Ariba Blanket Purchase Order (BPO) Invoice Guide
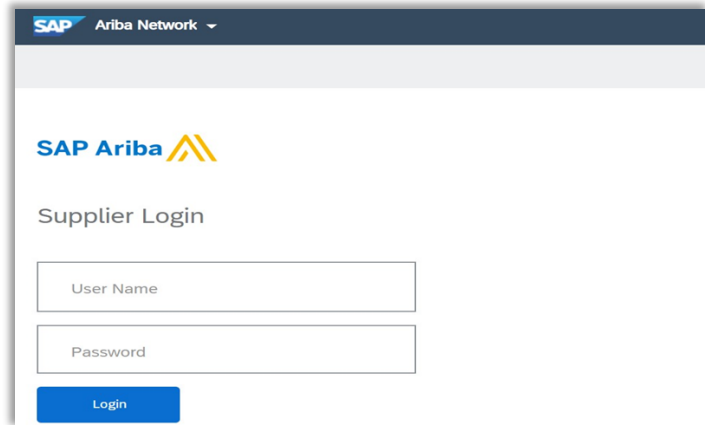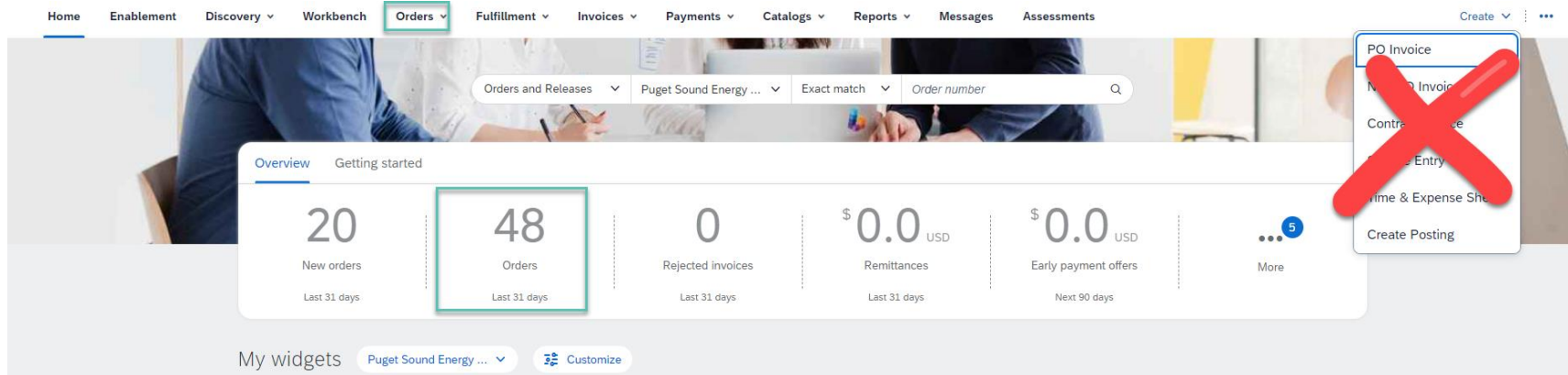
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How to Locate a BPO

1. Login into your Ariba account: [Click Here (https://service.ariba.com/Supplier.aw/)](https://service.ariba.com/Supplier.aw/)

  ➢ Select Forgot Username or Password if you do not know your username or password.

2. Select **Orders. DO NOT** click the **Create** dropdown in the upper right.

  ➢ If you receive the following Error Message: *Error: Cannot access customer's site. Your buying organization must approve your access to their system before you proceed with this action. Please try again later.*

