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1. Introduction

Introduction

Procure-to-Pay Process

Dear Valued Supplier,

- This document contains training for your organization around transacting purchase orders and order confirmations with Baker Hughes Entities that that are live on Ariba.

Interacting with and transmitting invoices through the Ariba Network will soon be required to conduct business with Baker Hughes (including legacy GE Oil and Gas entities). All standard accounts are offered for free. Additionally, for most suppliers there are NO fees associated with the Baker Hughes buyer relationship. To confirm, contact Supplier.Enablement@bakerhughes.com.

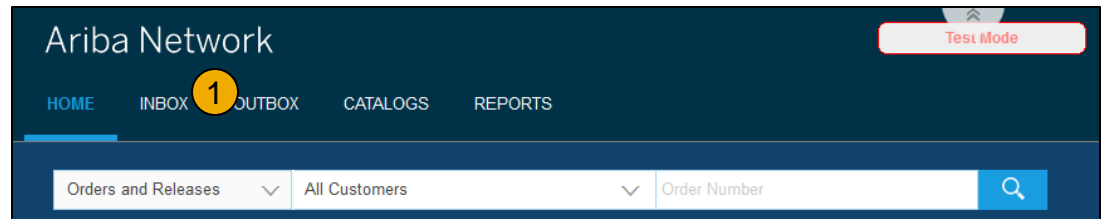If you are currently using the iSupplier portal for any of the below:

- Request for Quotations (RFQ) Process
- Document Sharing (Bill of Material/ Quality & Standard Documentation)
- Order management (PO Confirmation / Date management)

Please continue using iSupplier. **This Initiative will only impact Electronic Invoicing**

2. Purchase Order Management
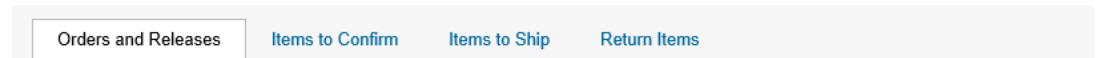
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To View Purchase Orders

1. **Click** on Inbox tab to manage your Purchase Orders.

2. **Inbox** is presented as a list of the Purchase Orders received by Baker Hughes.

3. **Search** filters allows you to search using multiple criteria.

4. **Click** the arrow next to Search Filters to display the query fields. Enter your criteria and click Search

5. **Click** the blue calendar icon on the right of your screen to change the columns you want to see. You can also group orders by customer, order status, etc.

6. **Click** the link on the Order Number column to view the purchase order details

Purchase Order Detail

1. **View** the details of your order. The order header includes the order date and information about the buying organization and supplier.

Note: If you have configured Electronic Order Routing but you didn't receive a copy of the order via email, cXML or EDI properly you can always Resend a PO by clicking the **Resend** button. To set up Electronic Order Routing see Account Configuration Guide pg 16-19. You also have the option to click **Export cXML** to save a copy of the cXML source information. Click **Order History** for diagnosing problems and for auditing total value

2. The **Line Items section** describes the ordered items. Each line describes the part number, the quantity of items Baker Hughes wants to purchase, the need by date and the price. The order sub-total can be seen at the bottom right of the screen. Click on details to view additional details about the item.

Purchase Order Detail

1. **Baker Hughes requires that you reference the PDF copy of your PO for PO specific details such as shipping instruction, documentation requirements and any other pertinent information.** PO PDF can be found under attachments.

2. **Click** on show item details to see if any drawings or other attachments have been included.

