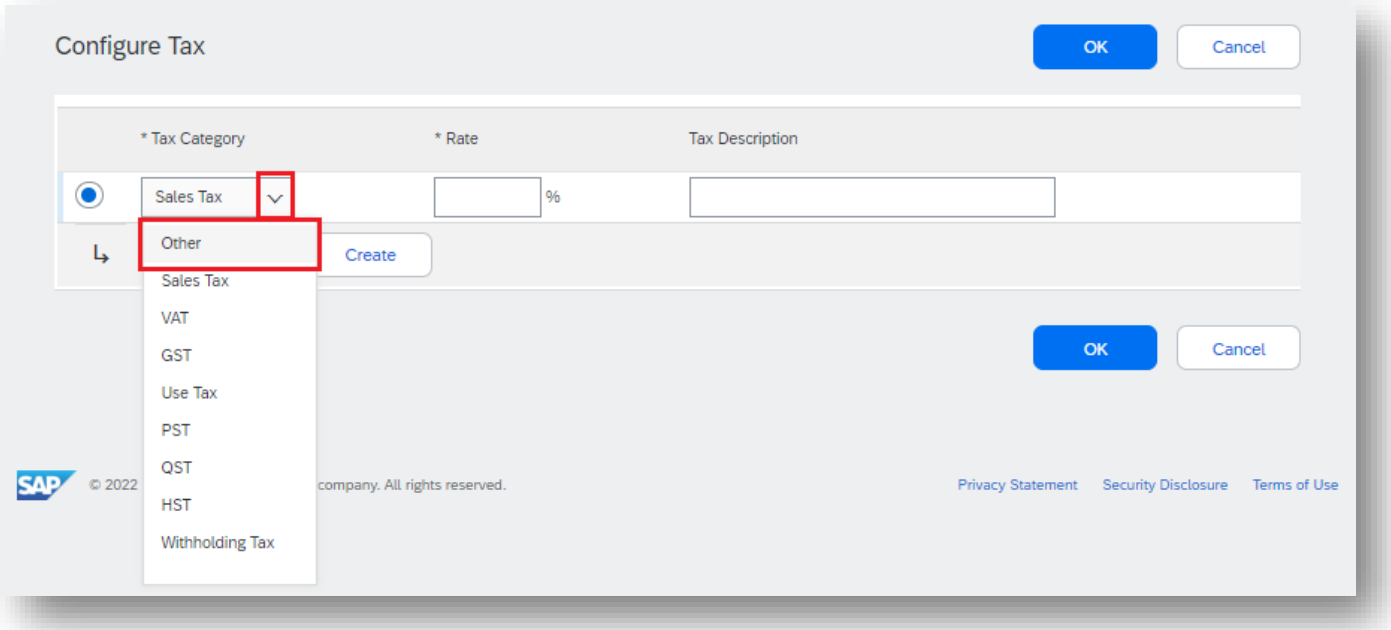
Configuring Tax Presets

Any tax presets that you've already configured will show in this screen. To create a new one, click on Create



Click on the drop down and select "Other"



