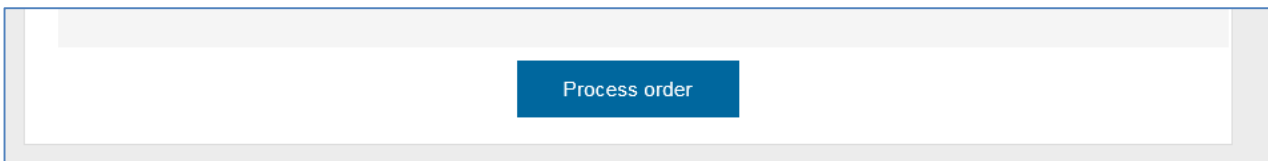


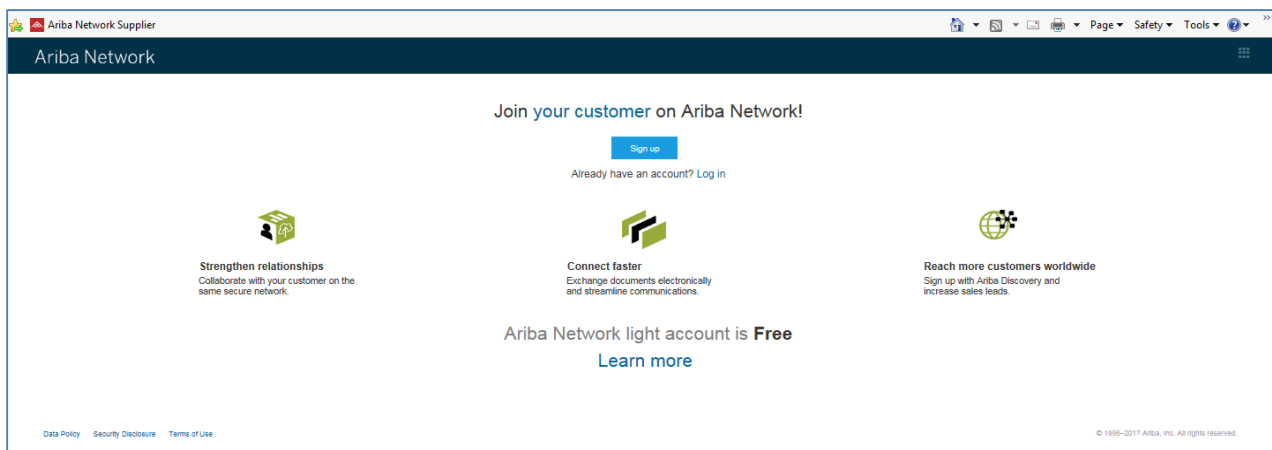
## How to Flip a Purchase Order (PO) into a Invoice in Ariba

**Note:** If you have a Light Account it is recommend that you create a folder in your email account to store all the Ariba PO emails so when it comes time to process for Invoicing it will be easier to locate the email.

1. Locate the email containing the Purchase Order:
  - The email will come from: [ordersender-prod@ansmtp.ariba.com](mailto:ordersender-prod@ansmtp.ariba.com)
  - With a subject line of: **Constellation Brands, Inc. sent a new Purchase Order 7\*\*\*\*\*.00100.A0.000**
2. View the body of the email and scroll down and click on **Process Order**, as shown in the example here:



If this is your first time interacting with constellation you will then be directed to login or register from the screen below. If it is not your first time got to page 2 to continue.



- **Please note:** Logging in or registering from the above screen will establish the trading relationship between your firm and Constellation Brands in the Ariba Network

## How to Flip a PO into a Invoice in Ariba

3. The Purchase Order will open in your Ariba Light Account, click on **Create Invoice**

Purchase Order: 7911872.00300.A0.000 Done

Create Order Confirmation  Create Ship Notice  Create Invoice  Hide |  Print |  Download PDF |  Export cXML |  Download CSV |  Resend

Order Detail  Order History

**From:**  
1400257-CONSTELLATION BRANDS US OPERATIONS, INC  
235 NORTH BLOOMFIELD RD  
CANANDAIGUA, NY 14424  
United States

**To:**  
TEST #3 - [REDACTED]  
United States  
Phone:  
Fax:  
Email: NoReplyAribaCS@ariba.com

**Purchase Order (New)**  
7911872.00300.A0.000  
Amount: \$7,000.00 USD  
Version: 1

**Payment Terms** ⓘ  
NET 45 Routing Status: Sent

**Comments**  
Comment Type: Terms and Conditions  
Body: http://www.cbrands.com/sites/default/files/Purchase-Order-Terms-and-Conditions\_North-America.pdf

4. Click on **Standard Invoice** from the drop down.

Purchase Order: 7911872.00300.A0.000

Create Order Confirmation  Create Ship Notice  Create Invoice  Hide

Order Detail  Order History

Standard Invoice  
 Credit Memo

**From:**  
1400257-CONSTELLATION BRANDS US OPERATIONS, INC  
235 NORTH BLOOMFIELD RD  
CANANDAIGUA, NY 14424  
United States

## How to Flip a PO into a Invoice in Ariba

5. Now start entering your header invoice information.

- a. Your invoice number (required)
- b. Tax ID (required)
- **Please Note:** You can set up your Tax ID to auto-populate by entering it in your Company Settings (job aid available).

