User and Configuration Guide

(In)Business Procurement AI–1.4

December 11, 2025

Contents

(In)Business Procurement AI

Overview

The current operating model in procurement relies on established processes and systems. Both business users and procurement specialists face challenges when working on procurement requests, lengthy negotiations, difficulty in managing contract lifecycle details, and poor automation in reporting and validation processes.

(In)Business Procurement is an AI-powered solution that enhances traditional procurement processes through contract and supplier management, and the generation of insights. It seamlessly integrates with your existing ERP systems, such as Coupa, Oracle, or SAP, serving as an intelligent AI layer that enhances capabilities and streamlines procurement activities.

Key capabilities

AI assistant

The AI assistant employs multiple AI agents that handle natural language processing, SQL query generation, document analysis, and policy enforcement. The system utilizes OCR to retrieve information from procurement documents.

By leveraging agentic flows rather than deterministic workflows, the app delivers flexible, context-aware responses. This functionality eliminates the need for users to navigate complex interfaces to access supplier, contract, and procurement information.

Key features

- Multi-layered architecture for natural language processing.
- Error handling framework.
- Contextual intelligence framework.
- Session management system.
- Guided interaction system.
- Cross-module integration architecture.
- Real-time data processing engine.
- Voice input subsystem.
- Response feedback management.

Contract management

The Contract Management module extracts key information from contract documents using advanced solutions, including Optical Character Recognition (OCR) and natural language processing (NLP). Users can identify contracts by status, value, and expiration date. The system stores both metadata and full contract text, enabling detailed queries about contract terms, clauses, and obligations.

Key features

- Contract analysis and risk assessment.
- Expiration management and renewal tracking.
- Comprehensive contract overview.
- Document viewer with multi-format support.
- Quick prompts and AI assistant integration.

Supplier management

The supplier module consolidates supplier data from multiple sources to provide a unified view. It tracks supplier performance, certifications, and risk factors. The system displays key supplier attributes, including In-country Value (ICV) scores, industry ratings, and contract history, enabling procurement officers to make informed decisions about supplier selection.

Key features

- Centralized supplier data management.
- AI-powered natural language queries.
- Comprehensive supplier analysis.
- Automated metadata extraction.
- Quick prompts and AI assistant integration.

Sourcing

The Sourcing module provides real-time visibility into procurement activity, performance metrics, and team efficiency. It connects users, procurement officers, and suppliers across the purchase request lifecycle, enabling streamlined sourcing, informed decision-making, and role-based access to dashboards, Fairmarkit, and organization-wide insights.

Key features

- Real-time visibility.
- Role-based access.
- Date-range filter.
- Fairmarkit integration.

Insights and dashboards

The insights module offers both prebuilt and customizable dashboards for procurement analytics. Users can create personalized dashboards by pinning AI-generated insights as widgets. The system supports various visualization formats, including tables and charts, letting procurement teams track key metrics and identify trends across their procurement activities.

Key features

- AI-powered visualization.
- Unlimited custom dashboards.
- Preconfigured KPI widgets.
- Natural language insights.

- Flexible widget management.

App customization

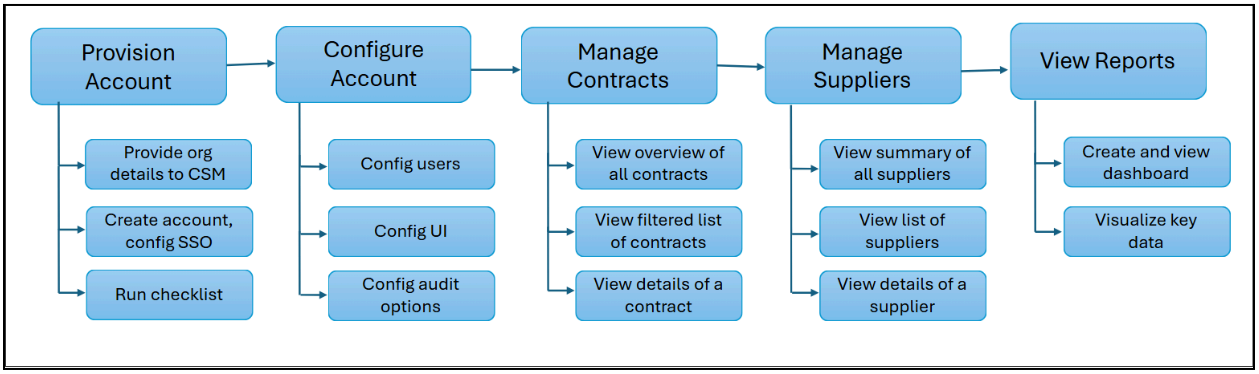
(In)Business Procurement offers robust app customization, helping procurement professionals tailor workflows, approval structures, and compliance standards to their organization's specific needs.

Key features

- Advanced role-based access controls and user management.
- ERP integration support.
- AI-driven Quick Prompts.
- Comprehensive audit logs.
- Customizable UI configuration.
- Multi-tenant switching functionality for users with access to multiple tenants.
- General settings and branding control.

Get started

This section guides you through provisioning a new customer account in the (In)Business Procurement system. It includes prerequisites, required information, step-by-step workflows, product access details, and post-provisioning tasks.



Provision an account

Account provisioning is the process of creating and configuring a new customer account in the (In)Business Procurement system. This process typically begins during the sales cycle and involves several steps to ensure proper setup and user access.

The account provisioning workflow involves several steps: initiating a request through the customer success manager, creating the account in the internal portal, configuring SSO, sending user invitations for setup, and verifying account owner access.

Prerequisites

Before initiating account provisioning, make sure that you have:

- Completed the sales cycle with the customer.
- Coordinated with the customer success manager, who supervises the process.
- Gathered all the required customer information.

Required customer information

To create a new account, gather the following information from the customer. The customer success manager uses this information to complete the provisioning process in the internal portal:

- **Account name**: The organization name in the system.
- **SSO type**: The single sign-on authentication method that you can't change later.
- **Owner details**: First name, last name, and email address.

- **Initial password setup**: Information to establish the first login credentials.

Communications

During the provisioning process, the system automatically sends several types of email notifications:

- **New user invitations**: Sent when adding users to the system.
- **Update notifications**: Sent when someone updates the user information.
- **Password reset requests**: Sent when users request a password reset.
- **Reinvite emails**: Reminder emails to users to activate their accounts.

Note*: The Contents of an email vary based on the recipient's assigned role in the system.*

Product access configuration

The following options are available after provisioning an account:

- (In)Business Procurement, (In)Alpha, and Board Observer products have a unique login address.
- All products within an account share the same SSO configuration.
- Users must log in to each product using the configured SSO for their account.
- You can add additional products to the account.

Post-provisioning checklist

After account provisioning is complete:

1. **Verify the access**: Confirm that the account owner can log in successfully.
2. **Add additional users**: Use the admin module to invite other users.
3. **Configure system settings**: Adjust UI settings, widgets, and other configurations as needed.
4. **Enable features**: Activate required modules and capabilities based on the customer's subscription.

Troubleshoot

If users encounter access issues after provisioning, then follow these steps:

- Verify that you provide the correct email address of a user.
- Verify that you've applied the correct SSO configuration. You can't change it later.
- Ensure the user is accessing the correct login address.
- If necessary, use the reinvite functionality to send new access instructions.

For additional support, contact the technical support team.

App administration and configuration

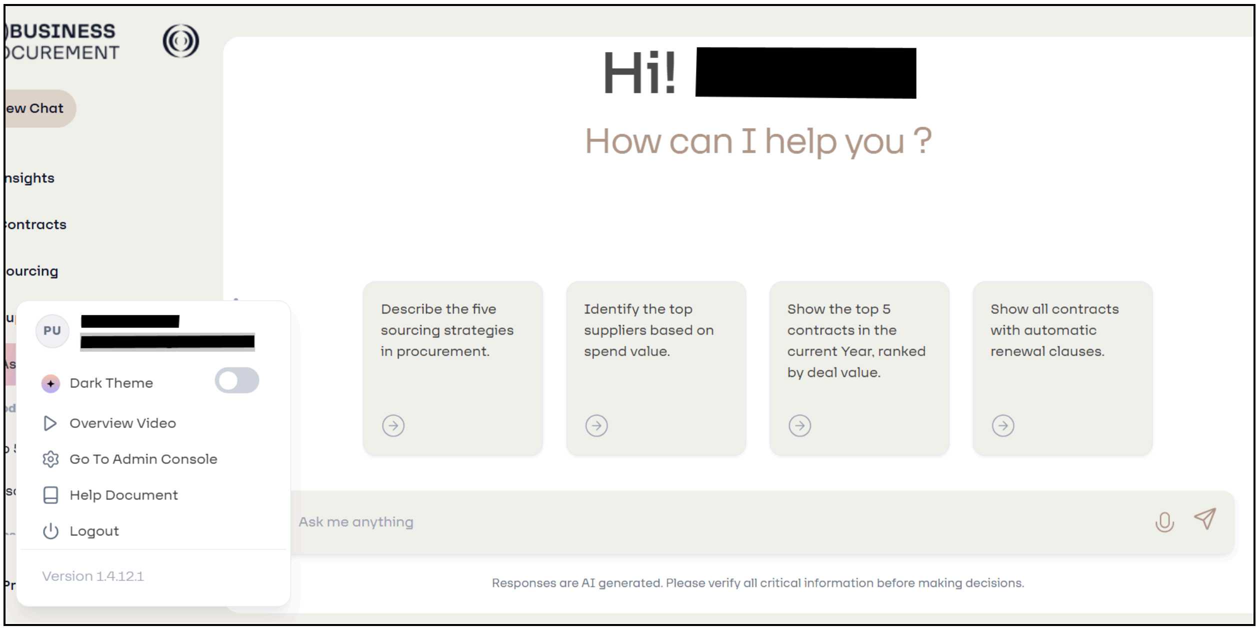
This section provides centralized administrative control over key areas, such as general settings, user management, UI configurations, audit logs, and analytics. General settings let you configure core app preferences, while the user management enables you to manage user accounts and permissions across your organization. UI configurations enable you to customize interface elements to match your visual preferences, and audit logs provide comprehensive tracking of system changes and user activity. The analytics dashboard provides comprehensive analytics on app usage, AI assistant engagement, and query patterns for administrative users. Use these configuration options to tailor the app to your organization's specific workflows, approval processes, and compliance requirements.