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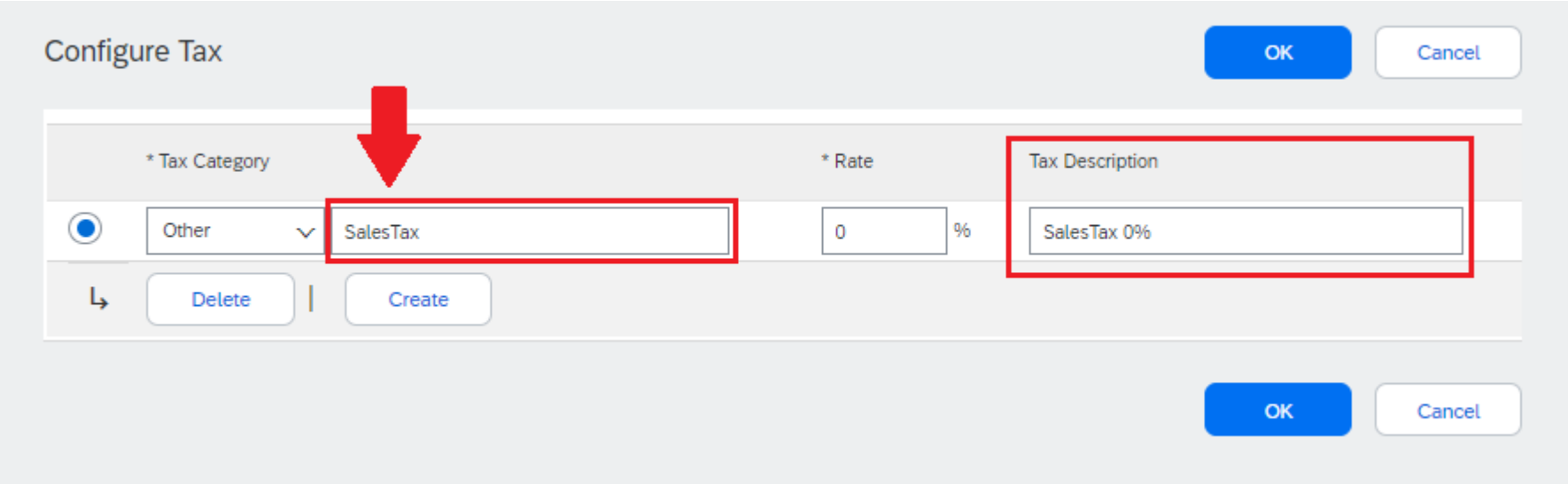
Configuring Tax Presets

After you've selected "Other", a blank field will appear to the right (red arrow in the screenshot below). This field must contain the correct tax category for the invoice and the values are case sensitive. For us sales tax, the value must be entered as "SalesTax". You can use the Tax Description field to label this preset for ease of use. This is a one time configuration but these presets can be modified and more can be added as needed.

The configuration in the screenshot below would be appropriate for billing US Gerdau locations with zero taxes added to the invoice. In this situation the vendor is indicating that the invoice is subject to sales tax, but it is not being billed on the invoice and Gerdau will instead, accrue and remit the taxes directly to the appropriate tax agency.



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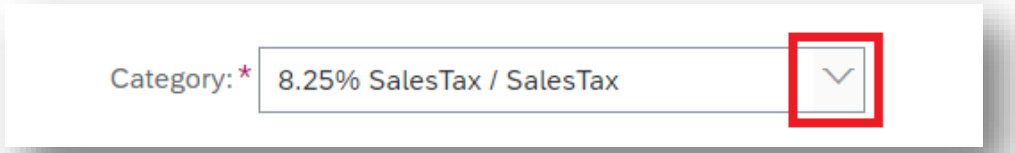
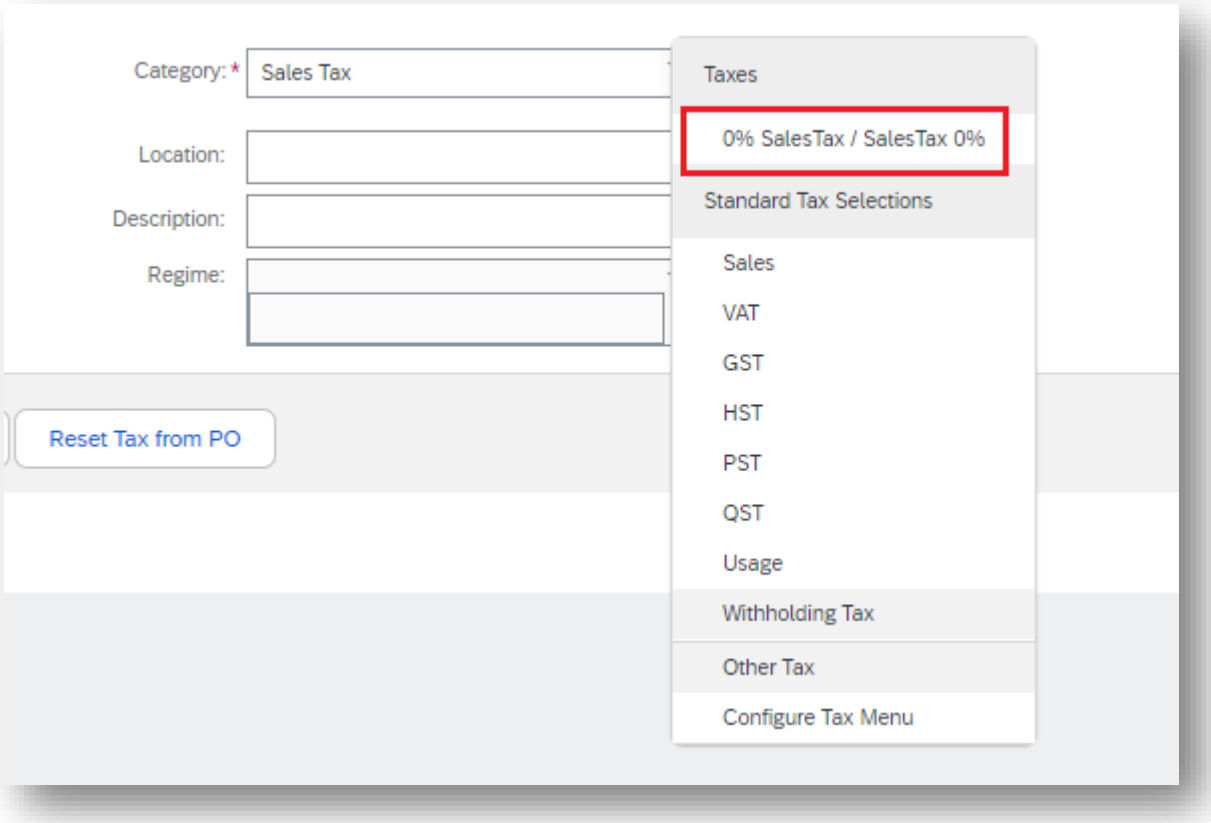
Selecting Tax Presets

