Light Account Process Step by Step Guide

DISCLAIMER:

This training material is created by Carrier Corporation to help its suppliers register for Light Account and navigate the dashboard.

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What is Light Account?

Light Account is also known as "Interactive Email" which is a no-cost channel for suppliers with customers procuring via SAP ®Ariba®. This Ariba P2P functionality will deliver purchase orders (PO) via a system generated email with easy invoice submission, enhanced PO email layout and the ability for suppliers to view all of their PO's, invoices and payment status in a single portal. This system generated PO email is sent via the Ariba Network to suppliers without the need to establish a full Ariba Network trading relationship with Ariba. Light Account is a free-of-charge option that provides these capabilities:

- Review all orders, invoices and payments in one portal
- Send order confirmations
- Create invoices and submit against orders
- Receive invoice and payment status
- Resend PO copy to your email account for invoice processing

The only prerequisite is an internet connection and a web browser to be able to generate the Order Confirmation and Invoice submission.

You will be required to register for Light Account when you access the first order.

Light Account setup criteria

All new suppliers who are not fully enabled on the Ariba Network will be set up for Light Account by default.

You are free to upgrade to a full Ariba Network Account at any time should you decide you need additional functionality that the Light Account is not able to provide you.

Overview of the Light Account Process

1. Ariba P2P order is created

2. Ariba P2P systematically generates an email with PO details and sends to the supplier email address on file with Carrier Corporation

3. Supplier receives system generated email with the PO

4. [**Optional**] Supplier may confirm receipt of the PO (Order Confirmation) through Light Account

5. [**Optional**] Supplier may submit the Ship To notice through Light Account when they ship the goods to the receiver
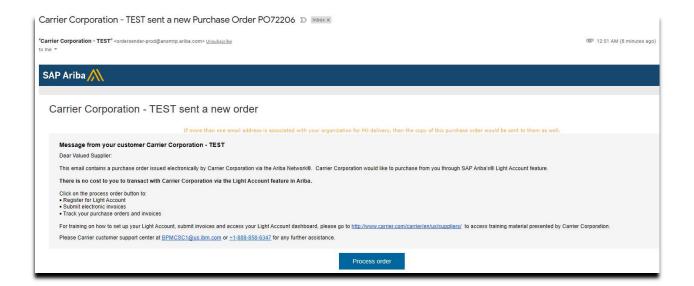
6. Supplier submits the invoice through Light Account

Note: Below conditions should be met to enable supplier for Light Account. (Carrier takes the responsibility of below)

    a. Preferred Order Method (POM) must be set for email

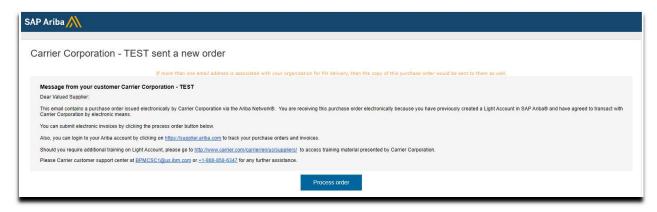   b. Valid Supplier email address must be present in the supplier's vendor master record

Let's Get Started!

1) Receive the PO from Carrier

Supplier receives an email when Carrier issues the PO through Light Account. Supplier can review all the PO information from this email notification:
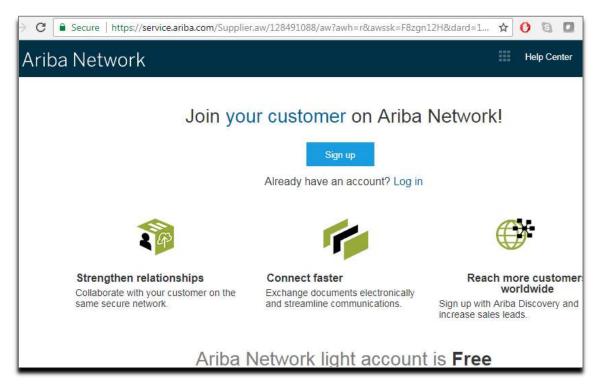
For all subsequent orders, supplier receives email like below:

2) Registration

This is applicable only when supplier receives the first PO through Light Account. This page will not appear if you have already registered for Light Account.

a. Click on **Process Order** button in the email. Your default browser will be opened and redirect you to below screen.

b. Click on **Sign up** Button. It will redirect you to the *Register* page.   Most of the data is already defaulted from Carrier's vendor master. (Note: If you have already registered on Light Account before, you can click the log in link and log in with your existing credentials).