You can personalize your experience and manage your account settings through the application interface to:

- **Get started**—Watch the product overview video for onboarding guidance. For product video, navigate to **Admin Settings** > **Overview Video**.
- **Customize your experience**—Switch themes using the toggle button. For theme control, navigate to **Admin Settings** > **Dark Theme**.
- **Access documentation**—View comprehensive product documentation. To access documentation, navigate to **Admin Settings** > **Help Document**.
- **Version information**—View application version information. For the app version information, navigate to **Admin Settings** > **Version**.

The configuration module uses Role-Based Access Controls (RBAC) with granular permission settings to maintain system security. This security framework ensures that only authorized users can modify system settings. You can assign specific permissions based on user roles and responsibilities, creating a tailored access structure that suits your organization's needs. The system protects critical procurement processes through controlled access to configuration settings, maintaining the integrity of your business operations while providing the necessary flexibility.

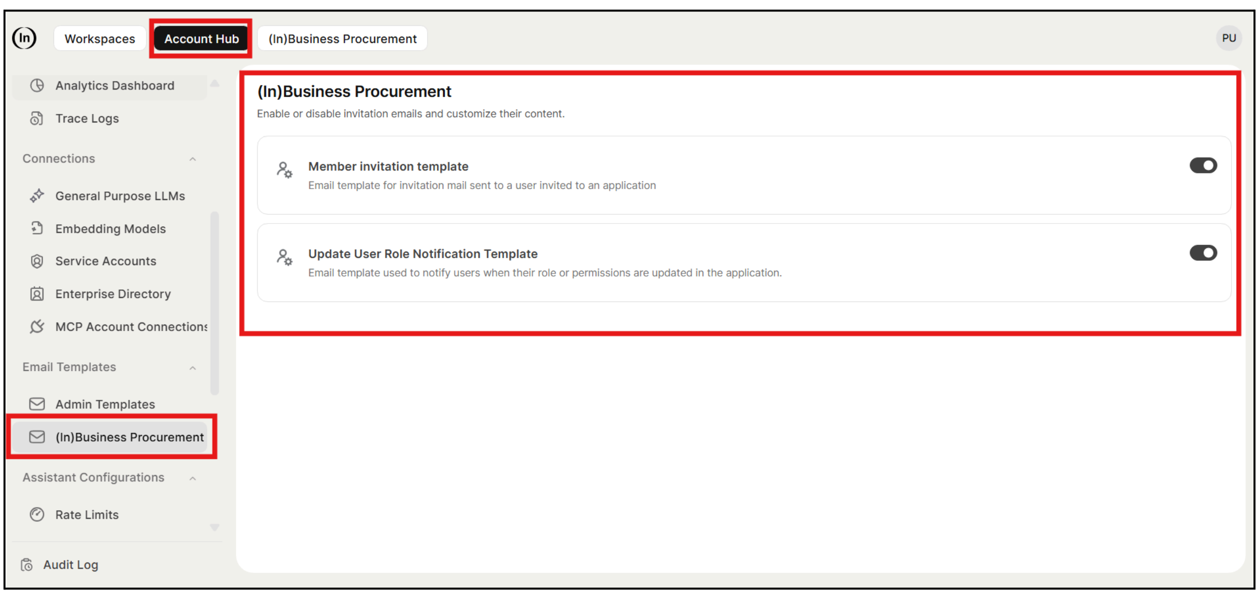
To configure settings, navigate to **Admin Settings** > **Go to Admin Console.**



Email templates

The email templates section, available in the account hub, helps admins customize email content and control email notifications, such as member invitations and changes in user roles.

To access the email templates, navigate to **Admin Settings** > **Go to Admin Console** > **Account Hub** > **Email Templates** > **(In) Business Procurement.**

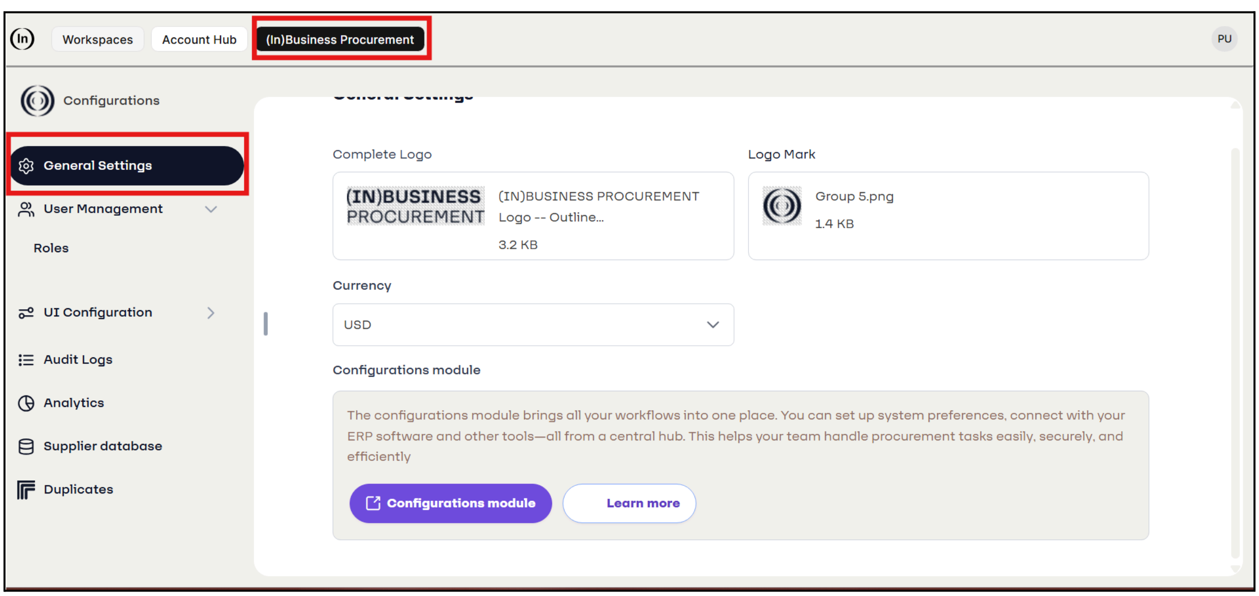


General settings

The General settings section serves as a central control panel for the app's core operations. You can customize the following settings as needed.

To access the general settings, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **General Settings.**

Setting name	Description
Complete Logo	You can change the organization's logo. To upload a new logo, hover over the logo bar, select the edit sign, and then upload the image.
Logo Mark	Simplified logo mark for use in space-constrained areas. To upload the logo, hover over the complete logo bar, select the edit sign, and then upload the image.
Currency	Currency used for all procurement activities.
Configurations module	The Configurations module centralizes workflows and system preferences, let you to integrate ERP software and other tools from a single location. This unified hub streamlines procurement tasks for your team, enhancing ease, security, and efficiency. To get started, select the Configurations module to set up your App Services Platform.

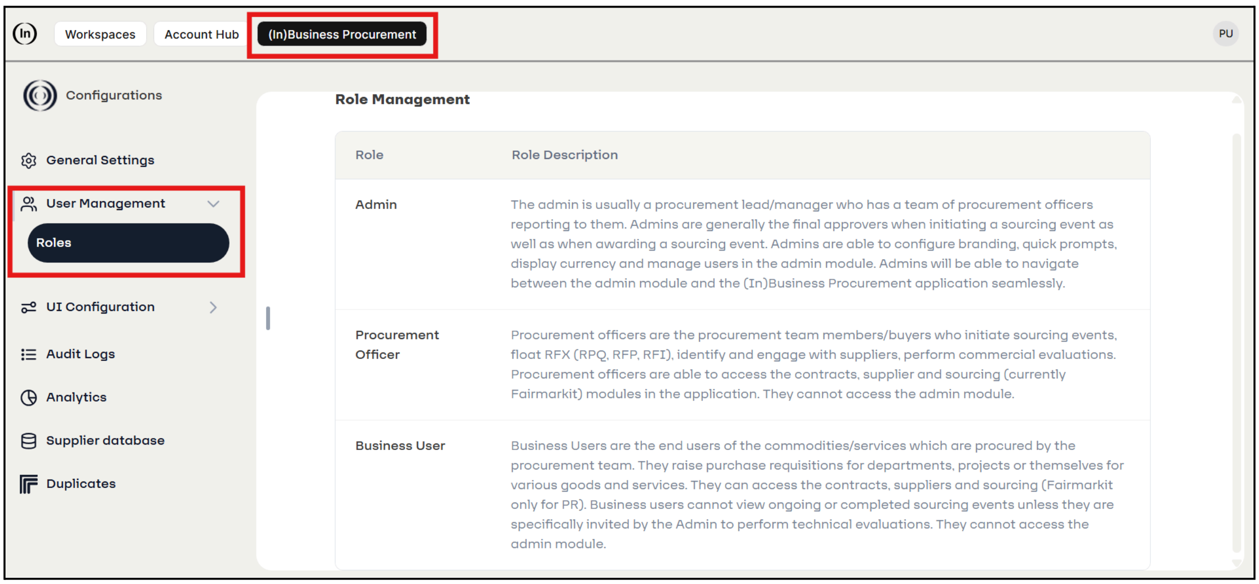


User management

User management in (In)Business Procurement helps you control access through users and roles. You can manage permissions, enforce role-based access, and align with your organization's structure. This approach supports compliance by separating duties and granting users only the necessary access.

The authorization system controls user roles, permissions, and approval authority for procurement activities. Permission matrices determine access to catalog browsing, requisition creation, supplier management, approvals, and financial data.

To access the user management UI, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **User Management** > **Roles.**



User interface configuration

Admins can customize key modules, including the suppliers module, the contracts module, and the AI assistant. Organizations can tailor the software to match their specific workflows and operational needs through two main tools: Quick prompts and widgets.

