Light Account Process Step by step Guide

DISCLAIMER:

This training material is created by UTC Climate, Controls & Security to help its suppliers register for Light Accounts 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 Accounts is a free of charge option that provides these capabilities:

- View all orders, invoices, payments in one portal
- Easily send order confirmations
- Create Invoices and submit against orders
- Receive invoice & 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 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 functionality 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 issues 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 user
6. Submit the invoice through Light Account

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

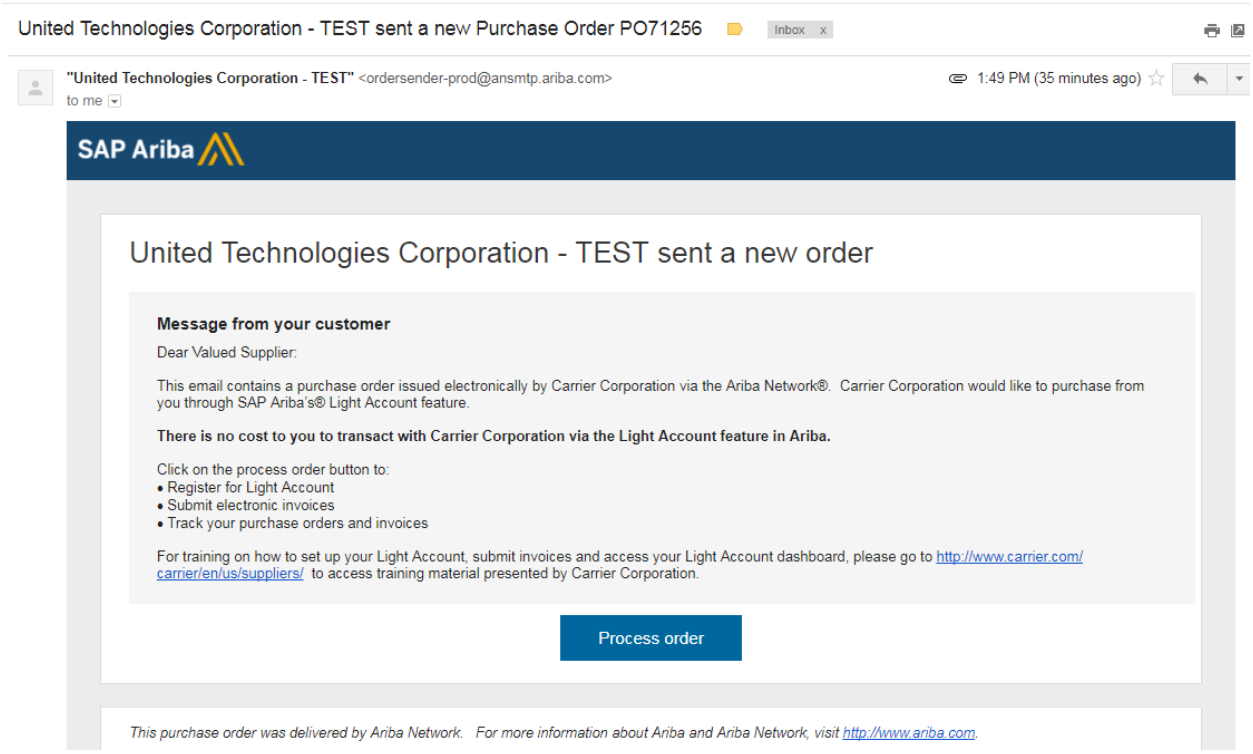
   a. Preferred Order Method (POM) must be set for email

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

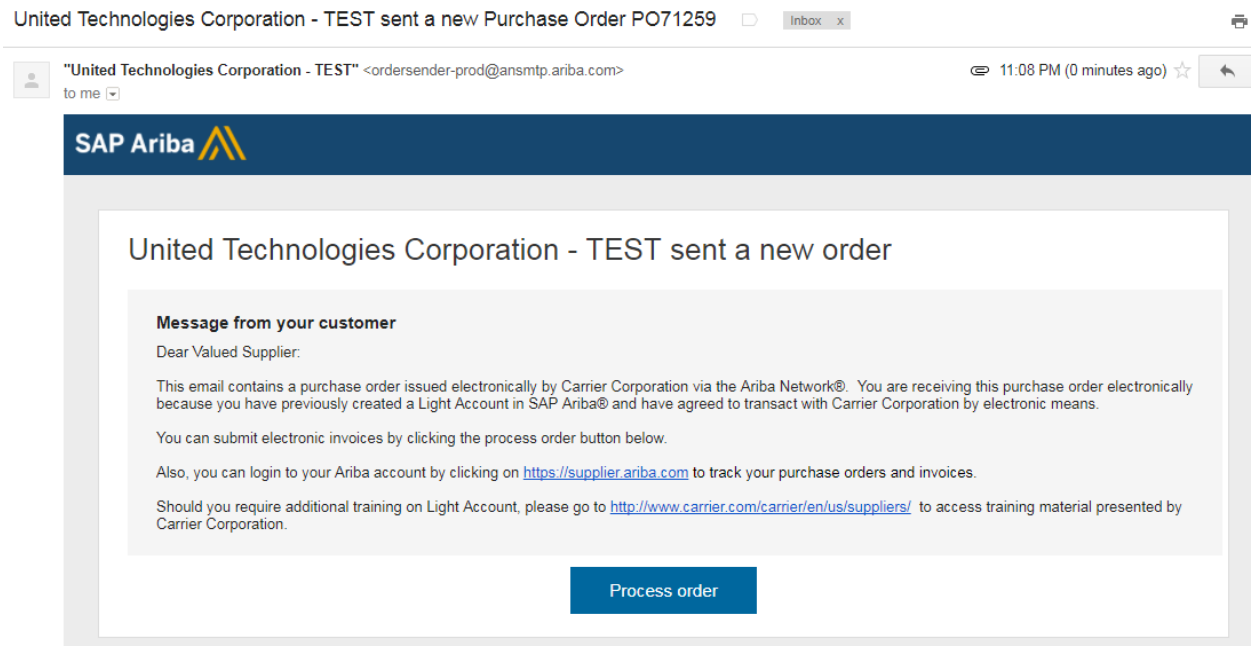
Let's Get Started!

1) Receive the PO from Carrier

Supplier receives an email like below when Carrier submits the PO to that supplier through Light Account. Supplier can review all the PO information on this email notification.



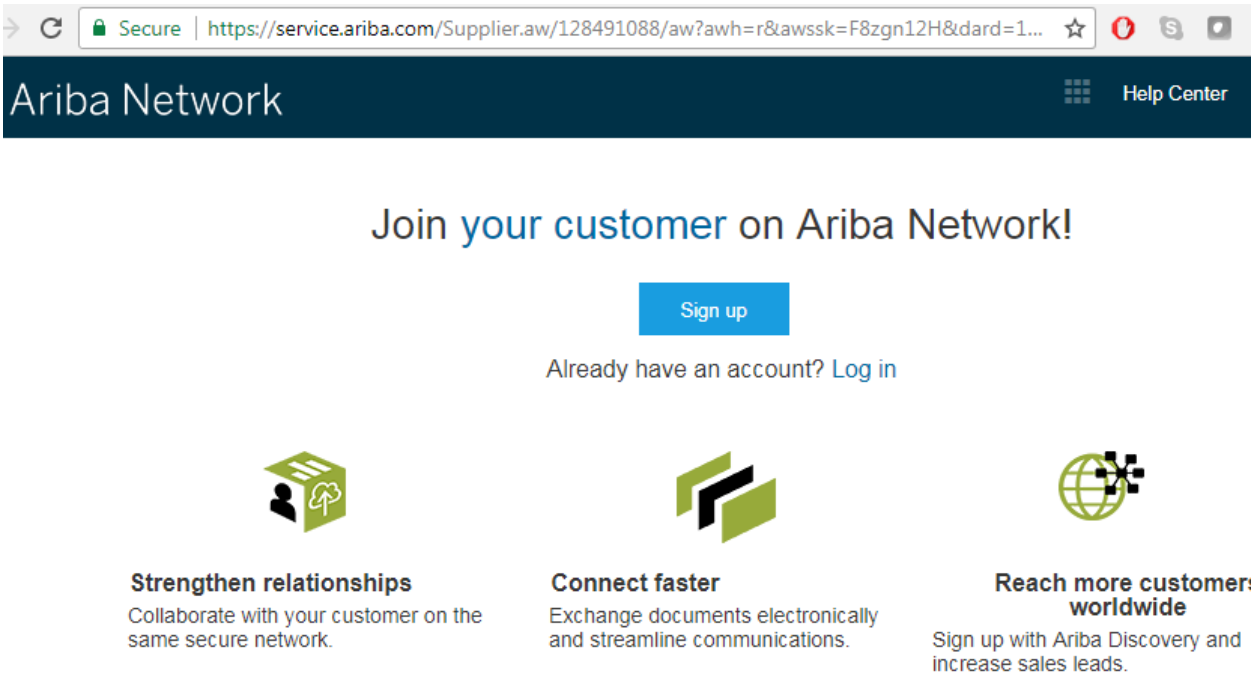
For all subsequent orders, supplier receives email like below.



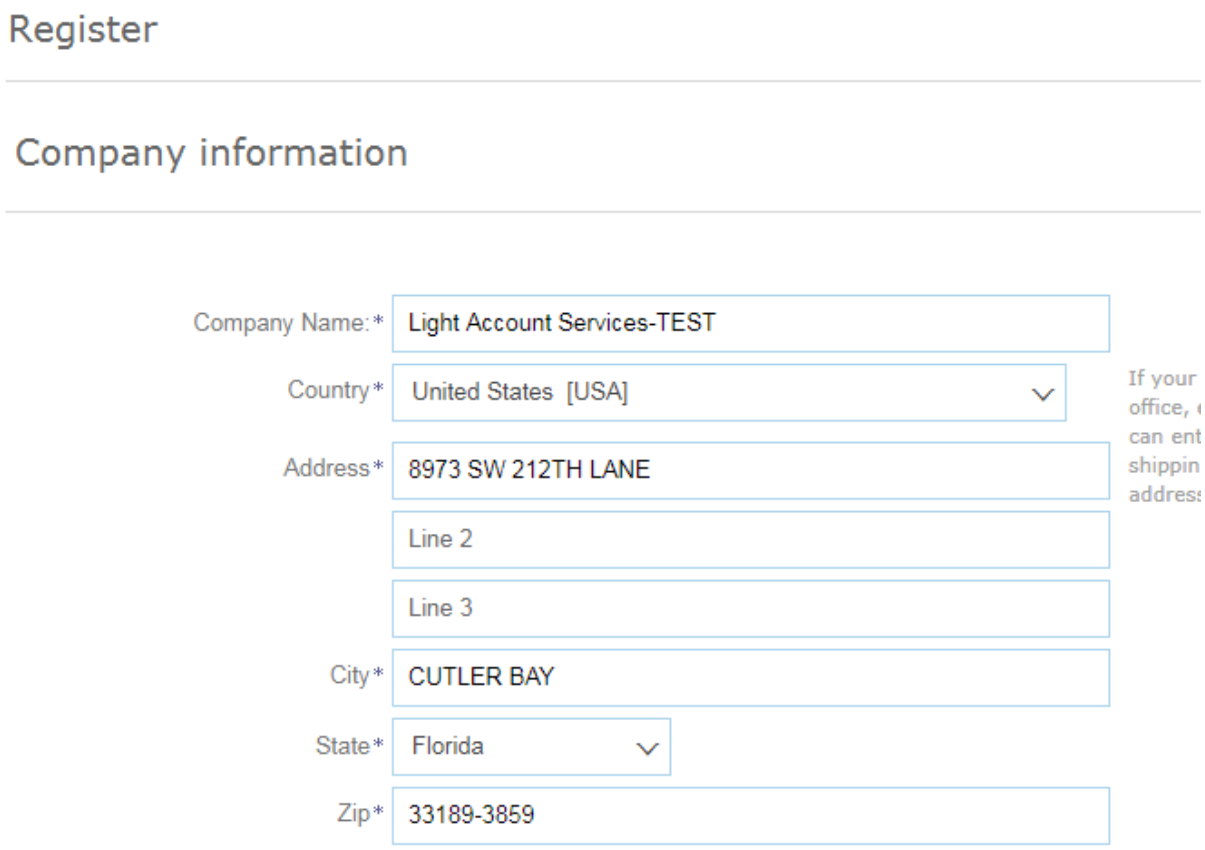
2) Registration

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 on the email. Your default browser will be opened and redirect you to below screen.