Register

Company information

Company Name:* Light Account Services-TEST

Country* United States [USA]

Address* 8973 SW 212TH LANE

Line 2

Line 3

City* CUTLER BAY

State* Florida

Zip* 33189-3859

If your
office,
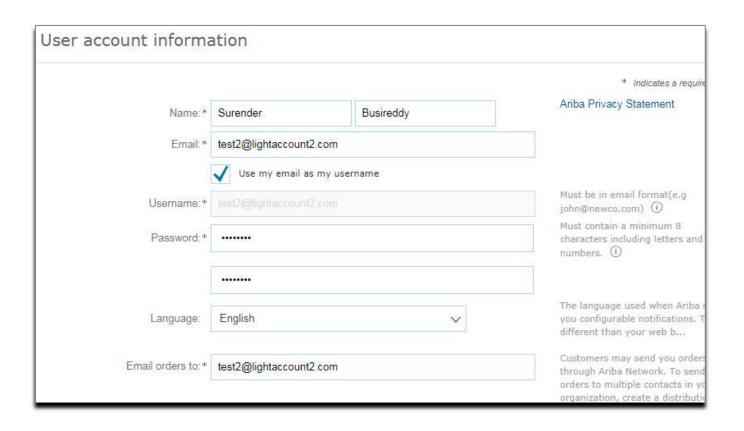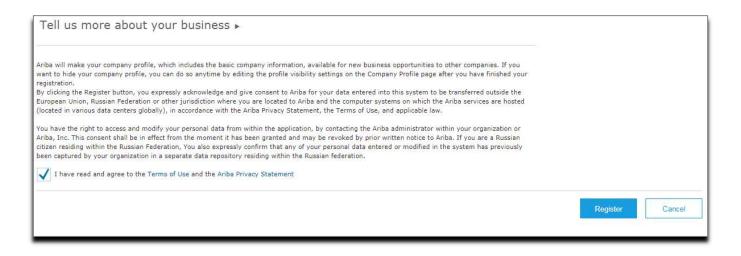can ent
shippin
address

c. Verify your organization information.   If it is incorrect or needs to be updated, you must first contact Customer Assistance Center at BPMCSC1@us.ibm.com or +1-888-858-6347 to get your information updated in Carrier's vendor master before you update your Light Account.

d. Scroll down to the "User account information":
- i. Enter first and last name
- ii. Enter your email address
- iii. Select the box next to "Use my email as my username" if you want to use your email as your user name (Recommended)
- iv. Choose your password and reenter the password
- v. Leave the language as English
- vi. Enter your email ID again in "Email orders to" field

User account information

Ariba Privacy Statement

Name: *	Surender	Busireddy

Email: * test2@lightaccount2.com

☑ Use my email as my username

Username: * test2@lightaccount2.com

Must be in email format(e.g john@newco.com) ⓘ

Password: * ●●●●●●●●

Must contain a minimum 8 characters including letters and numbers. ⓘ

●●●●●●●●

Language: English ⌄

The language used when Ariba you configurable notifications. T different than your web b...

Email orders to: * test2@lightaccount2.com

Customers may send you orders through Ariba Network. To send orders to multiple contacts in yc organization, create a distributic

e. Scroll down, accept the terms and conditions by checking the box, and click the **Register** button.

Tell us more about your business ▸

Ariba will make your company profile, which includes the basic company information, available for new business opportunities to other companies. If you want to hide your company profile, you can do so anytime by editing the profile visibility settings on the Company Profile page after you have finished your registration.
By clicking the Register button, you expressly acknowledge and give consent to Ariba for your data entered into this system to be transferred outside the European Union, Russian Federation or other jurisdiction where you are located to Ariba and the computer systems on which the Ariba services are hosted (located in various data centers globally), in accordance with the Ariba Privacy Statement, the Terms of Use, and applicable law.