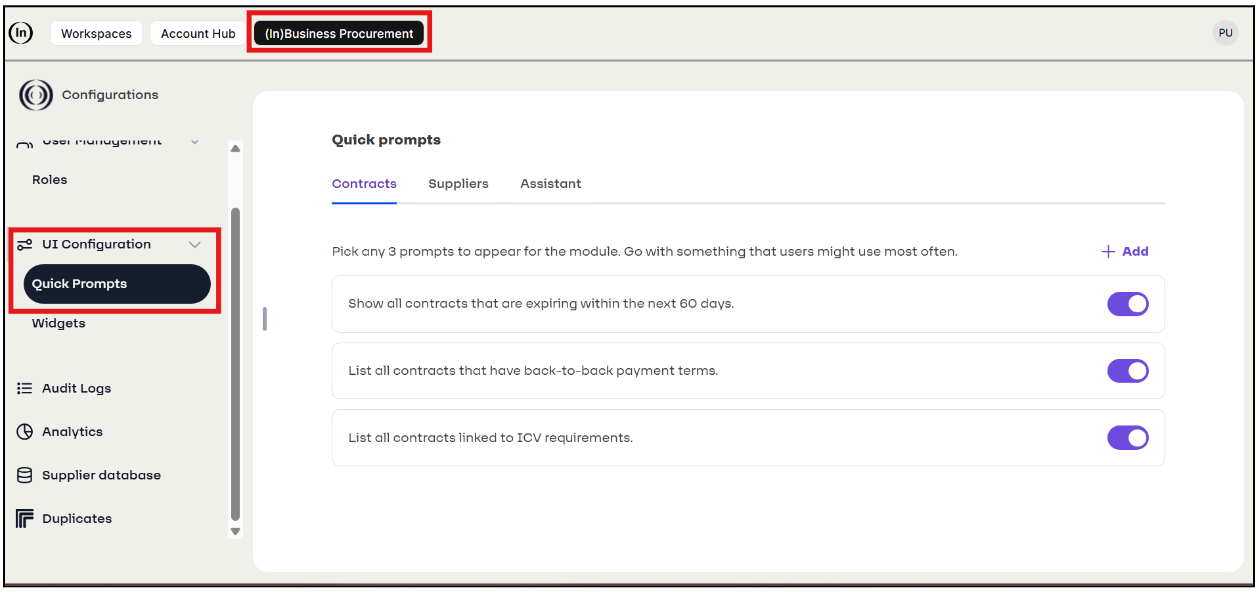
Quick prompts

AI-driven suggestions, called quick prompts, tailor themselves to each module—contracts, suppliers, and the AI assistant. Additionally, it dynamically adapts to the user's current context, including the page, workflow stage, or document type. These functionalities simplify task initiation by surfacing the most relevant actions right when and where users need them.

The system can display up to four prompts per module. Administrators can create, edit, enable, or disable prompts to align them with operational priorities. Common uses include launching workflows, generating documents, or retrieving data with a single click.

Quick prompts reduce manual steps, speed up routine tasks, and guide users toward the most efficient actions—improving accuracy and productivity across the app.

To access the quick prompts, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **UI Configuration** > **Quick Prompts.**



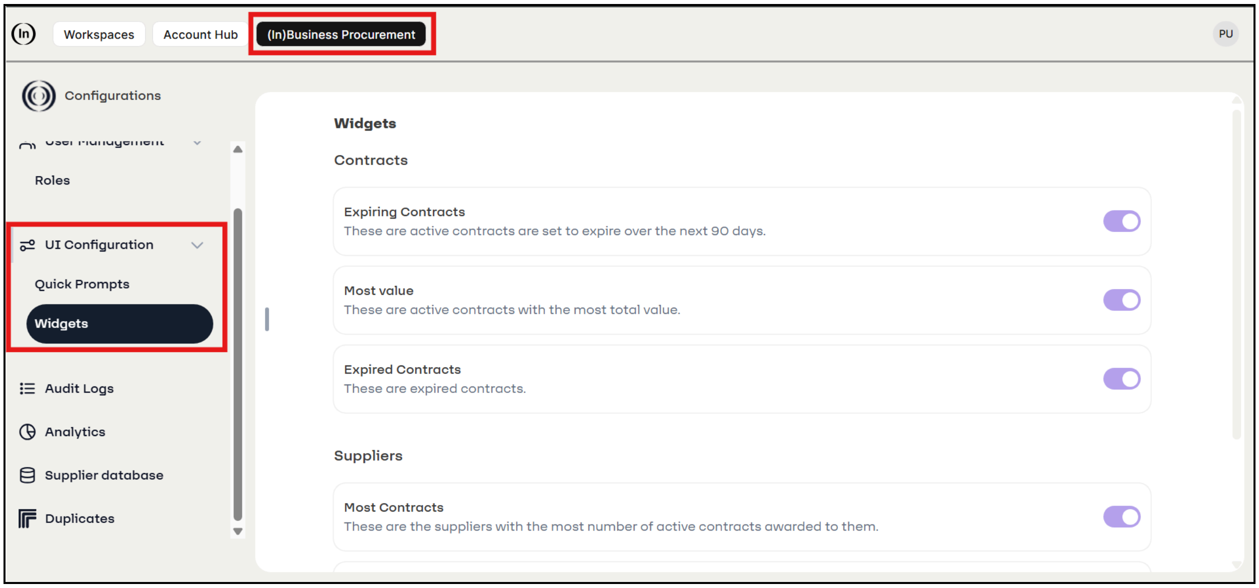
Widgets

Widgets are interactive dashboard components that display key metrics, real-time updates, and shortcuts to frequently used features for specific modules. Use widgets to monitor procurement activities and take informed actions with improved visibility and efficiency.

Each module supports up to 3 widgets, which administrators can arrange and enable/disable to align with organizational goals or user roles. For example:

- **Supplier module**: Displays onboarding progress and supplier performance trends.
- **Contracts module**: Highlights the upcoming expirations and approval statuses.
- **Digital assistant**: Offers smart recommendations and automated actions.

To access the widgets, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **UI Configuration** > **Widgets.**



Audit logs

The Audit logs in (In)Business Procurement provide a detailed, tamper-proof record of all administrative actions and system changes. The logs track who made a change, when it occurred, and the impact of the changes—ensuring transparency, security, and accountability across the app.

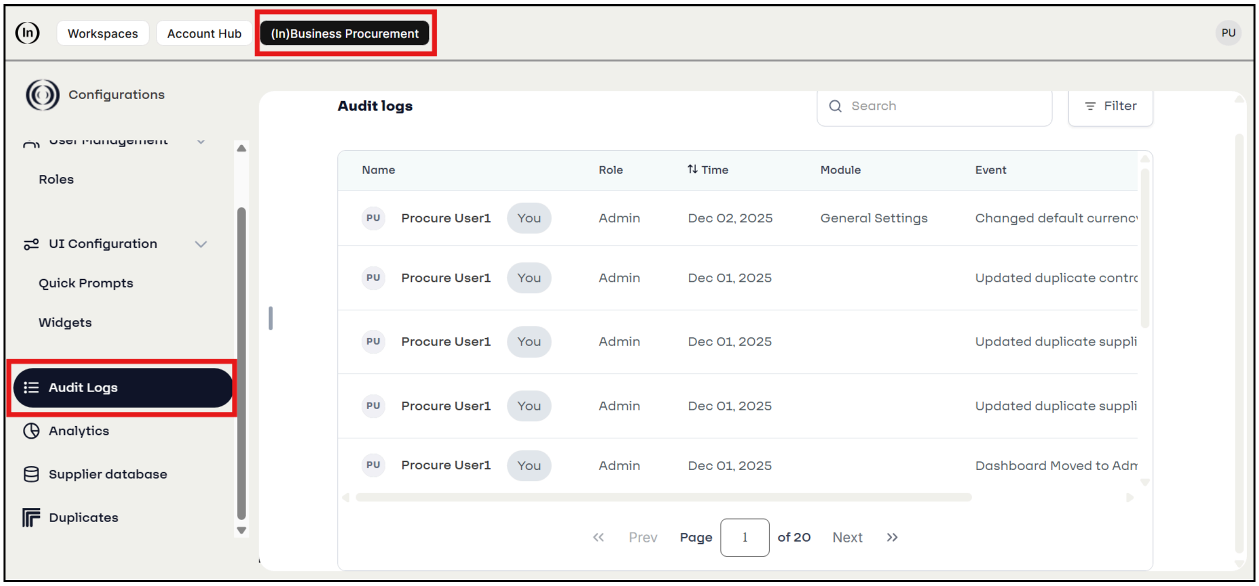
The system offers advanced filtering to locate logs by date, module, or user role. Each log entry includes the exact timestamp, user role name, role type (system-defined or custom), affected module, and a description of the changes and the reasons for change.

The system offers advanced filtering capabilities, enabling you to locate logs by date, module, or user role. Each log entry contains the exact timestamp, including the user's role name and role type (system-defined or custom), the affected module, a description of the changes, and the reason for the changes. This structured approach enables you to identify and review specific log entries according to your requirements.

The following are the key features of audit logs:

- Monitor system updates and changes to user roles.
- Detect unauthorized or unusual activity.
- Support compliance, audits, and dispute resolution.
- Maintain a historical record for critical actions.
- Drive process improvements through meaningful insights.

To access the audit logs, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **Audit Logs.**



Analytics

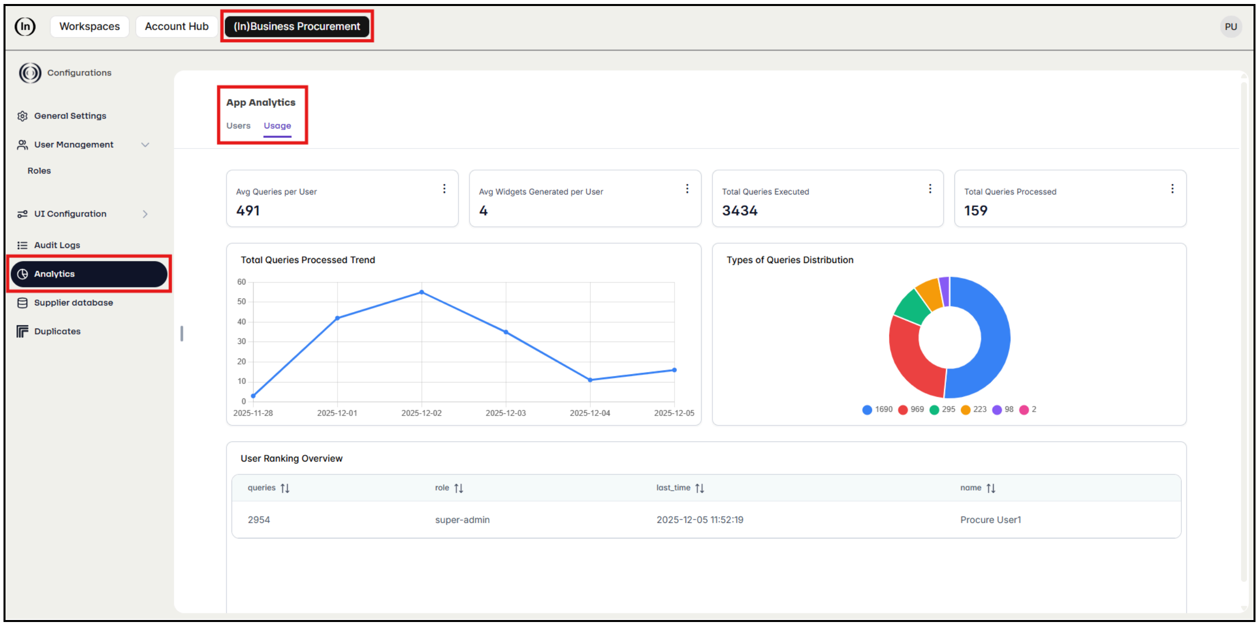
The analytics dashboard provides comprehensive analytics of app usage, user engagement, and AI assistant interaction patterns. This dashboard enables administrators to monitor adoption rates, identify high-performing users, track query configurations, and optimize assistant performance across the app.