3. Select **Edit filter.**
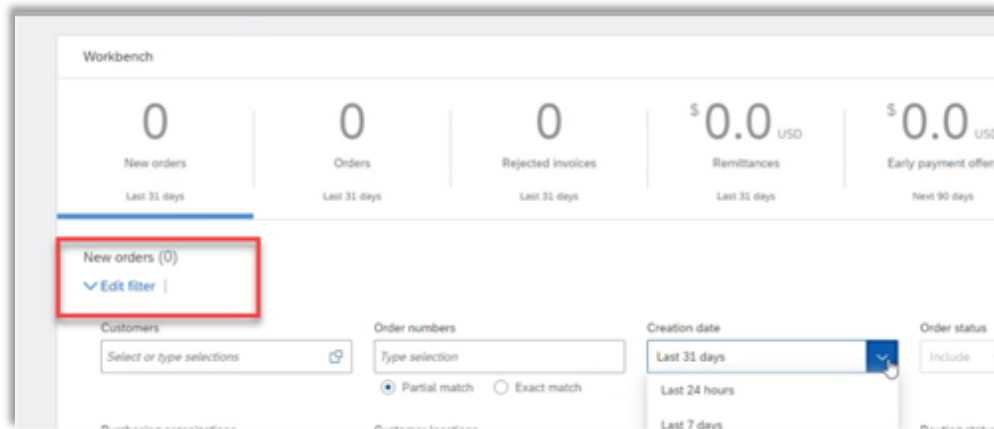
4. Select **Creation Date** and change to **Last 365 days.**
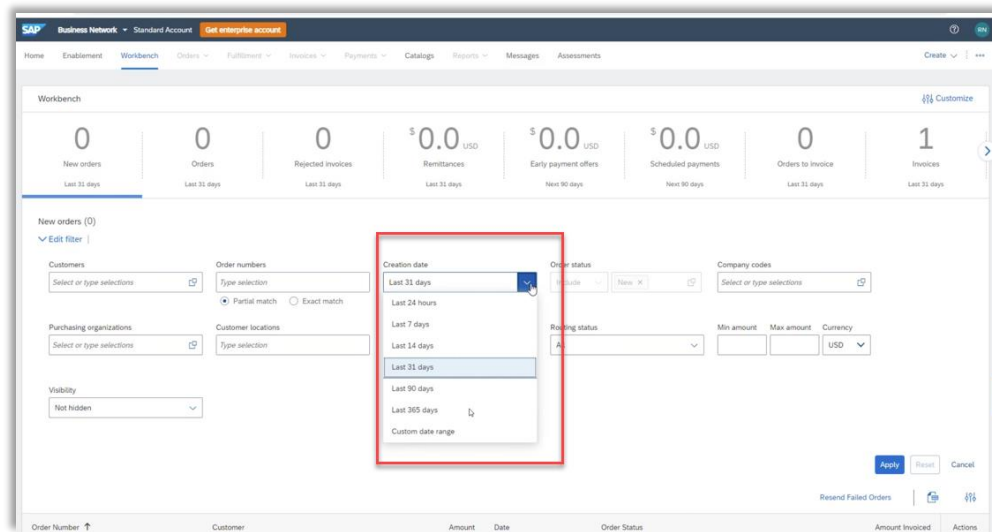
- ➢ Your BPO should populate. If your BPO does not populate, email supplierinquiries@pse.com.
- ➢ **Click** the BPO number to open the agreement and start the Invoice Process.