Now when you are creating the tax information for your $0 tax invoice, simply click in the Category field to get to the dropdown and select the top value that you just configured: “0% SalesTax / SalesTax”.
Remember this is only if you are not charging tax on the invoice. If you are going to charge the tax, select “Sales” and then you will have to enter your rate or amount.





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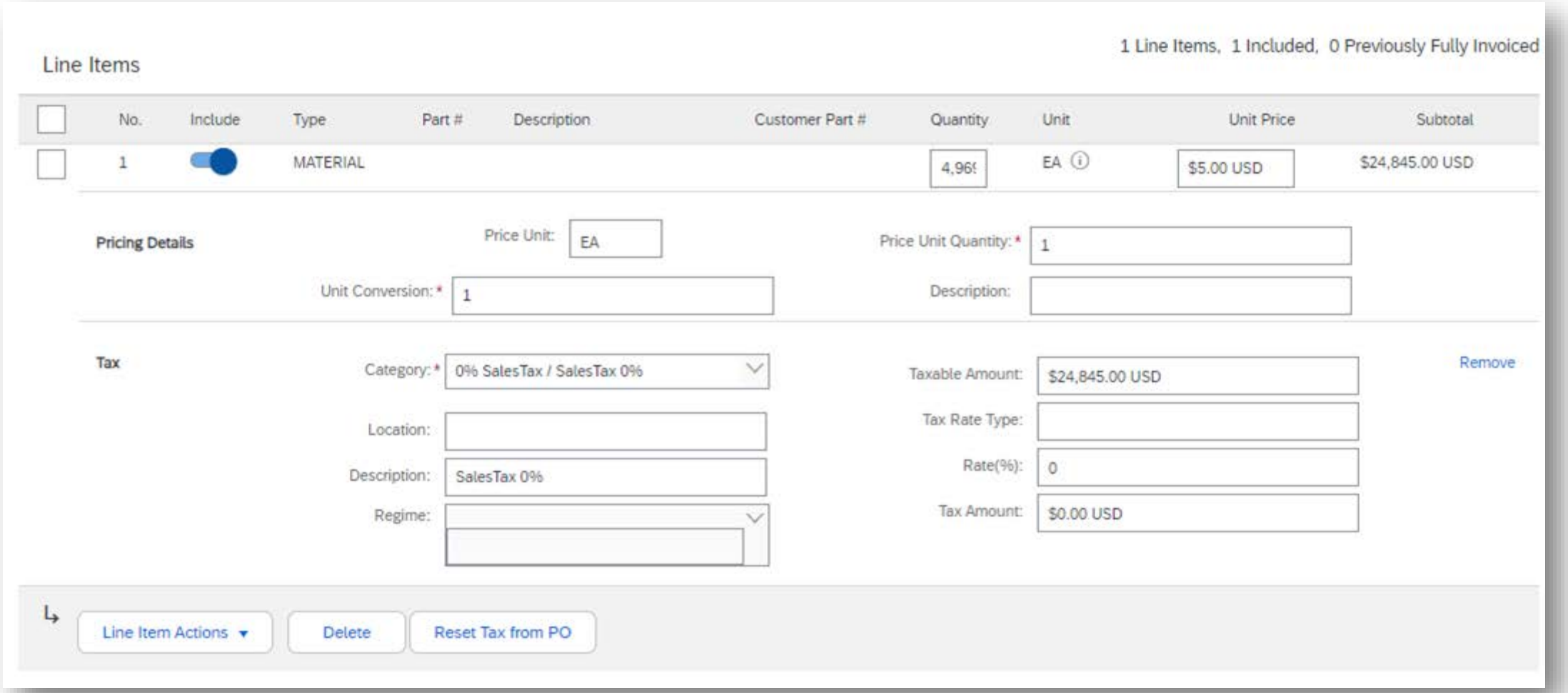
Example: 0% SalesTax