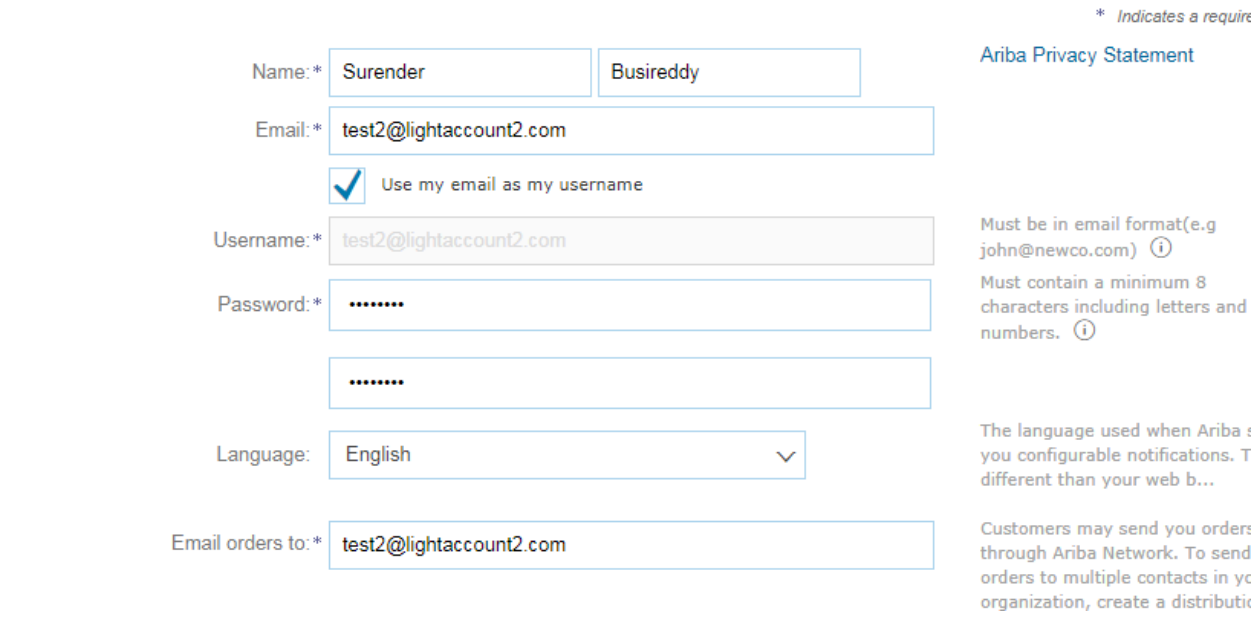


a. Click on **Sign up** Button. It will redirect you to Registration page. Most of the data is already defaulted from Carrier's vendor master. (**Note:** If you have previously registered on Light Account with another customer, you can click the Login link and login with your existing credentials).

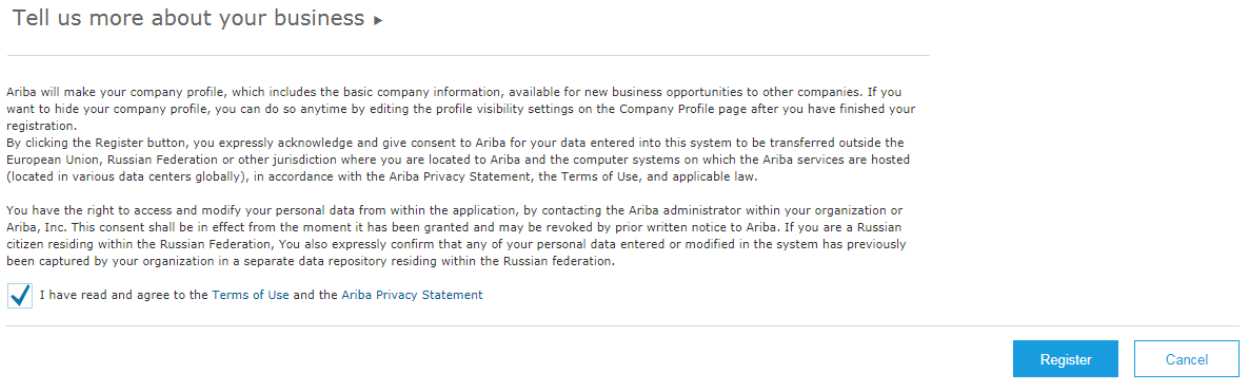


b. Verify the organization information. If your company organization information is incorrect or needs to be updated, you must first contact Customer Assistance Center at BPMCSC1@us.ibm.com or +1-888-858-6347 to get your information updated in Carrier's vendor master before you update same in your Light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

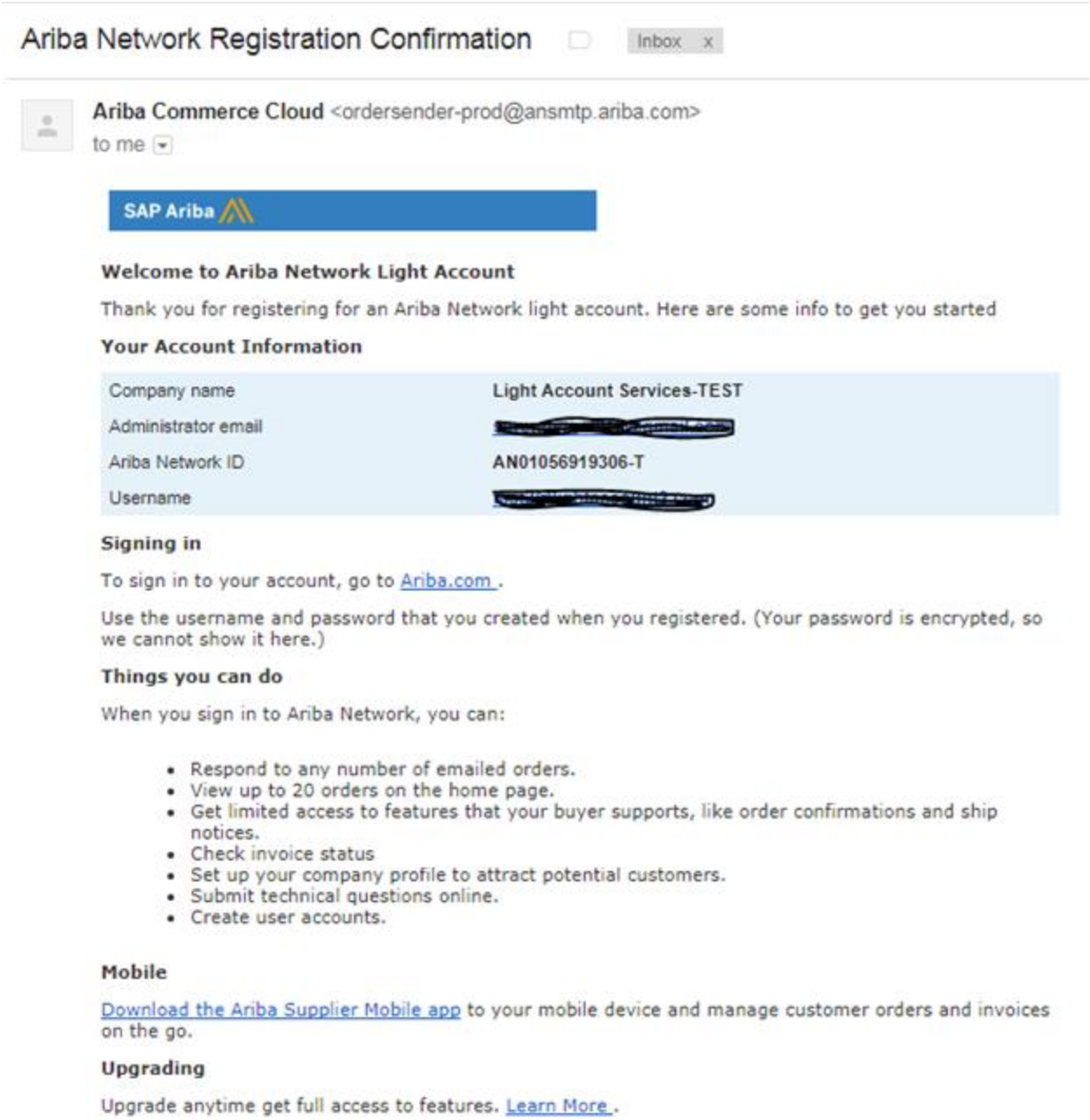
c. Scroll down to the User account information.
   i. Enter first name and Last name
   ii. Enter your email address.
   iii. Tick Use my email as my username if you want to use your email as your user name (Recommended)
   iv. Choose your password and reenter the password.
   v. Leave the language as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



d. Scroll down, Accept the terms and conditions and click on Register button.



You will receive email confirmation after clicking on Register button.



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	[redacted]
Ariba Network ID	**AN01056919306-T**
Username	[redacted]

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

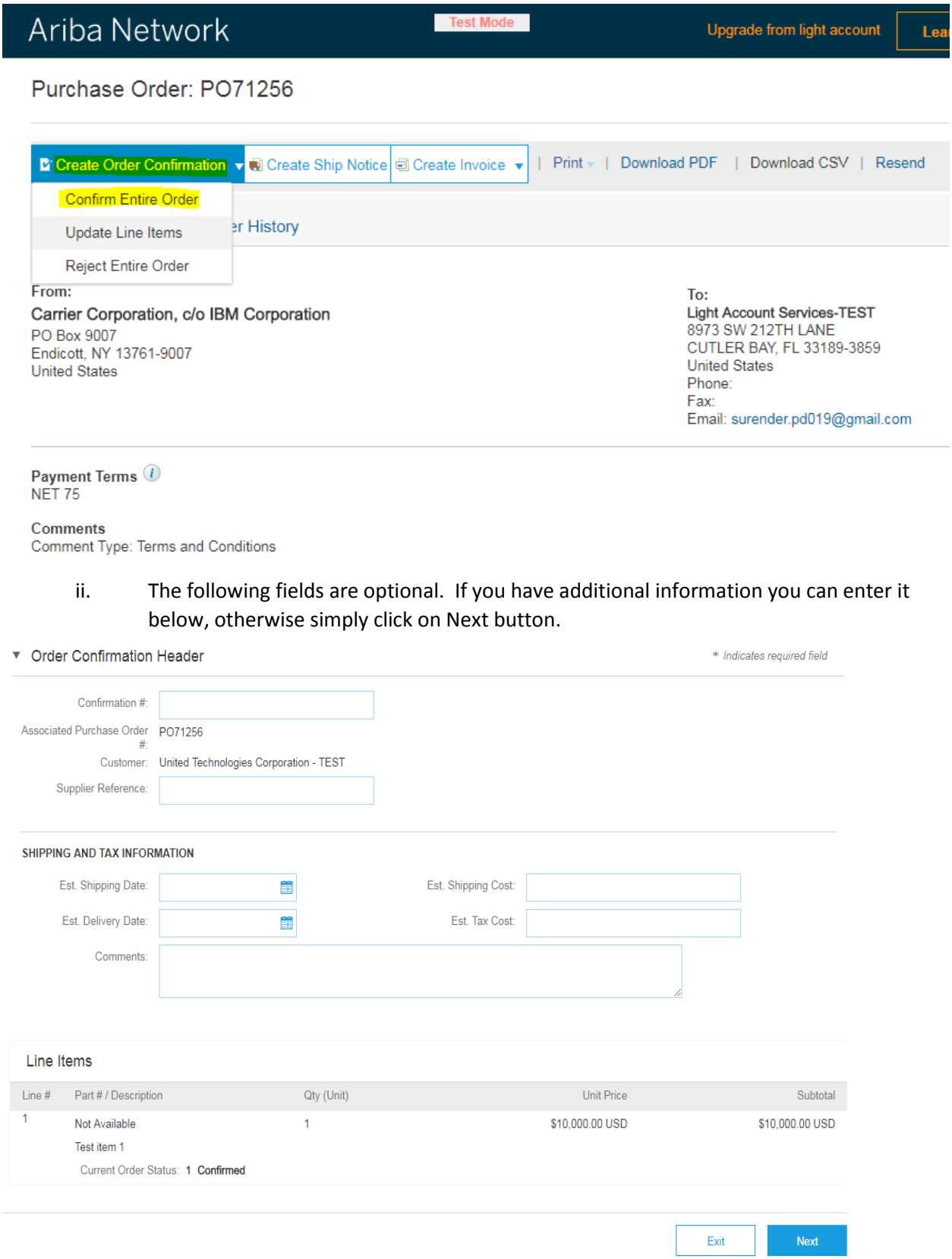
Upgrade anytime get full access to features. Learn More .