The system restricts access to the analytics dashboard to administrators only. This role-based access control ensures that only authorized administrative personnel can access sensitive usage analytics and platform insights.

The following are the key features of the analytics dashboard:

- **User analytics**: Displays active user count in daily or monthly trends and top user rankings.
- **User performance**: Displays average queries and widgets generated per user.
- **Query insights**: Displays the total queries processed, along with category breakdown across modules.

To access the analytics, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **Analytics.**



Admin - supplier attribute configurations

The supplier enrichment system creates master supplier records by combining internal and external data sources with intelligent decision logic. You can configure attribute and category priorities directly in the admin console. The system updates tenant-specific master supplier profiles in real time to reflect your changes.

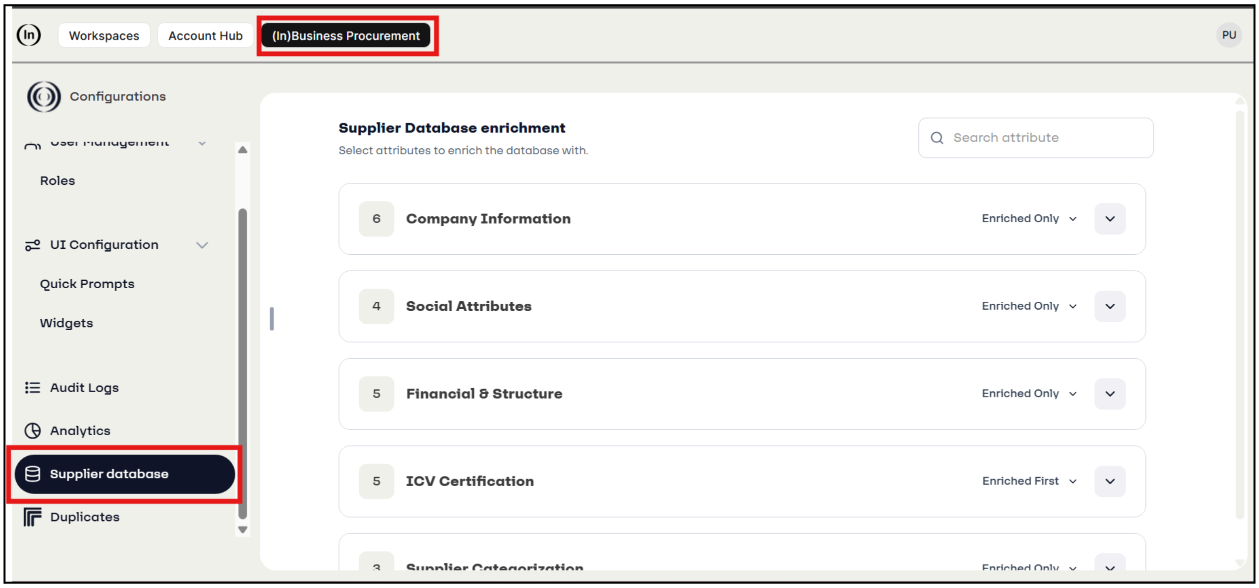
The following are the key features of the supplier attribute configuration:

- **Regular enrichment**: Enhances your supplier database with the most comprehensive and up-to-date information available from multiple verified third-party data sources.
- **Bulk configuration**: Category-wide settings with auto-save for scalable process management.
- **Enhanced visibility**: Comprehensive supplier intelligence supporting risk analysis, contracts, and sourcing decisions.
- **Client-specific master supplier profiles**: The Admin can choose the preferred source for each supplier attribute to create a client-specific master supplier profile that the agentic system refers to between the following priorities:

Priority	Description
In-house only	Client's system (ERP/P2P) data only.
In-house first	Client's system first, enriched DB for blanks.
Enriched only	Enrich the supplier DB only.

Enriched first	Enrich the DB first, then the client's system for blanks.

To access the supplier database, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **Supplier Database.**



Duplicates

The duplicate dashboard is an admin-facing quality assurance tool designed to maintain data integrity within the procurement solution. The system identifies potential duplicate contracts and suppliers using exact match and fuzzy matching algorithms, presents them in a centralized dashboard, and enables administrators to coordinate remediation activities in the source ERP system through a structured workflow. All administrative actions are logged to provide complete audit trails for compliance and governance.

The following are the key features of the duplicates dashboard:

Remediation Workflow: Enables administrators to mark duplicates as resolved or ignored, with the ability to add comments and update resolution status as business requirements change.

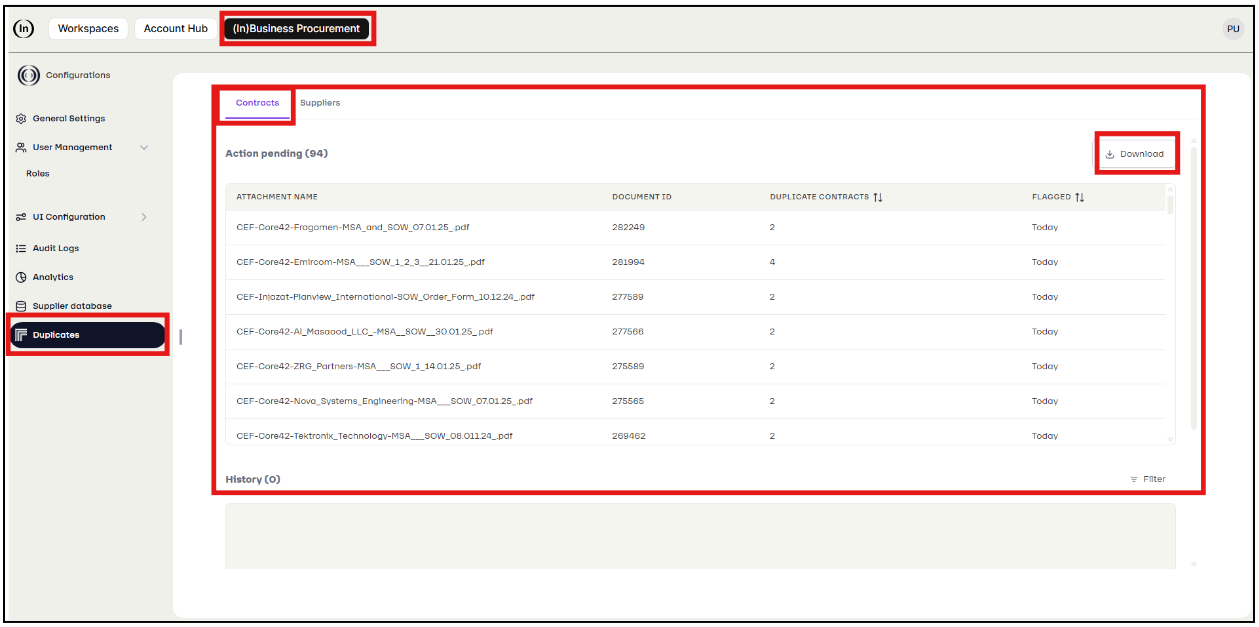
Complete Audit Trail: Logs all administrative actions with timestamps, user identification, action types, and justifications in both the History tab and system-wide audit logs for compliance.

Admin-Only Access: Restricts console access to authorized administrators through the admin interface, ensuring secure and traceable duplicate management.

Contracts

The system detects duplicate contracts by comparing attachment document IDs and flags them for review. These duplicates appear in a dedicated dashboard tab that displays pending actions, duplicate counts, and resolution history. The detailed view lists each contract in the duplicate set, including record IDs, titles, metadata, and links to the source records. Users can also download the duplicate contract records in .csv format.

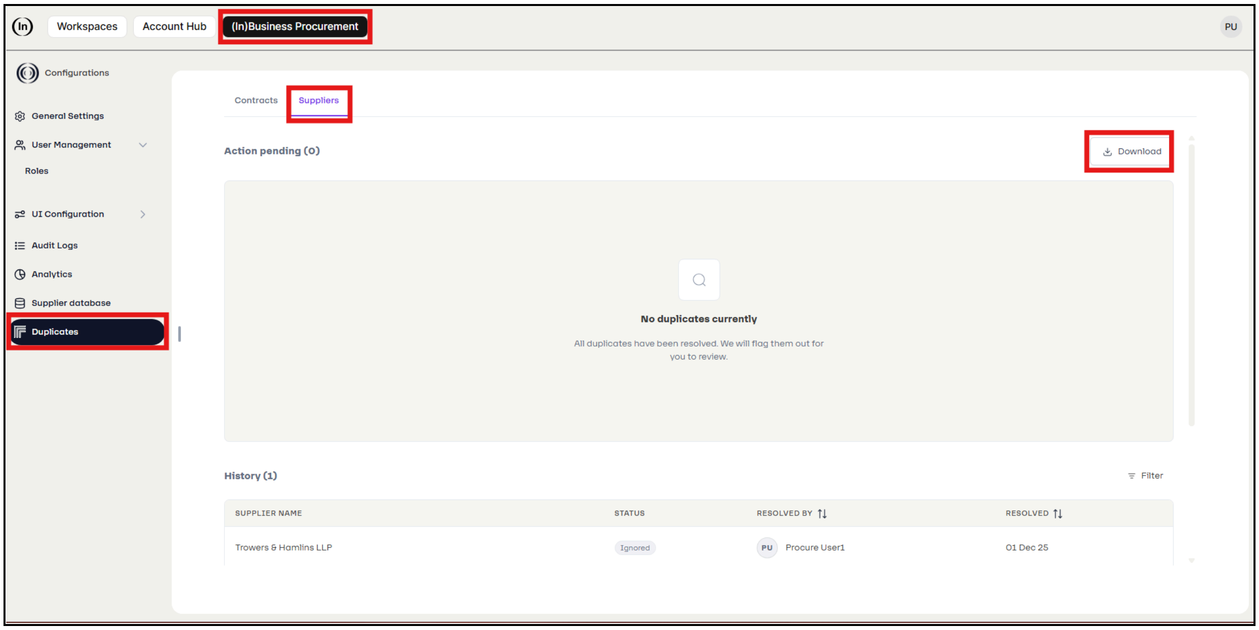
To access the duplicate contracts, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **Duplicates** > **Contracts.**



Suppliers

The system detects duplicate suppliers using exact and fuzzy matching across names, email addresses, locations, and certification IDs (VAT, ISO, ICV, Trade License). Identified duplicates appear in a dedicated dashboard tab that displays pending actions, duplicate counts, and resolution history. The detailed view lists all suppliers in a duplicate set with record IDs, names, metadata, and links to the corresponding records. The download tab lets users export duplicate supplier data in .csv format.

