SAP Ariba /\\

Feature at a Glance
PDF Invoices

Ajain Kuzhimattathil, SAP Ariba
Target GA: September 2018

SAP **Run Simple**

Feature at a Glance
Introducing: **PDF Invoices**

Customer challenge

The current methods of submitting buyer invoices to Ariba Network is either complex or not scalable enough. Customers are spending resources on converting PDF invoices using OCR or similar technologies and often times these invoices does not pass the buyer rules in addition to incremental cost involved with subscribing to conversion services

Meet that challenge with
SAP Ariba

SAP Ariba is introducing an additional channel for suppliers to submit invoices. Take advantage of this feature if your organization is creating and submitting digital/text searchable invoices. Digital PDF invoices can be uploaded or e-mailed to Ariba Network. Ariba Network will in turn convert them to cXml invoices and scrub them through the network invoicing buyer rules.

Experience key benefits

Easy integration with very little change management. This offering can get you 100% conversion to Ariba Invoicing standards. Customers do not have to wait for Supplier to integrate with network to reap full benefits of the Ariba Commerce Network. Network invoice rules ensure clean invoices to be submitted to buyer. The solution is compliant with invoice archiving requirements.

PDF invoices feature is free to use for Buyer and Supplier. There is no additional cost for Buyers and Suppliers to use this feature. Full and Light supplier accounts can use PDF Invoices

Solution area

SAP Ariba Buying and Invoicing
SAP Ariba Invoice Management
Ariba Network

Implementation information

This feature is "off" by default. To enable this feature, please submit a Service Request to have this feature turned on for you. All suppliers in the applicable regions will get access to the feature once buyer is activated
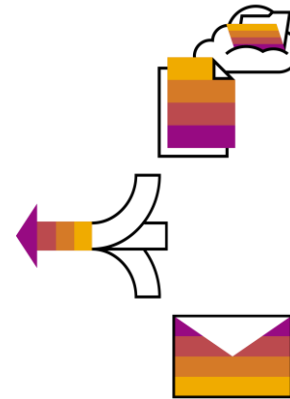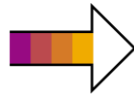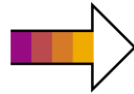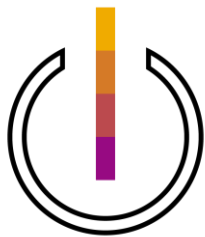
Prerequisites and Limitations

Solution is currently live on four languages, German, English, Dutch and French. Suppliers from the following countries can use this feature – Germany, France, United States, United Kingdom, Sweden, Belgium, Netherlands, Italy and Switzerland

Feature at a Glance
Introducing: **PDF Invoices**

High Level Process

- Buyer Enables PDF Invoice
- Suppliers uploads 5–10 example invoices which is a representative sample of Supplier Organization's invoices into Ariba Network

- Provider completes supplier invoice mapping
- Supplier sets processing preferences on Ariba Network

- Upload invoice use Ariba Network OR
- Send invoices via e-mail

Set up and Testing

Enabling PDF Invoice feature

- ❑ Enablement is initiated by Supplier; time required 10 mins
- ❑ Set-up should be done from Supplier's PROD account, which enables use of PDF Invoice for TEST and PROD account "Electronic Invoice Routing Settings" → "PDF Uploader" tab (4 step process)
- ❑ Specify the user e-mail who would like to be notified of enablement status
- ❑ Upload a representative sample of Invoices (5-10) for creating conversion templates. Template creation and activation takes a maximum of 48 hours
- ❑ Finalize processing settings after enablement is complete (step 4)

Testing PDF Invoice feature

1. Set-up processing settings for PDF Invoices under Electronic Invoice Routing/ PDF Invoices in test account
2. Request a test PO from your customer (optional step)
3. E-mail Invoices to Ariba Network adding buyer's ANID in subject line of the e-mail OR upload PDF invoices from supplier portal
4. Review conversion results and make adjustments if necessary
5. Confirm successful receipt of Invoice