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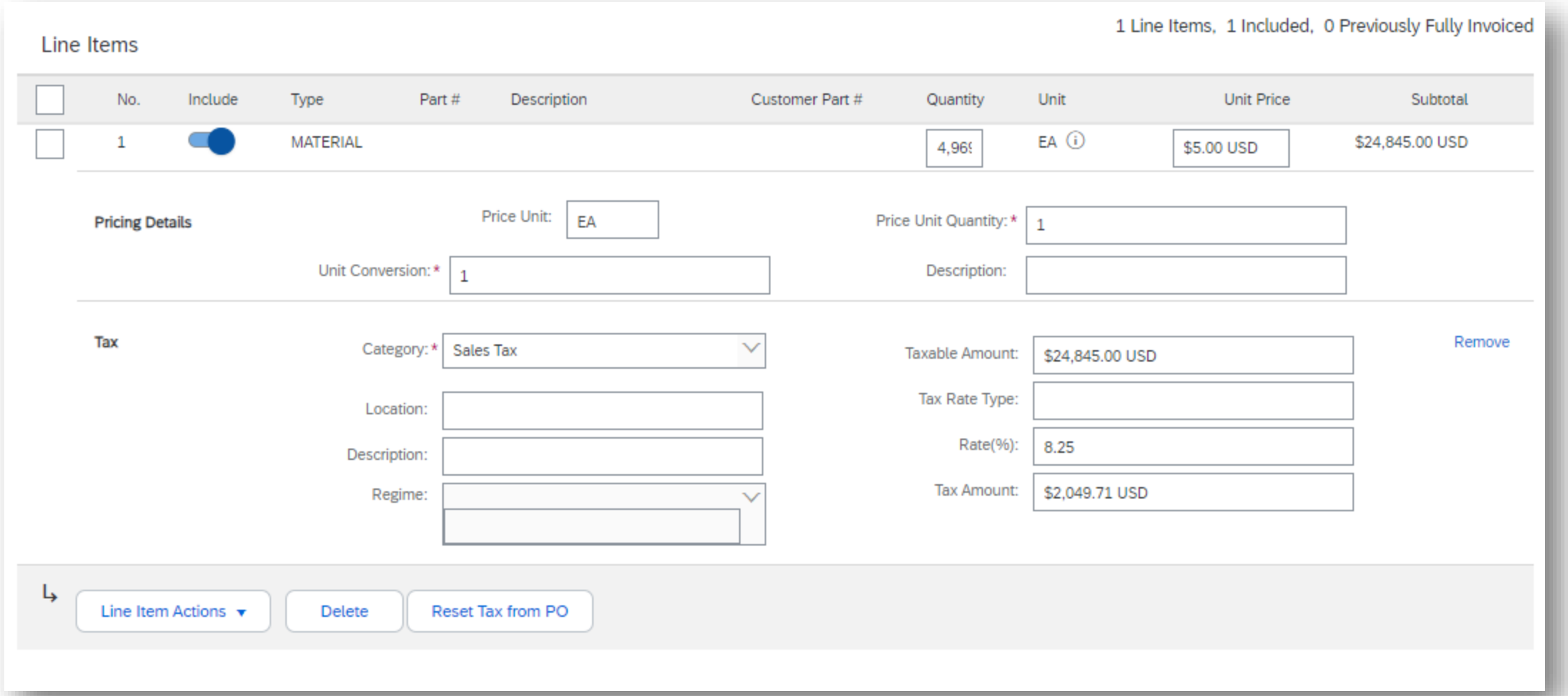
Example: SalesTax billed on invoice