5. Select **Create Invoice** at the top of screen and select **Standard Invoice** from drop down.
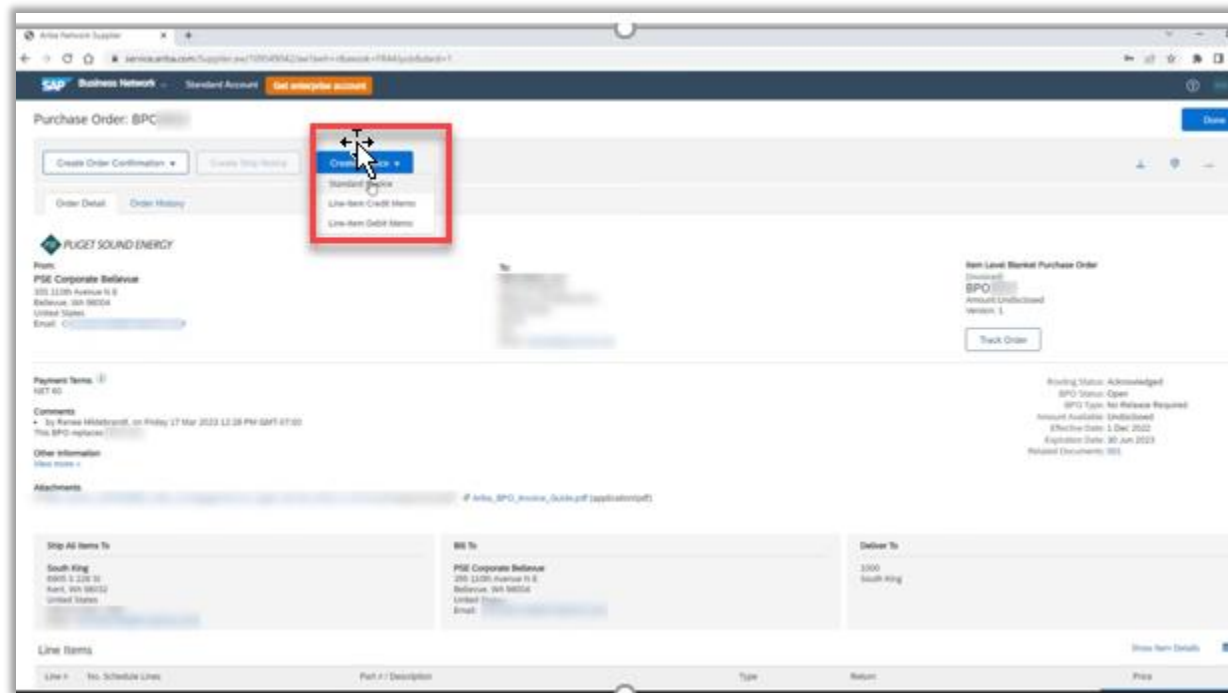
6. Enter Invoice Number.

➢ Please note **Subtotal will default to $0** until you move on to steps #9 – 13.

7. Enter **Invoice Date**.
   ➢ This should be the date of the invoice, not today's date.
   ➢ Ariba allows you to backdate a maximum of **61 days** from today's date if invoice is past due.

8. Sales Tax (Always on the header level).
  - ➤ **Required:** Rate (%)
    - o If non-taxable, enter 0 for *Tax Amount* and *Rate* (%).
    - o **Invoice will be auto-rejected if rate is blank.**
  - ➤ Tax amount will be automatically calculated when the rate is entered.
    - o Tax amount can be adjusted only if rate is entered.
9. **Required:** Service Start Date and Service End Date.

10. Check the box to the left of the line you want to invoice.
    - ➢ If invoicing multiple lines, select one box at a time.
11. **Create** in bottom left.
12. Select **Service** for service, **Goods** for Materials/Hardware from the drop down.
13. **Next.**

14. Enter Quantity but leave unit price "as-is" unless it's an expense line.
    ➢ If it is a Costs & Expenses line: enter $1 for the Unit Price and enter invoice subtotal for the Quantity.

15. Repeat steps #9-13 if you have additional lines to invoice.

How to Add Attachments

1. Required: Click **Add to Header** drop down and select **Attachment** to attach PDF Copy of Invoice.

   ➢ **Attachment** section will be added near the bottom of the screen above PO line items.

   ➢ Upload your file by clicking **Choose File.**

   ➢ Select file from computer.

   ➢ Click Add Attachment – make sure to click on "add attachment" after you have chosen your file.

   ➢ **NOTE**: Ariba will not allow special characters in an attachment. Numbers and letters only.