To access the duplicate suppliers, navigate to **Admin Settings** > **Go to Admin Console** > **(In)Business Procurement** > **Duplicates** > **Suppliers**.



Workspaces
Account Hub
(In)Business Procurement
PU
Configurations
General Settings
User Management
Roles
UI Configuration
Audit Logs
Analytics
Supplier database
Duplicates
Contracts
Suppliers
Action pending (0)
Download
No duplicates currently
All duplicates have been resolved. We will flag them out for you to review.
History (1)
Filter
SUPPLIER NAME
STATUS
RESOLVED BY
RESOLVED
Towers & Hamlins LLP
Ignored
PU
Procure User1
01 Dec 25

View contract module

The contract management module offers organizations enhanced contract insight through AI-powered analysis and clear visibility into crucial contract information and timelines. Administrators retain the ability to tailor specific module features, including the quick prompt queries.

The following are the key features of the contract module:

- **Metadata extraction**: Automatically identifies and extracts essential contract attributes.
- **Contract analysis**: Evaluates contract terms, potential risks, and opportunities for optimization.
- **Expiration management**: Proactively monitors contract timelines and impending renewals.
- **Historical analysis**: Delivers valuable insights about the past contract performance.
- **Data synchronization**: Integrates your ERP system with the database through an automated synchronization process. The integration completes a full sync of all data when first configured, then uses timestamp-based tracking to sync only modified data in subsequent runs. The system automatically retries failed operations to ensure data consistency and processes complex data structures and relationships. You can choose which contract types to sync, including active, expired, and terminated contracts. Run synchronization manually or set up automatic schedules to meet your organization's needs.

The module offers the following pages:

- **Contracts landing page**: Provides an overview of critical contract statuses through three widgets: expiring soon, most valuable, and expired contracts. Each widget displays up to five relevant contracts and lets you navigate to a listing page that shows the full list. The landing page also has a quick prompts section that opens the AI assistant with predefined queries.
- **Contracts listing page**: Displays the full list of contracts for a given category (from the landing page widgets) or for user queries via the assistant. This page supports pagination, searching by contract name, sorting, and filtering. Selecting a contract row displays the contract overview page.
- **Contracts overview page**: Displays all contract details in a read-only format. It includes a document viewer for the contract text (supporting multiple docs), a summary panel highlighting key points, and metadata sections populated from the database.

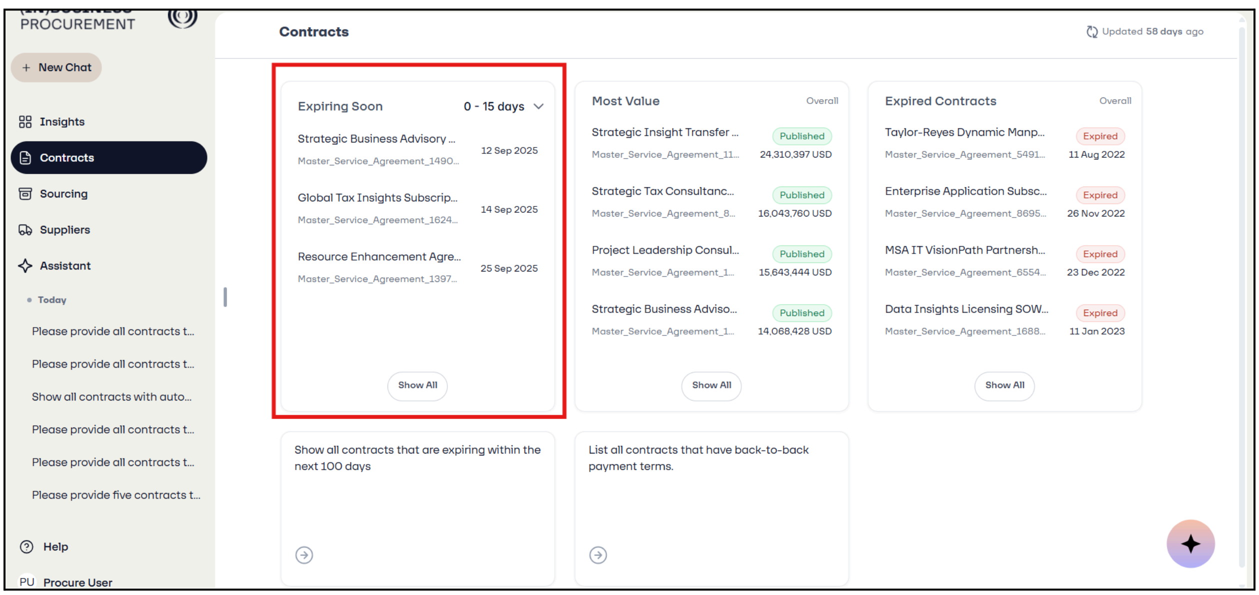
View contracts landing

The contract landing page displays a quick overview of contract status across the organization. It displays the timestamp of the last data update to indicate the data's freshness. The page includes the following widgets:

- Expiring Soon
- Most Value
- Expired Contracts

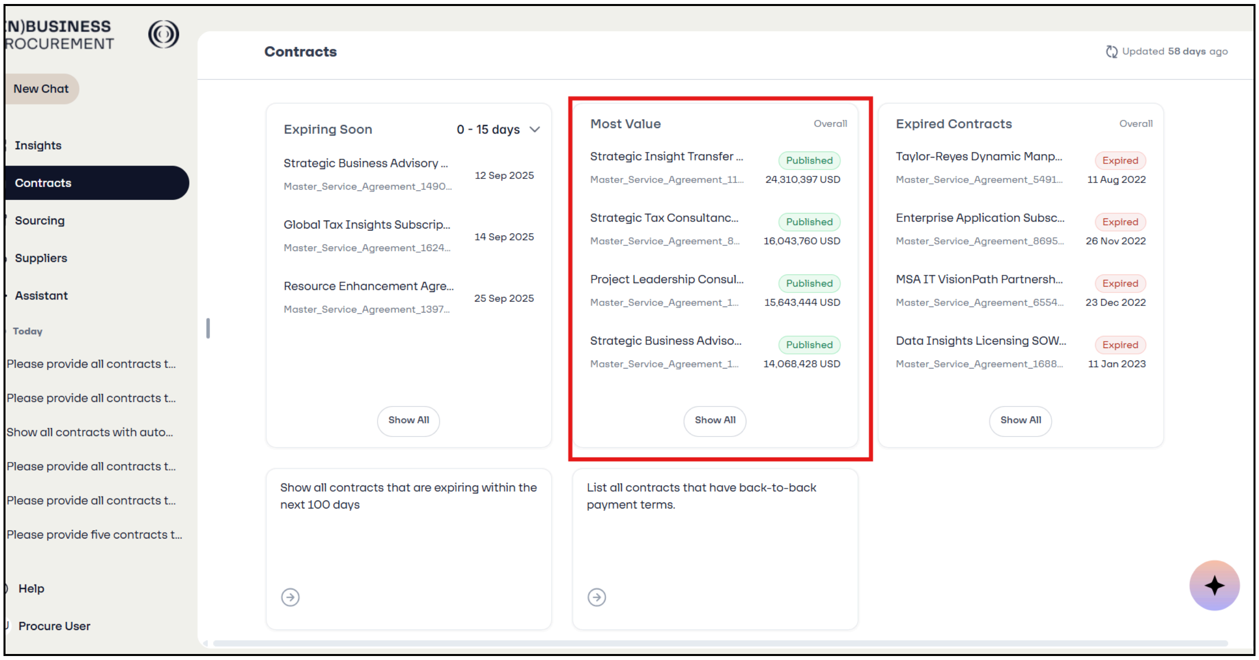
Expiring soon

This section displays up to four contracts expiring within a user-selected timeframe, with a default of 0-15 days, and additional options of 15-30, 30-60, 60-90, or 90-120 days. A Show All tab helps you navigate to the full listing Page.



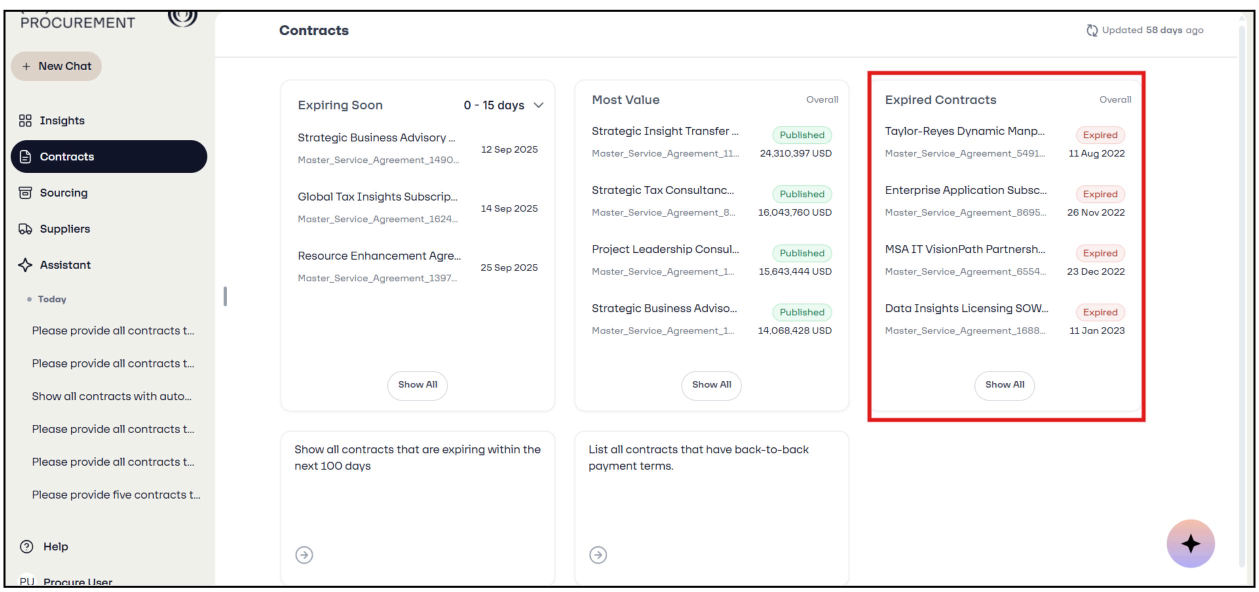
Most value

The tile displays four contracts with the highest value in descending order, with an option to view the complete listing page.



Expired contracts

This tile displays up to four expired contracts sorted by the longest delay since expiry. An option lets you view the complete listing. Selecting a contract opens its overview page.



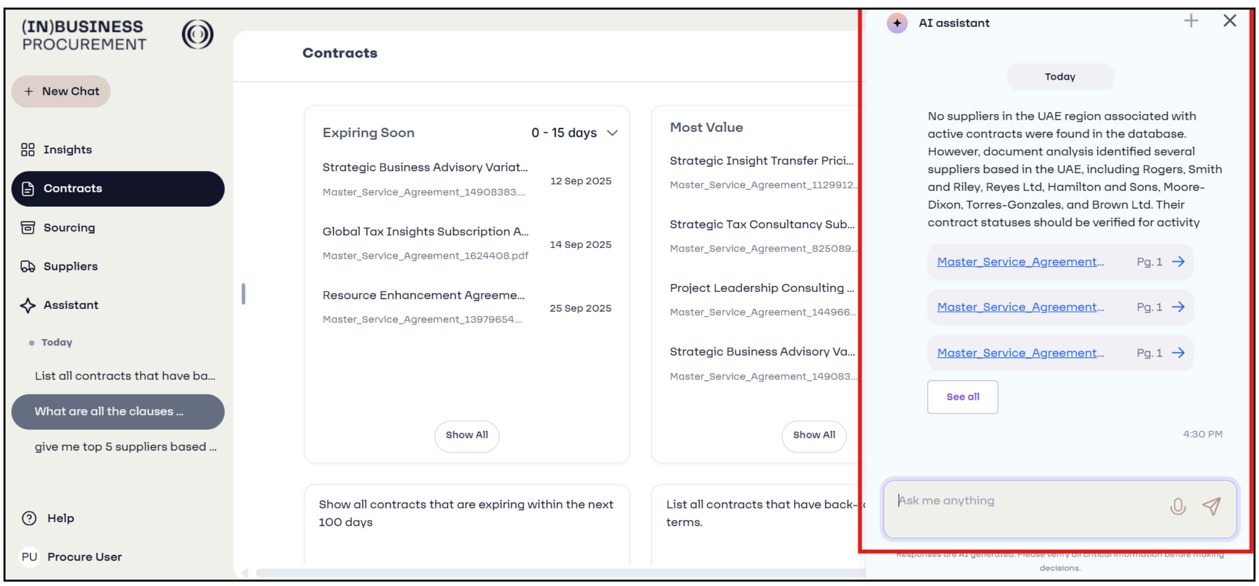
Assistant icon and quick prompts

The assistant icon features several key enhancements designed to boost user productivity. Automatic context switching enables the assistant to detect when users move between contracts and update its context instantly, with no manual setup or configuration required. Context persistence ensures that while users navigate within a single contract, the assistant maintains its understanding of the current work session, enabling smooth transitions between related documents without resetting the conversation history. The assistant's icon is consistently placed in all modules and on all pages to make sure that users can access it without disruption.

Quick prompts provide users with immediate access to commonly used features, organized on the main page. The selection process requires minimal effort, and launching features involves no additional configuration steps, letting users begin working with the assistant immediately upon selection.

The following conversation displays the pattern of the assistant's response:

- *User's query: What are all the clauses mentioned in the office supply contracts?*
- *The assistant displays the result for the query.*



The following are a few examples of similar queries related to the contracts module:

- *I need some office supplies for my team. Do we've any existing contracts in place?*
- *List all contracts with John Doe, and when are those expiring?*
- *What are the clauses mentioned in the strategic insight transfer pricing contract?*

View contracts listing

The contract listing page helps you manage all your organization's contracts in one place. You can access contracts organized by category, including those expiring soon, those of the most value, and those that have expired. Use the AI assistant to search for contracts with natural language queries, or sort and filter contracts by date, value, contract type, and custom fields. This approach gives all stakeholders quick access to the contract information they need.

The contract listing page contains the following features:

Pagination

- Ten contracts per page with intuitive navigation controls.
- Page numbers and previous/next options for easy browsing.

Search & sorting

- Contract name search functionality.
- Contract value sorting (high to low, low to high).
- Context-aware default sorting from widgets.

Contract display

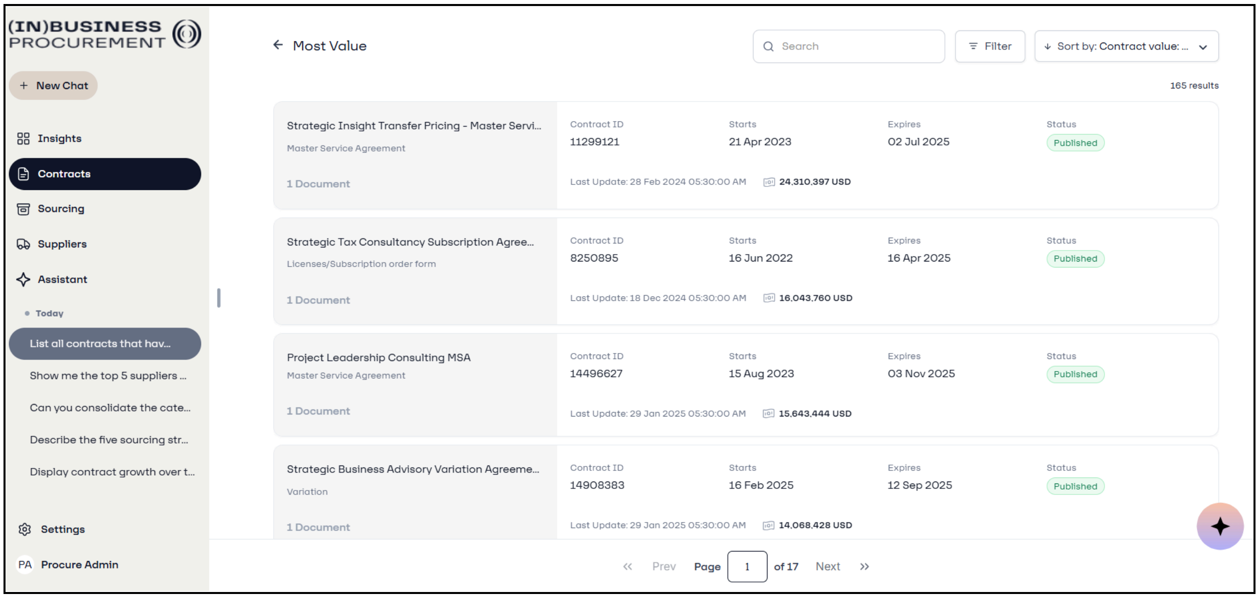
- Essential contract details such as title, classification, document count, ID, and dates.
- Color-coded status indicators such as red, green, and grey.
- Standardized monetary values such as USD or AED with date-based conversion.
- Last modification timestamps.

Navigation

- Click-through access to a detailed overview of a contract.
- Seamless transition to comprehensive contract analysis.

Filtering

- Automatic filtering in the widget.
- Conversational queries and quick filters.
- Multi-select status options (published, expired, and terminated).
- Customizable expiration timeline ranges (0 to 120 days).
- Personalized view creation for portfolio analysis.


(IN)BUSINESS PROCUREMENT
+ New Chat
Insights
Contracts
Sourcing
Suppliers
Assistant
Today
List all contracts that hav...
Show me the top 5 suppliers ...
Can you consolidate the cate...
Describe the five sourcing str...
Display contract growth over t...
Settings
PA Procure Admin
Most Value
Search
Filter
Sort by: Contract value: ...
165 results
Strategic Insight Transfer Pricing - Master Servi...
Master Service Agreement
1 Document
Contract ID 11299121
Starts 21 Apr 2023
Expires 02 Jul 2025
Status Published
Last Update: 28 Feb 2024 05:30:00 AM
24,310,397 USD
Strategic Tax Consultancy Subscription Agree...
Licenses/Subscription order form
1 Document
Contract ID 8250895
Starts 16 Jun 2022
Expires 16 Apr 2025
Status Published
Last Update: 18 Dec 2024 05:30:00 AM
16,043,760 USD
Project Leadership Consulting MSA
Master Service Agreement
1 Document
Contract ID 14496627
Starts 15 Aug 2023
Expires 03 Nov 2025
Status Published
Last Update: 29 Jan 2025 05:30:00 AM
15,643,444 USD
Strategic Business Advisory Variation Agreeme...
Variation
1 Document
Contract ID 14908383
Starts 16 Feb 2025
Expires 12 Sep 2025
Status Published
Last Update: 29 Jan 2025 05:30:00 AM
14,068,428 USD
Prev Page 1 of 17 Next

View a contract

The contract overview provides a read-only view of comprehensive contract details, including terms, conditions, obligations, and key dates, to preserve data integrity. This centralized application facilitates efficient contract review and analysis, enabling users to identify risks and opportunities while monitoring compliance requirements. The unified interface consolidates all contract-related elements, including documents, metadata (such as contract type, vendor, key dates, and value), and contract summaries, ensuring streamlined access and comprehensive visibility into contractual obligations.

The following are the capabilities of the contracts module:

Document/PDF viewer

- Displays extracted contract text in optimized digital format.
- Provides zoom controls to adjust text size for improved readability.
- Includes page navigation controls for multi-page documents.
- Maintains read-only access to preserve document integrity.
- Enables seamless switching between all associated contract materials.

Summary panel

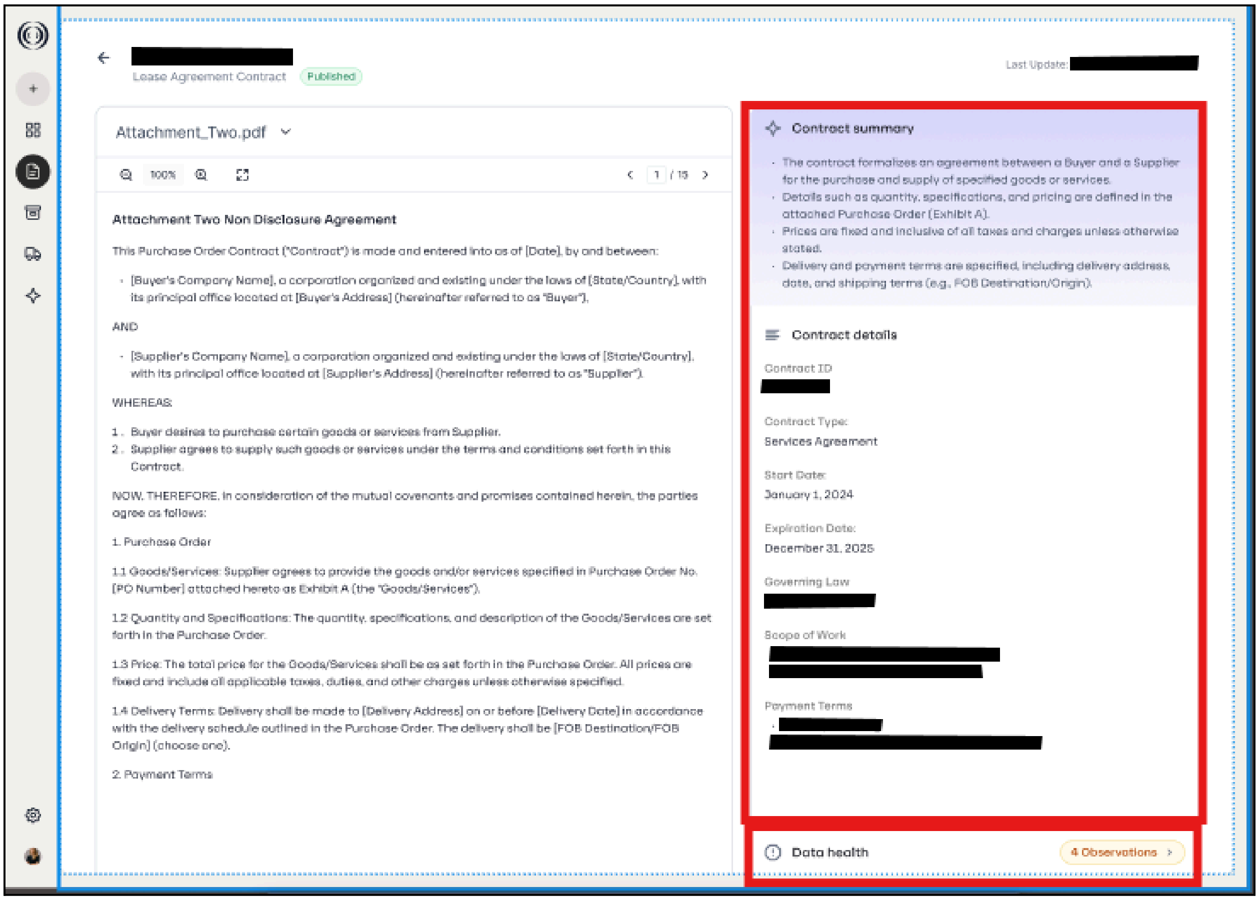
- Generates summaries during the design phase using Agentic workflows.
- Displays key contract components, including amendment details and risk factors.

Contract details

Displays the following metadata regarding the contract:

- **Contract ID**: Displays ID as recorded in the database.
- **Contract Number**: Displays the number as recorded in the database.
- **Contract Type**: Displays classification such as Non-Disclosure Agreement (NDA) and Master Service Agreement (MSA).
- **Supplier:** Displays the supplier's name as a clickable link. Clicking the link redirects the user to the supplier overview page.
- **Supplier ID:** The unique identifier for the supplier.
- **Parent MSA:** Displays a clickable link that redirects the user to the parent contract's contract overview page; if no parent is available, `NA` is displayed.
- **Start/Expiration Dates**: Represents dates in `mm-dd-yyyy` format.
- **Governing Law**: Displays legal jurisdiction.
- **Scope of Work**: Indicates the type of work that users perform.

- **Payment Terms**: Indicates the payment schedule.
- **Termination Notice**: Indicates notification period in days or `NA`.
- **Contract Value/Spend**: Displays values in a comma as a thousand separator format with currency.



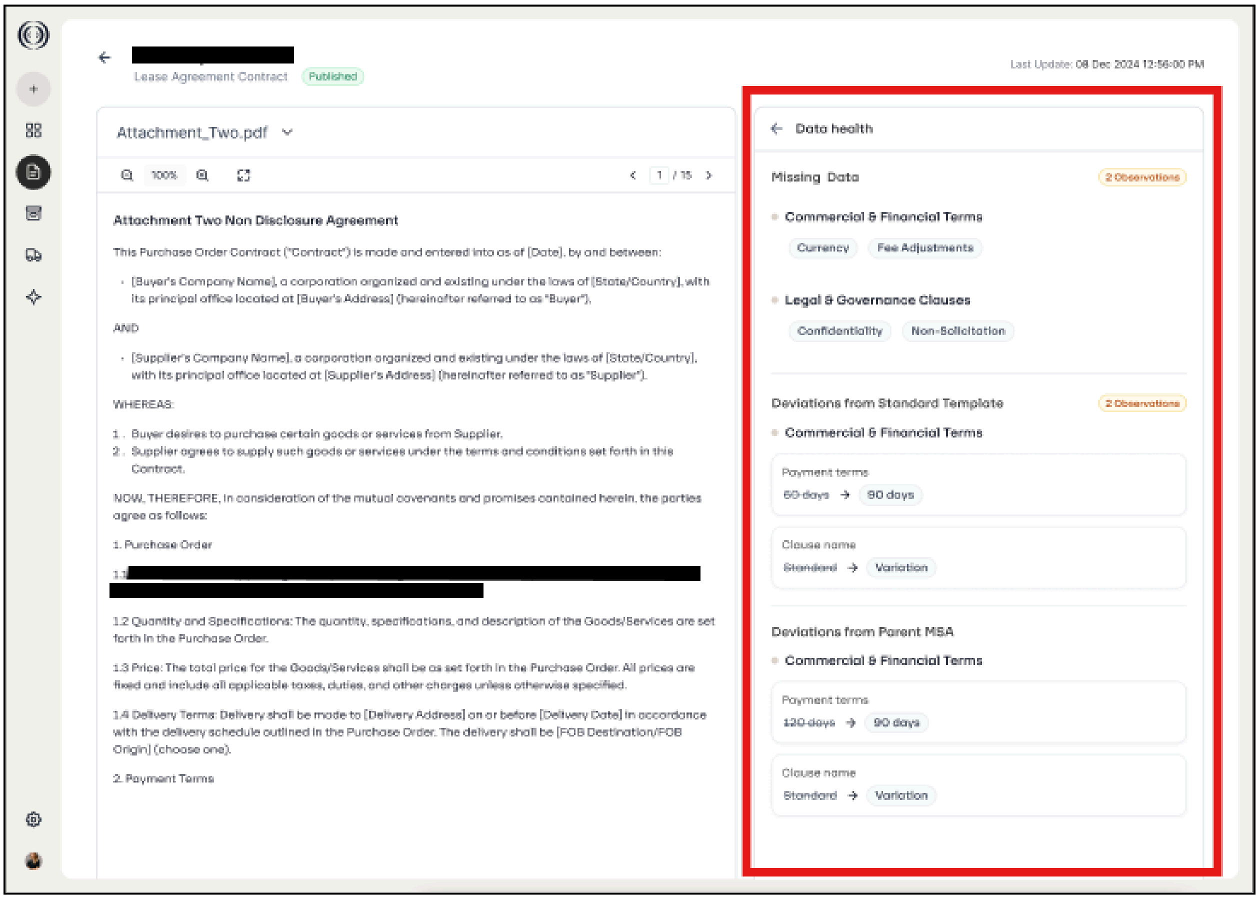
Data health

The data health section is available in the contract overview page under the summary section. It displays contractual deviations and missing clauses. To do so, it compares executed contracts against entity-specific standard templates, enabling contract managers to monitor standardization across business units. The view-only interface provides risk visibility and post-signature intelligence without modifying the existing contracts. It helps organizations track adherence to legal and procurement standards while building historical deviation data to support future negotiations, contract renewals, and template revisions across multiple entities with distinct baselines.

This feature applies to executed contracts only, including MSAs and SOWs across business units as configured. Procurement officers can review insights using a view-only experience that doesn't support contract editing or workflow actions. Draft or in-progress contracts are excluded from this feature.

The following are the key parameters of the data health:

- **Deviation**: Term exists but differs from the standard value.
- **Missing**: Required term is absent from the contract.
- **No flag**: Term aligns with the standard.



View supplier module

The supplier module is a centralized app for efficient supplier relationship management. It consolidates supplier data, analytics, and interactions from various systems (ERP, third-party, and internal databases) to establish a single source of truth. This unified hub empowers procurement officers with data-driven insights, advanced filtering, and an AI assistant with natural language query capabilities, enabling them to make better-informed decisions throughout the supplier engagement process.

The following are the key features of the supplier module:

- **Metadata extraction**: Captures key supplier details, such as addresses, certifications, and contracts.
- **Supplier analysis**: Provides performance metrics, certifications, ICV scores, and contract links for a complete supplier profile.
- **Supplier enrichment**: adds external data, such as logos, ratings, and certifications, to enhance profiles.
- **Real-time insights**: Keeps supplier information up to date with regular updates.
- **Historical analysis**: Tracks past engagements, spending trends, and lifecycle performance.
- **AI-powered queries**: Help users ask natural language queries, such as top-rated suppliers or spend by category, from any module.
- **Custom dashboards**: Create and personalize dashboards with pinned widgets and shared views.
- **Auto-sync:** Retrieves all supplier records from ERPs and uses the fetched logs to debug and track compliance. It also shows the timestamp of the last sync.
- **Contract linkage**: Access contracts linked to supplier records.
- **Assistant integration**: An AI assistant maintains context across modules, enabling smooth, guided workflows.
- **Multi-format support**: Supports various methods and formats for importing data, including SFTP, API, and CSV.
- **Import status tracking and reporting**: Tracks imported data and provides real-time status updates.