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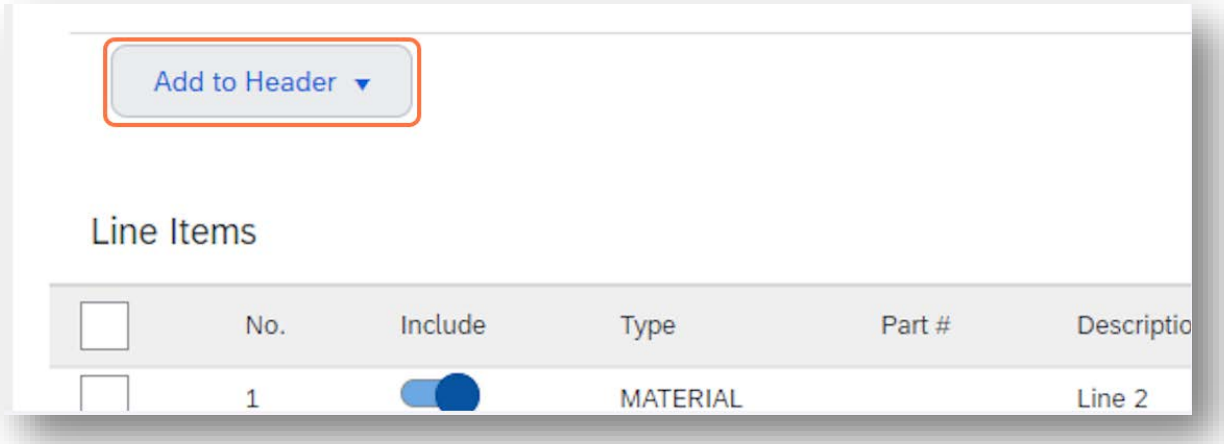
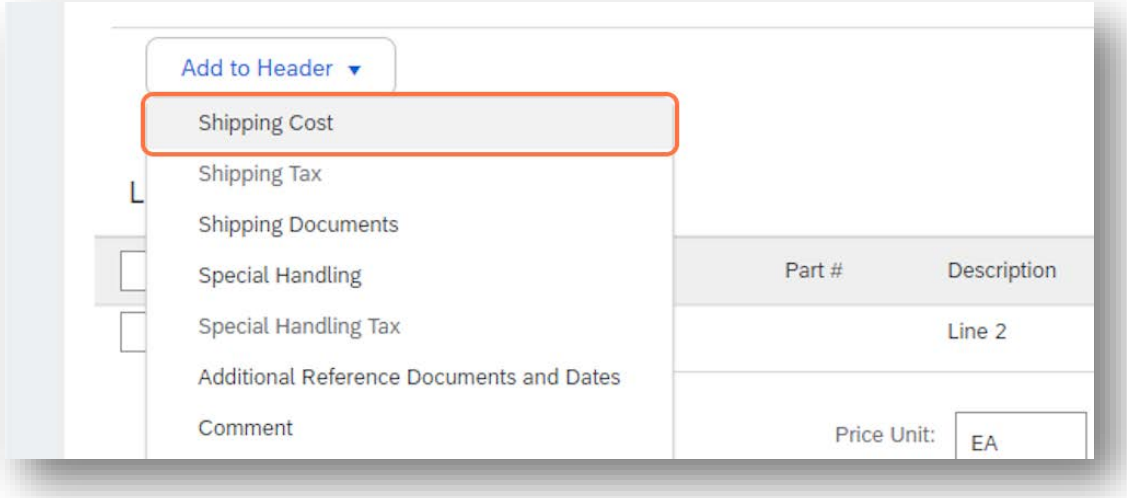
Adding Shipping Cost

To add shipping or handling charges to an invoice, click on the “Add to Header” button

This process is identical for both Shipping Cost and Special Handling Charges.