1. If applicable, select **Shipping Cost** on **Header Level.**
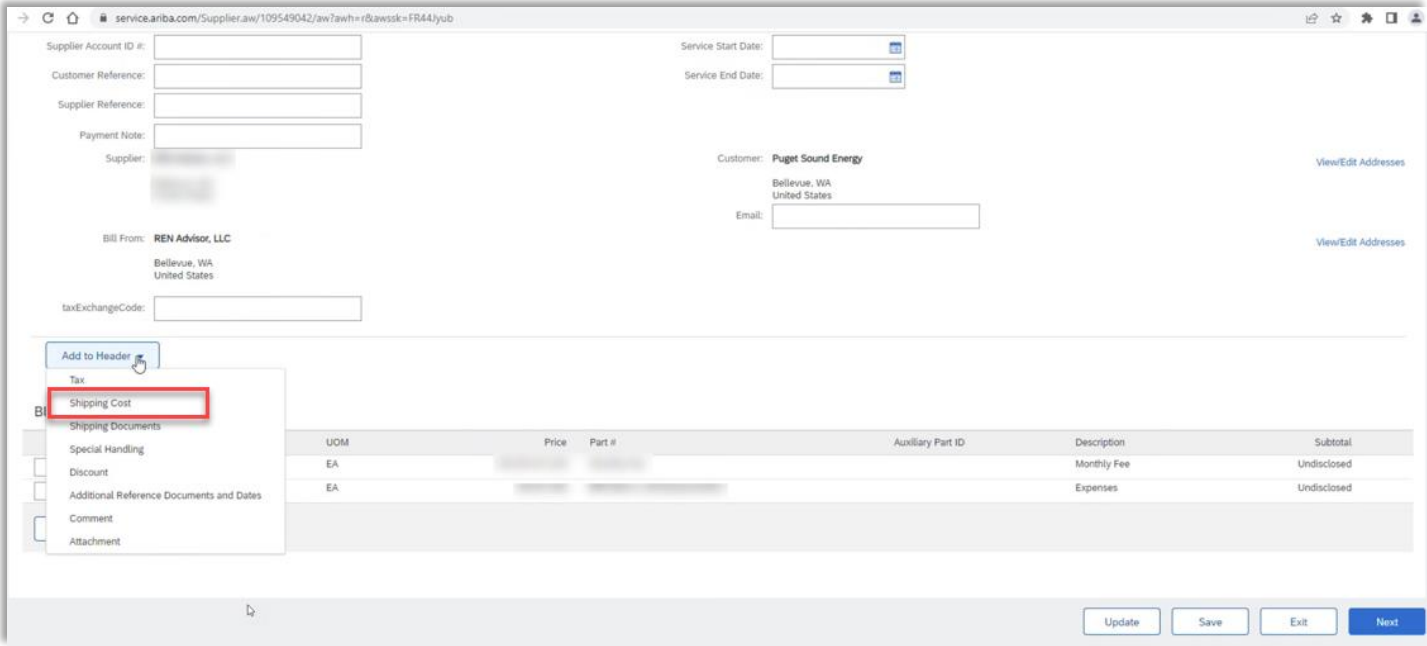
2. Click **Save** and **Next** when you have selected all lines to invoice and attached a PDF copy of the invoice.
3. Review invoice details and **Submit.**

