How to: Submit an Online Invoice

SAP Ariba Network

Purpose

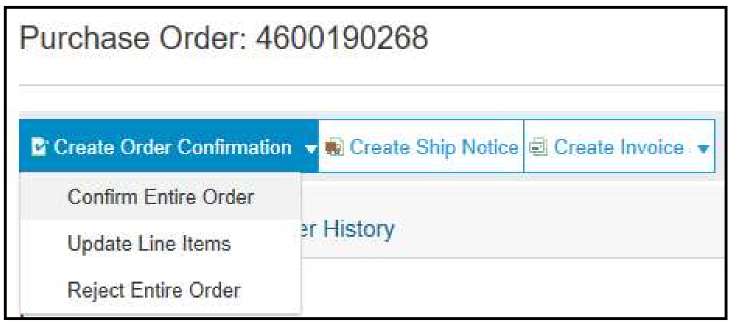
The purpose of this guide is to provide a simple, 3 step process to support NiSource suppliers with submitting their own invoices over the SAP Ariba Network. Standard account suppliers can locate their PO's within their email inbox and Enterprise suppliers can find their PO's on their online dashboard at supplier.ariba.com. After locating your PO, the invoicing process is the same for both Ariba account tiers.

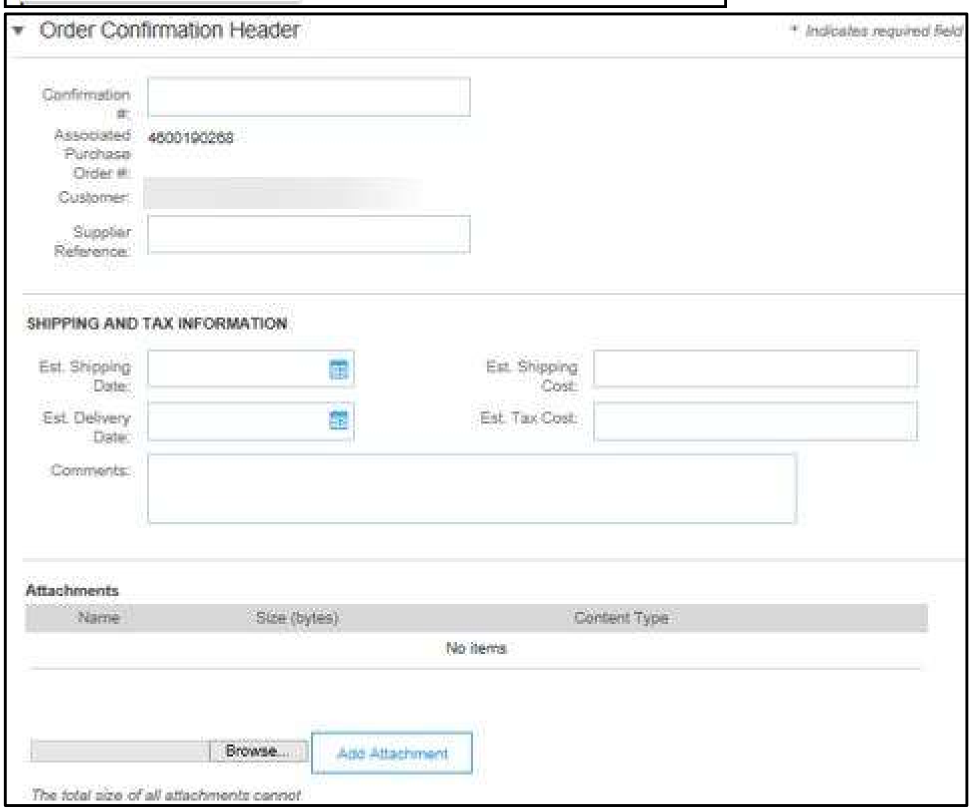
Step 1: Create an Order Confirmation (OC)

Order confirmations (OCs) are required for all NiSource PO's.

To create an Order Confirmation from the PO:

1. Locate the PO in your e-mail Inbox.
2. Click on **Process Order**.
3. Click on **Create Order Confirmation** and **Confirm Entire Order**.
4. Fill in the **Confirmation #** and **Shipping and Tax Information** if applicable.
5. To add an attachment, click **Browse**, **Open** the desired attachment, and click **Add Attachment**.
6. Click on **Next.**
7. Review details and **Submit**.





Step 2: Create a standard PO Invoice

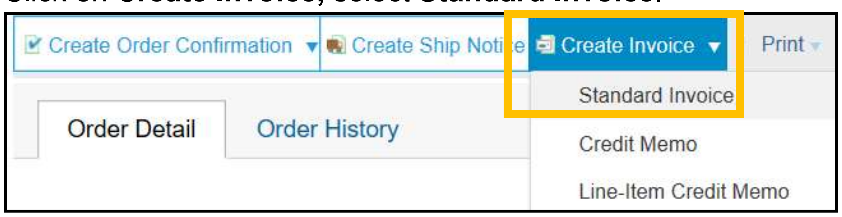
Once you have received your first PO from NiSource and you have registered your Ariba Network account, and have created an Order Confirmation, you can then create a PO invoice. Please see the next few pages for detailed invoicing steps and screen shots from the Ariba Network.

<u>Note</u>:

- Each Invoice # must be unique unless resubmitting a rejected or failed invoice.
- **Supplier Commercial Identifier** is the registration number of the supplier company as entered in the commercial register on the invoice (may not be applicable).
- **Do NOT check the box next to "Information Only".** No action is required from the customer." *This will keep your invoice from being paid!*

To create an invoice from the PO:

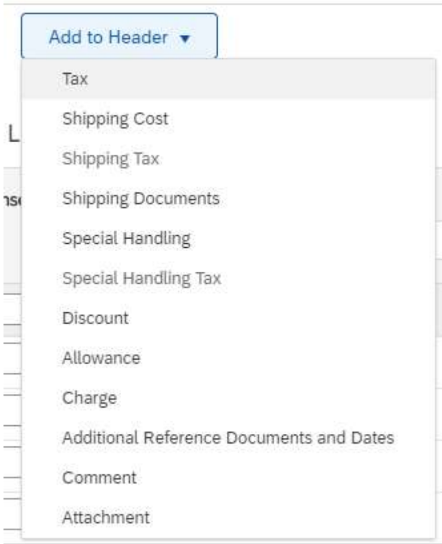
1. Locate the PO in your e-mail Inbox (Standard Account Only).
2. Click on **Process Order** (Standard Account Only).
3. Enterprise Account users can use the **Purchase Orders** tile from the home page.
4. Click on **Create Invoice,** select **Standard Invoice**.



Header Actions:

1. Fill out **Invoice Header** including **Invoice #** and **Invoice Date**
   <u>Note:</u> The invoice number must be the same as what is attached. The date will default to the current date. This **<u>MUST</u>** be updated to the actual date of the invoice. If this is not updated, your invoice could be rejected.
2. Enter **Tax** at the Header or Line level, if applicable. Select the **Remove** hyperlink, to remove tax from the invoice. NiSource accepts tax at the header or line level.
3. Select the **Category** and confirm **Taxable Amount**.
4. Enter either **Tax Amount** or **Rate (%)**.
5. Select **Shipping** at the Header or Line level, if applicable. NiSource accepts shipping at the header or line level.
6. Fill in applicable **Additional Fields** such as **Supplier Account ID #, Customer Reference, Supplier Reference, Payment Note**.

7. To add **Tax, Shipping Costs, Discounts, Charges, Comments** or **Attachments** to the header, click the **Add to Header** menu.

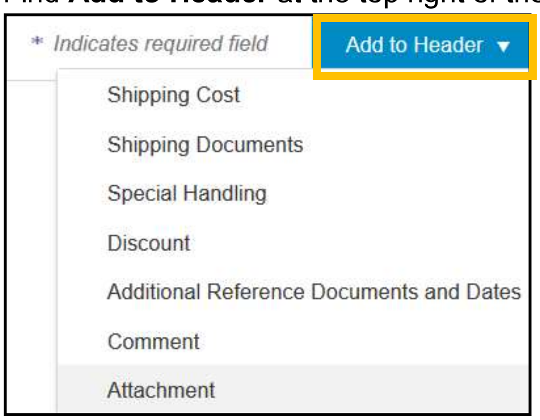


Header Actions: Add an Attachment

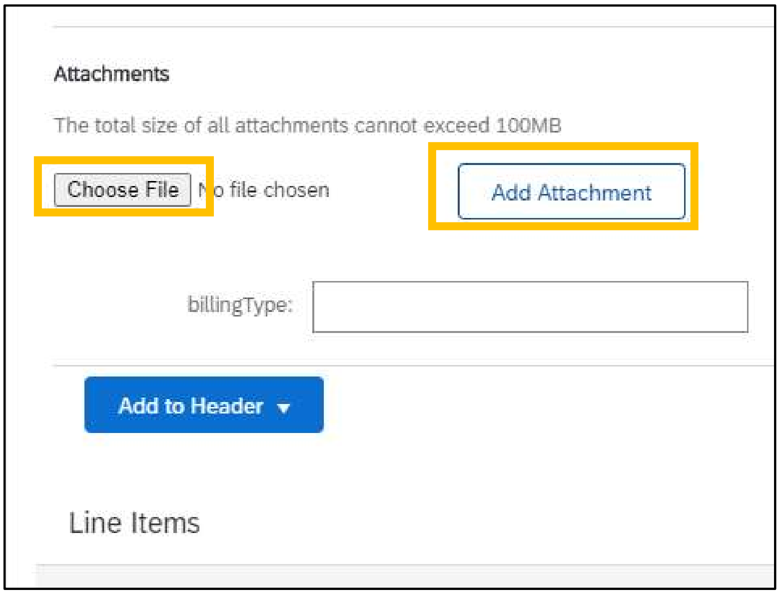
Attachments are mandatory and can be added to the Header or to the Line. It is preferred that all attachments are done at the **Header.** The total maximum attachment size is 100 MB per invoice.

To add an attachment at the Header:

1. Find **Add to Header** at the top right of the invoice creation screen.



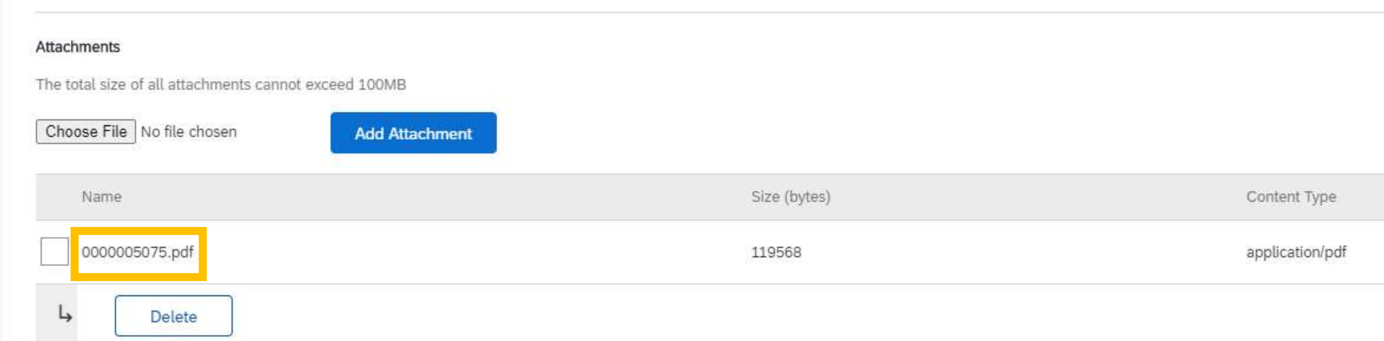
2. Scroll down to locate the added **Attachments** section above the Line Items section.
3. Click on **Choose File.** A new window will pop-up for you to select your file.



4. Locate and select your file. Click on **Open**.
5. Once your file is opened, you must click on **Add Attachment** to add the file to the invoice.

Note: If you do not click on **Add Attachment**, your file will not be attached to the invoice. Please make sure that your attached file appears in a separate line under the Attachments section.

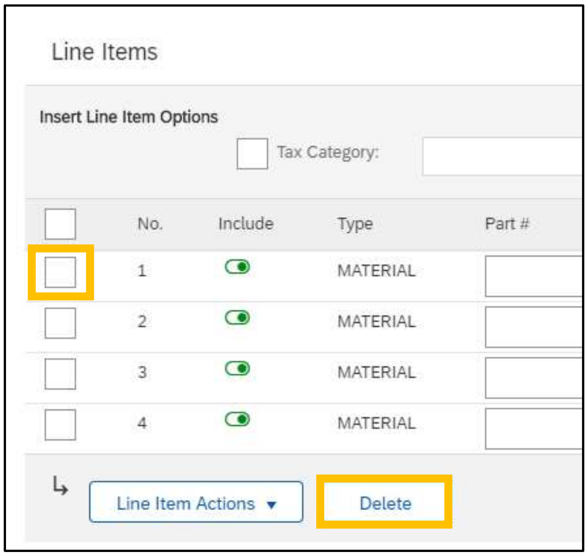
The added attachment appears.



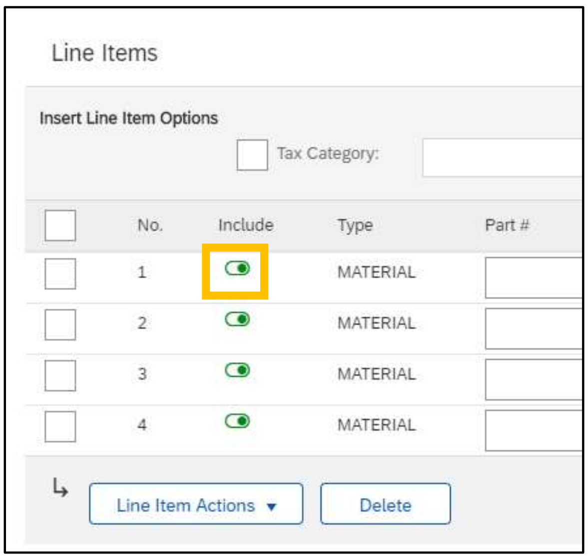
Line Item Actions:

A PO can have multiple lines. NiSource is unable to process invoices with a $0.00 line amount. When creating an invoice, you may need to remove a line. There are two ways to remove a PO Line, this page will cover both methods.
Note: This does not remove the line from the PO, only from this individual invoice.

To **Delete**:
1. Check the box next to the line item to be removed
2. Select **Delete.**



To use the **Toggle** feature, click the green toggle button on the line you want to remove:

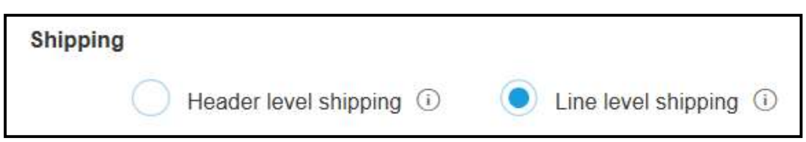


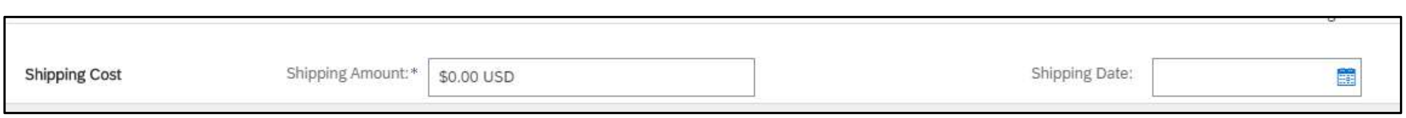
To add **Tax** at the Line Level:

3. Select **Line Level Tax** on the Invoice Header.
4. Check the box next to the line item being invoiced.
5. Click on the **Line Items Actions** menu at the bottom left.
6. Select **Tax**
7. Select the **Category** and confirm **Taxable Amount**

To add **Shipping** at the Line Level:

1. Select **Line Level Shipping** on the Invoice Header.
2. Scroll to **Line Items** and enter **Shipping Amount** and **Shipping Date**.





To add an **Attachment** at the Line:

1. Check the box next to the line item being invoiced.
2. Click on the **Line Items Actions** menu at the bottom left.
3. Select **Attachment**
4. Click on **Choose File**. A new window will pop-up for you to select your file.
5. Locate and select your file. Click on **Open**.
6. Once your file is opened, you must click on **Add Attachment** to add the file to the invoice.

Note: If you do not click on **Add Attachment**, your file will not be attached to the invoice. Please make sure that your attached file appears in a separate line under the Attachments section.

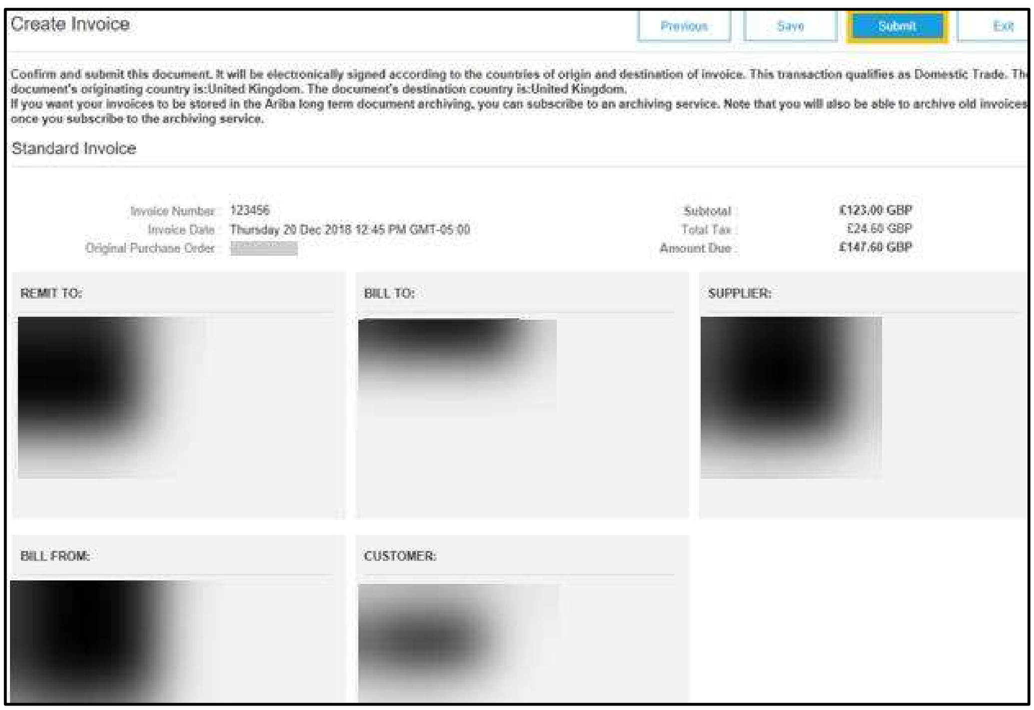
Step 3: Submit the PO Invoice

Once you have completed all required fields and line item actions, you will be ready to review and submit your PO-flip invoice.

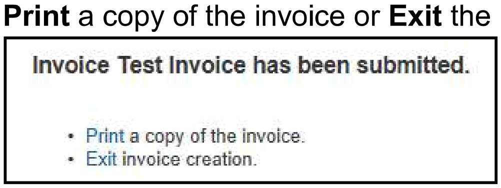
To submit your invoice:

1. Fill out required invoice details on the **Create Invoice** screen.
2. Click **Next** at the bottom of the invoice page.
3. Review invoice details and **Submit.**