To add these charges, click on the Add to Header button, then select either Shipping Cost or Special Handling from the drop-down menu.





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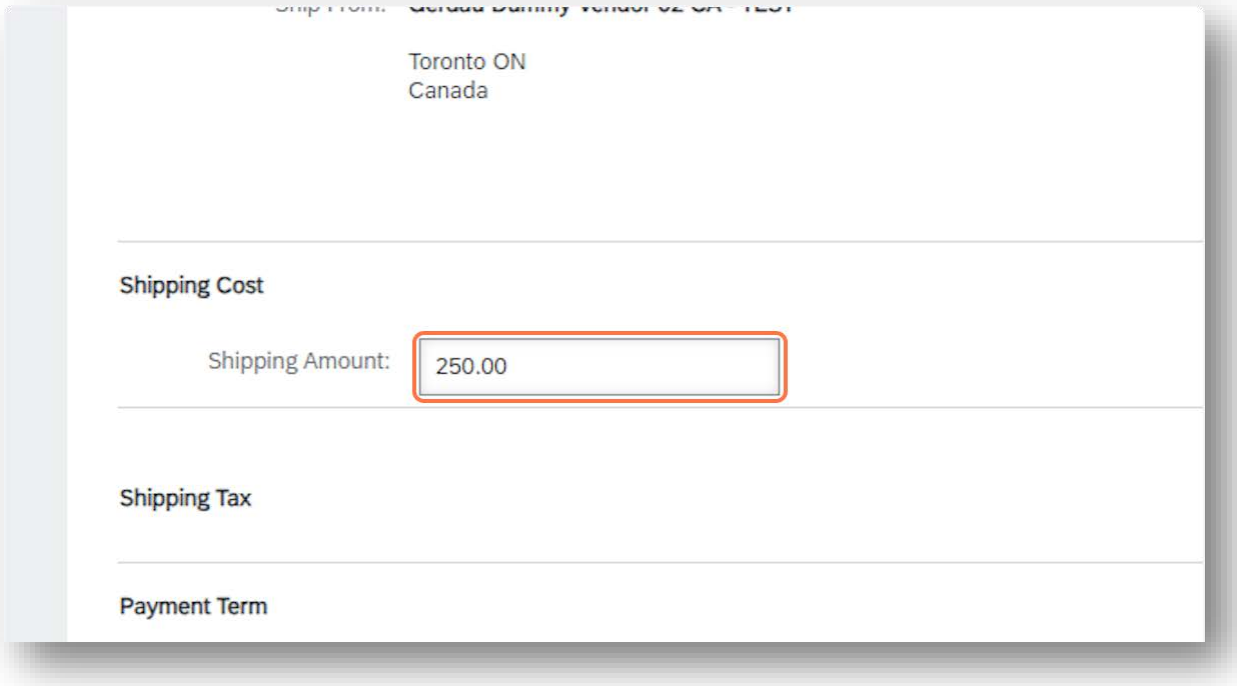
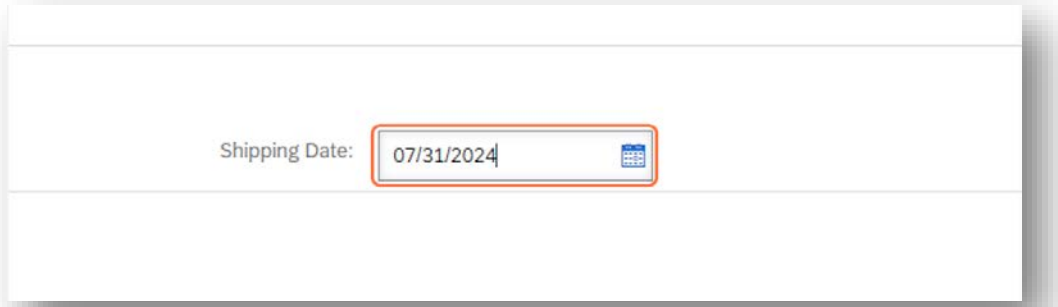
Adding Shipping Cost

A field for the shipping or handling cost will appear in the header section of the invoice.