Click here if you would like to attach a document to the invoice you are creating. It will open up an attachments section after the **Additional Fields** section. Attachment max size is 100MB

Invoice Header

Summary

Purchase Order: 7911872.00300.A0.000

Invoice #: \*

Invoice Date: \* 23 Feb 2018

Supplier Tax ID: \*

Subtotal:	\$7,000.00 USD
Total Tax:	\$0.00 USD
Total Gross Amount:	\$7,000.00 USD
Total Amount without Tax:	\$7,000.00 USD
Total Net Amount:	\$7,000.00 USD
Amount Due:	\$7,000.00 USD

\* Indicates required field

Add to Header

- Tax
- Shipping Cost
- Shipping Documents
- Special Handling
- Allowance
- Charge
- Additional Reference Documents and Dates
- Comment
- Attachment

## 6. Tax

**Please Note:** All taxes MUST be entered at the Header level. Tax will not be accepted if placed at the line Level.

### a. To REMOVE tax

If you do not have to add tax to the invoice you can remove by clicking **Remove**.

Tax

Header level tax Line level tax

Category: \* Sales Tax

Location:

Description:

Regime:

Taxable Amount: \$7,000.00 USD

Tax Rate Type:

Rate(%):

Tax Amount:

Remove

The section will look below once removed.

Tax

Header level tax Line level tax

## How to Flip a PO into a Invoice in Ariba

### 6. Tax continued

**Please Note:** All taxes **MUST** be entered at the Header level. Tax will not be accepted if placed at the line Level.

#### b. To Add Header Level tax

If you need to add tax to the invoice:

- Confirm “**Header Level Tax**” is checked
- Plug in the **Rate (%)**

Tax ⓘ

Header level tax ⓘ  Line level tax ⓘ

Category:\* Sales Tax ▼

Location:

Description:

Regime:

Taxable Amount: \$7,000.00 USD

Tax Rate Type:

Rate(%): 7

Tax Amount:

- Then scroll to top and click the **Update** button.

Create Invoice

- The tax rate will then calculate
  - **Please Note:** You can customize the **Taxable Amount** field if not all items on the Invoice are taxable

Tax ⓘ

Header level tax ⓘ  Line level tax ⓘ

Category:\* Sales Tax ▼

Location:

Description:

Regime:

Taxable Amount: \$7,000.00 USD

Tax Rate Type:

Rate(%): 7

Tax Amount: \$490.00 USD

# How to Flip a PO into a Invoice in Ariba

## 7. Shipping Cost

If you need to add shipping cost:

- Go back to top to **Add to Header** and click on **Shipping Cost**.



- It will display the Shipping Cost section. Enter in the **Total Shipping Cost** and **Ship Date** field.

Shipping Cost

Shipping Amount:

Shipping Date:

## 8. Additional Fields

All fields in this category are OPTIONAL

- Please Note:** You DO NOT need to add a Constellation Brands email address, as the Invoice will route to the Constellation Representative who submitted the Purchase Order.

## 9. Attachments

If you chose in the beginning to **Add Header>> Attachments** this is where the section will show up. Browse and select your file(s) and then click **Add Attachment**. (100MB size limit)

Attachments

The total size of all attachments cannot exceed 100MB Remove

No file chosen

# How to Flip a PO into a Invoice in Ariba

## 10. Line Items

- a. To Invoice in **full**, the quantity and cost will automatically populate from the Purchase Order – leave as is.

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

Insert Line Item Options

Tax Category:  Shipping Documents  Special Handling  Discount [Add to Included Lines](#)

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input checked="" type="checkbox"/>	MATERIAL	Not Available	Demo Meiomi KY		7,000	Each	\$1.00 USD	\$7,000.00 USD

[Line Item Actions](#) [Delete](#) [Add](#)

- b. To invoice **partial**, you can edit the quantity to reflect the amount you would like to Invoice then select **Update**.

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

Insert Line Item Options

Tax Category:  Shipping Documents  Special Handling  Discount [Add to Included Lines](#)

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input checked="" type="checkbox"/>	MATERIAL	Not Available	Demo Meiomi KY		4,500	Each	\$1.00 USD	\$4,500.00 USD

[Line Item Actions](#) [Delete](#) [Add](#)

[Update](#) [Save](#) [Exit](#) [Next](#)

**Note:** If you have *multiple line items*, you can click on the **Include** “toggle” to select which items you would like to include in the invoice and which items you do not.

No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
1	<input checked="" type="checkbox"/>	MATERIAL	Not Available	Tshirts Medium		100	Each	\$20.00 USD	\$2,000.00 USD
2	<input checked="" type="checkbox"/>	MATERIAL	Not Available	Tshirts Large		50	Each	\$20.00 USD	\$1,000.00 USD
3	<input type="checkbox"/>	MATERIAL	Not Available	Mouse pads		0	Each	\$12.00 USD	\$0 USD

## How to Flip a PO into a Invoice in Ariba

### 10. Line Items continued

- c. You also have the ability to add attachments to each line item.
- “Check” the line item
  - Click on **Line Item Actions**

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

Insert Line Item Options

Tax Category:   Shipping Documents  Special Handling  Discount [Add to Included Lines](#)

<input type="checkbox"/>	No.	Include	Type	Part #	Description	Customer Part #	Quantity	Unit	Unit Price	Subtotal
<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	MATERIAL	Not Available	Demo Meiomi KY		4,500	Each	\$1.00 USD	\$4,500.00 USD

↳ [Line Item Actions](#) [Delete](#) [Add](#)

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

11. Once your Invoice is complete, click **Next** at the bottom right of the screen

[Update](#) [Save](#) [Exit](#) [Next](#)

12. A Summary of the Invoice will display, please review the invoice and once approved, click on **Submit**. The Invoice has been sent.