Other Information

Company Code: 1811

PO Special Instructions: Supplier must reference the attached PDF copy of the purchase order for Standard Terms, link to BHGE Standard Terms of Purchase, special shipping instructions, and other pertinent information. If a PDF copy is not attached, supplier must reference BHGE Standard Terms of Purchase at the following link: http://www.bhge.com/supplier-center

View less »

Attachments

1010152235.pdf (application/pdf) **(1)**

Line Items

(2) Show Item Details

Line #	Change	Part #	Customer Part #	Type	Return	Buyer Part ID	Revision Level	Qty (Unit)	Need By	Price	Subtotal	Customer Location
10		Not Available		Material				1.000 (DR)	28 Feb 2018	$999,999,999.00 USD	$999,999,999.00 USD	Details

Description: Test materail

3. Order Confirmations

Please keep in mind that **not all Baker Hughes entities require Order Confirmation (OC)**. Please confirm orders that have the Create Order Confirmation option available. (if grayed out or unavailable then it is not required)
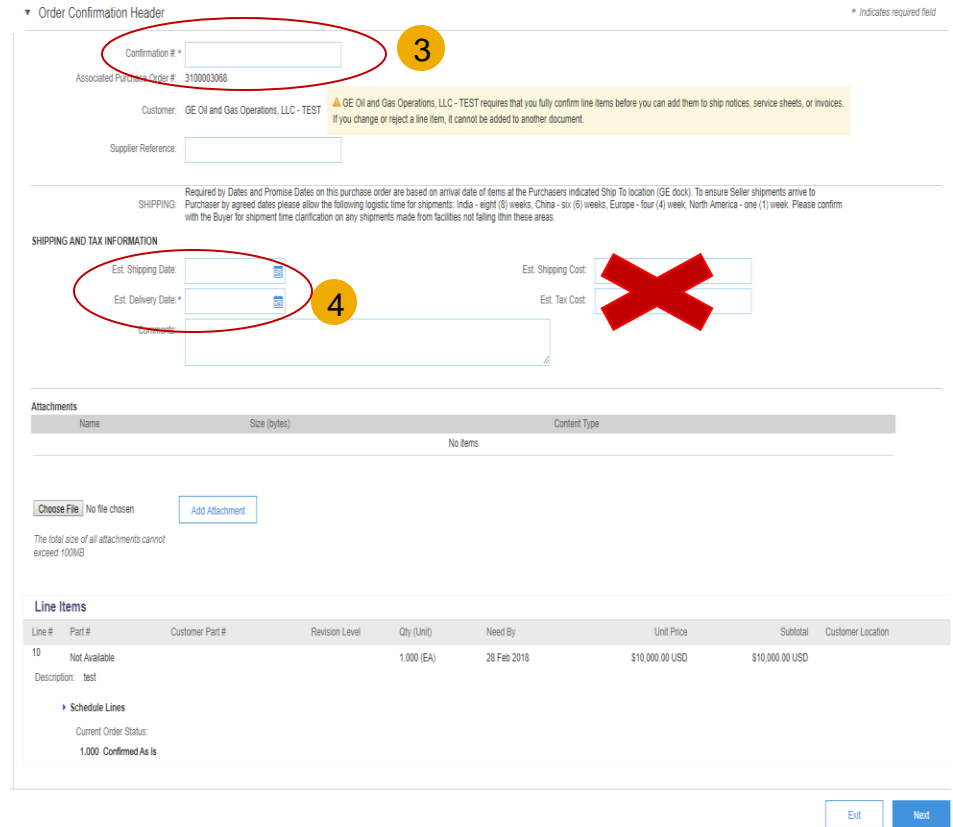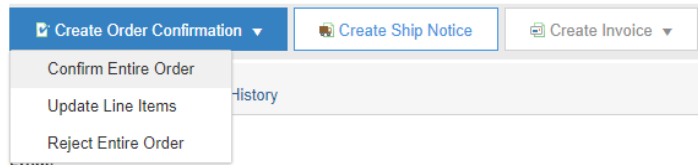

SAP Ariba
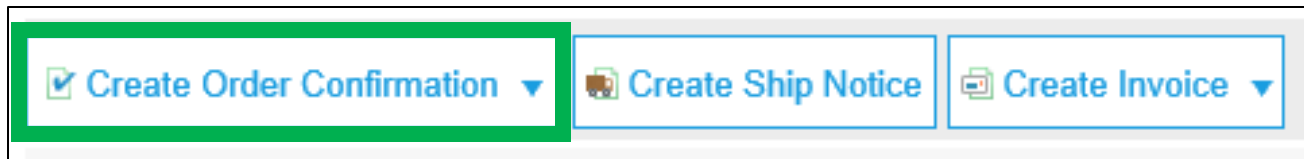
Create Order Confirmation: Confirm Entire Order

This slide explains how to Confirm Entire Order IF NO CHANGES ARE NEEDED TO ANY LINE.

1. **Review Need by Dates, Quantity and Unit Price for each line.**

2. **If no changes are needed to any lines** click Confirm Order and select Confirm Entire Order. **If changes are needed proceed to slide 13 for instruction.**

3. **Enter** Confirmation Number which is any number you use to identify the order with i.e., your internal sales order. The maximum length allowed is 35 characters.

4. **Enter** estimated **Delivery Date**. Delivery date should include ship date + transit time. DO NOT put data in est. shipping cost or tax cost fields.

5. **Click** Next when finished.

Create Order Confirmation: Confirm Entire Order

6. **Review** the order confirmation and click **Submit**

7. Your order confirmation is sent to Baker Hughes. PO status is displayed as "Confirmed"

8. You can find a copy of the order confirmation

Create Order Confirmation: Mass PO confirmation via Excel Upload

You can use an Excel template to upload a batch order confirmation.

1. Logon to supplier Ariba Network (https://service.ariba.com/SCMSupplier.aw) with your credentials .

2. Go to Upload/Download > Uploads menu option and click the Upload button.

3. Use template for uploading bulk order confirmation that is on Ariba Network Supplier Information Portal. Check OC File Format slide to check the batch order confirmation file format and requirement.

4. In the Upload File popup, enter a Name for upload, select Order Confirmation from the Type dropdown, select the Customer, select the file to upload, and click Upload.

5. Check OC File Format slide to check the batch order confirmation file format and requirement

This option is only available for Supply Chain Collaboration Accounts

Create Order Confirmation: Mass PO confirmation via Excel Upload ... continued

4. In the Upload File popup, enter a Name for upload, select Order Confirmation from the Type dropdown, select the Customer, select the file to upload, and click Upload.

5. Click Refresh Status to check the processing status. If the status is 'Completed', the upload is successful.

Create Order Confirmation: Mass PO confirmation via Excel Upload ... continued

If the status is 'Failed', the upload is unsuccessful. Then, download the log file to check the for the root cause of issue. Check the slide on Common Upload Errors to learn more about failures. Once the issue is identified, fix the issue and reload the file by following the steps (2-4) again.

Order Confirmation (OC) File Format Requirements

Batch Order confirmation file format with column requirement and sample values
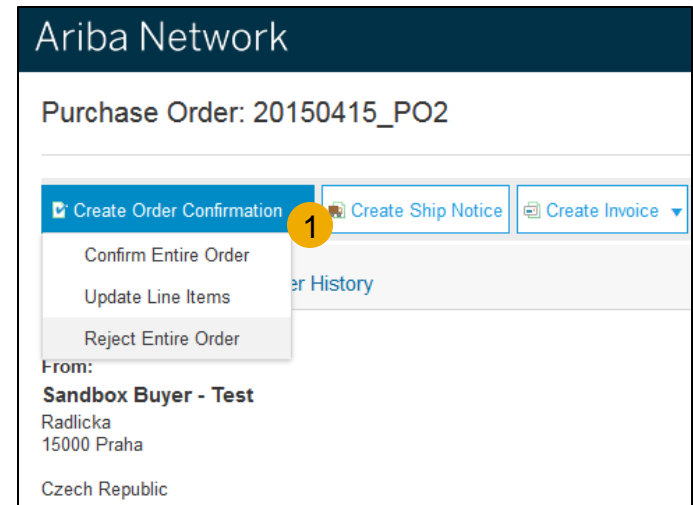
Column Name	Required / Optional	Sample Value	Comments
Confirmation Number	Optional	OC-5051138154	Order confirmation ID. If not entered, system creates a random #. E.g., OC-1559830582373
Order Number	Required	5051138154	Purchase order ID
Order Version	Optional		Leave it blank
Order Date	Required	18 Apr 2019 12:40:29 AM	Purchase order date; format: DD MMM YYYY hh:mm:ss AM/PM
Shipping Currency	Optional	USD	Shipping currency
Shipping Money	Optional	2	Estimated shipping cost
Tax Currency	Optional	USD	Tax currency
Tax Amount	Optional	3	Tax amount
Comment	Optional	NA	Comments about the order confirmation
Item Line number	Required	10	Purchase order line number for the item
Item Type	Required	accept	Order confirmation type for the item (**accept** or **detail** or **backordered** or **reject**). For Price change (variance), the item type should be **detail**
Item Supplier Part ID	Optional	000004043-658-0000	Supplier Part ID
Item Customer Part ID	Optional	100004	Customer Part ID
Item Revision Level	Optional		Leave it blank
Item Quantity	Required	1	Item quantity
Item Unit Of Measure	Required	EA	UN/CEFACT unit of measure code; for example, EA for each or PK for pack
Item Delivery Date	Optional	01 Jul 2019	Item delivery date; format: DD MMM YYYY
Item Shipment Date	Optional	24 Jun 2019	Item shipment date; format: DD MMM YYYY
Item Unit Price Amount	Optional	18	Item Unit Price
Item Unit Price Currency	Optional	USD	Item Price Currency
Item Shipping Currency	Optional	USD	Item shipping currency
Item Shipping Amount	Optional	2	Item shipping cost
Item Tax Currency	Optional	USD	Item tax currency
Item Tax Amount	Optional	3	Item tax amount
Item Comment	Optional / Required	Updated line price	Comments about the confirmation for an item. Item Comment are required when an order confirmation line item has changes (like Price update)
Item Supplier Batch Number	Optional	1	Item supplier batch ID

Common Upload Errors

#	Error	Reason
1	Value 5/9/19 for Field Order Date of type DateTime in row 5 has invalid format	This error is due to the invalid date. Order Date field value should have the valid date format. Valid format: DD MMM YYYY hh:mm:ss AM/PM (18 Apr 2019 12:40:29 AM)
2	Value 7/9/19 for Field Item Delivery Date of type Date in row 5 has invalid format	This error is due to the invalid Item Delivery Date. Item Delivery Date field value should have the valid date format. Valid format: DD MMM YYYY (01 Jul 2019)
3	OC-4: orderDate 2019-04-17T21:40:29-07:00 in OrderReference element does not match the original orderDate 2019-04-18T09:14:29-07:00 in PO.	Order Date should exactly match the order date (with timestamp) when the order got created on Ariba Network
4	Comments are required when an order confirmation line item has changes for line 10.	When the Item Type is 'Detail' and has line item price updates, then Item Comments are required to be entered
5	Invalid type (accept) for item with price. It should use type (detail) instead. Related to order 5051138810 in line number 10 - Field itemUnitPriceAmount.	When there is line item Price change (variance), the item type should be detail. If the line item type is other than detail, system throws this error
6	The quantity for line item 10 falls outside the range (0 - 300.00) allowed by the buyer.	0% tolerance set for quantity variance. Suppliers are not allowed to increase the quantity than what is requested on the PO.
7	Mapping failure: There is more than one current order with number (5051138504) for line number 10.	Due to a system issue, if there is more than 1 PO with same PO # on AN then system throws this error. Mostly, this is a rare system error and the data needs to be corrected to proceed further
8	No valid data found in uploaded document. Make sure you entered correct values.	If the file is uploaded without any data (only header), system throws this error during upload

Create Order Confirmation: DO NOT Reject Entire Order

1. **DO NOT Reject Entire Order – if there is something wrong <u>other than a price or date change</u>, contact the buyer to get a corrected Purchase Order**

Create Order Confirmation: Update Line Items

1. **If you need to change something on a specific line** i.e., price or delivery date **click** on Create Order Confirmation and **Select** Update Line items

Update Line Item Field Definitions:

- **Confirmation #** – any number you use to identify the order with i.e., your internal sales order.

- **SKIP the Shipping and Tax Information** and scroll down to view the line items. DO NOT enter information in these fields.

- **Confirm box** – This is where you enter the QTY you are confirming and indicates that you have received the order and will ship this QTY.

- **Backorder box** –. **DO NOT USE**

- **Reject box – DO NOT USE**

Create Order Confirmation: Update Line Items with Multiple Delivery Dates

If you need to confirm a line with a split shipment (partial QTY will ship on one date and the balance on another)

1. **Choose Update Line Items.**

2. **Fill** in your confirmation number.

3. **Scroll past the Shipping and Tax Information** down to view the line items.

4. **Enter** the first QTY you plan to ship

5. **Click** on Details

6. **Enter** your estimated <u>delivery date</u> (this is the date the parts will arrive to Baker Hughes dock.

7. **Enter** a comment about the split shipment and click OK.

Note: no backorder or reject quantity is allowed.

Create Order Confirmation: Update Line Items with Multiple Delivery Dates

8. You will be taken back to the order confirmation screen where you will see the first quantity you confirmed and the delivery date. You will see any remaining quantity on the line as unconfirmed.

9. **Repeat** steps 4-7 for any additional quantities shipping

10. **Click Next** to review order confirmation

11. **Click Submit** to send your confirmation to Baker Hughes

Note: no backorder or reject quantity is allowed.

Confirm Order: Update Line Items - Price or Date Change

1. **Choose update line items**.

2. **Enter** the quantity in the Confirm data entry field.

3. **Click** Details to enter the details regarding the price or date change.

4. **Enter** your estimated <u>delivery date.</u> This is the date goods will arrive to Baker Hughes

5. **Note** the new price in the Unit Price field

6. **Enter** a Comment regarding the price change.

7. **Update** the Description as needed and click OK when done.

Note: no backorder or reject quantity is allowed.

Confirm Order: Update Line Items – Price or Date Change

8. **Continue** to update the status for each line item on the purchase order. Once finished, click Next to proceed to the review page.

9. **Review** the order confirmation and **ensure that you see Current order status reflecting the changes you submitted.** Click **Submit.** Your order confirmation is sent to Baker Hughes.

10. **A copy** of your order confirmation can be found under Related Documents.

11. **The Order Status will display** as Partially Confirmed if items were not fully confirmed.

- **Generate** another order confirmation to set them to confirm if needed.

- **Click Done** to return to the Inbox.

Confirm Order: Update Line Items - Price Change – Baker Hughes Process

1. **When a price change is submitted via Order Confirmation the PO will change to confirmed**

2. **Do not ship an order with price or delivery date change until a change order is received or a Baker Hughes buyer reaches out directly.**

Note: Once Baker Hughes buyer starts to process your price change request, the order status will change to "Cancelled"

4. Items to Confirm

Please keep in mind that **not all Baker Hughes entities allow for Item Confirmation.** If "Items to Confirm" option is grayed out or unavailable then it is not allowed

Orders and Releases	Time & Expense Sheets	Early Payments and Auctions	Scheduled Payments	Remittances	Notifications	More...

Orders and Releases

Orders and Releases	**Items to Confirm**	Items to Ship

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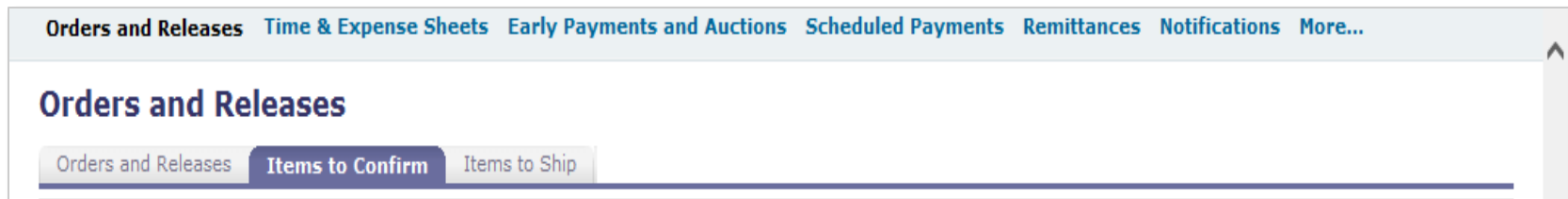
How to view all items that are pending Confirmation

1. **Click on** "Items to Confirm" tab
2. **Shows** all PO line items that need to be confirmed
3. **Rows shown** are at the PO line item level; schedule lines can be viewed through the "View Schedule" link
4. **Default sort** is "Need By" date
5. **Actions** can be taken at both the individual row level and at the mass selection level
6. **Click on** "Search Filters" to see additional search options

Items to Confirm List: How to Utilize Search Filters

1. **Filters:** customer, order number, need by date range, part number.

2. **Three views** provides flexibility and can be used as an actionable list (view "Only items that can be confirmed"). Can be used as include orders that do not require confirmation (views "All items with unconfirmed quantity" and "Only fully confirmed items")

3. **Part number view** allows entries of multiple part numbers.

Items to Confirm List: Viewing Schedule Lines

1. **Each row** represents a purchase order line

2. **To view** schedule lines and existing confirmations on a purchase order line, click on View Schedule

3. **Pop-up window** displays two tables **schedule lines & Confirmation status lines**

Items to Confirm List: Single Row Actions

Row actions

1. **Confirm** Entire Order: even though the row shows only one line item of a purchase order, the entire purchase order can be confirmed in a single click

2. **Confirm** Requested Quantity: confirms the single purchase order line item

3. **Update** Line Item: takes user to the confirmation wizard to confirm the purchase order line item, as well as make adjustments (e.g. quantity, date)

4. **Reject** Requested Quantity: Please do not reject a confirmation

Items to Confirm List: Multi-Row Actions

Mass Actions

1. **Confirm** Requested Quantity: confirms all selected purchase order line items

2. **Confirm** Entire Orders: confirms all selected purchase orders (header level)

3. **"Confirmation Review"** pop-up informs the user of the purchase orders / purchase order line items that are being mass confirmed

5. Understanding Order Status

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Understanding Order status

1. **PO status will change throughout the order life cycle.** Your inbox can be grouped to view orders by order status, amongst other things.

2. **In your inbox** under the Orders and Releases tab click on the calendar icon at the right of your screen**.**

3. **Under "Group By Columns" select order status.** You will now see all of your POs grouped by order status

②

Group by Column

Customer

Inquiries

Ship To Address

Ordering Address

Order Status

Revision

③

Type	Order Number ↑	C
▶ Order Status: Changed (2)		
▶ Order Status: Confirmed (18)		
▶ Order Status: Invoiced (6)		
▶ Order Status: New (43)		
▶ Order Status: Obsoleted (8)		
▶ Order Status: Partially Confirmed (2)		
▶ Order Status: Partially Invoiced (1)		
▶ Order Status: Partially Shipped (1)		
▶ Order Status: Received (3)		
▶ Order Status: Rejected (2)		
▶ Order Status: Shipped (14)		

Orders and Releases

| Orders and Releases | Items to Confirm | Items to Ship | Return Items |

▶ Search Filters

Orders and Releases (100+)

①

Understanding Order status cont.

- **New –** these are new orders pending your review and action

- **Confirmed –** these are orders that you have created order confirmations for. You may also see "Partially confirmed" which means some lines/quantity of the order have not yet been confirmed.

- **Shipped –** these are orders that you have created shipping notices for. You may also see "Partially shipped" indicating that some lines have not been shipped.

- **Invoiced –** these are orders that have invoices created against them. You may also see "Partially Invoiced" indicating that some lines have not yet been invoiced

- **Changed** – these are change POs that require your review and confirmation

- **Rejected** – these are orders that you have rejected

- **Received** – these are orders that have been received into Baker Hughes system

- **Obsoleted –** these are old revisions of POs and cannot be actioned. This likely means that there is a new revision of a PO.

Type	Order Number ↑	C
▶ Order Status: Changed (2)		
▶ Order Status: Confirmed (18)		
▶ Order Status: Invoiced (6)		
▶ Order Status: New (43)		
▶ Order Status: Obsoleted (8)		
▶ Order Status: Partially Confirmed (2)		
▶ Order Status: Partially Invoiced (1)		
▶ Order Status: Partially Shipped (1)		
▶ Order Status: Received (3)		
▶ Order Status: Rejected (2)		
▶ Order Status: Shipped (14)		

6. PDF Generation

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PDF Generation

1. **The option to Download a PDF** version of the PO is now present as shown.

Note: If the document exceeds 1000 lines or is larger than 1MB size, details are not shown in the UI. Therefore the detail is not included in the PDF generated [Increased Document Size Support feature].
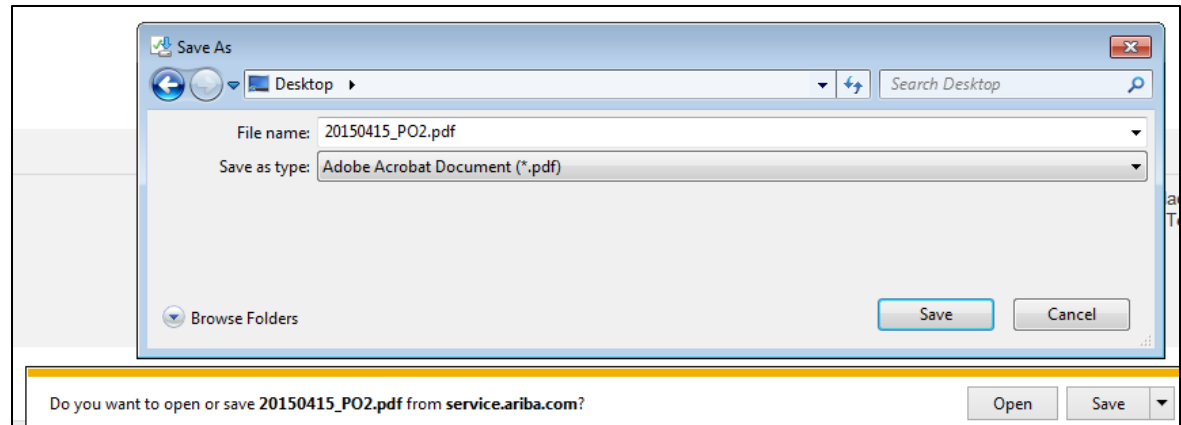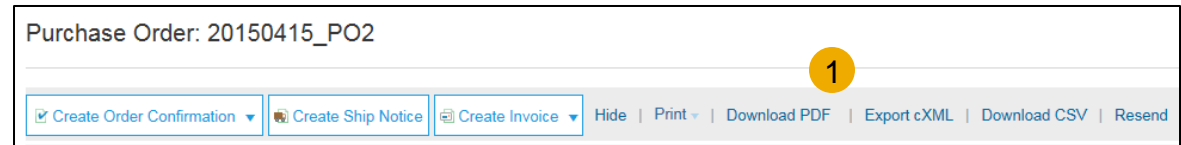
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