Input the amount of your charge and the relevant date.





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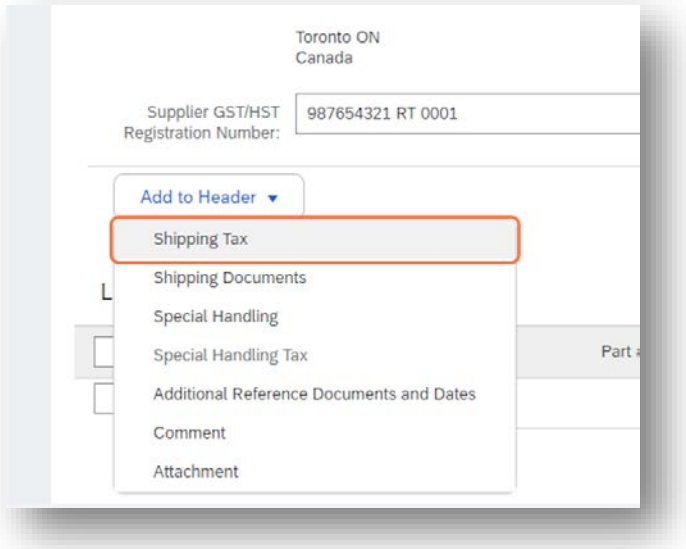
Adding Shipping Tax

Scroll back down to just above the line items section and click on Add to Header again, then select Shipping Tax



Please Note:

Shipping and handling tax categories must match the line-item tax categories exactly.

You will need to click "Add to Header" and Select “Shipping Tax” one time for each tax category included on your invoice line items. If the U.S. taxes on your invoice lines are broken out into SalesTaxCity, SalesTaxCounty, SalesTaxState, then you must add those same three tax categories to any shipping and handling charges via this process. You can simplify invoice entry by removing the defaulted city, county, and state tax categories and adding simply SalesTax on both the lines and the shipping/handling charges

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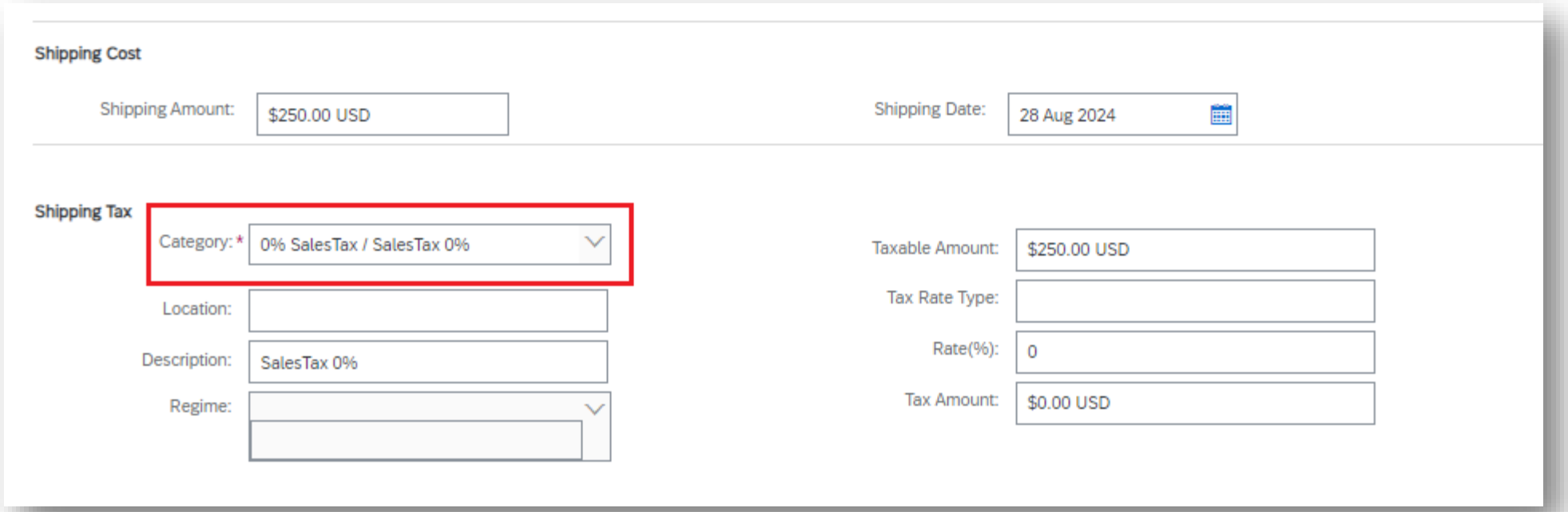
Adding Shipping Tax