Using PDF Invoices in Production

Web Upload of PDF Invoice

1. Choose "Upload PDF Invoice" from "CSV/PDF Documents" menu on Supplier Account home page
2. Choose <customer> as Customer
3. Upload Invoices
4. Go to OUTBOX → Converted Documents
5. When status is "Converted" go to OUTBOX → Drafts tab to select and review the converted invoice. You can edit data while in drafts tab (4 hour maximum time to convert PDFs)
6. Finish review and submit the Invoice. Invoice will move to "Invoices" tab

E-mail PDF Invoices

1. Ensure that the e-mail address from which invoices are sent is updated in step 4 of the enablement process
2. Add pdfinvoice-prod@ansmtp.ariba.com as the to e-mail address
3. Specify <customer>'s ANID in the subject line (ANXXXXXXXXXXX)
4. Send the e-mail. Repeat steps 4 through 6 to submit Invoice

Please note: Once you are comfortable with the process and no longer needs review, uncheck the option to send converted invoices to drafts folder. Successfully converted invoices will be submitted directly to <customer>

Onboarding with PDF Invoices

How to know if I have gained access to *PDF Invoices*?

Connect to your **Production account.**

If you have access to the *PDF Invoices* solution, you will see on your home screen
« **CSV/PDF Documents** »

How to onboard with *PDF Invoices*?

Onboarding happens **once** **from your Production account**. You cannot onboard from your test account.

To onboard, follow the steps:

1. Connect to your Production account.

2. From your Home screen, click on « CSV/PDF Documents », then « Upload PDF Invoice »

3. You will be redirected to the onboarding screens*

* Caution! If your onboarding has already been successfully completed, this action will take you to a screen where you can upload PDF invoices to Production. Make sure you have tested before.
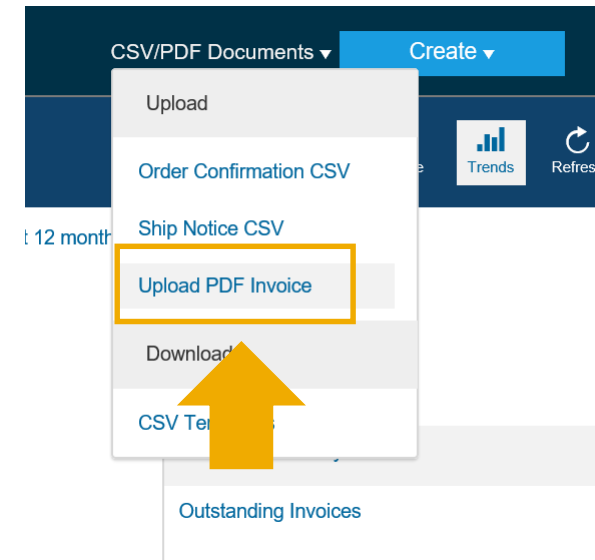
Onboarding – step 1

Step 1: Read through the process flows and understand *PDF Invoices* solution.

A. Click on the boxes for more detailed information.

B. Check the « Enable PDF Invoices » box and confirm.

C. Hit « Next ».

Onboarding – step 2

Step 2: Set-up onboarding status change notification.

Here you define the e-mail address to which a notification will be sent after the onboarding has been done.

The notification will either advise that the onboarding was successful or that there was a problem. If there was a problem, you will have 2 more onboarding attempts.

A. Check the box

B. Define e-mail

C. Hit « Next ».

Onboarding – step 3

Step 3: Upload 5 to 10 examples of PDF invoices representative of your invoicing practice with the customer.