1. Select the **Invoices Tab** and search for your invoice number.
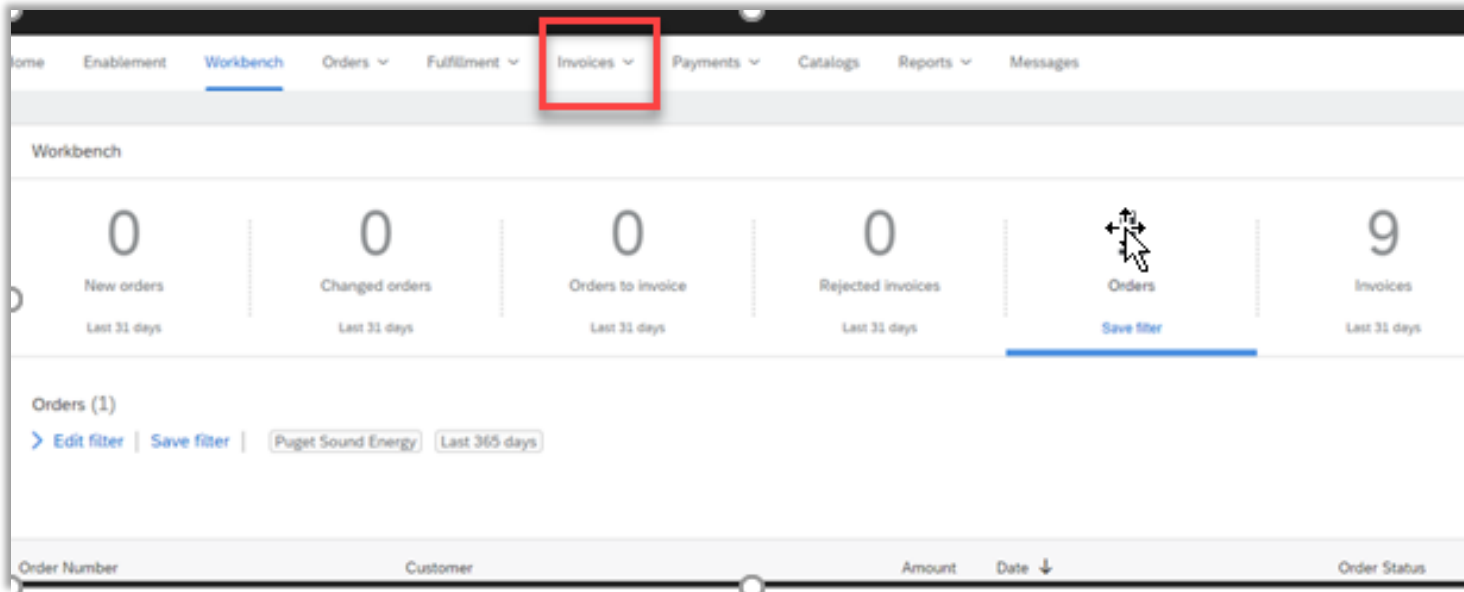
- If your invoice was rejected, you will receive an Ariba Notification.
    - o **DO NOT** Edit and Resubmit the same rejected invoice.
    - o Create a new invoice with the same number and a suffix "A" at the end.
        - ▪ Example: 1234A
    - o **Exception:** If invoice was rejected because the invoice date was **before** PO creation date, you can edit and resubmit the same invoice with a new date on or after the PO creation date.
- To view more information about the invoice click the invoice number to open it and view more information.
- If you have questions about why the invoice was rejected please email **supplierinquiries@pse.com** with as much detail as possible such as your BPO number, the invoice number, and a copy of the invoice.

Common Invoice Statuses

| Status	Definition
Submitted	The invoice or credit memo has successfully uploaded to Ariba.
Pending Approval	The supplier has submitted the invoice or credit memo to PSE and it is being reviewed by the appropriate departments.
Approved	PSE has approved the invoice or credit memo. It will get paid based on the payment terms outlined in the contract.
Paid	The invoice or credit memo has been paid.
Rejected	Either PSE has rejected the invoice, or Ariba has auto rejected it. Please refer to the invoice history tab on the Ariba supplier portal to determine the reason for rejection. See next page for more info on common rejection reason.

1. If you receive the rejection reason **The tax rate in the invoice summary is missing**, create and submit a new invoice, being sure to include tax information ([step 8](#)). Do not click Edit and Resubmit.
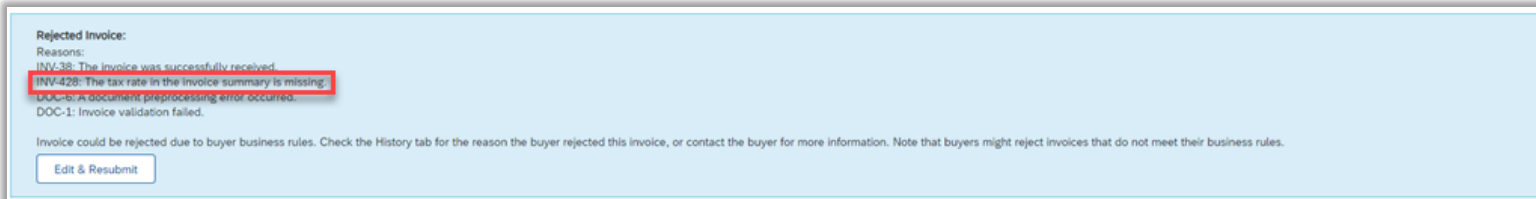
2. If you receive the rejection reason **This customer requires header-level start and end dates**, create and submit a new invoice being sure to include this information ([step 9](#)). Do not click Edit and Resubmit.