You have the right to access and modify your personal data from within the application, by contacting the Ariba administrator within your organization or Ariba, Inc. This consent shall be in effect from the moment it has been granted and may be revoked by prior written notice to Ariba. If you are a Russian citizen residing within the Russian Federation, You also expressly confirm that any of your personal data entered or modified in the system has previously been captured by your organization in a separate data repository residing within the Russian federation.

☑ I have read and agree to the Terms of Use and the Ariba Privacy Statement

[Register] [Cancel]

You will receive an email with a Registration Confirmation:

Ariba Network Registration Confirmation

Inbox x

Ariba Commerce Cloud <ordersender-prod@ansmtp.ariba.com>
to me

SAP Ariba

Welcome to Ariba Network Light Account

Thank you for registering for an Ariba Network light account. Here are some info to get you started

Your Account Information

Company name	Light Account Services-TEST
Administrator email	
Ariba Network ID	AN01056919306-T
Username	

Signing in

To sign in to your account, go to Ariba.com .

Use the username and password that you created when you registered. (Your password is encrypted, so we cannot show it here.)

Things you can do

When you sign in to Ariba Network, you can:

- Respond to any number of emailed orders.
- View up to 20 orders on the home page.
- Get limited access to features that your buyer supports, like order confirmations and ship notices.
- Check invoice status
- Set up your company profile to attract potential customers.
- Submit technical questions online.
- Create user accounts.

Mobile

Download the Ariba Supplier Mobile app to your mobile device and manage customer orders and invoices on the go.

Upgrading

Upgrade anytime get full access to features. Learn More .

2b) Light Account registration without PO email

i) Open the URL *https://supplier.ariba.com* in your browser and click **Register Now**.

ii) Enter the company information and user (Administrator) information and click the **Register** button. Please note the company information will not be defaulted automatically here. All the mandatory fields should be filled manually:

iii) You will receive email notification when the registration is complete.

iv) When you receive PO from Carrier, you can click the **Process Order** button and use these credentials to login and process the PO.

3) Process the PO

(If you have already registered for Light Account, you will be redirected to this page when you login.   If you are the first-time user, you will be redirected to this page when registration is complete)

  a. **Submit order confirmation (Optional):**
      You can review the PO information and Click on **Create Order Confirmation** button to confirm the order.
      i.   Click on: **Create Order Confirmation** → **Confirm Entire Order**.

ii.   The following fields are optional. If you have additional information you can enter it below, otherwise simply click on **Next** button:

iii.   Click on **Submit** button to send order confirmation to customer. You will receive email confirmation upon submitting the order confirmation:

b. <u>**Submit Invoice:**</u>

When you are ready to submit the invoice, you can access the PO email, click on **Process Order** button, login with your credentials and follow below steps:

i.   Click on: **Create Invoice → Standard Invoice**.

ii.   Fill in all the mandatory fields (which are indicated with "*")

Header: Enter invoice number and invoice date (Today's date will be defaulted in Invoice Date field). The invoice date cannot be older than five (5) days
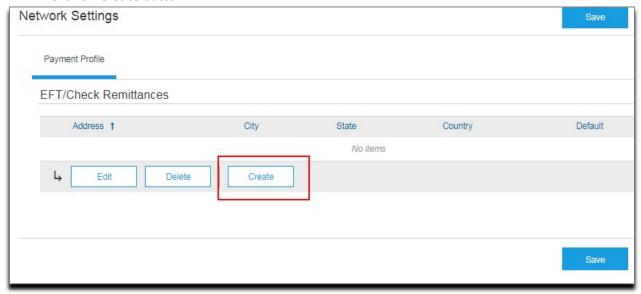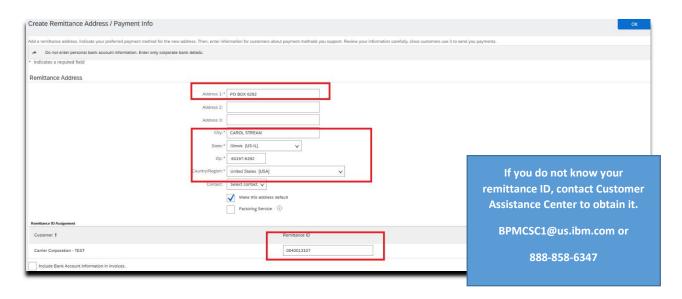