A. Prepare example PDF invoices. Hit « Browse » and select the files from your computer. Hit « Add files »

B. Hit « Submit »
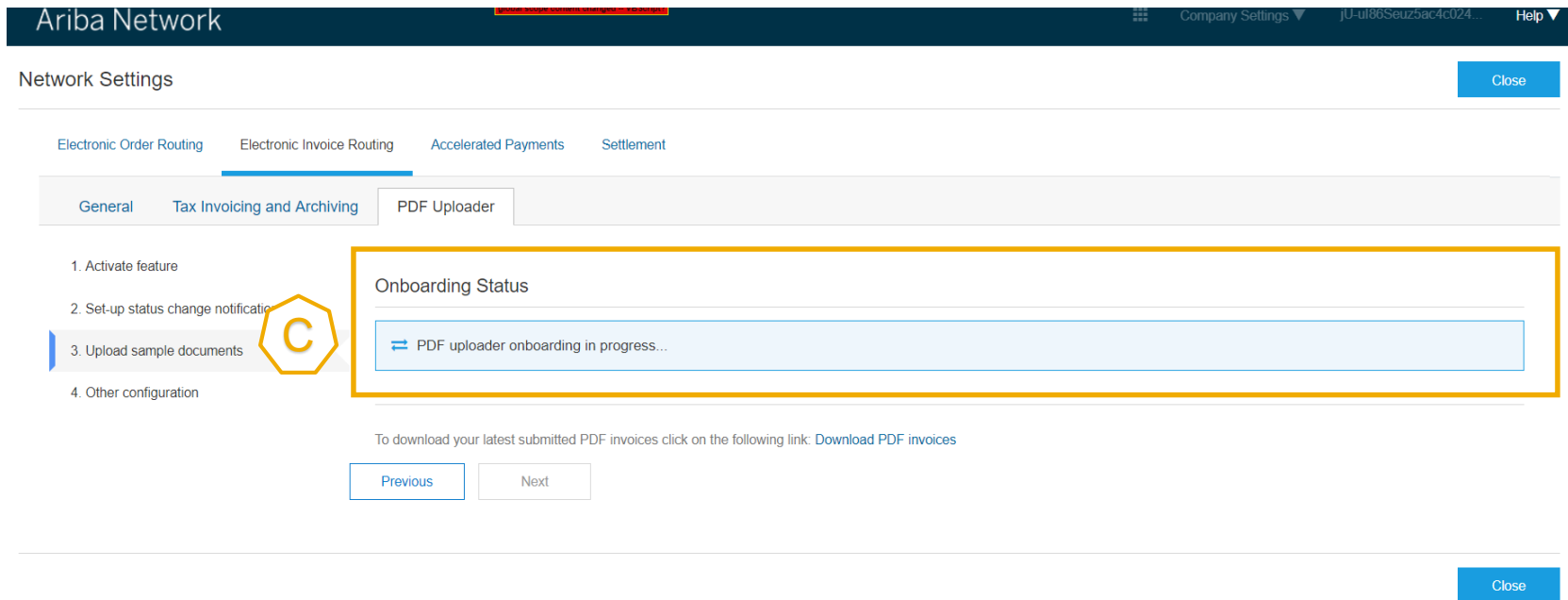
Onboarding – step 3

Step 3:

C. Once you have sent the example PDF invoices, the system displays « **Onboarding in progress** ».

In 48 hours, you will receive the onboarding status change notification.

Onboarding – step 3

Step 3: If you see the following messsage on step 3 in your Production account, it means that you have successfully onboarded. You can now run tests with your test account.

D. Hit « Next » to finalize the settings of your Production account.

Onboarding – step 4

Step 4: Finalize settings of the Production account.

A. Request a draft invoice to be created out of your PDF before submission to review the extraction results (recommended).

B. Enter the e-mail address of your organization if you want to send PDF invoices via e-mail to Ariba Network.

C. Activate the 2 notifications and put the e-mail address to which they must be sent.

  • For Light Account, these notifications will always be sent, using the user's main account e-mail address if they are not set-up here.

D. Hit « Save ».

Testing PDF Invoices

Can I run tests with my test account?

Switch to your **Test account**.

Can I run tests with my test account?

In your **Test account,** if you have successfully onboarded following the process in the previous section, you will see on your home screen « **CSV/PDF Documents** ».

It means you can test *PDF Invoices*.

How do I start testing?