Select the correct tax categories for your Shipping Cost, again be sure to match these selections to the tax categories used on the line items.

Even if the tax amounts you are billing are $0, the appropriate tax categories must be added to indicate $0 tax is being charged. This is required on both the line items and any shipping or handling charges added to the header.



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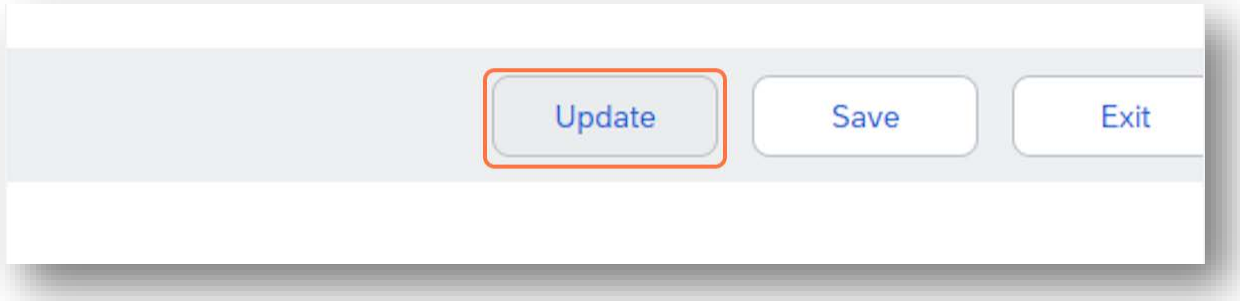
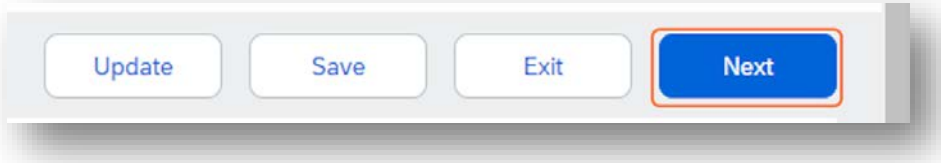
Submitting the Invoice

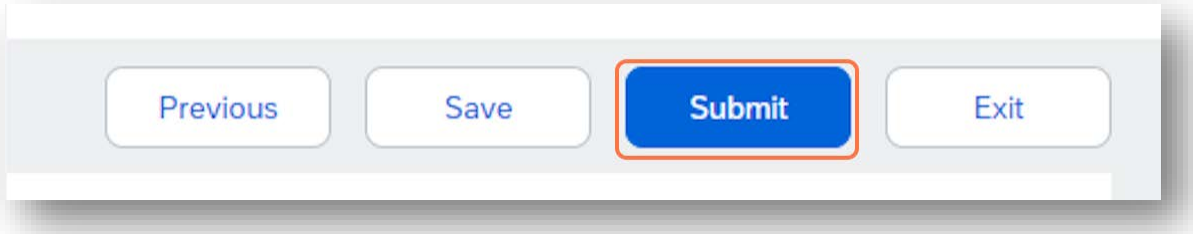
Click on Update to refresh all values. Review and confirm accuracy.



Click on Next



Click on Submit to create the invoice. You will be taken to a page that displays a message confirming the invoice has been submitted.



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Thank you!

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