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Update the remittance Information: Remittance information **must match exactly** with what you provided to Carrier Corporation during the initial vendor set-up process. You cannot have a different remit to address in your Light Account than what Carrier has in its vendor master. If you need to change your remit to address with Carrier, contact Customer Assistance Center at **BPMCSC1@us.ibm.com** or **+1-888-858-6347.** (Please note that this step is applicable only when you submit the invoice for the first time through Light Account. If you have already updated remittance information and have previously submitted invoices, you can proceed to Tax section).
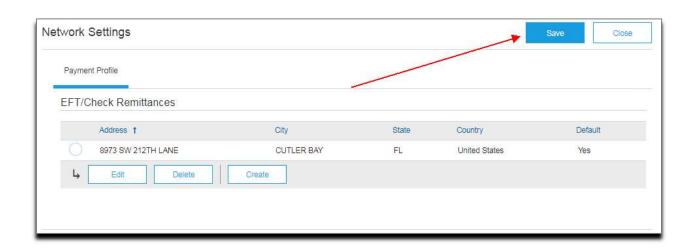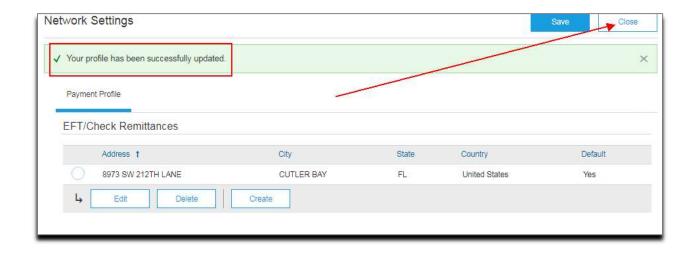

Click on **Create** button:

Enter your **Remittance Address** then check the box "Make this address default" for all invoices. Enter your **Remittance ID** (note: if you have other Ariba accounts be sure to select United Technologies Corporation) and click **Save** then click **OK**. DO NOT FILL IN ANY OTHER INFORMATION SUCH AS BANKING INFO. THE PAYMENT METHOD IS DEFAULTED FROM CARRIER VENDOR MASTER AND CANNOT BE CHANGED IN THE LIGHT ACCOUNT SET UP.
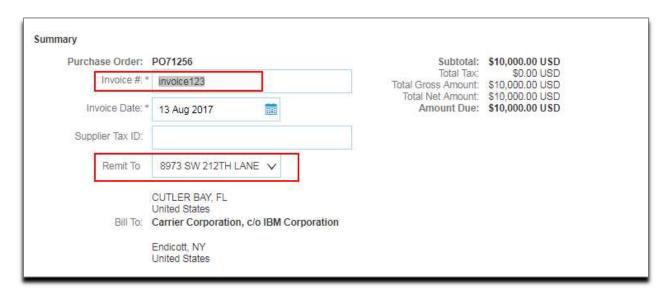

If you do not know your remittance ID, contact Customer Assistance Center to obtain it.

BPMCSC1@us.ibm.com or

888-858-6347

Click on the **Save** button:

Click on the **Close** button after displaying confirmation message:
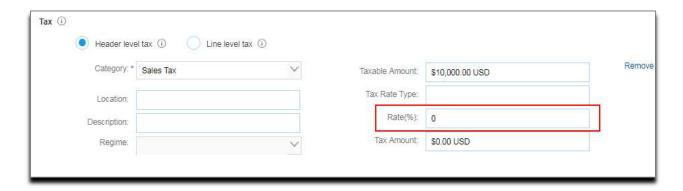
Select the appropriate remittance address from the drop-down menu:
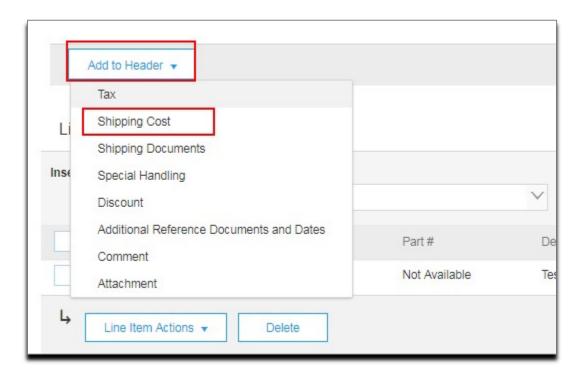

Add Tax:

Scroll down to Tax section and enter the tax percentage OR tax amount. Note: Input "0" if it is nontaxable.

Shipping Charge (Optional):
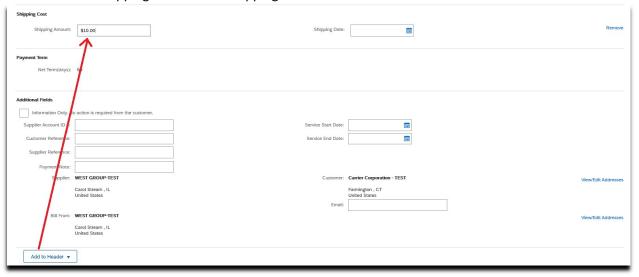
If there is a shipping charge on your invoice, scroll down and click on the **Add to Header** button, then click on **Shipping Cost**. If there is no shipping charge on the invoice, go directly to Line Items.

Add the shipping amount and shipping date:

Attach the soft copy of your invoice (Optional):

Click on **Add to Header** button and click on **Attachmen**t in the drop down menu:

Choose the file and click **Add Attachment** button:

Update amount on Line items (Invoice amount):
Scroll down to line items and update the amount in each line item you want to invoice. If it is a partial invoice, you can update the partial amount, otherwise enter full PO amount and then click **Next** button.

You can create multiple invoices on the same PO until the PO amount is fully invoiced. To submit additional partial invoices against the same PO simply return to the PO email, click the **Process Order** button and follow the same process as above.

<u>Review the information and Submit:</u>

After invoice submission confirmation, click on **Exit** button and then **Done** button.

You will receive email notification with the confirmation:

ordersender-prod@ansmtp.ariba.com

to me

Dear WEST GROUP-TEST,

You have successfully submitted Invoice Test_12 for $3,610.00 USD to **Carrier Corporation - TEST** through the Ariba Network.

A PDF copy of the invoice and the invoice data in cXML format are attached to this email. Please retain these files to support your local business records storage and archiving requirements.

Important:
Remember to follow your country's electronic invoice (e-invoice) management regulations, such as those formulated for archiving tax invoices.

Where can I get more information about Ariba Network?
To access product documentation and tutorials, go to Ariba Network Exchange User Community
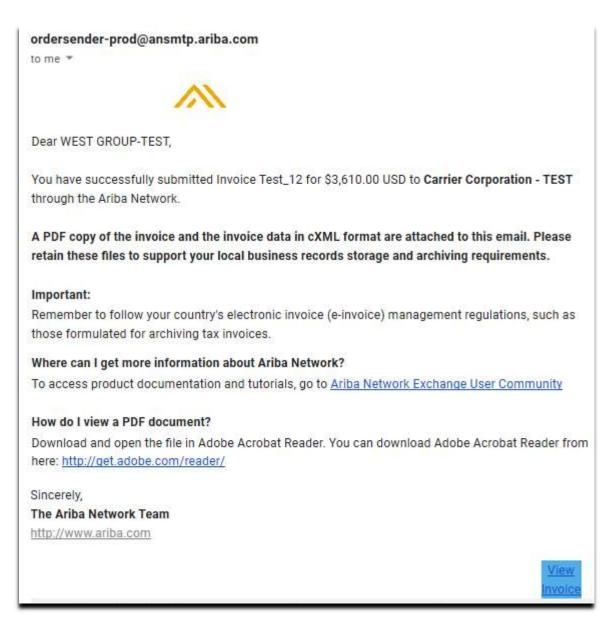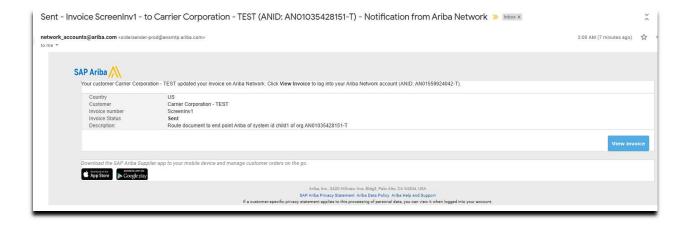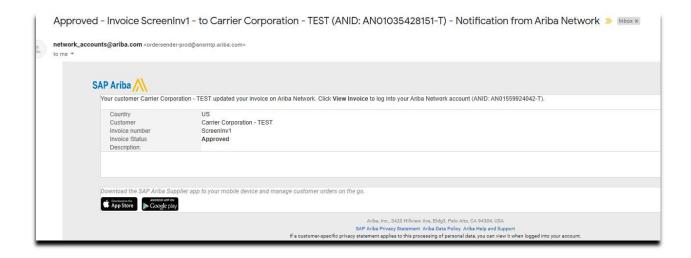
How do I view a PDF document?
Download and open the file in Adobe Acrobat Reader. You can download Adobe Acrobat Reader from here: http://get.adobe.com/reader/

Sincerely,
The Ariba Network Team
http://www.ariba.com

View Invoice

You will receive another email notification when Customer (Carrier A/P) receives your invoice:

Sent - Invoice ScreenInv1 - to Carrier Corporation - TEST (ANID: AN01035428151-T) - Notification from Ariba Network   Inbox x

network_accounts@ariba.com <ordersender-prod@ansmtp.ariba.com>   2:00 AM (7 minutes ago)

to me

SAP Ariba

Your customer Carrier Corporation - TEST updated your invoice on Ariba Network. Click View Invoice to log into your Ariba Network account (ANID: AN01559924042-T).

Country	US
Customer	Carrier Corporation - TEST
Invoice number	ScreenInv1
Invoice Status	**Sent**
Description:	Route document to end point Ariba of system id child1 of org AN01035428151-T

View Invoice

Download the SAP Ariba Supplier app to your mobile device and manage customer orders on the go.

App Store   Google play

Ariba, Inc., 3420 Hillview Ave, Bldg3, Palo Alto, CA 94304, USA
SAP Ariba Privacy Statement Ariba Data Policy Ariba Help and Support
If a customer-specific privacy statement applies to this processing of personal data, you can view it when logged into your account.

When invoice is approved for payment, you will receive below email notification:

Approved - Invoice ScreenInv1 - to Carrier Corporation - TEST (ANID: AN01035428151-T) - Notification from Ariba Network ➤ Inbox ✕

network_accounts@ariba.com <ordersender-prod@ansmtp.ariba.com>
to me ▾

SAP Ariba ⋀⋀

Your customer Carrier Corporation - TEST updated your invoice on Ariba Network. Click **View Invoice** to log into your Ariba Network account (ANID: AN01559924042-T).

Country	US
Customer	Carrier Corporation - TEST
Invoice number	ScreenInv1
Invoice Status	**Approved**
Description:	

Download the SAP Ariba Supplier app to your mobile device and manage customer orders on the go.

Ariba, Inc., 3420 Hillview Ave, Bldg3, Palo Alto, CA 94304, USA
SAP Ariba Privacy Statement Ariba Data Policy Ariba Help and Support
If a customer-specific privacy statement applies to this processing of personal data, you can view it when logged into your account.

You will receive another email notification when payment is made against the submitted invoice:

Subject: Notice of new Remittance Advice
To:

This notification contains important information about your Ariba account (ANID:).

Ariba Network

A new Remittance Advice has been received successfully. This Remittance Advice is stored online.

Customer: Carrier Corporation- Test
Supplier:

Remittance Advice #: PMT22374

This Remittance Advice is available online to both you and the Customer.

Click the following URL to view it online.
https://service.ariba.com/Supplier.aw/ad/documentDetail?docPayload=1496401832360.786398546.0000132899%40LELZ%2F4%2B4SyE36QP606XB%2FJt5%2BUe%3D&community=5&amp=Ariba

If you have any questions regarding this Remittance Advice, please contact Carrier Corporation Systems directly.

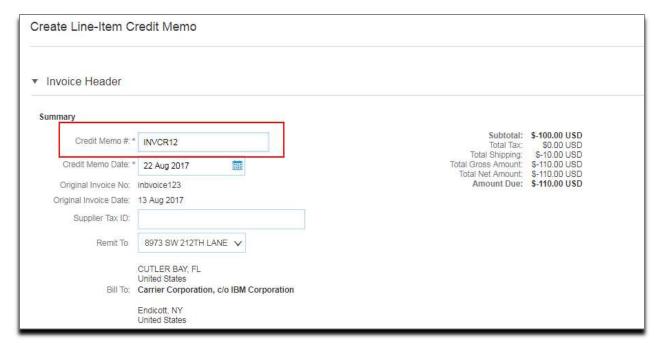**How to submit the credit memo for an Invoice:**

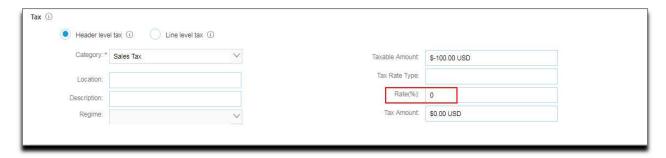Open the Approved invoice email and click on **View invoice** button and login with your credentials:

Click on **Create Line Item Credit Memo** button:

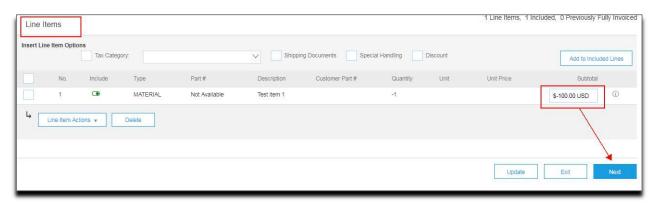Enter the **Credit Memo #** and date, and then attach the credit memo copy if available:

Create Line-Item Credit Memo

▼ Invoice Header

Summary

Credit Memo #: * INVCR12

Credit Memo Date: * 22 Aug 2017

Original Invoice No: inbvoice123

Original Invoice Date: 13 Aug 2017

Supplier Tax ID:

Remit To 8973 SW 212TH LANE ⌄

CUTLER BAY, FL
United States
Bill To: Carrier Corporation, c/o IBM Corporation

Endicott, NY
United States

Subtotal: $-100.00 USD
Total Tax: $0.00 USD
Total Shipping: $-10.00 USD
Total Gross Amount: $-110.00 USD
Total Net Amount: $-110.00 USD
Amount Due: $-110.00 USD

Update the tax information (note: put "0" if the original invoice was nontaxable):

Tax ⓘ

● Header level tax ⓘ   ○ Line level tax ⓘ

Category: * Sales Tax ⌄

Location:

Description:

Regime: ⌄

Taxable Amount: $-100.00 USD

Tax Rate Type:

Rate(%): 0

Tax Amount: $0.00 USD

Scroll down and enter the **Reason for Credit Memo**:

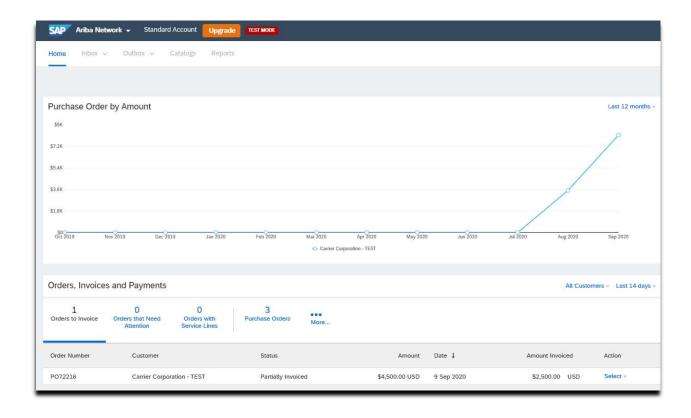Scroll down to Line Items, verify the credit amount is negative and click **Next** button:

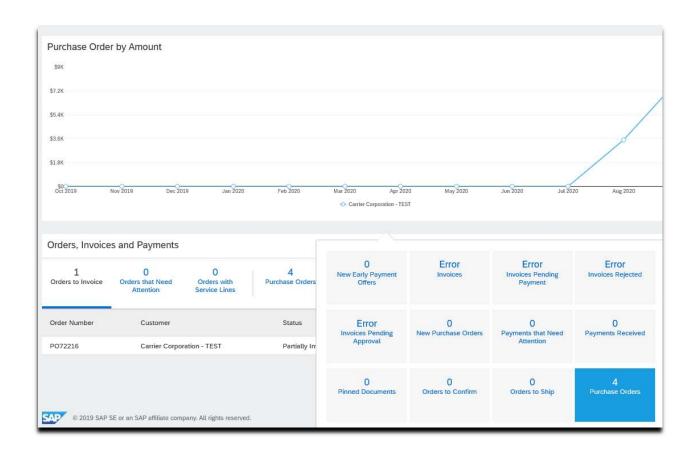Verify the information then click the **Submit** button to submit the credit memo:

4) How to view PO's, invoices, payments in Ariba Network Light Account.
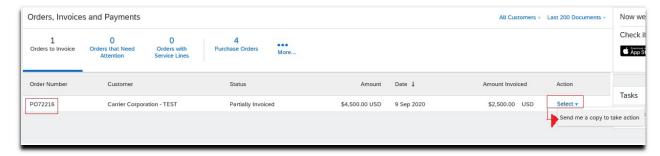
Go to *https://supplier.ariba.com* and enter your login ID (your email address) and password.

On the *Home* tab you will find tiles with different document types, click on the respective tile to view:
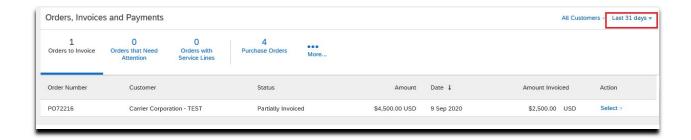
If you want to submit an invoice on a PO, but you deleted or lost the original email, simply click on the *Orders to Invoice* tile. Next, search for the PO under "Action", click **Select** button, and then click the **Send me a copy to take action** button:

You will receive an email with PO copy. Click on the **Process Order** button to create the invoice.
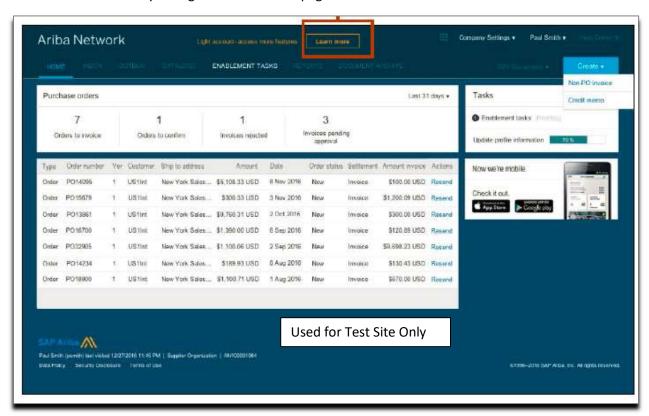
If you don't find the PO in the list, change the date filter and try again:

5) How to upgrade to Full Ariba Network account

Note: Ariba charges fees to subscribe to the full Ariba Network account. Should you choose to upgrade to a full Ariba Network account, associated fees are at the cost of the supplier and WILL NOT be reimbursed by Carrier Corporation.

Click on **Learn More** on your Light Account home page:

Review the terms and conditions and fee structure and click on **Upgrade** button.