Make sure you complete the PDF Invoices settings in your **Test account.**

A. Go to « *Electronic Invoice routing* »

B. Click on « *PDF Invoices* ».
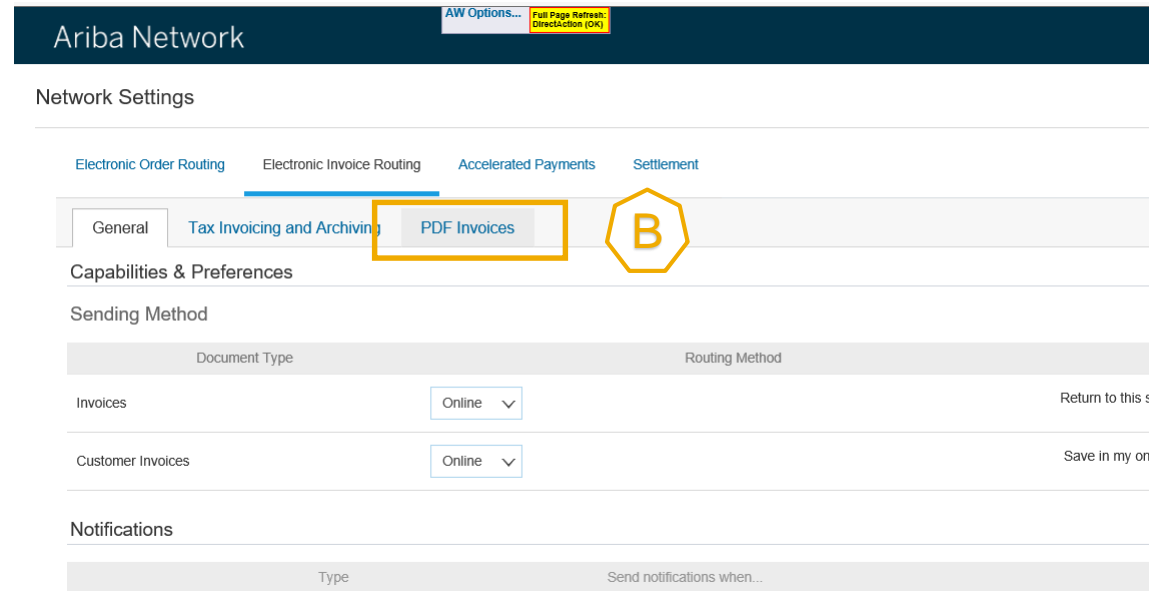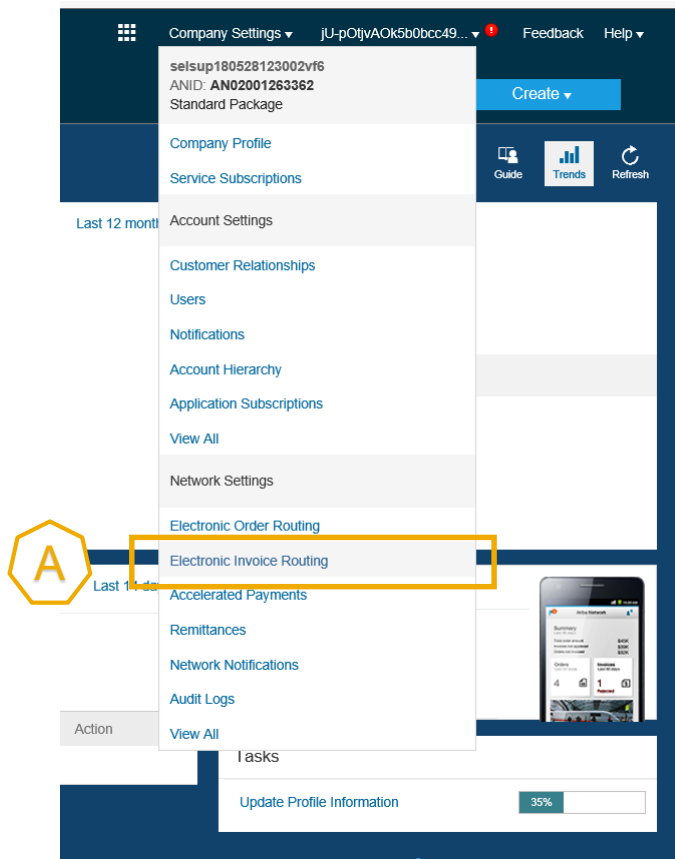
How do I start testing?