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):

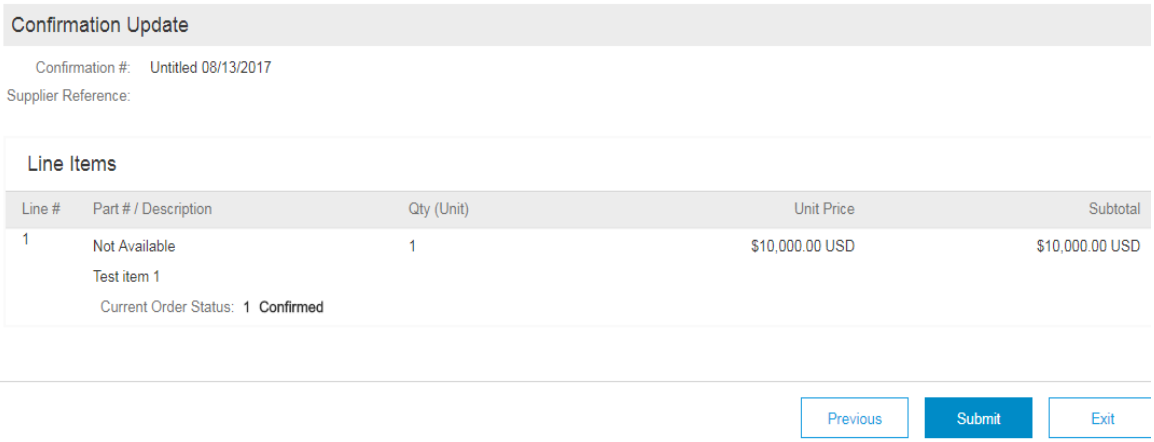
You can review the PO information and Click on Create Order confirmation button to confirm the order.

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.

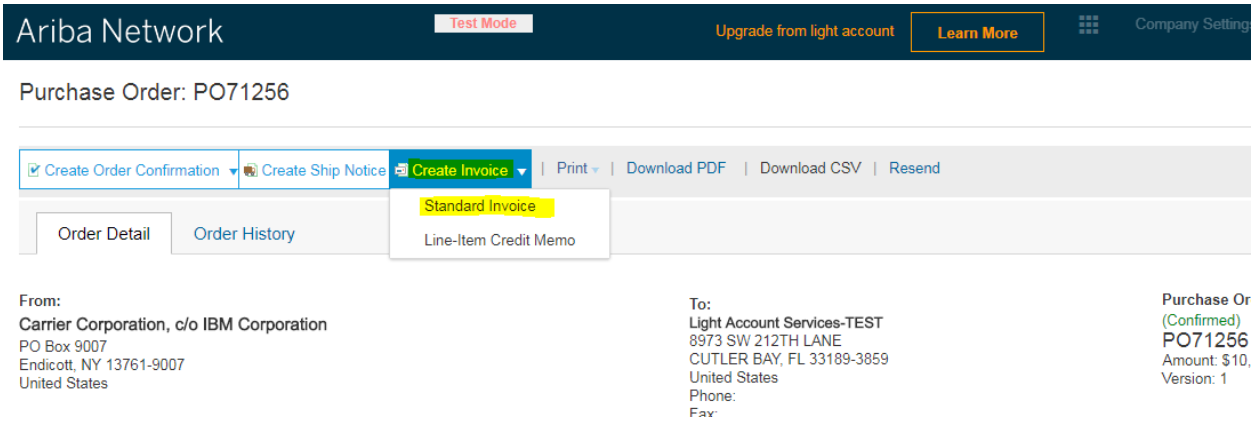
iii. Click on Submit button to send order confirmation to customer. You will receive email confirmation upon submitting the order confirmation.



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.

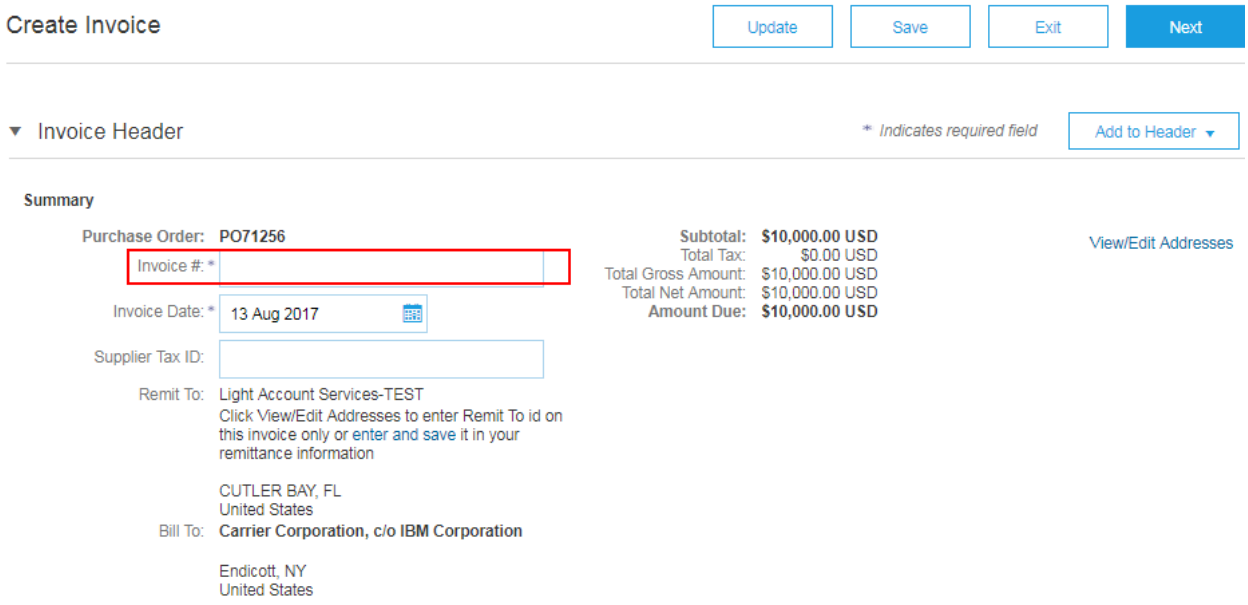
i. Click on Create Invoice → Standard Invoice.



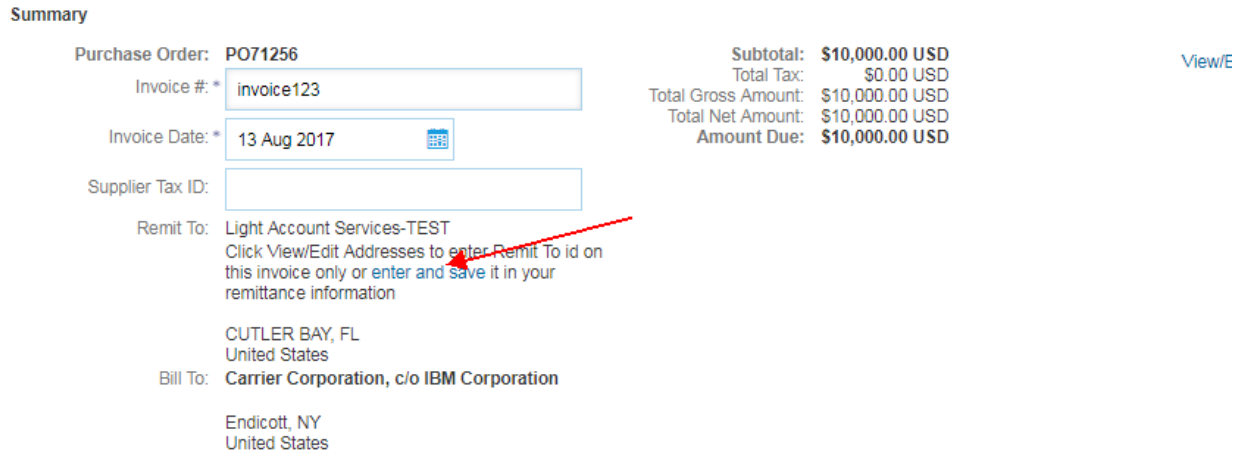
ii. Fill all the mandatory fields (which are indicated with "*")

<u>Header</u>:

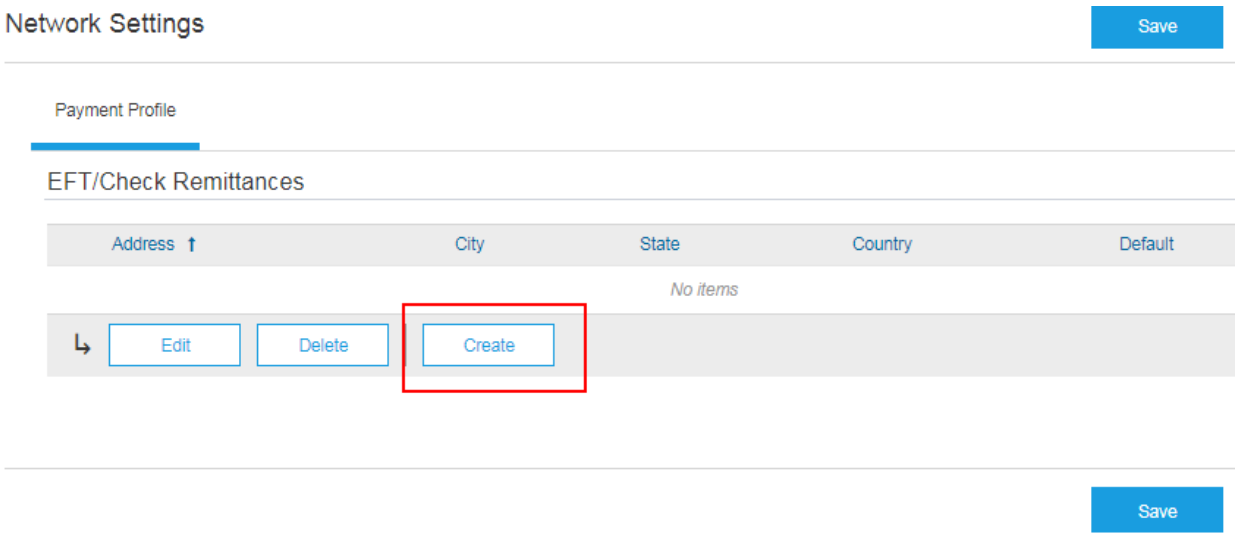
Enter Invoice number, Invoice date (Today's date will be defaulted in Invoice Date field). The invoice date cannot be older than five (5) days.