3. If you receive the rejection reason **Contract Hard Maximum Limit Exceeded**, please contact supplierinquiries@pse.com. This means your invoice exceeds the amount available against your BPO and will need a change order.
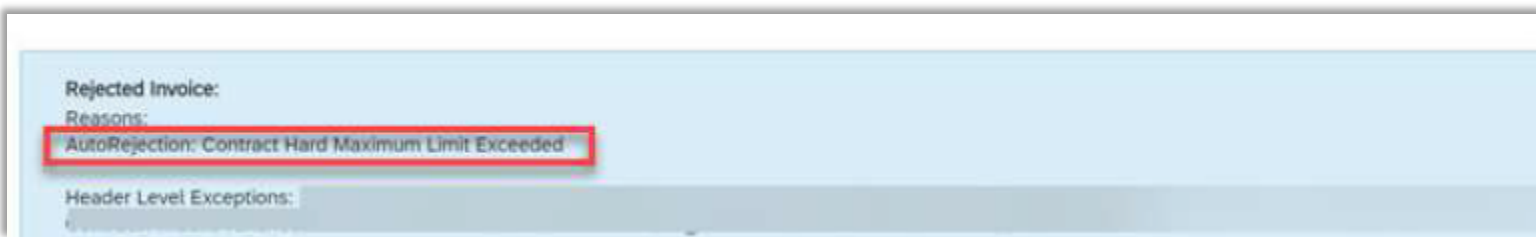
1. **Select** the **Outbox** Tab.

2. **Select** your previously created invoice.

3. Click the button the Invoice for **Create Line-Item Credit Memo.**

   ➢ Please submit credit memo for the full invoice price.
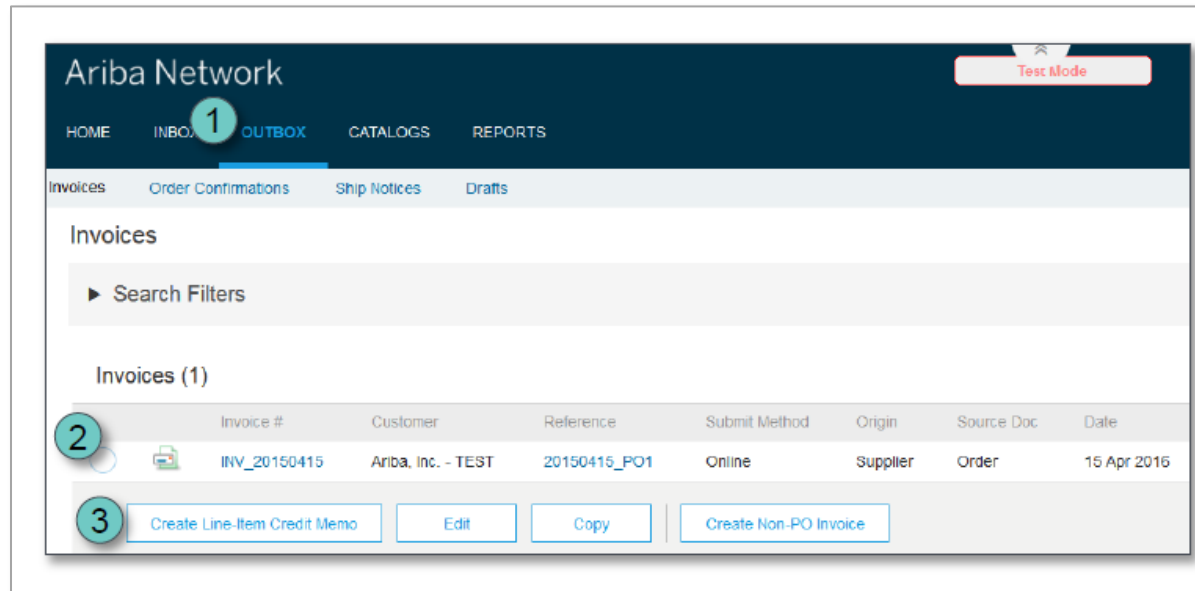
   ➢ Include a note in the comment section to expedite the approval process: