Erie Insurance Group
Vendor Ariba User Guide

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1 Ariba Ordering Methods

- Light/Standard Enabled (Email) – means the vendor uses Ariba to receive purchase orders (POs) and submit invoices. The free option has limited capabilities; such as vendors can not see their “inbox” of purchase orders but rather get sent purchase orders via email notifications only. Contracts are not visible until they begin creating a contract invoice in Ariba system.

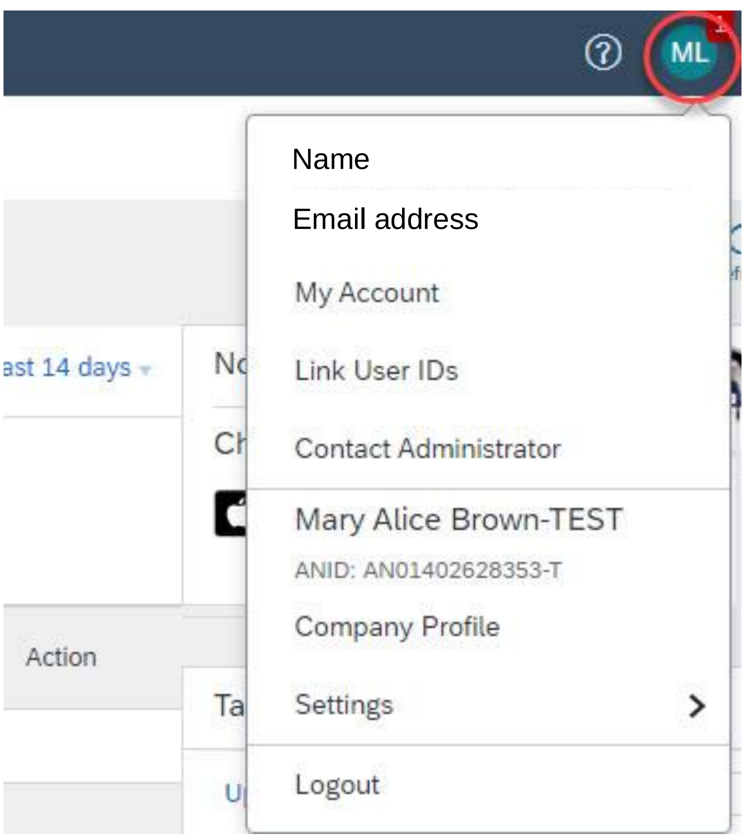
- Full/Enterprise Enabled (Electronic Ordering) – means the vendor uses Ariba to receive purchase orders (POs) and submit invoices. The paid option allows the vendor see to their inbox of purchase orders, outbox of sent invoices, further Ariba support, and the account has much more functionality (reports, etc.). Contracts are still not visible until they begin creating a contract invoice in Ariba system.

2 Ariba Enterprise/Full Account Fee Structure

For information regarding cost of using the Ariba Network, please see following link:

[Ariba Network For Suppliers: Accounts and Pricing | SAP Ariba]

3 Ariba Network Identification Number (ANID)

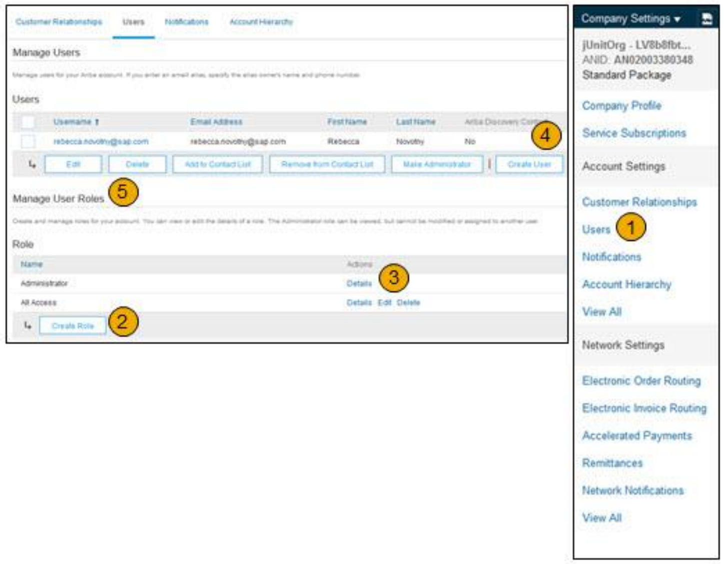


4 Adding Other Users

Set Up User Accounts

Create Roles and Users (Administrator Only)

1. **Click** on the Users tab on the **Company Settings** menu. The Users page will load.
2. **Click** on the **Create Role** button in the Manage Roles section and type in the Name and a Description for the Role.
3. **Add** Permissions **to the Role** that correspond to the user's actual job responsibilities by checking the proper boxes and click save to create the role.
4. **To Create** a User Click on Create User button and add all relevant information about the user including name and contact info.
5. **Select** a role in the Role Assignment section and Click on Done.



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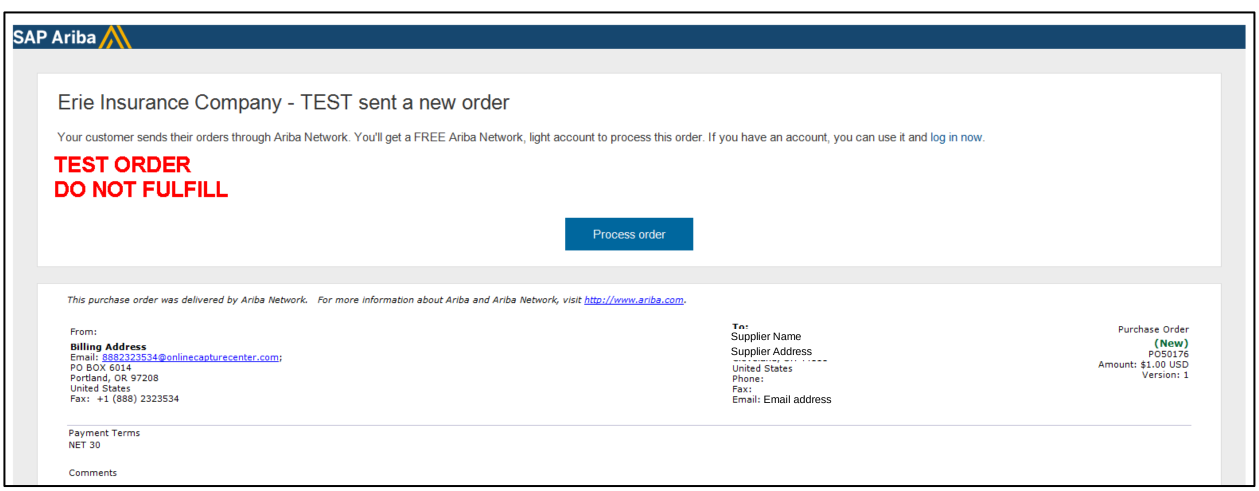
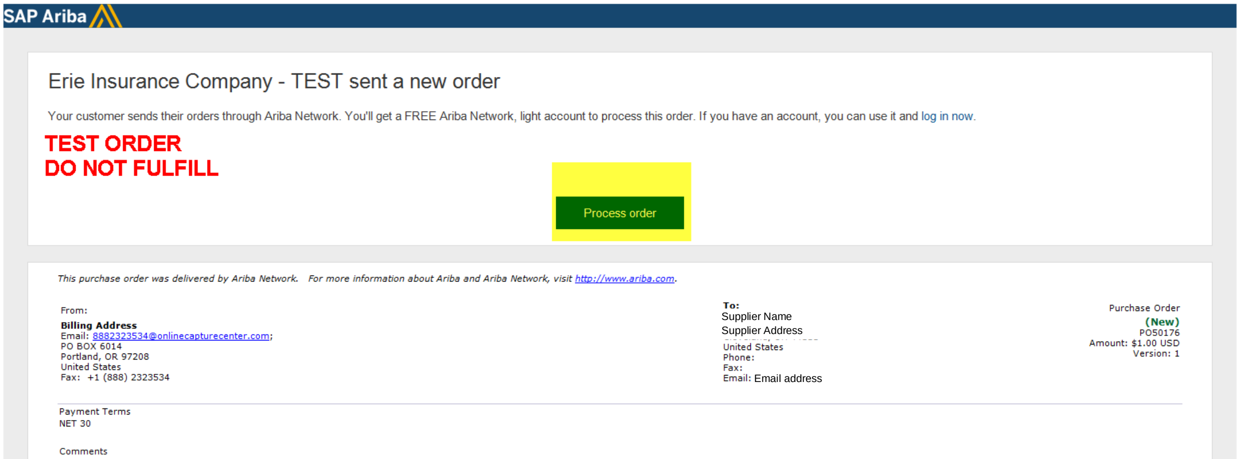
5 Accepting ERIE's Relationship Request – Test PO Process for Light/Standard Account

1. SVM sends a $1 PO to supplier to trigger the creation of their Ariba account.

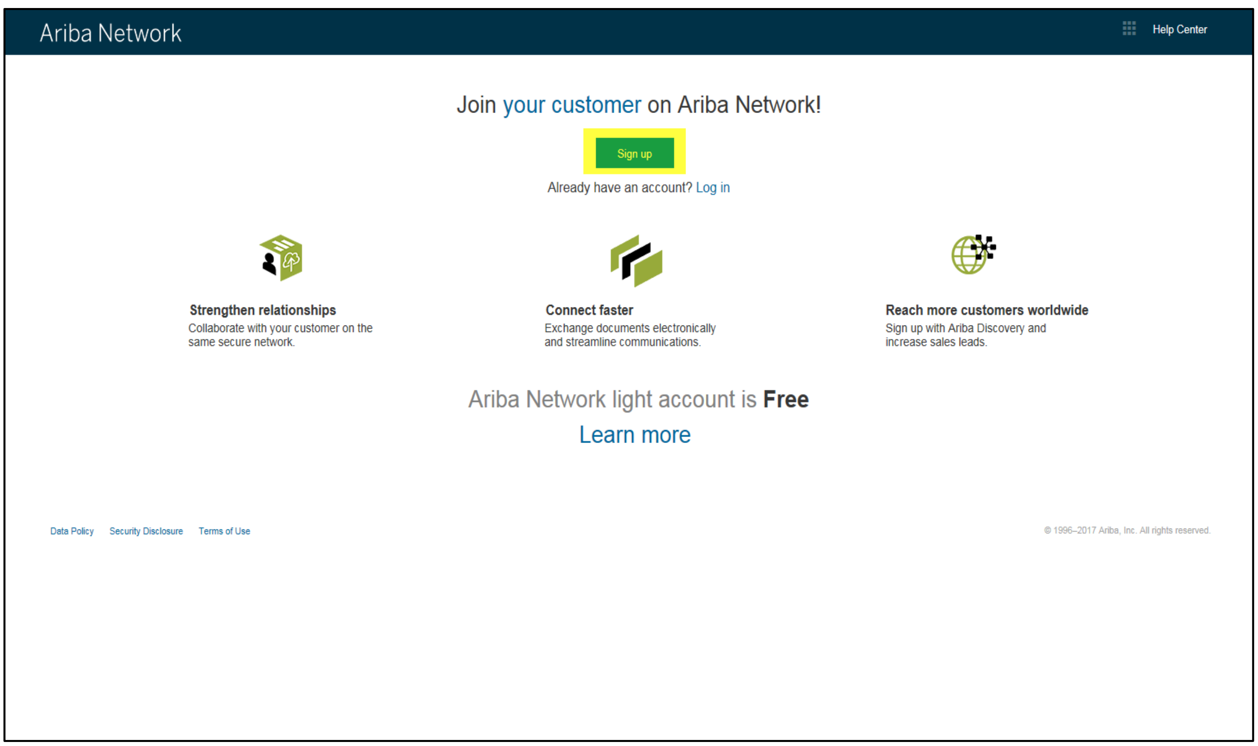


2. Supplier views the email and following the links and instructions creates their Light account.

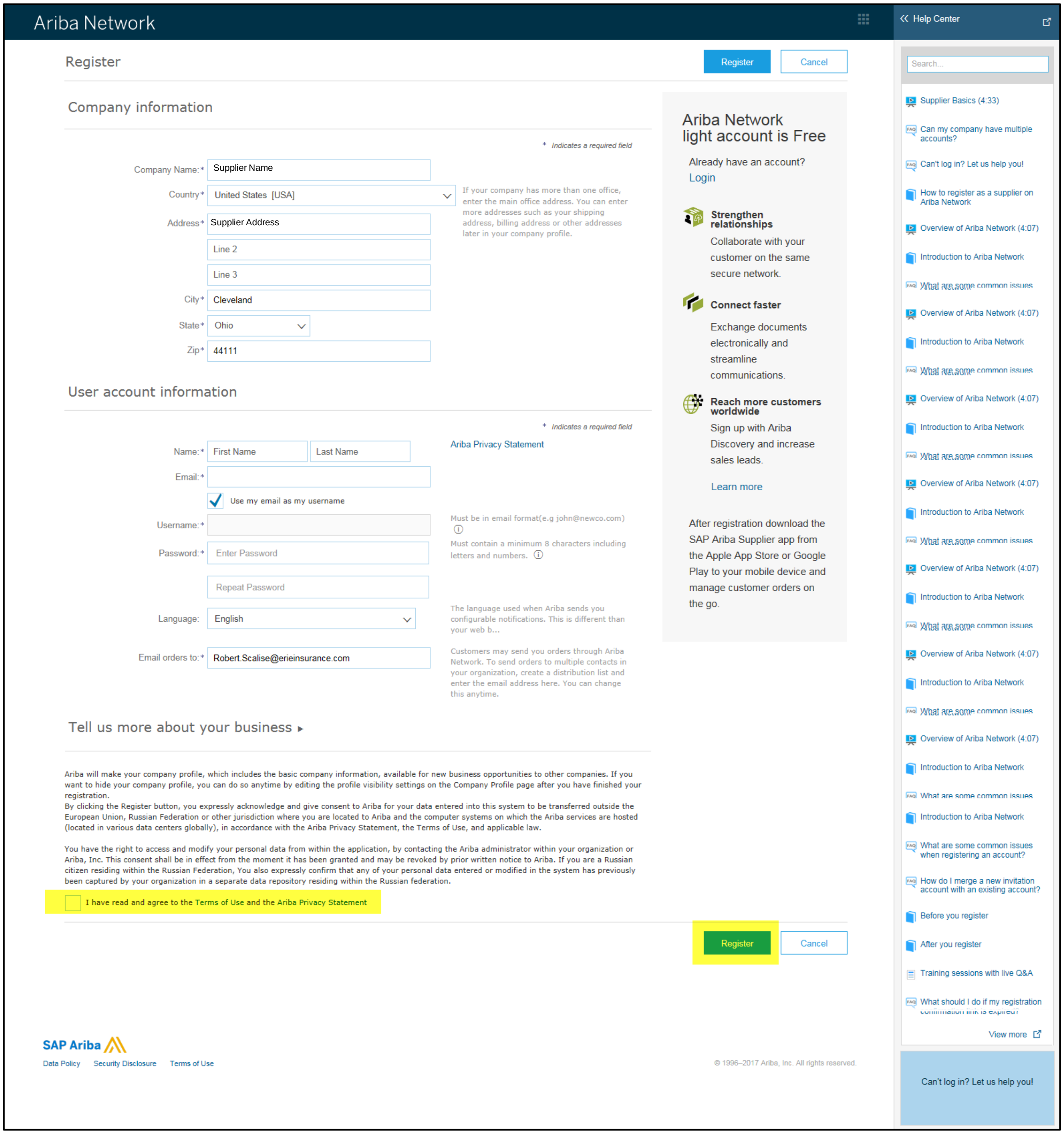
3. The supplier will first receive the following test PO in their email, and then will click "Process Order"



4. The supplier will click "Sign up" to begin the registration process or "Log in" if there is an existing account.

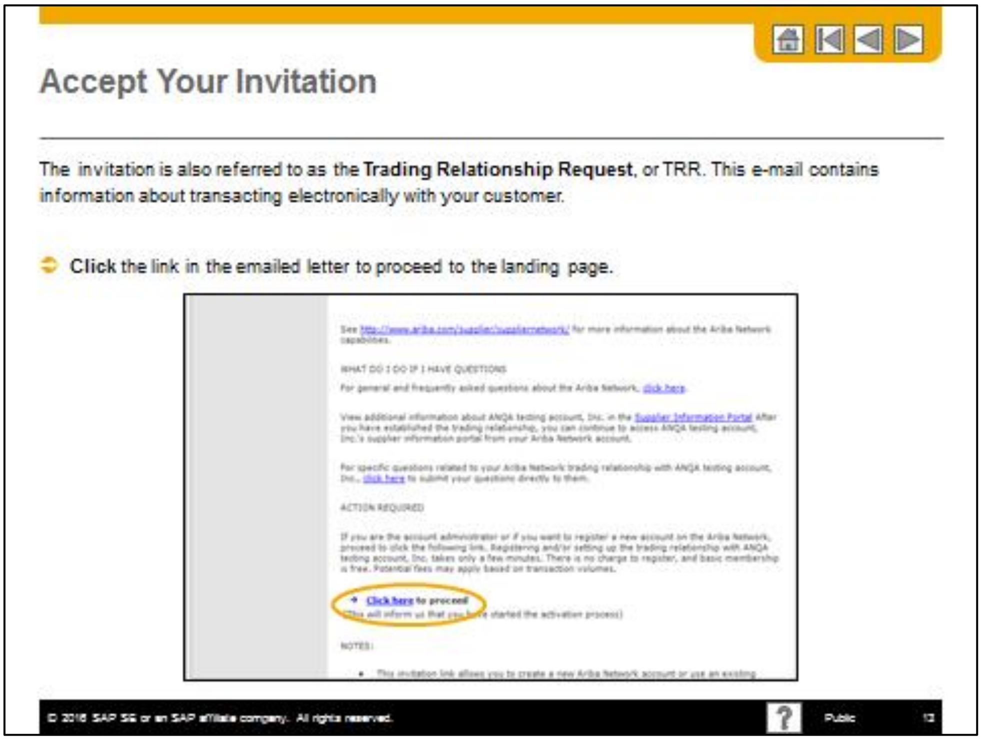


5. If registering, the supplier will complete the registration form. They must agree to the terms, and then click "Register"

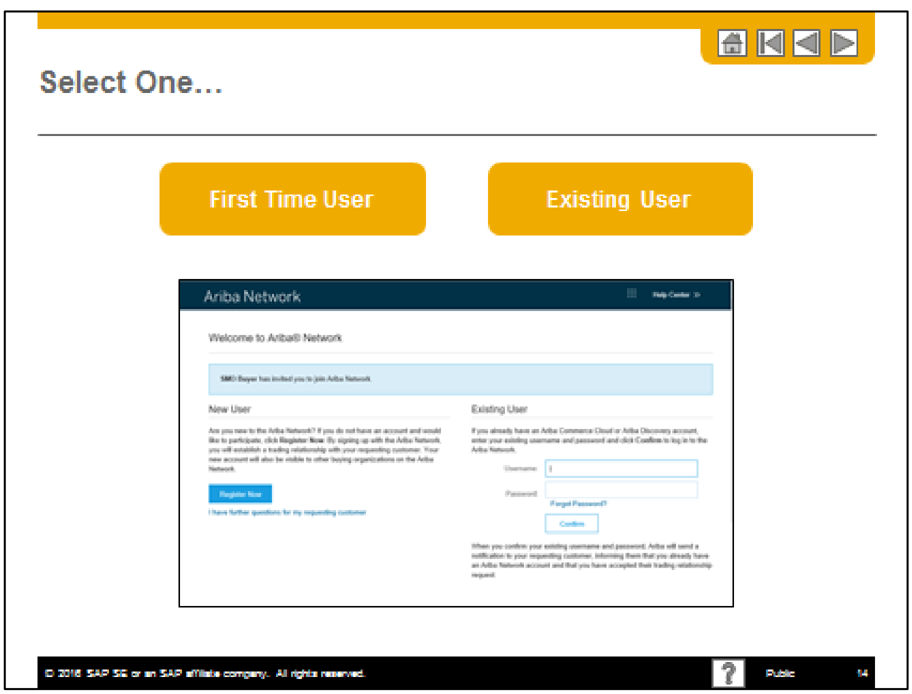


6 Accepting ERIE's Relationship Request – TRR Process for Full/Enterpise Account

1. Supplier must accept TRR by clicking "Click here to proceed" which will be delivered from Ariba via email.



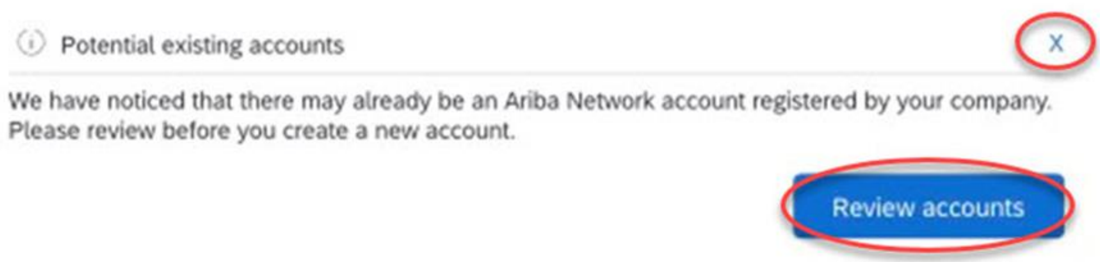
2. Supplier must either register as a new user or log in with an existing account to complete the connection.



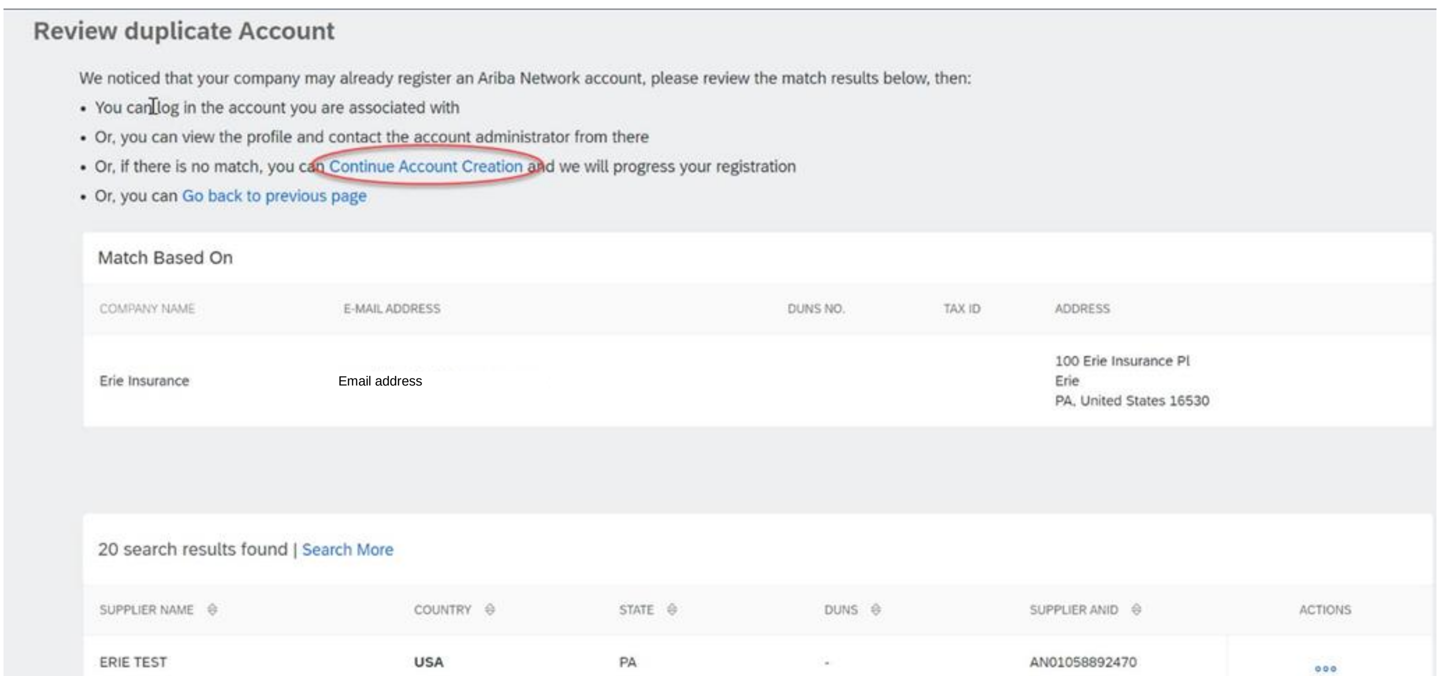
3. Sourcing and vendor management analyst should provide Remittance ID to be configured.

7 Ariba Set Up Issue – Potential Account Identified

1. If you are getting a pop up window saying “Potential Existing Accounts” there are two ways to move past it depending on if you already have an account or if you are creating a new account.
   a) Already Have an Account? – click on the “X” in the corner of the window then you should be able to login.
   b) Creating A New Account? – click on the “Review accounts” button.



2. If you still need to create the new account after reviewing the existing accounts, click “Continue Account Creation” to set it up.

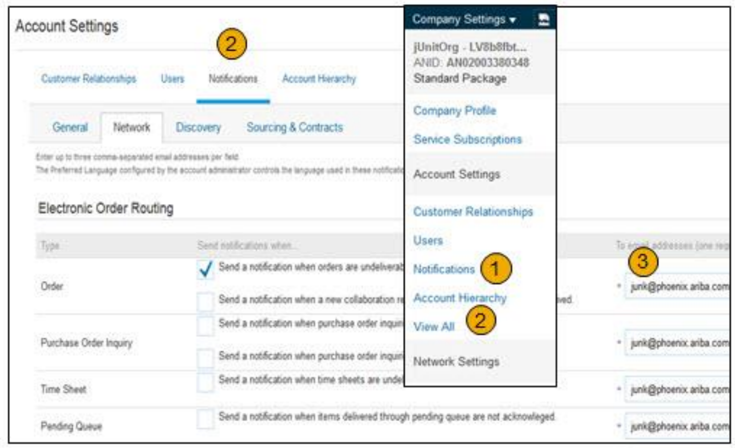


8 Configuring Email Notifications – Light/Standard Account

Configure Your Email Notifications

The Network Notifications section indicates which system notifications you would like to receive and allows you to designate which email addresses you would like to send them to.

1. **Click** on Notifications under Company Settings.
2. **Network Notifications** can be accessed from here as well, or you may switch to the Network tab when in Notifications.
3. **You can enter** up to 3 email addresses per notification type. You must separate each address with a comma but include NO spaces between the emails.



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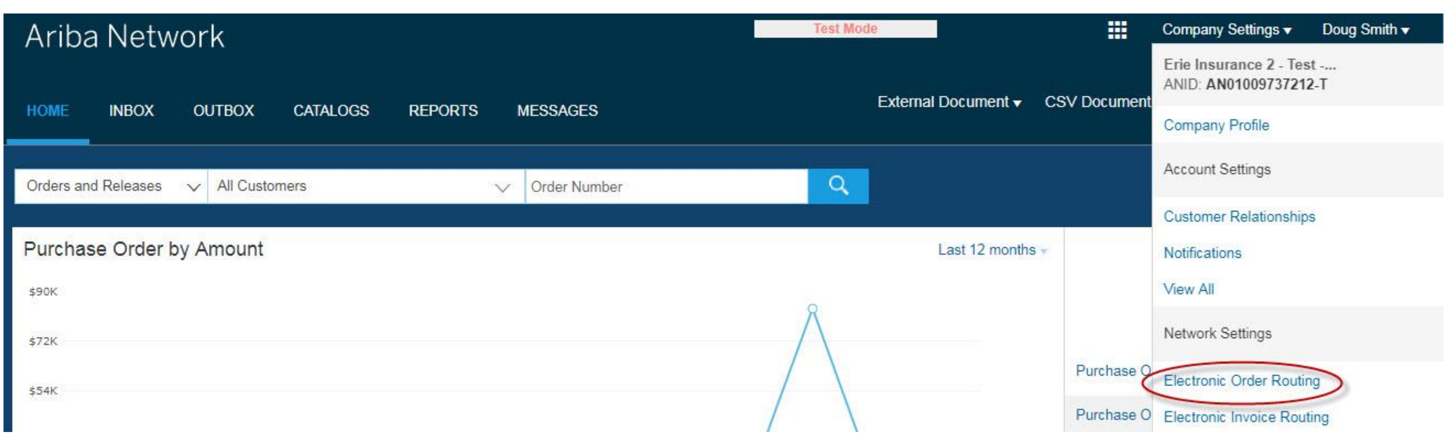
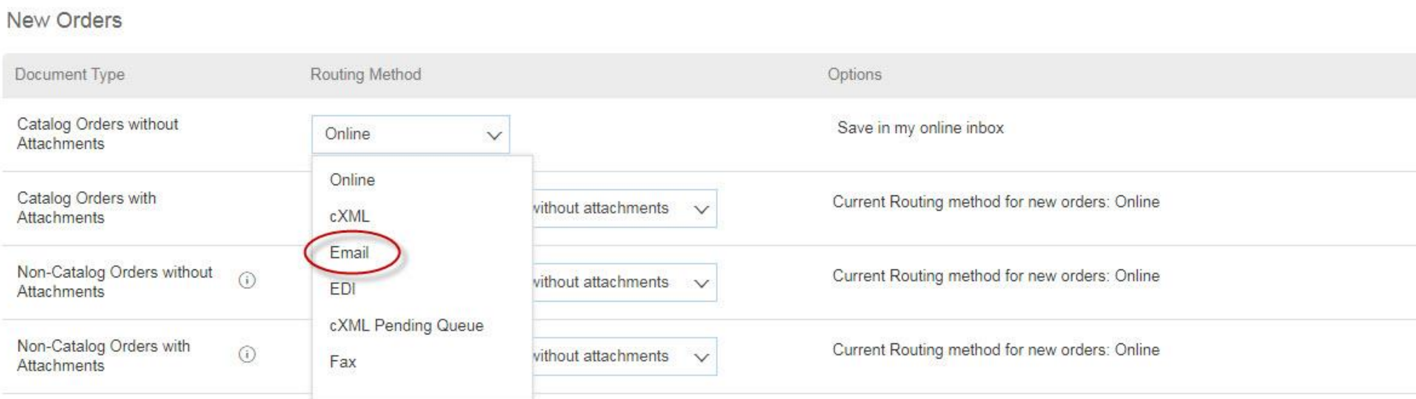
9 Configuring PO Notifications – Full/Enterprise Account

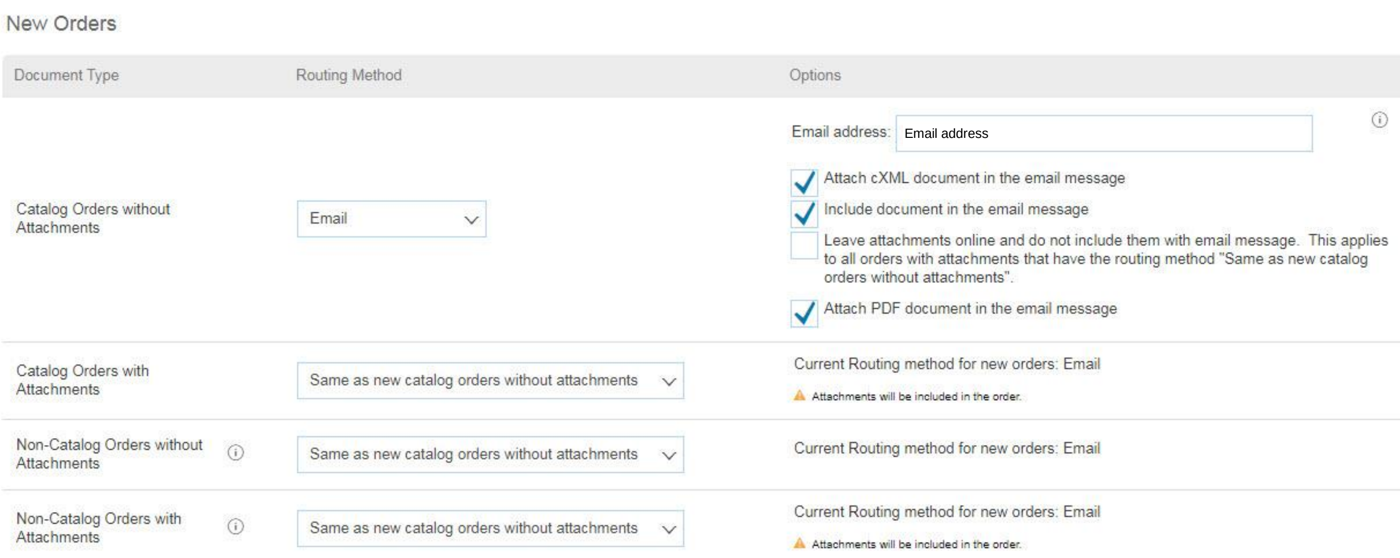
1. Click "Company Settings" in the top right corner then click "Electronic Order Routing."



2. The default routing method for orders is “Online,” click on that box and change it to “Email.”



3. Add the email address that you would like the purchase orders to go to. You can separate multiple email addresses by commas.

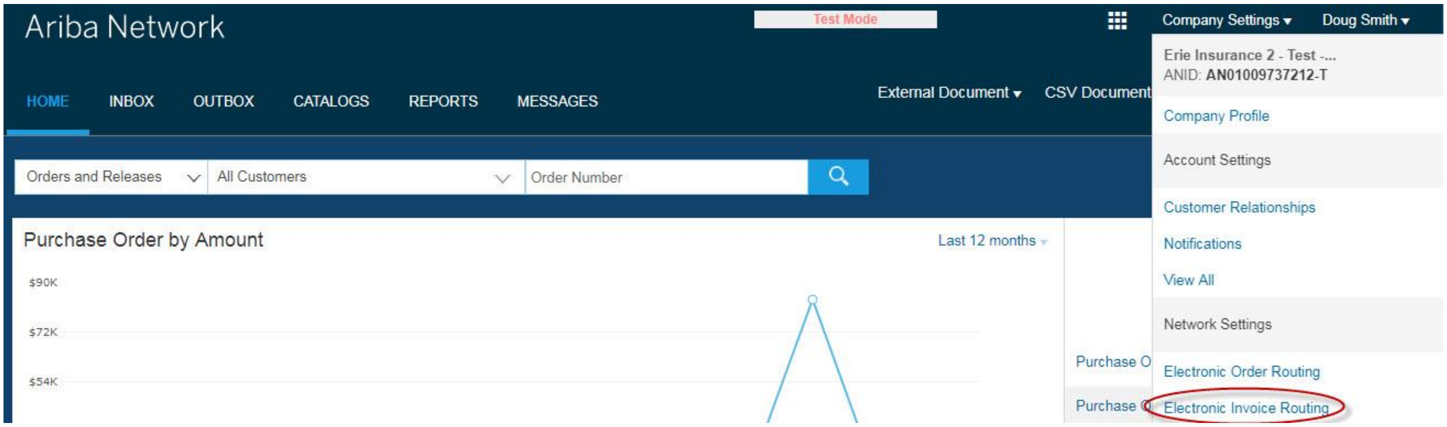


Notice the options for PDF and other documents in the email message. Notice the default routing method for all orders and change orders now shows “Email.”

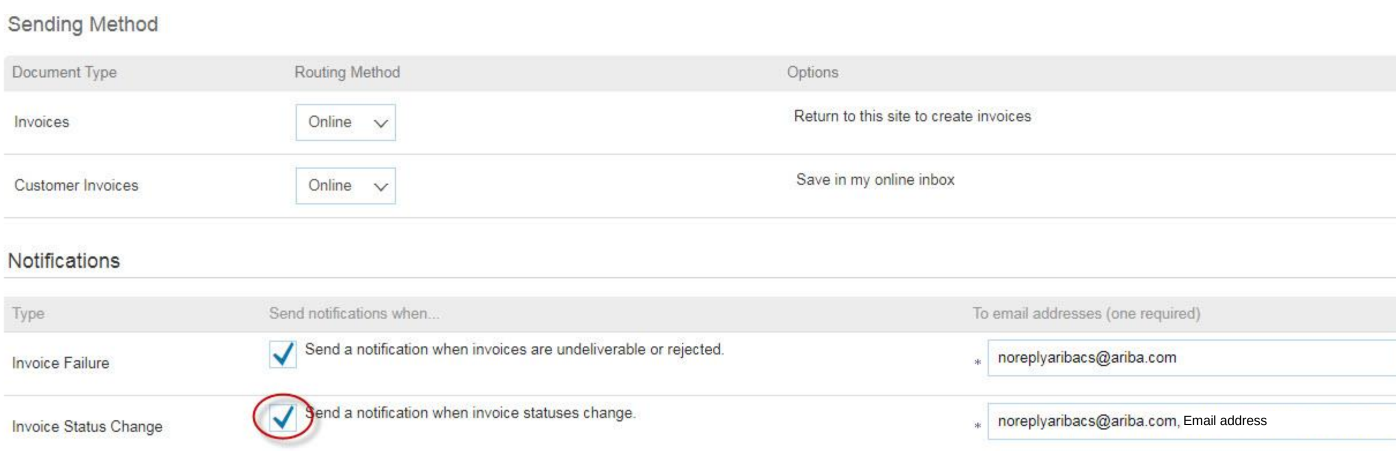
4. Click “Save” in the top right or bottom right corner.

10 Configuring Invoice Notifications – Full/Enterprise Account

1. Click “Company Settings” in the top right corner then click “Electronic Invoice Routing.”

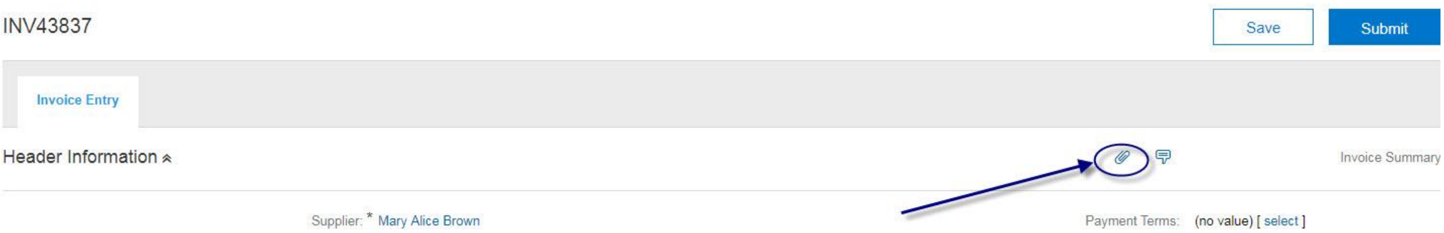


2. Under “Notifications” check the box next to “Invoice Status Change.” Your email address will default in the box to the right but other email addresses can be added separated by commas.



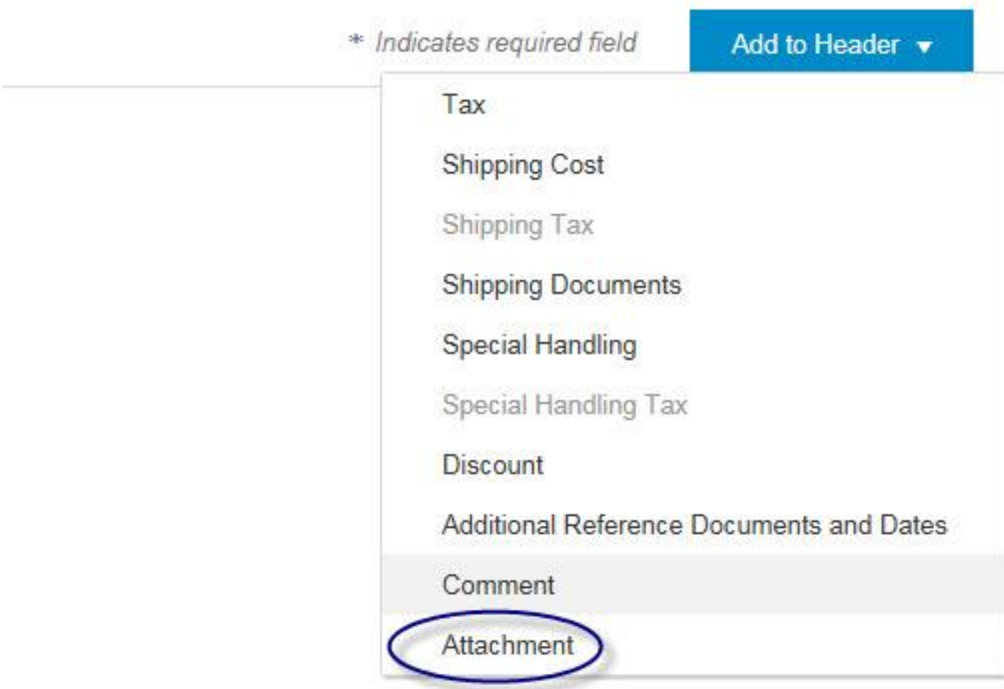
3. Click “Save” in the top right or bottom right corner.

11 Attaching an Invoice – Contract



12 Attaching an Invoice – Purchase Order (PO)

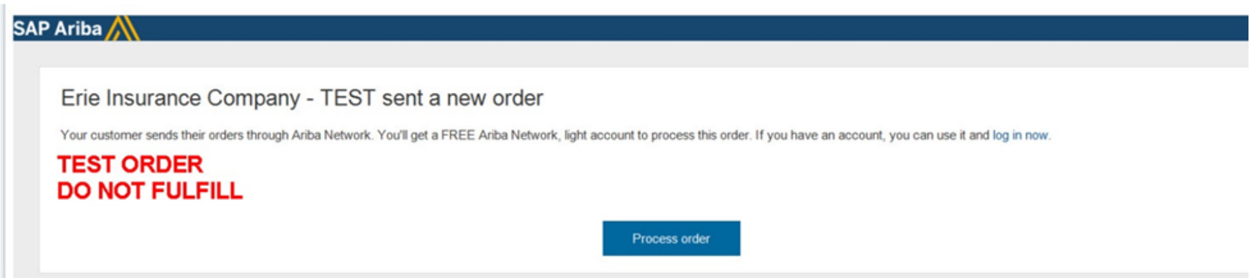
1. If you have a light or standard account - click “process order” from the PO email received, then click Create a Standard Invoice. If you have a full or enterprise account - you can go into the “Inbox” then click on the PO number then click Create a Standard Invoice.
2. On the right side of the page, click the arrow next to “Add to Header” to drop down the options. Then click on “attachment.”



3. Scroll down to the bottom of the page and there will be an added section for attachments.

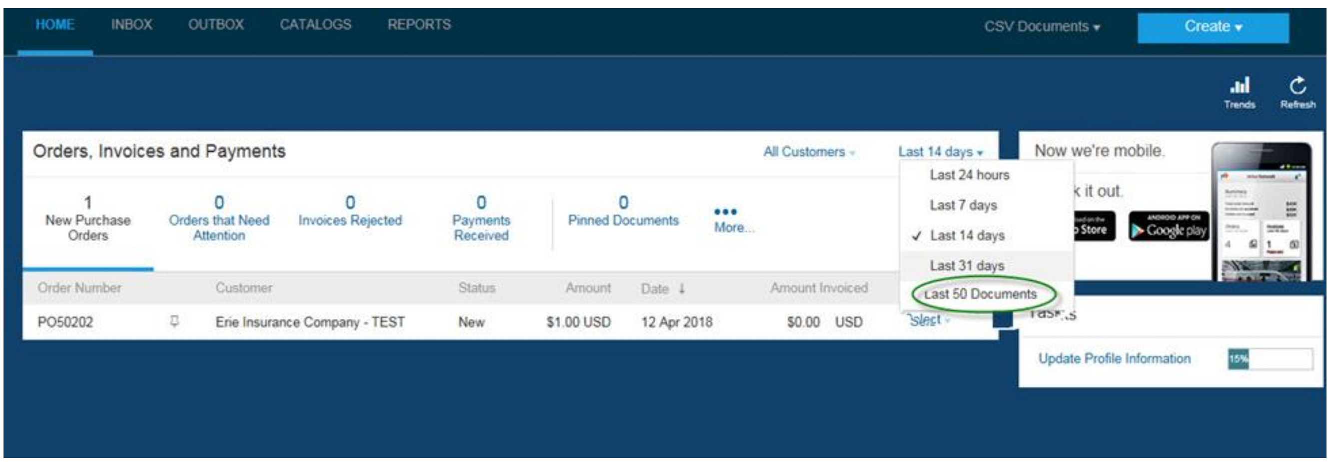
13 Purchase Order (PO) Invoicing – Light/Standard Account

1. Please ensure you have already followed the Test PO Link to set up your account.
2. Step 2: Locate your email from when the purchase order, not the test PO, was sent. Then, click on "Process Order" from the email.

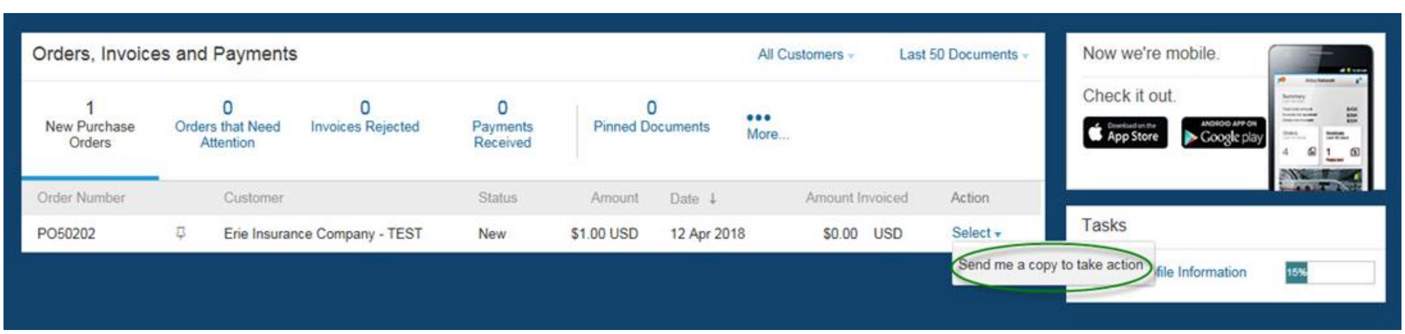


These next few steps should only be followed if you can not locate the PO email

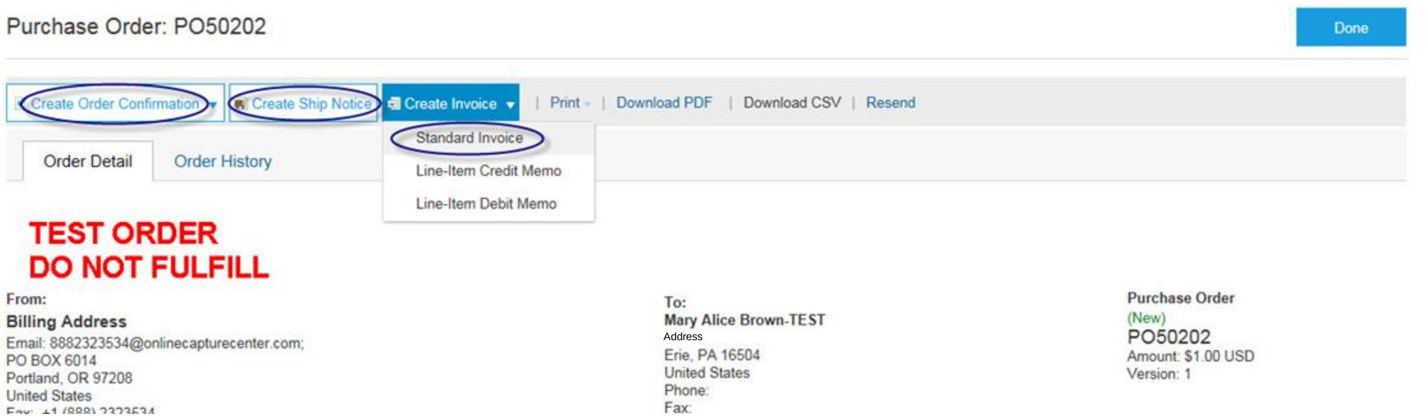
Make sure all the purchase orders are showing to ensure you invoice against the right one by changing the filter that says "Last 14 Days."



Click on "send me a copy to take action" then proceed from step 2.

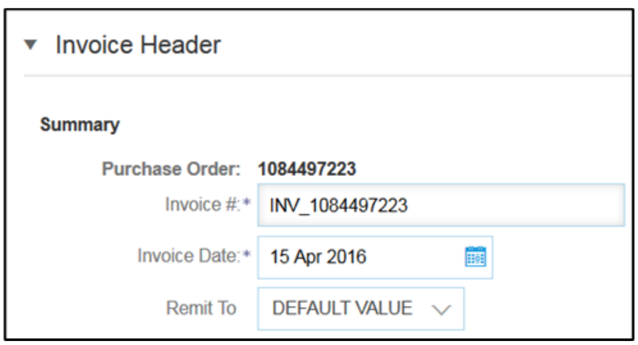


3. Once the link "process order" is clicked, you will be redirected to the PO on Ariba where you can create an order confirmation, ship notice, or standard invoice.



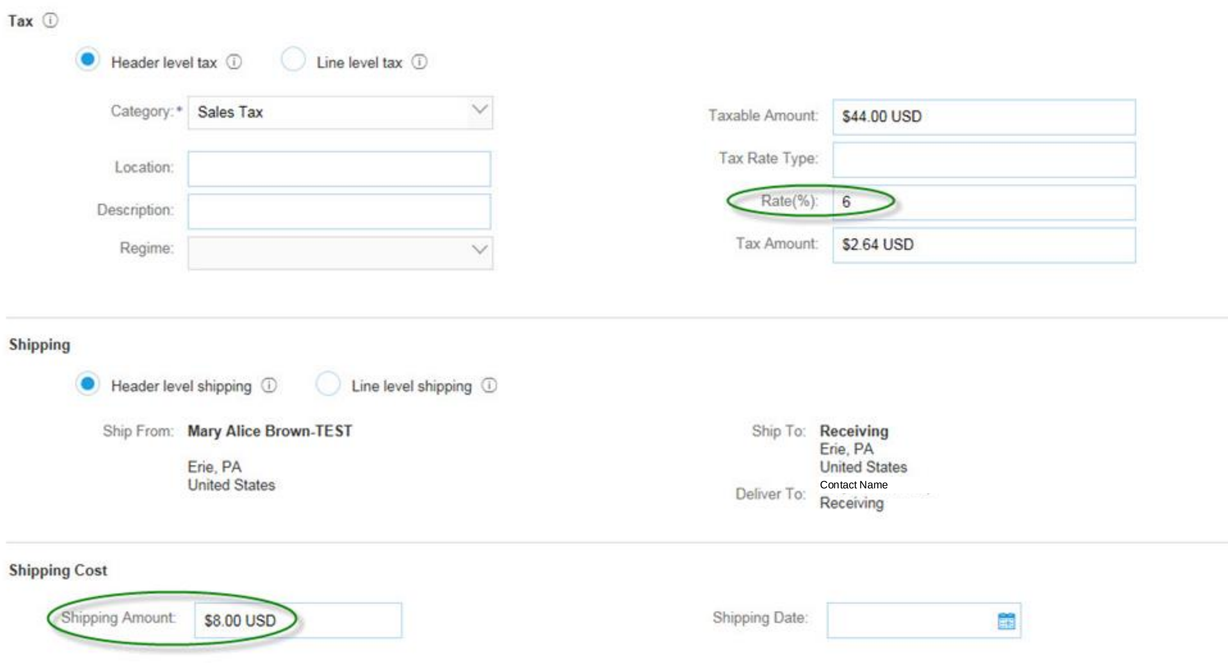
Invoice is automatically pre-populated with the PO data. **Complete all fields marked with an asterisk and add tax as applicable**.

4. Enter an Invoice # which is *your unique number* for invoice identification. The Invoice Date will auto-populate.

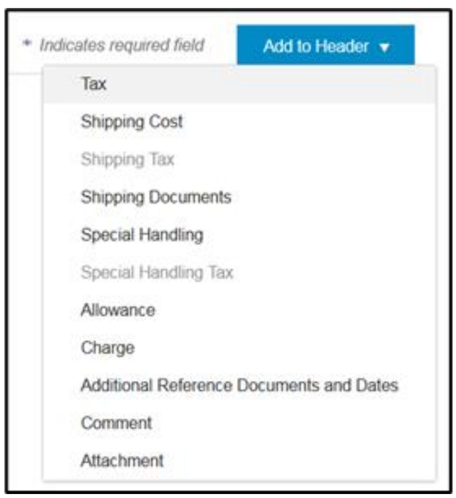


5. Select Remit-To address from the drop down box if you have entered more than one.

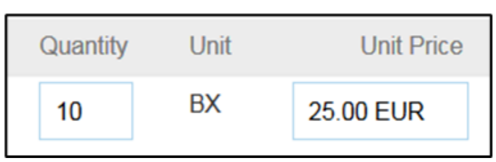
6. Tax and Shipping can be entered at either the Header or Line level by selecting the appropriate button. If there is no tax, please enter "0" in the Tax Rate (%) box.



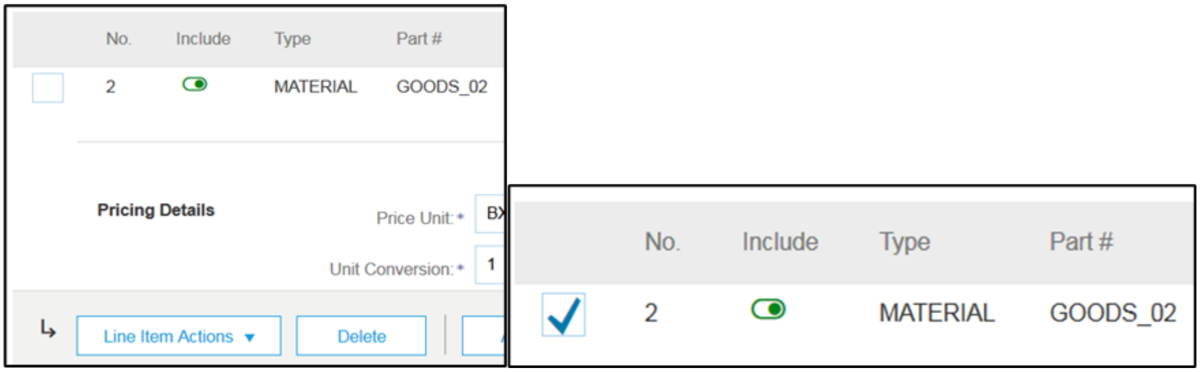
7. You can also add some additional information by clicking "Add to Header" such as: Special Handling, Shipping Cost, Comment, Attachment, or Shipping Documents. Optionally, here you can attach the file of the paper invoice using "attachment."



8. Scroll down to the Line items section to select the line items being invoiced. Review or update Quantity for each line item you are invoicing.



9. If line item should not be invoiced, click on the line item's Green slider to exclude it from the invoice, OR click the check box on the left of the item and click "delete" to remove the line item from the invoice. You can generate another invoice later to bill for that item.



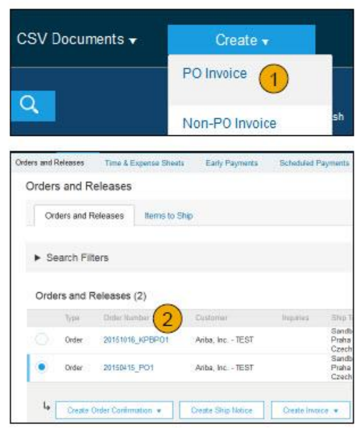
10. Click the “next” button in the bottom right corner and review the information you have entered on the following page. Click “submit” when everything looks correct.

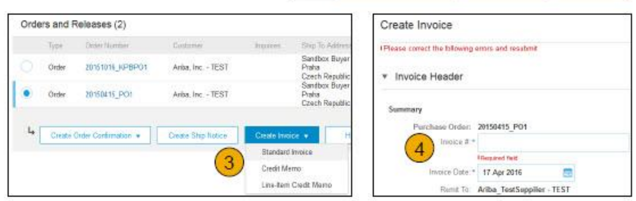
14 Purchase Order (PO) Invoicing – Full/Enterprise Account

Invoice via PO Flip

To create a PO-Flip invoice (or an invoice derived from a PO that you received via Ariba Network):

1. From the home screen within your Ariba Network account, select the **Create** dropdown menu and select **PO Invoice**.
2. For PO Invoice select a **PO number**.
3. Click on the **Create Invoice** button and then choose **Standard Invoice**.
4. Invoice is automatically pre-populated with the PO data. **Complete all fields marked with an asterisk and add tax as applicable**. Review your invoice for accuracy on the **Review** page. If no changes are needed, click **Submit** to send the invoice to Erie Insurance Group.





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