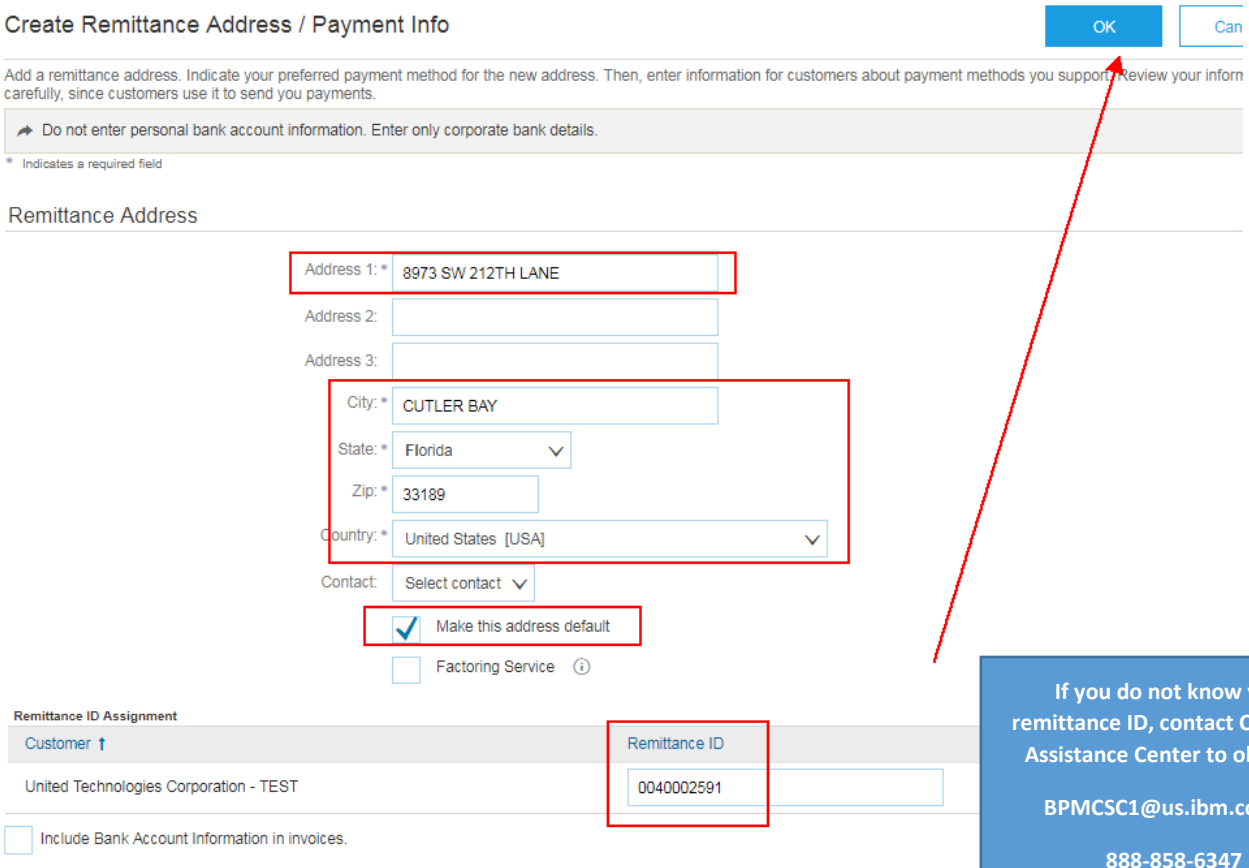
<u>Update the remittance Information</u>: Remittance information <u>must match exactly</u> what you provided to Carrier Corporation during the vendor set-up process. You cannot have a different remit to address in your Light Account than what Carrier has in its vendor master. If you need to change your 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 submitted some invoices before, you can proceed to Tax section).



Click on Create button:



Enter the remittance address & Remittance ID (Beside United Technologies Corporation) Check the box to make this address the default for all invoices and Click on 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.

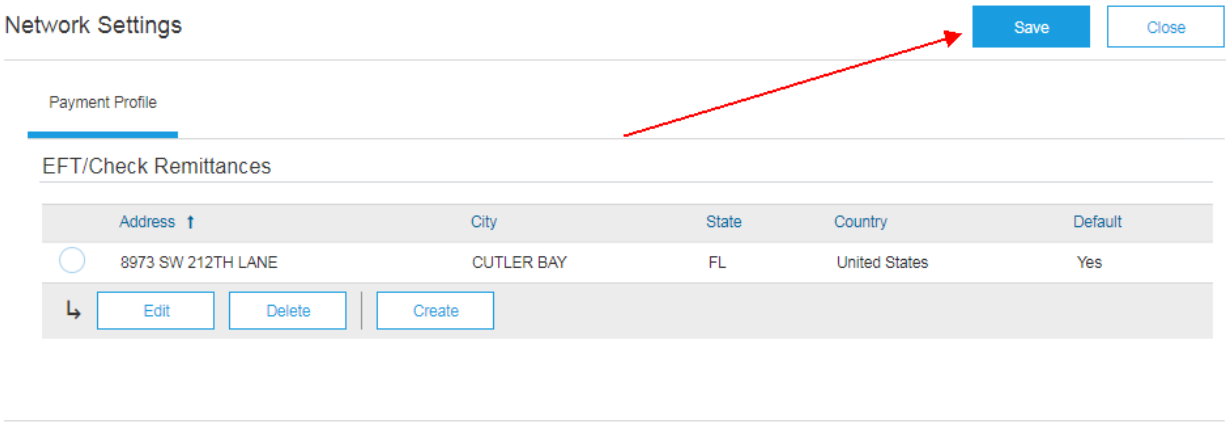


If you do not know your remittance ID, contact Customer Assistance Center to obtain it.

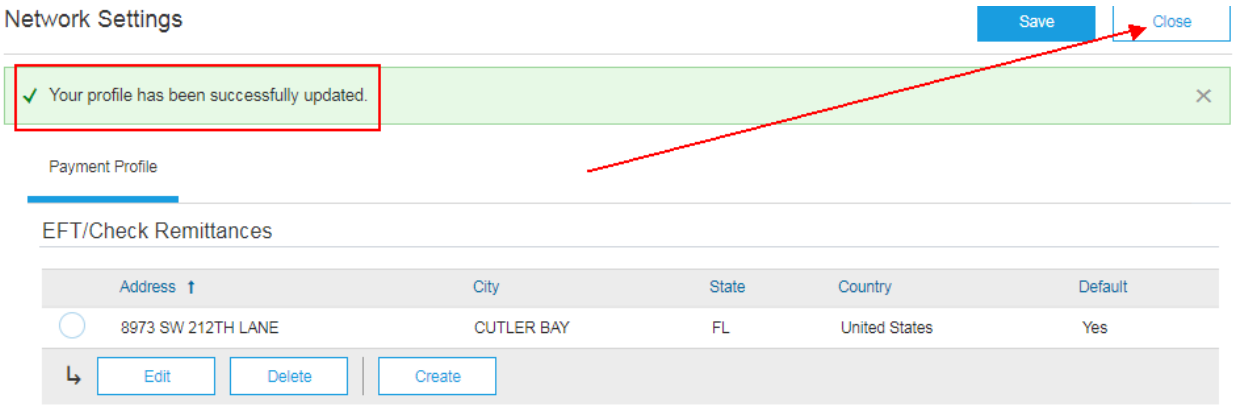
BPMCSC1@us.ibm.com or

888-858-6347

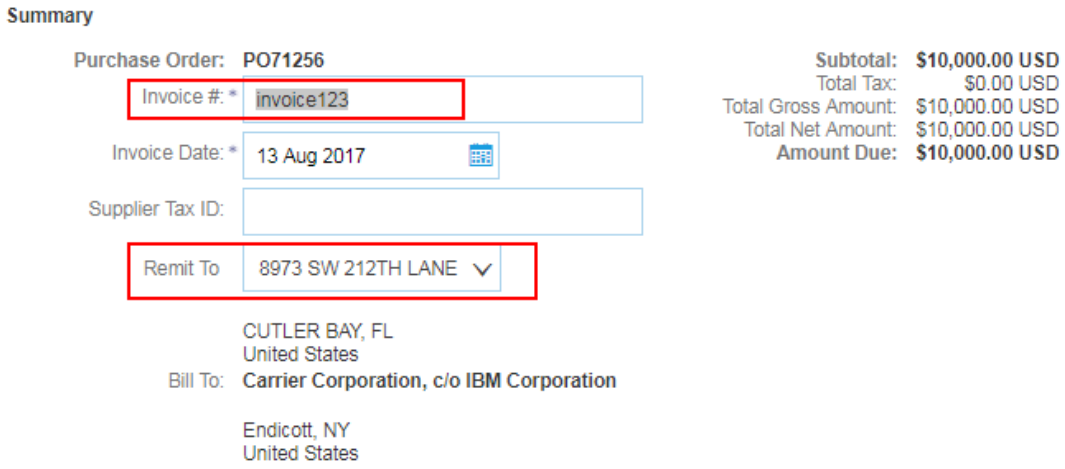
Click on Save Button:



Click on close button after displaying confirmation message:

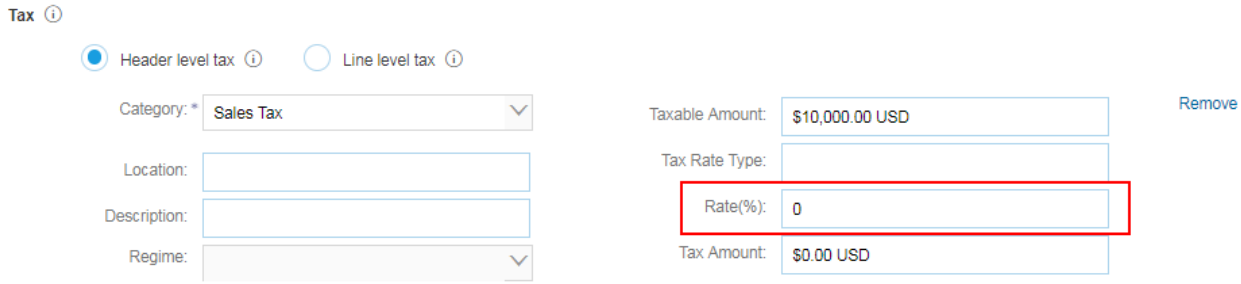


You can see Remittance address drop down in invoice now.



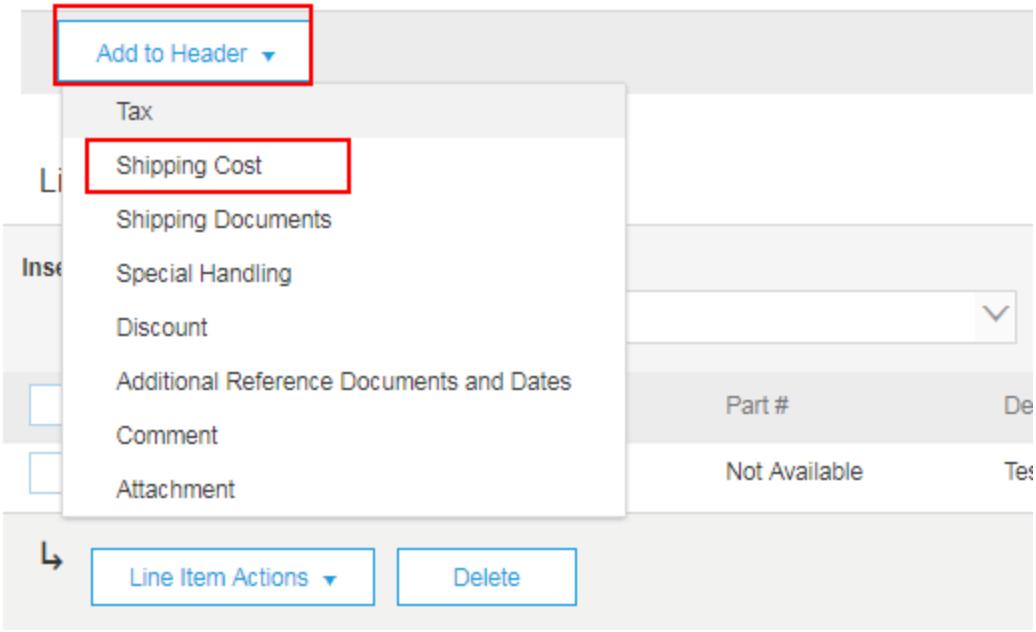
Add Tax:

Scroll down to Tax section and enter the tax percentage **OR** tax amount. (Put 0 if it is nontaxable).

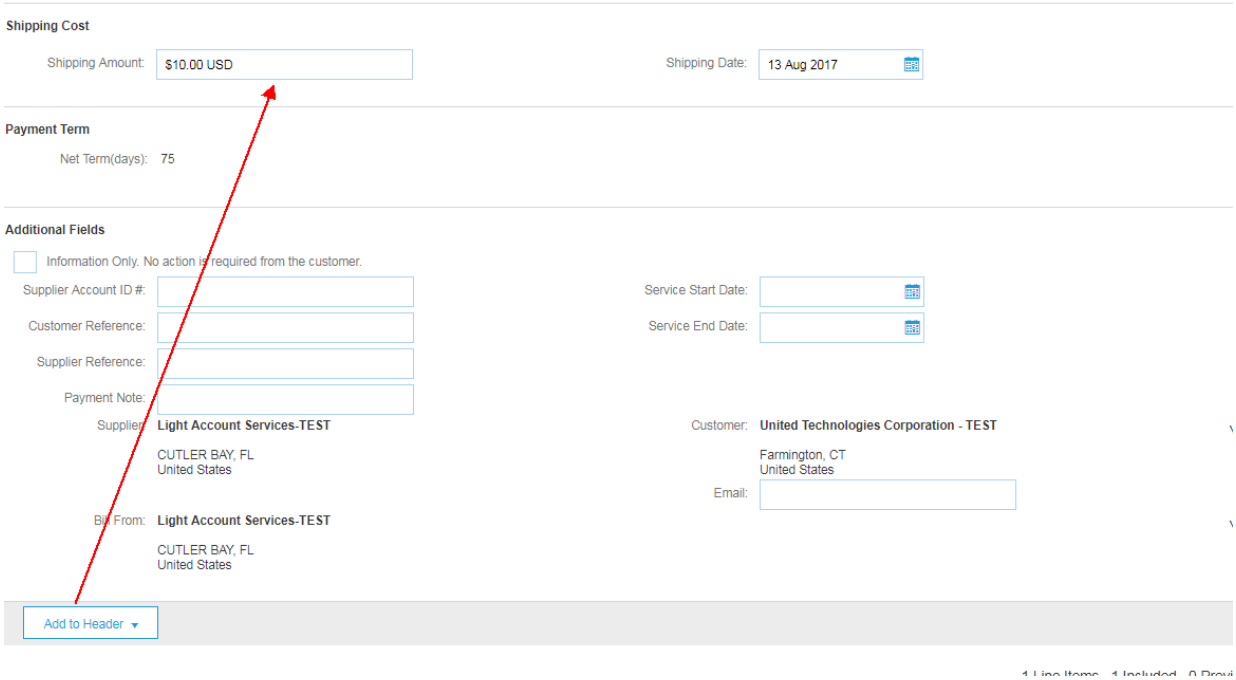


Shipping Charge (Optional):

If there is a shipping charge on your invoice, scroll down click on Add to Header button and then Click on Shipping Cost: (if there is no shipping charge on the invoice, go to line items directly.

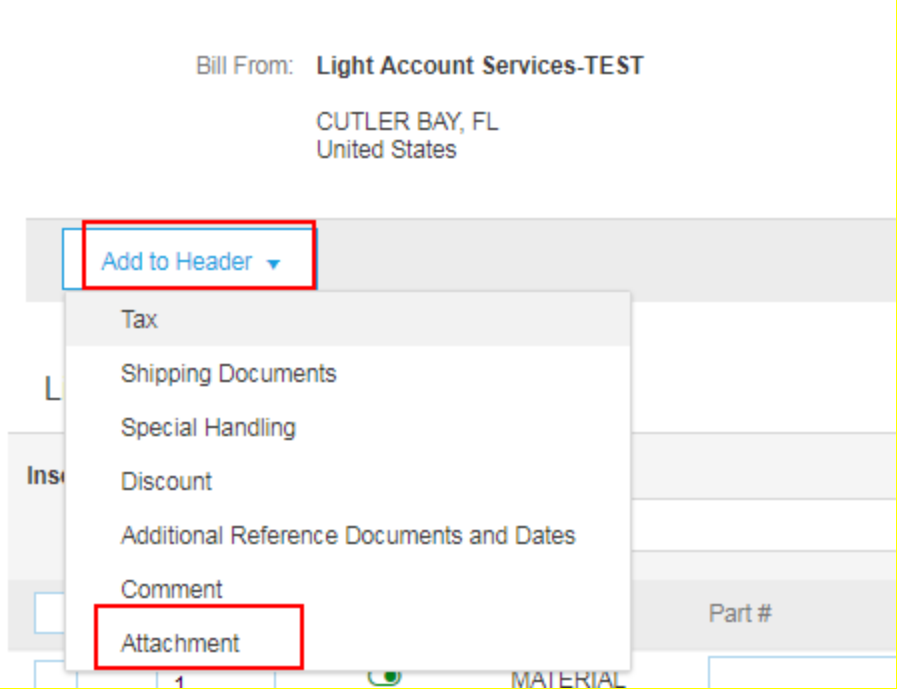


Add the shipping amount and shipping Date.

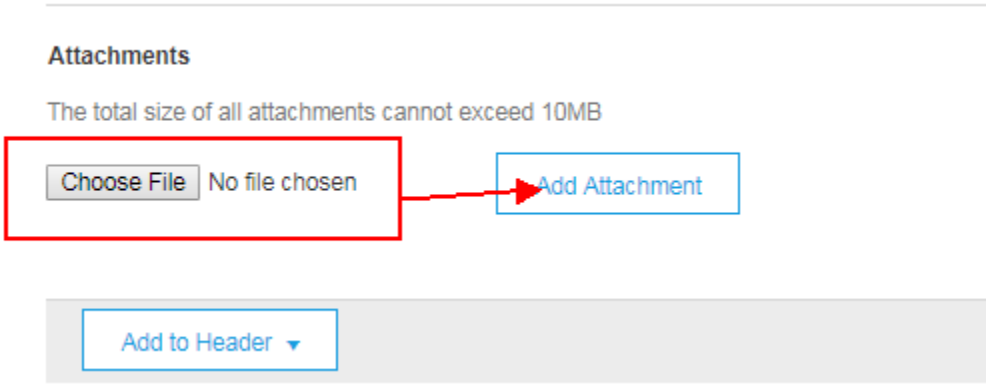


Attach the soft copy of your invoice (Optional):

Click on Add to Header Button and click on Attachment.

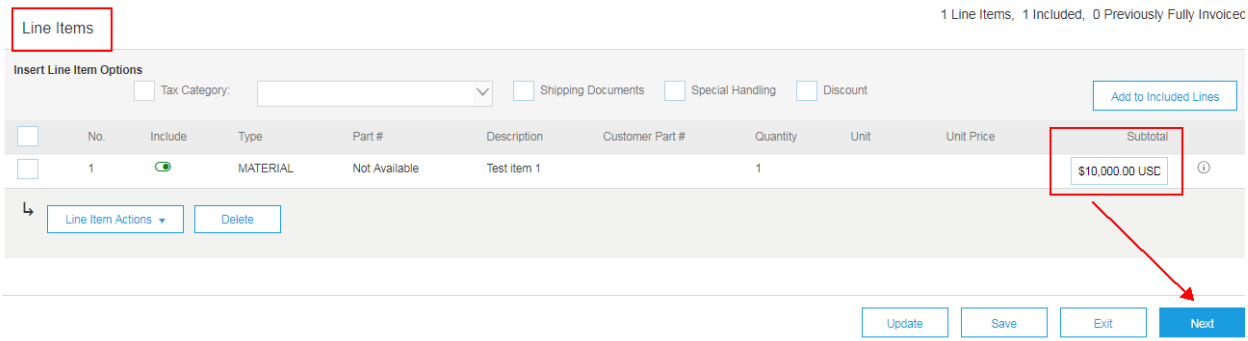


Choose the file and Click on Add Attachment.

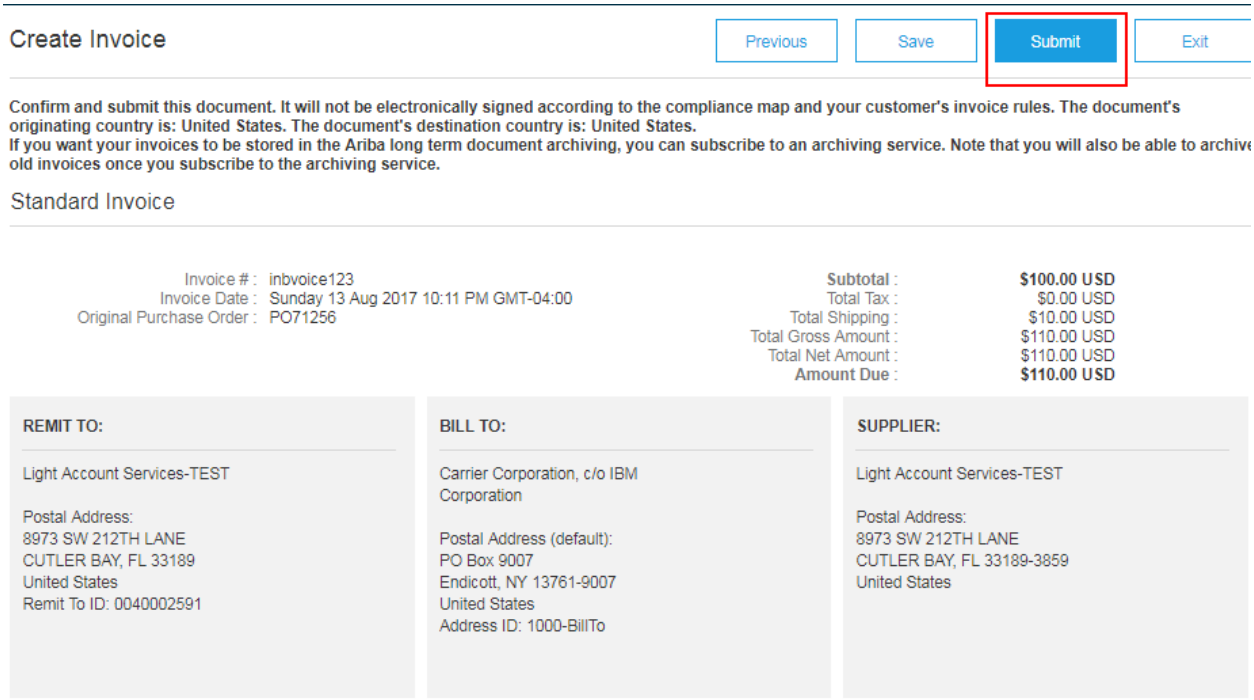


<u>Update amount on Line items (Invoice amount):</u>

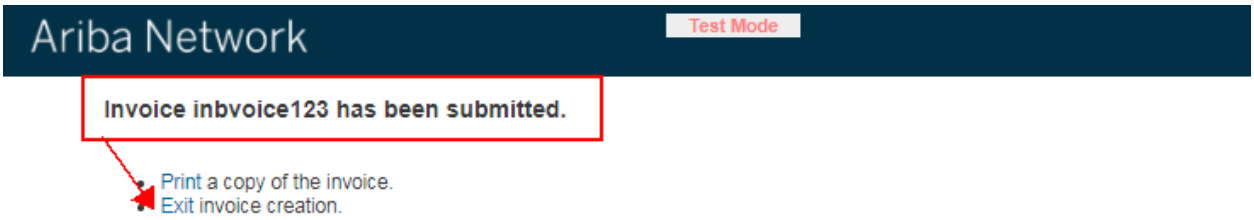
Scroll down to line items and update the amount in each line item you want to invoice. If it is a partial invoice, you can update the partial amount otherwise enter full PO amount and then click on Next. (**You can create multiple invoices on the same PO until the PO amount is fully invoiced. To submit additional partial invoices against the same PO simply return to the PO email, click Process Order button and follow the same process as above.)**



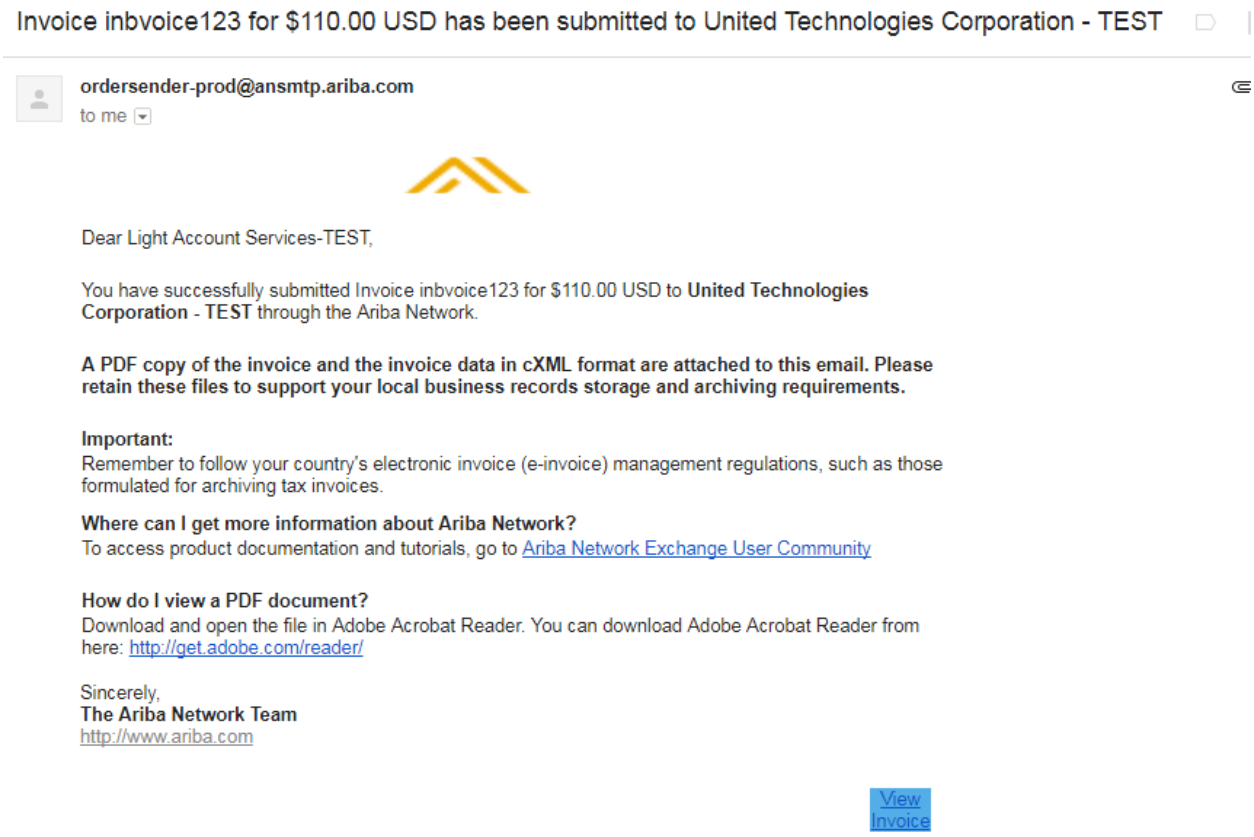
Review the information and Submit.



After invoice submission confirmation, you can click on Exit and Done.



You will get email notification with the confirmation.


Invoice inbvoice123 for $110.00 USD has been submitted to United Technologies Corporation - TEST

ordersender-prod@ansmtp.ariba.com
to me

Dear Light Account Services-TEST,

You have successfully submitted Invoice inbvoice123 for $110.00 USD to **United Technologies 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.

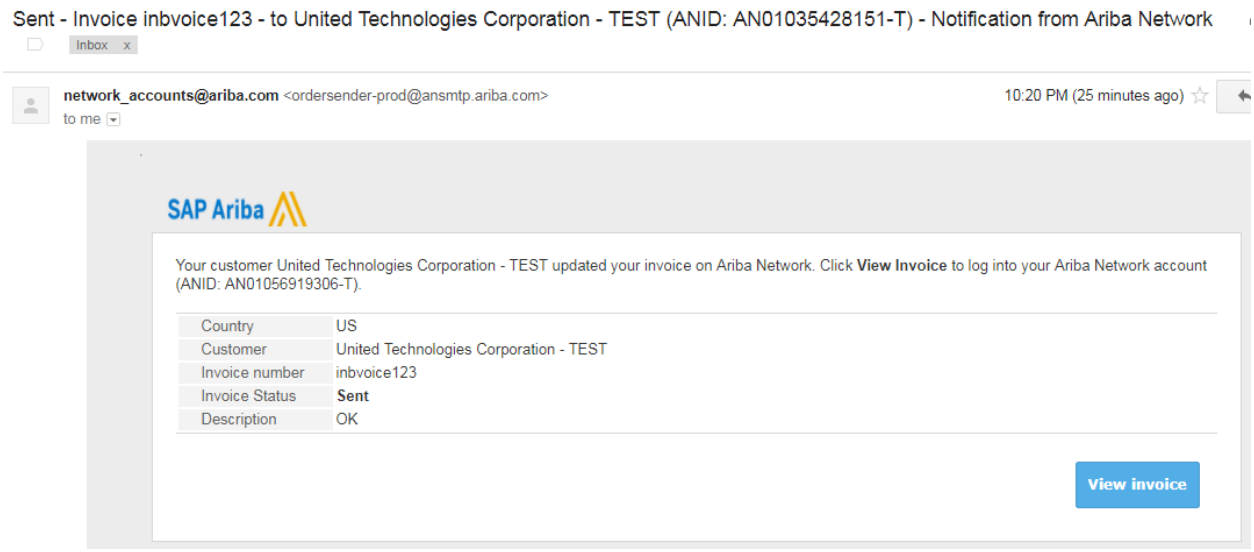
Where can I get more information about Ariba Network?
To access product documentation and tutorials, go to Ariba Network Exchange User Community

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 as below when Customer receives your invoice.



When invoice is approved for payment, you will get another email notification as below.

You will receive another email as below notification when payment is made by the customer against the submitted invoice.

Subject: Notice of new Remittance Advice
To: [redacted]

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

Ariba Network

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

Customer: UTC Climate Control and Security Systems

Supplier: [redacted]

Remittance Advice #: PMT22374

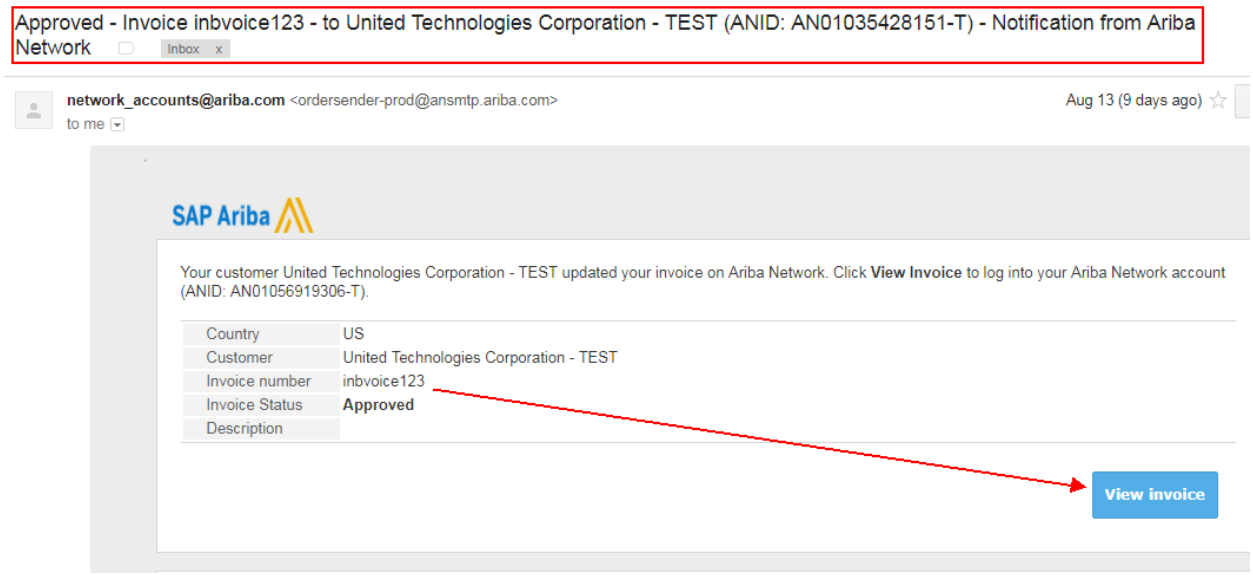
This Remittance Advice is available online to both you and the Customer.

Click the following URL to view it online.
https://service.ariba.com/Supplier.aw/ad/documentDetail?docPayload=1496401832360.786398546.000013289%40LELZ%2F4%2BdSyE36QPo06XB%2FJtS%2BUo%3D&community=5&anp=Ariba

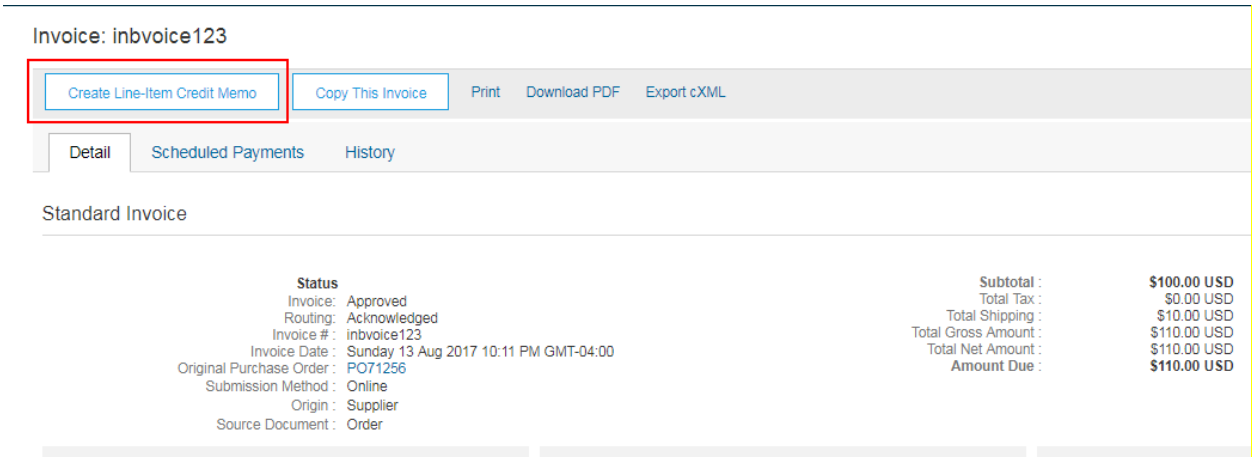
If you have any questions regarding this Remittance Advice, please contact UTC Climate Control and Security Systems directly.

How to submit the credit memo for an Invoice:

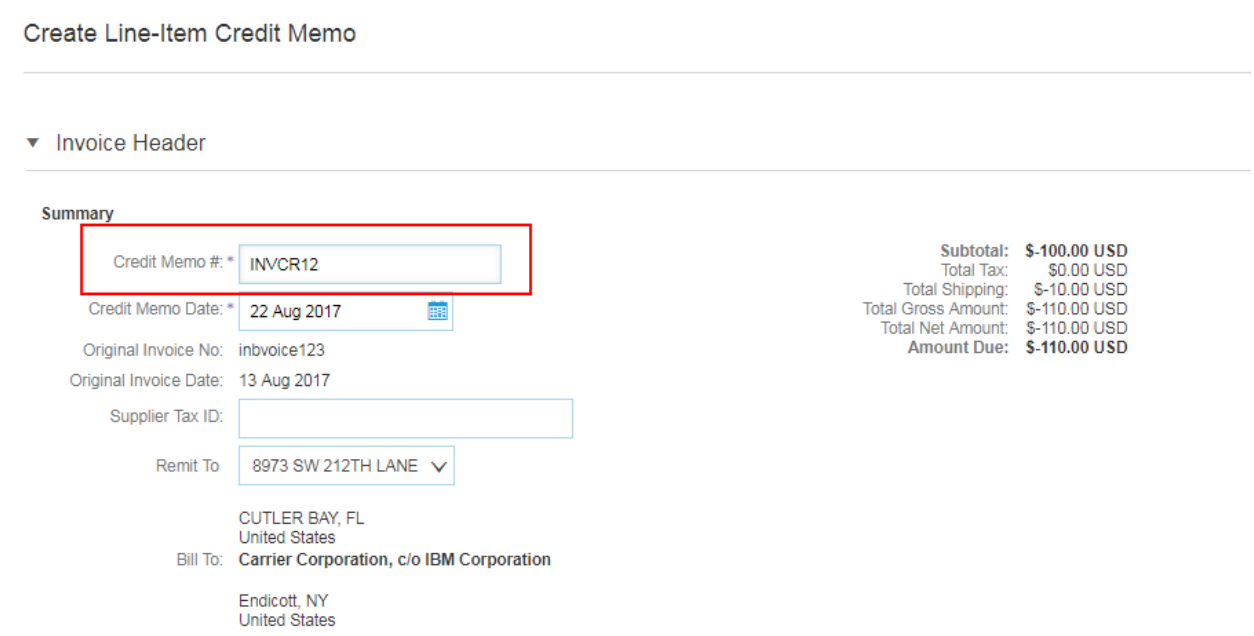
Open the Approved invoice email and click on View invoice button and Login with your credentials.