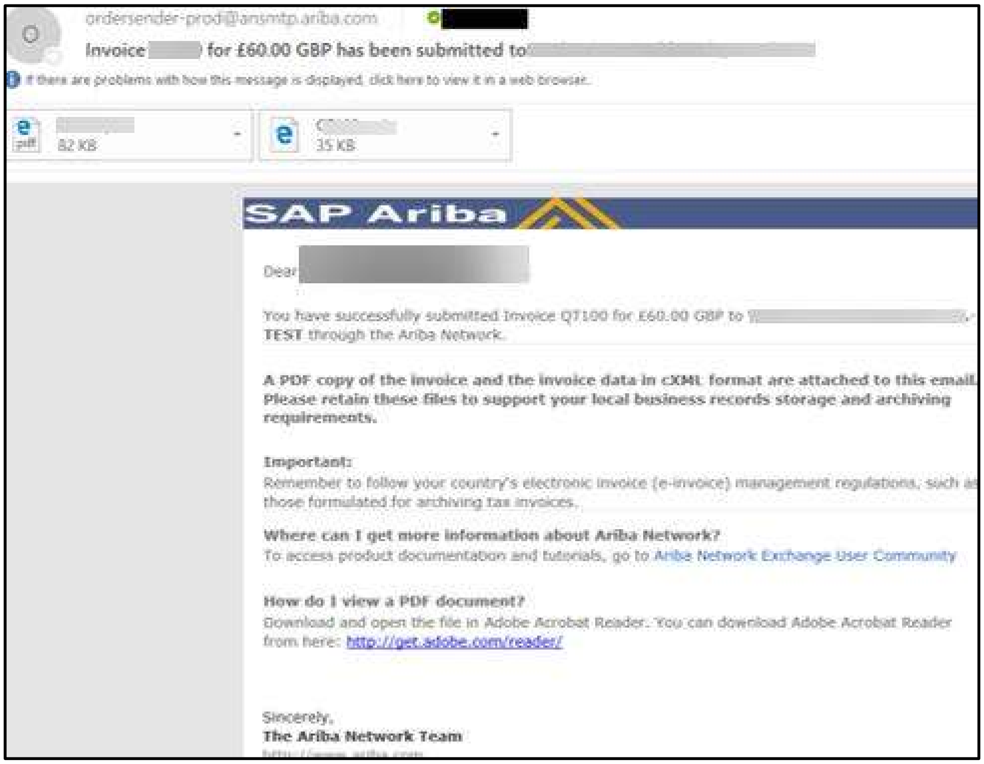
Note: If any details appear incorrectly, you may click on **Previous** to go back to the invoice creation screen.



After you have submitted the PO invoice, you will receive confirmation of submittal with the options to either **Print** a copy of the invoice or **Exit** the invoice creation.



If you are configured to receive notifications, you will receive confirmation of your Invoice.



You will also be able to locate the Invoice under **Related Documents** from the PO details page.

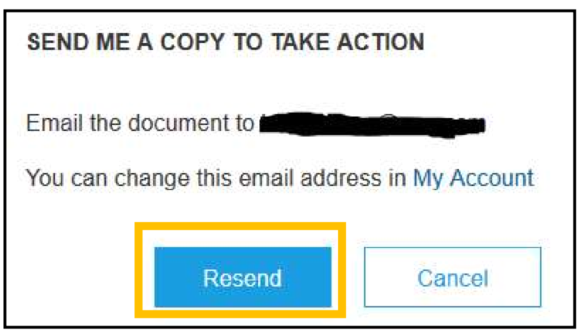
Appendix: Standard Account only – Resend a Purchase Order for Action

If your company uses a standard account and misplaces a purchase order (PO) email notification, you can resend the order from the dashboard of your homepage.

To resend a PO or other document:

1. Log into the Ariba Network account through supplier.ariba.com
2. Use the action tiles to locate the document that you would like to resend.
3. If you do not see the document category listed in the displayed tiles, click on **More** to locate the desired document category.
4. You can adjust what documents are shown by changing the defaulted display **Last 14 days** to **Last 24 hours, Last 31 days,** or **Last 50 Documents**.
5. **Select > Send me a copy to take action** in the **Action** column next to the PO.
6. Click on **Resend.**
7. Locate the PO from ordersender-prod@ansmtp.ariba.com in your mailbox.

Note: When you resend a PO, the PO email is sent to your email address instead of the email address configured to receive PO email notifications.



Appendix: Using the Help Center

If you are looking FAQ, tutorials, or other helpful Ariba Network documentation, you can utilize the **Help Center** on the righthand side of your Ariba Network account. When the Help Center is expanded, it will display FAQ related to the page that you are on. You can also use the search function to find articles, videos, and other documentation related to your area of interest.

To use the Help Center:

1. Expand or collapse the **Help Center** menu by click on **<< Help Center**. You can also pop-out the Help Center by clicking on the icon at the right side of the menu, of the icon next to **View More**.
2. Use **Search** to access FAQ, videos, and other documentation related to your search.
3. Click on **Documentation** to access the **Learning Center** and **Tutorials**.
4. Click on **Support** to access the **Support Center**. You may use the **Support Center** to search for helpful articles, or to raise a service request in case of technical issue.

If you have further questions you can reach the NiSource Supplier Enablement team at: SupplierRegistration@NiSource.com