You will only be able to see **step 4** there. Do the same set-up as on slide 16:

A. Request a draft invoice to be created out of your PDF before submission to review the extraction results (recommended).

B. Enter the e-mail address of your organization if you want to send PDF invoices via e-mail to Ariba Network..

C. Activate the 2 notifications and put the e-mail address to which they must be sent.

D. Hit « Save » and close the page.

How to send a PDF invoice in test?

In your **Test account,** click on « **CSV/PDF Documents** », then hit « **Upload PDF Invoice** ».

How to send a PDF invoice in test?

A. Select the customer you want to invoice.

B. Select the PDF invoice you want to send from your computer. Hit « Browse » and choose the file.

C. Upload the file.

D. After the file is uploaded, click on the link suggesting to redirect you to the page « PDF Converisons ». This is where you can track the status of your document.

How to track the status of my PDF invoice?

In your **Test account,** go to « **OUTBOX** », then hit « **PDF Conversions** ».

Once your invoice has been converted, go to « OUTBOX » > > « Drafts » or click on the « Reference » corresponding to your invoice on the « PDF Conversions » screen above. Review the extraction results, make any corrections if needed and submit the invoice.

Sending PDF Invoice via email

Supplier registers From e-mail address online

Enter here your orginitaing e-mail address that Ariba Network will consider as authorized to send PDF invoices on behalf of your *Supplier account.*

Supplier sends a PDF invoice via e-mail
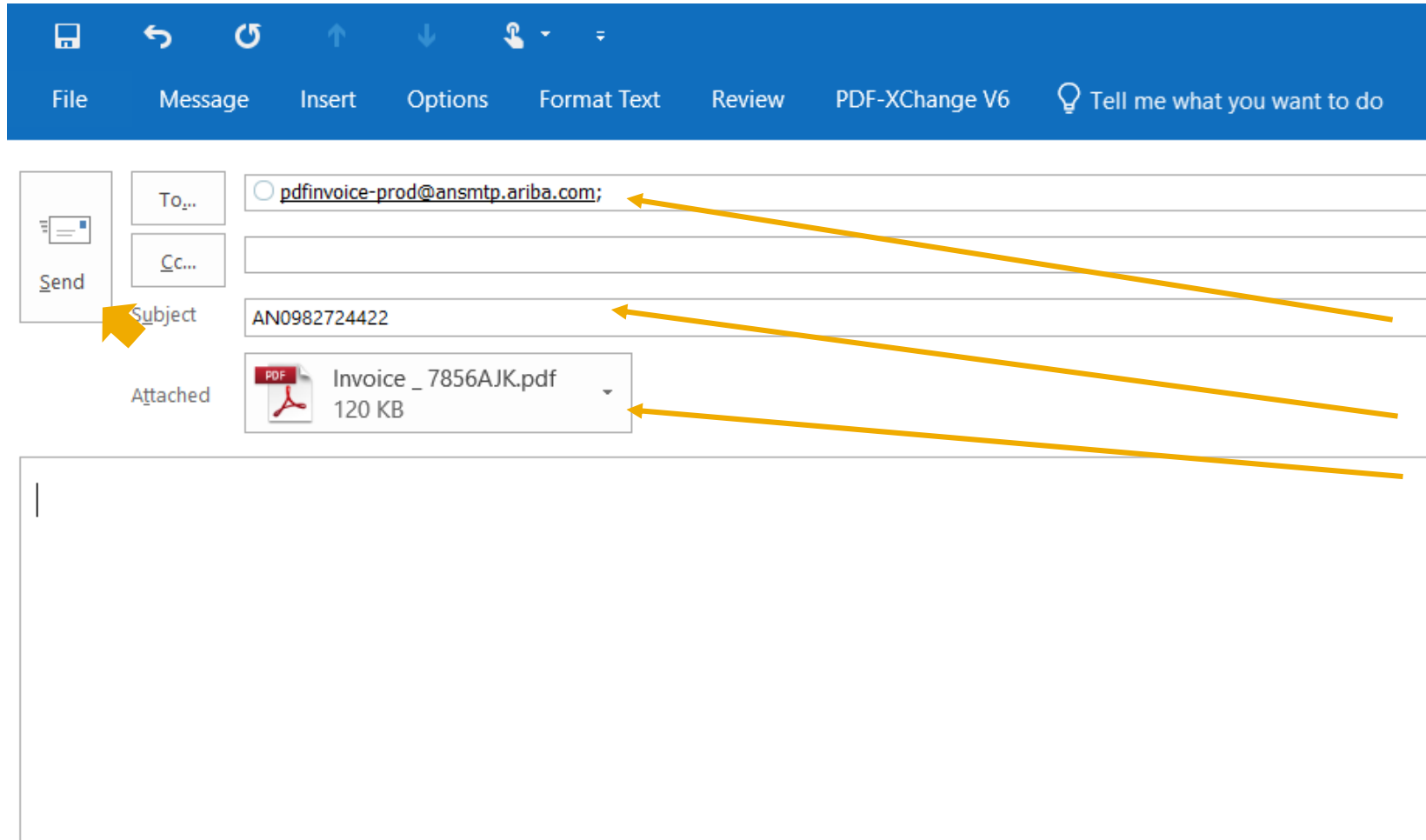
Ariba Network Production e-mail address