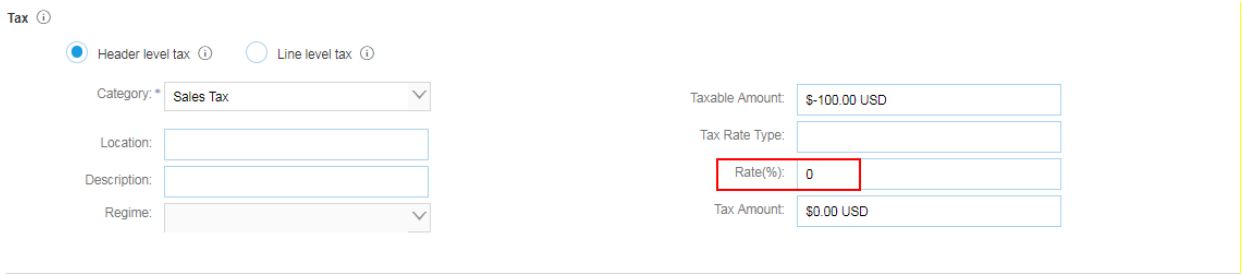
Click on Create Line Item Credit Memo.



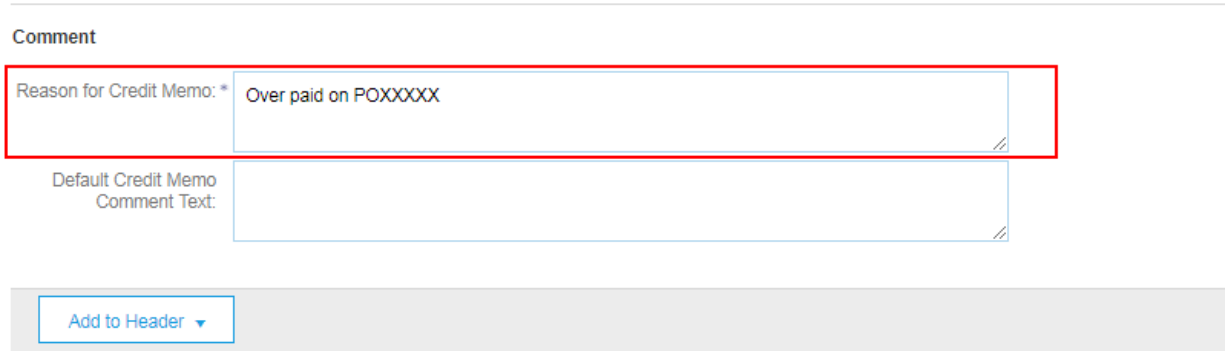
Enter the credit memo number, date and attach the credit memo copy if you have any.



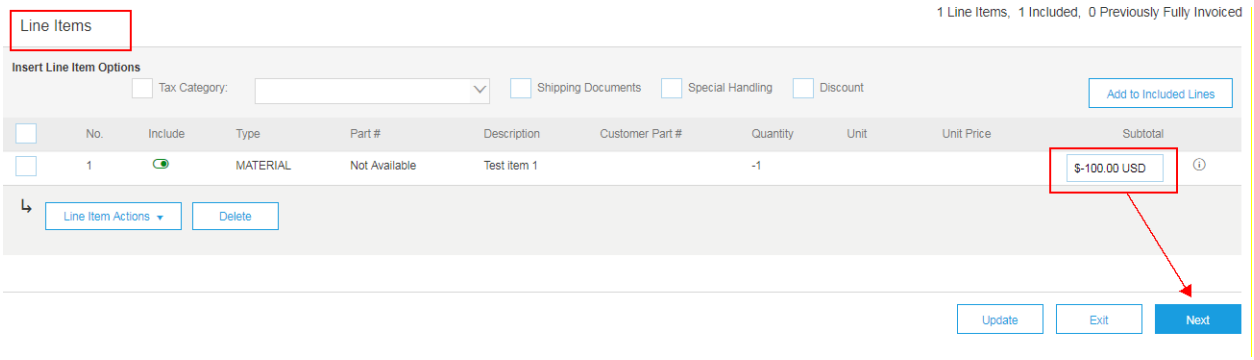
Update the tax information (Put “0” if the original invoice was nontaxable.)



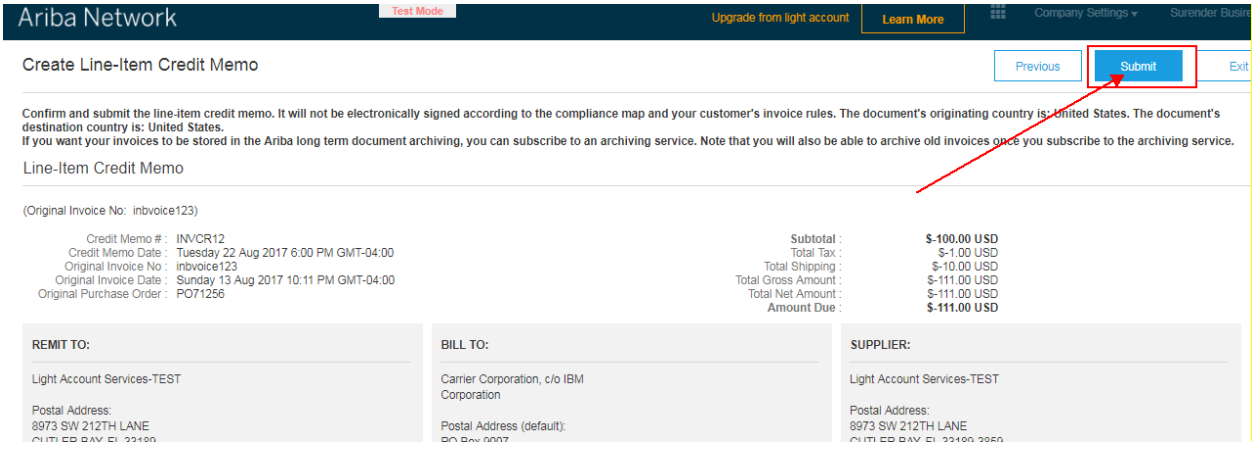
Scroll down and enter the credit memo reason.



Scroll down to the Line items, verify the credit amount (Amount must be negative) and click on Next.

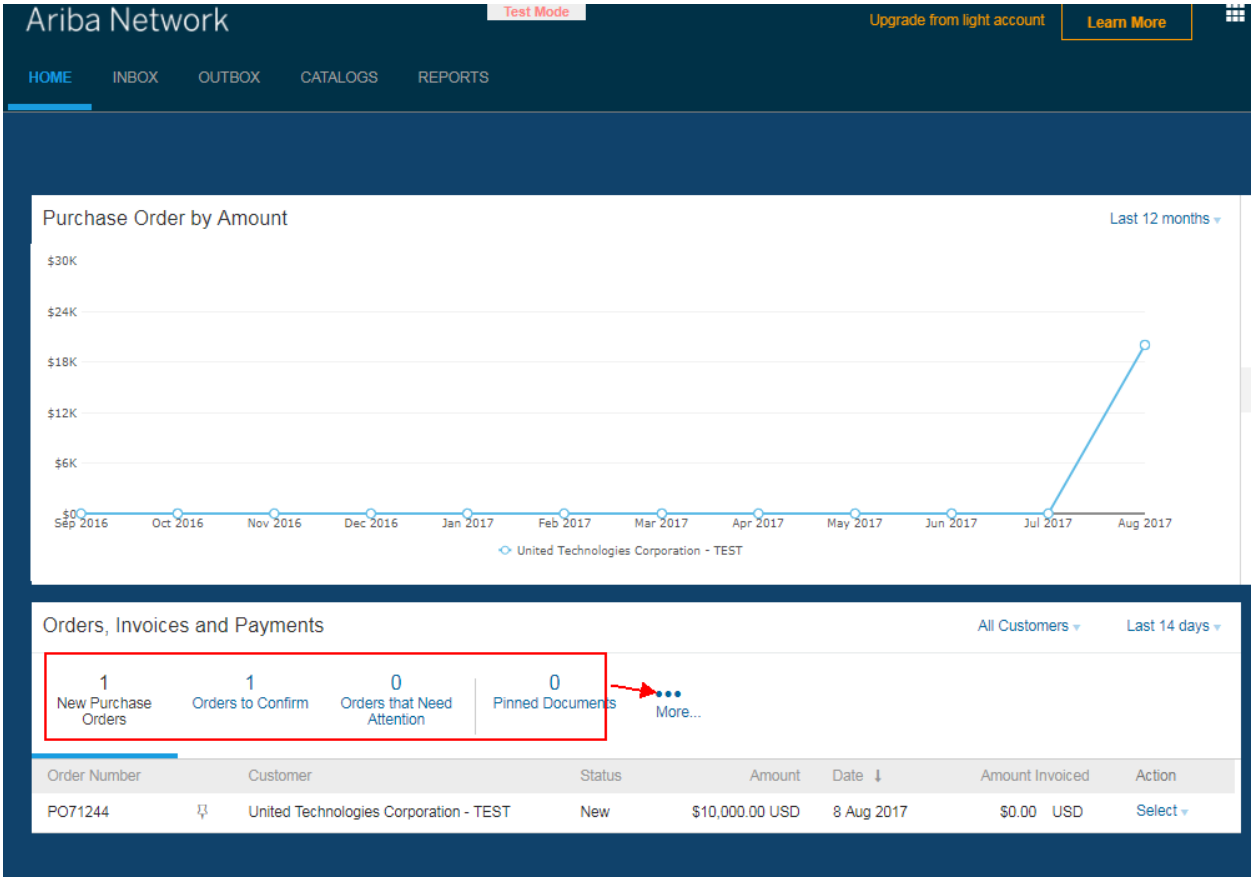


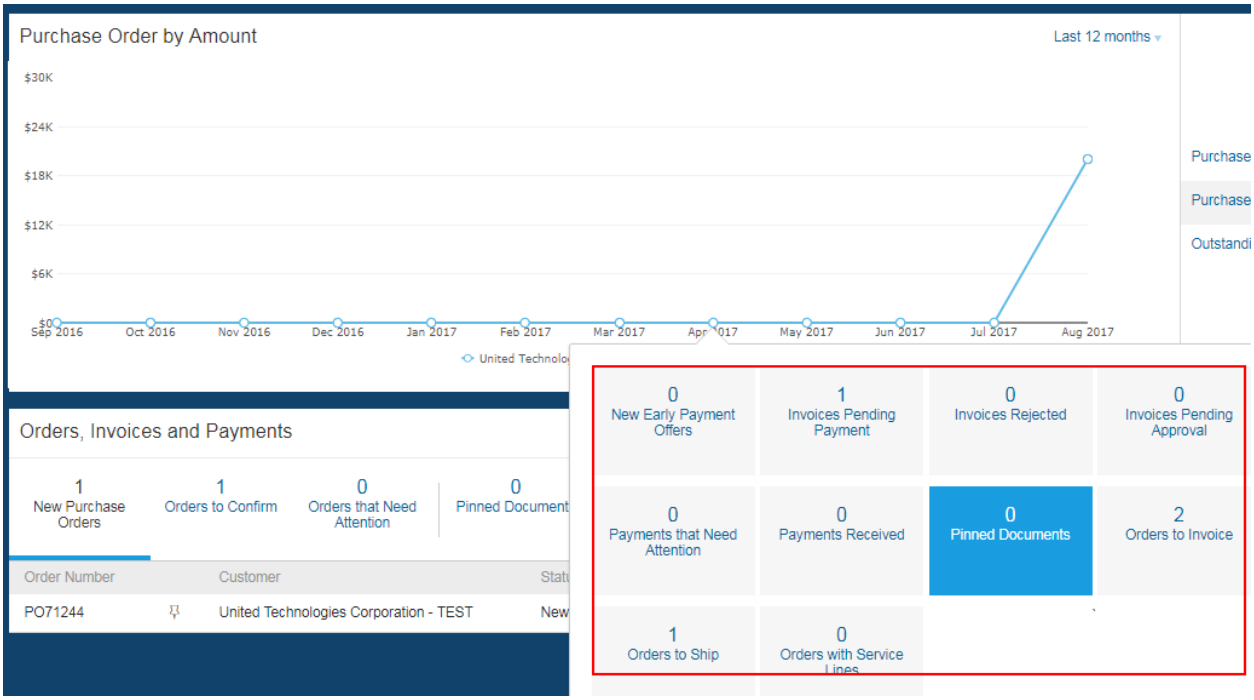
Verify the information and Submit the credit memo.



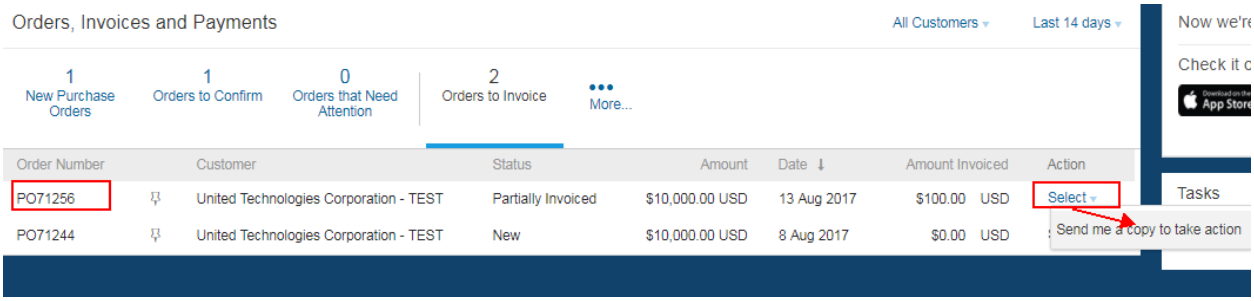
4) How to view PO's, invoices, payments in Ariba Network Light account.

Go to https://supplier.ariba.com and enter your login ID (your email address) and password. In home page you can find different tiles with the document type. Click on the tile to view the respective documents.



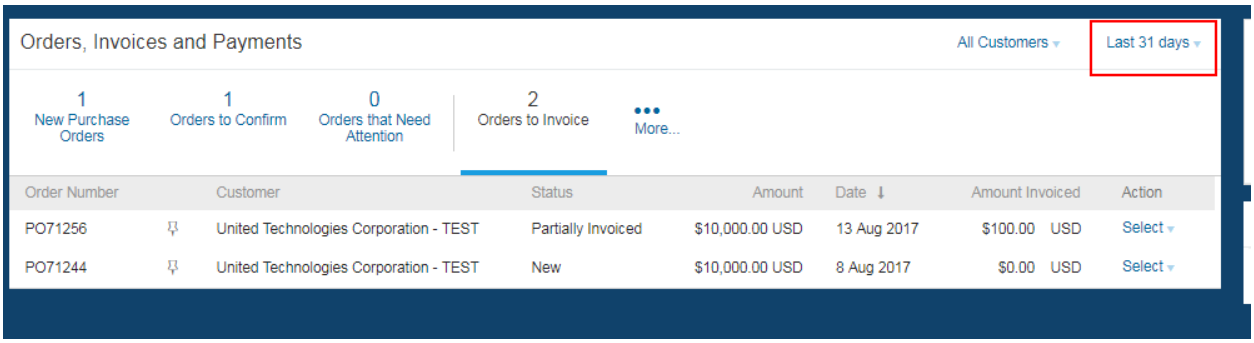


If you want to invoice on a PO, but you deleted/lost the original email, simply click on Orders to Invoice tile. On PO actions→ Click on Select and click on Send me a copy to take action.



Then you will receive an email with PO copy. Click on Process Order button there to create the invoice.

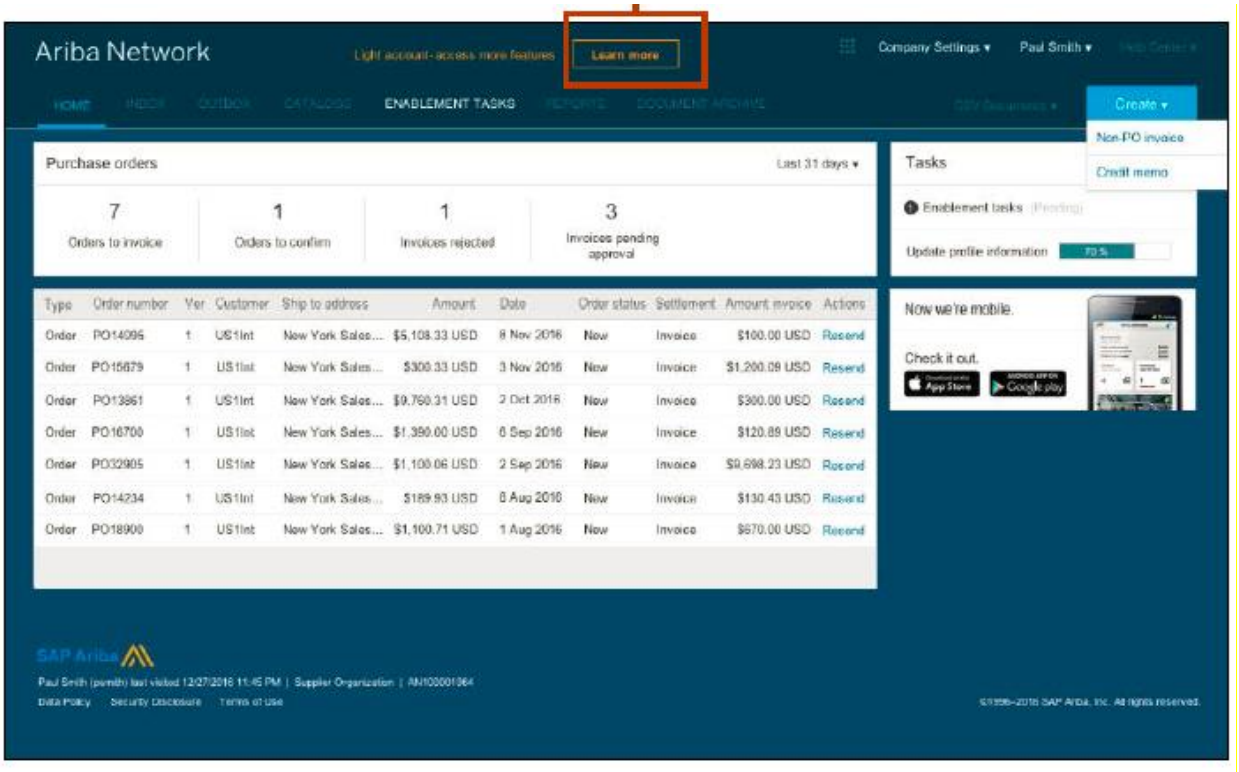
If you don't find the PO in the list, you can change the date filter and try again.



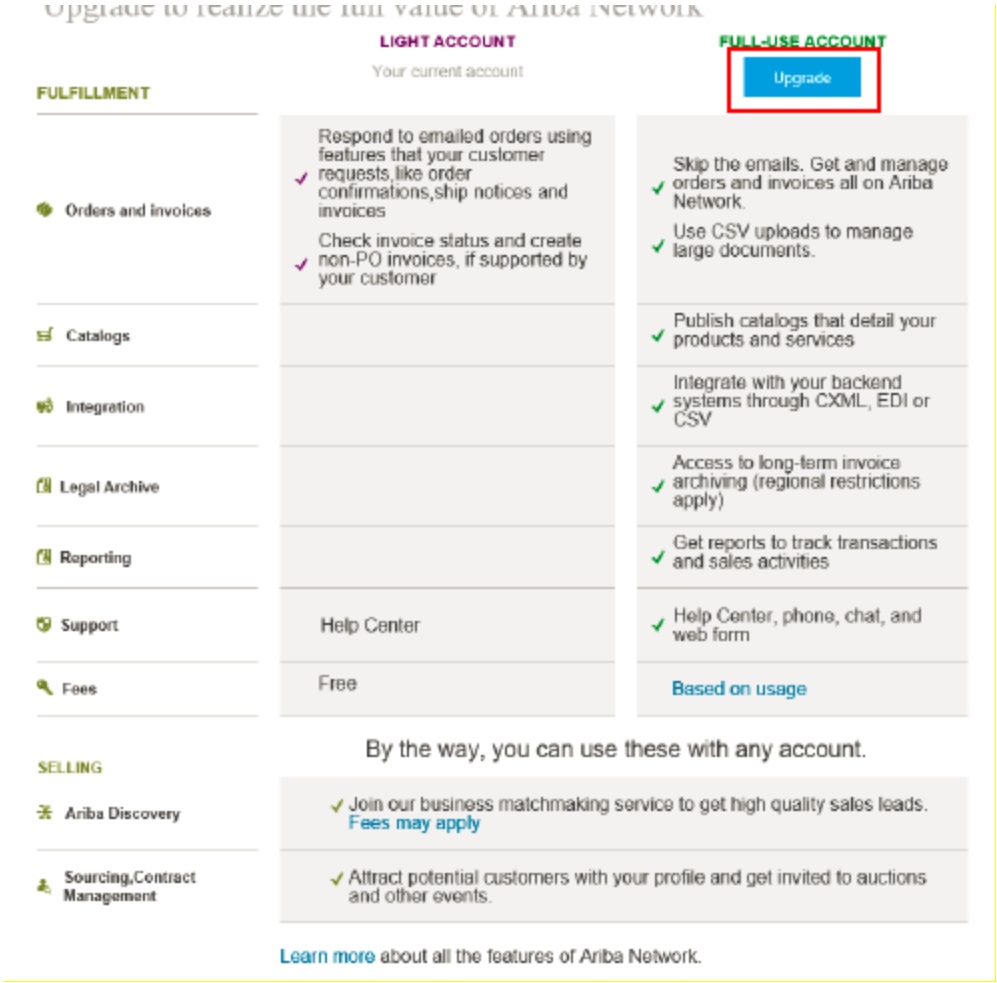
5) How to upgrade to Full Ariba Network account

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.


Upgrade to realize the full value of Ariba Network
LIGHT ACCOUNT
Your current account
FULL-USE ACCOUNT
Upgrade
FULFILLMENT
Orders and invoices
Respond to emailed orders using features that your customer requests, like order confirmations, ship notices and invoices
Check invoice status and create non-PO invoices, if supported by your customer
Skip the emails. Get and manage orders and invoices all on Ariba Network.
Use CSV uploads to manage large documents.
Catalogs
Publish catalogs that detail your products and services
Integration
Integrate with your backend systems through CXML, EDI or CSV
Legal Archive
Access to long-term invoice archiving (regional restrictions apply)
Reporting
Get reports to track transactions and sales activities
Support
Help Center
Help Center, phone, chat, and web form
Fees
Free
Based on usage
By the way, you can use these with any account.
SELLING
Ariba Discovery
Join our business matchmaking service to get high quality sales leads. Fees may apply
Sourcing, Contract Management
Attract potential customers with your profile and get invited to auctions and other events.
Learn more about all the features of Ariba Network.