Valid buyer ANID

Single PDF invoice as an attachment

Notifications

Suppliers only receive a notification if there was a problem with processing the PDF.

If the processing of the PDF document happened successfully, suppliers receive:

- A notification for draft creation (if set-up) or

- A notification that the invoice was successfully submitted (if set-up).

Using PDF Invoices from Light Account

Receiving an Interactive E-mail order

This button is available on the Interactive E-mail order only if the supplier has successfully onboarded with PDF Invoices.

PDF Invoices Light Account

PDF Invoices Light Account

PDF Invoices Light Account

There is no data to show on charts.

Purchase Order by Volume

Purchase Order by Amount

Outstanding Invoices

2 Documents Pending Conversion	1 Draft PDFs for Review	0 New Early Payment Offers	0 Invoices Pending Payment
0 Invoices Pending Approval	0 New Purchase Orders	0 Payments that Need Attention	0 Payments Received
0 Pinned Documents	0 Orders to Confirm	0 Orders to Ship	0 Orders with Service Lines

⚙ Manage Default Tiles

Orders, Invoices and Payments

0 Orders to Invoice	0 Orders that Need Attention	0 Invoices Rejected	2 Documents Pending Conversion

Order Number	Customer	Status	Amount

You do not have any Orders and

PDF Invoices Light Account

The linked image cannot be displayed. The file may have been moved, renamed, or deleted. Verify that the link points to the correct file and location.

Dear selsup180711105150hsl,

Your PDF document was successfully converted and a draft invoice was created on Ariba Network for your review.

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

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

Edit Draft

PDF Invoices Light Account

PDF Invoices Light Account

PDF Invoices Light Account

PDF Invoices Light Account

FAQ

FAQ

1	What should I test?	Test all scenarios such as PO and non-PO invoices. Have your customer sent you a test PO for testing purposes. If you test credit notes, they must refer to a previous invoice sent to Ariba.
2	What happens if my invoice template change?	If our invoice template changes, you can contact Ariba support and initiate a request to adjust for template changes
3	Does converted invoices have special rules?	No. All buyer network rules will be applied on invoices generated from PDF
4	Does this support any other document type?	No. Only invoices are supported in this service
5	Is there a fee to use PDF Invoices	No. PDF Invoice feature is free for buyers and suppliers
6	Can buyer/customer modify converted PDF invoice	No. Only suppliers can edit and modify converted invoices
7	Do I need to enroll from test account and production account?	No. Enablement is required only from production account. Once enabled, switch to test account for validation prior to submitting production invoices