View supplier landing

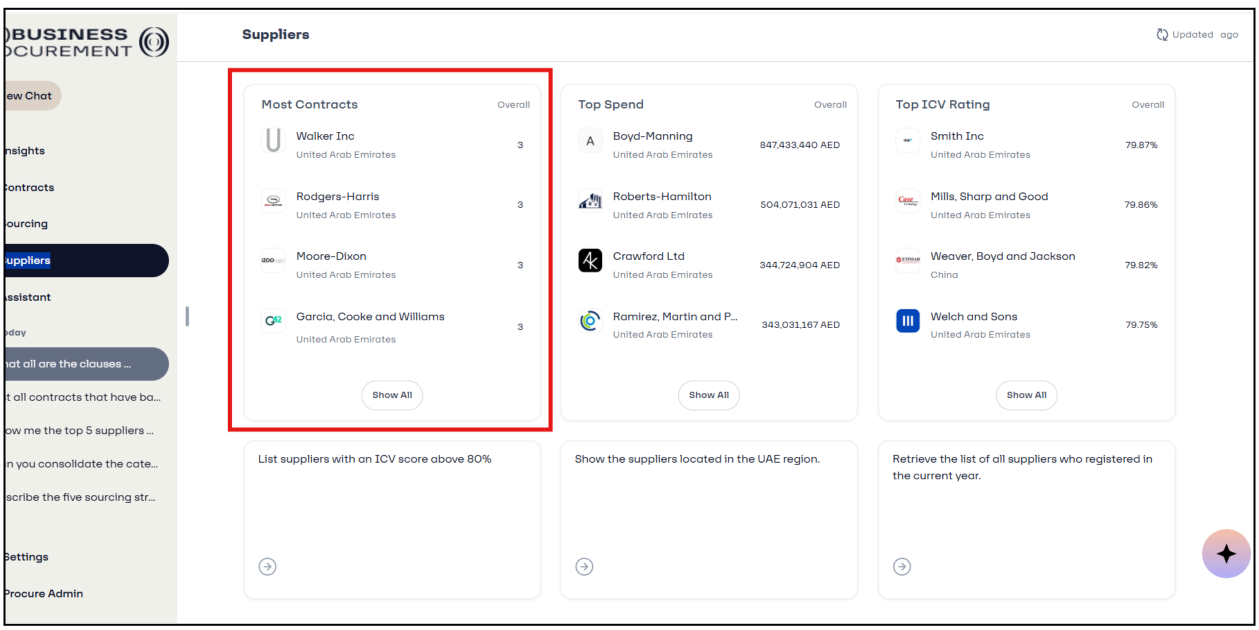
Procurement teams, compliance officers, and executives can leverage interactive widgets, quick AI queries, contextual support, and dynamic performance indicators to monitor supplier health, proactively identify risks, optimize spending, and maximize ICV.

The supplier dashboard features the following three primary interactive widgets:

- Most Contracts
- Top Spends
- Top ICV Ratings

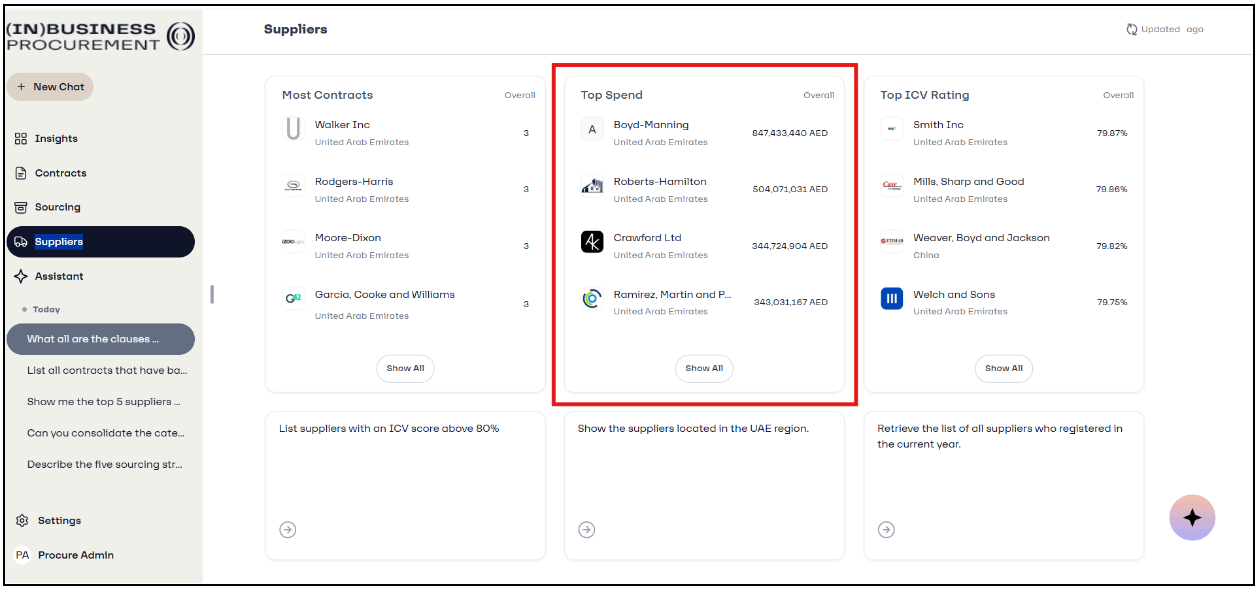
Most contracts

The column displays the top five suppliers with the most active contracts. If more than five active contracts are eligible or if they match the criteria then, the system displays suppliers based on their highest total contract value, thereby prioritizing financially significant suppliers.



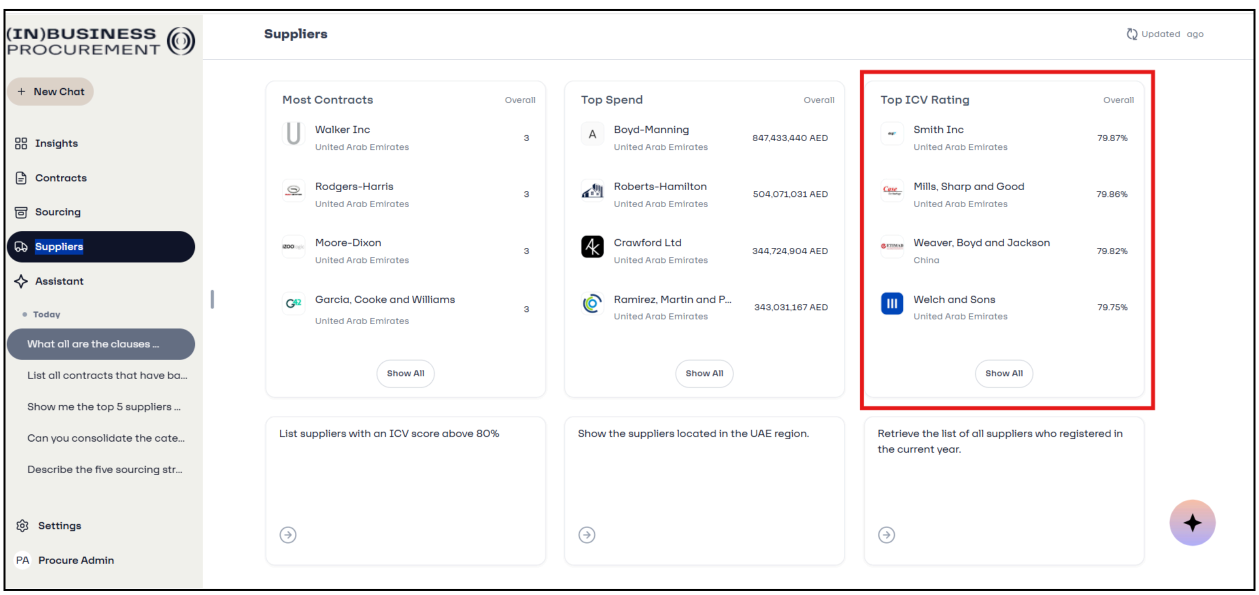
Top spend

This section displays the suppliers with the highest total procurement spending based on the total value of active contracts. When multiple suppliers have the same expenditure, suppliers with more contracts appear first, indicating greater overall interaction.



Top in-country value ratings

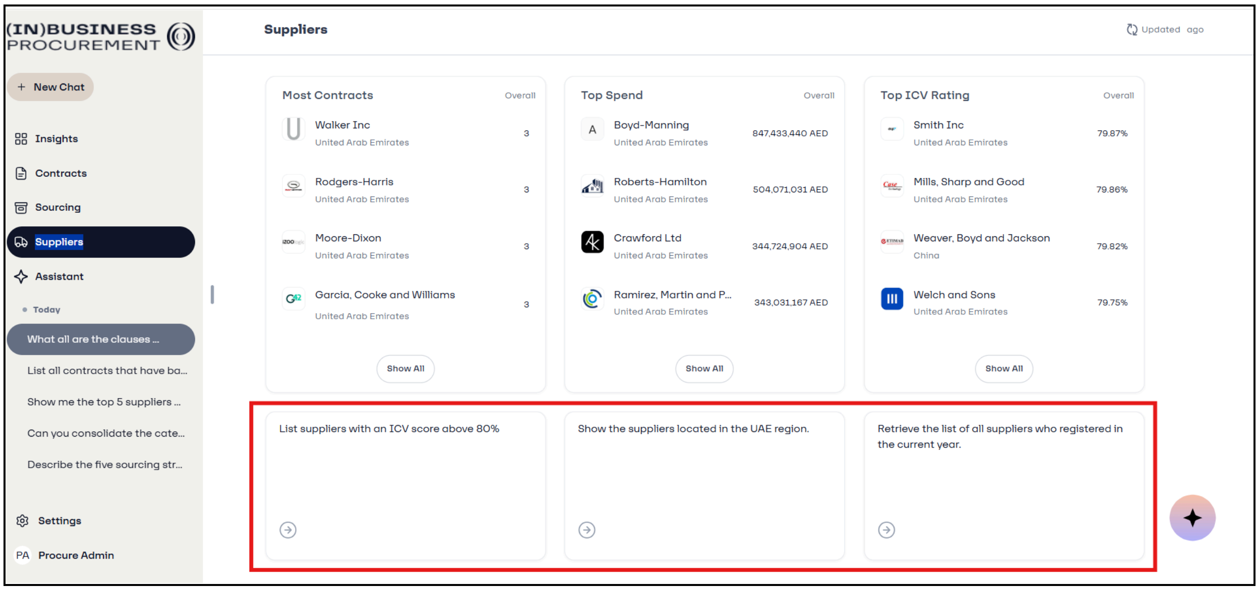
This section highlights the five suppliers with the highest ICV ratings. These ratings reflect their contributions to local economic development, job creation, and compliance with national localization standards.



All widgets provide full interactivity. Select supplier names to open the detailed supplier overview page for additional information. Select show all to expand any widget into a prefiltered supplier listing page that displays all suppliers meeting the widget criteria for further analysis. Widgets update automatically based on real-time data refreshes, ensuring you always have access to current supplier intelligence.

Quick prompts

Quick prompts appear throughout the dashboard to provide immediate, expert-driven insights. Procurement specialists develop these intelligent, preconfigured queries to reveal critical supplier trends, anomalies, and metrics with a single selection. Quick prompts help you conduct efficient analysis.



View supplier listing

The supplier listing page serves as a directory for all suppliers. Designed as both a powerful reporting tool and a central hub, it enables users to initiate supplier engagement, manage risks, and conduct performance evaluations.

The following are the key features of the supplier listing page:

Full supplier list

This page displays a complete, paginated table of suppliers with key organizational and operational information:

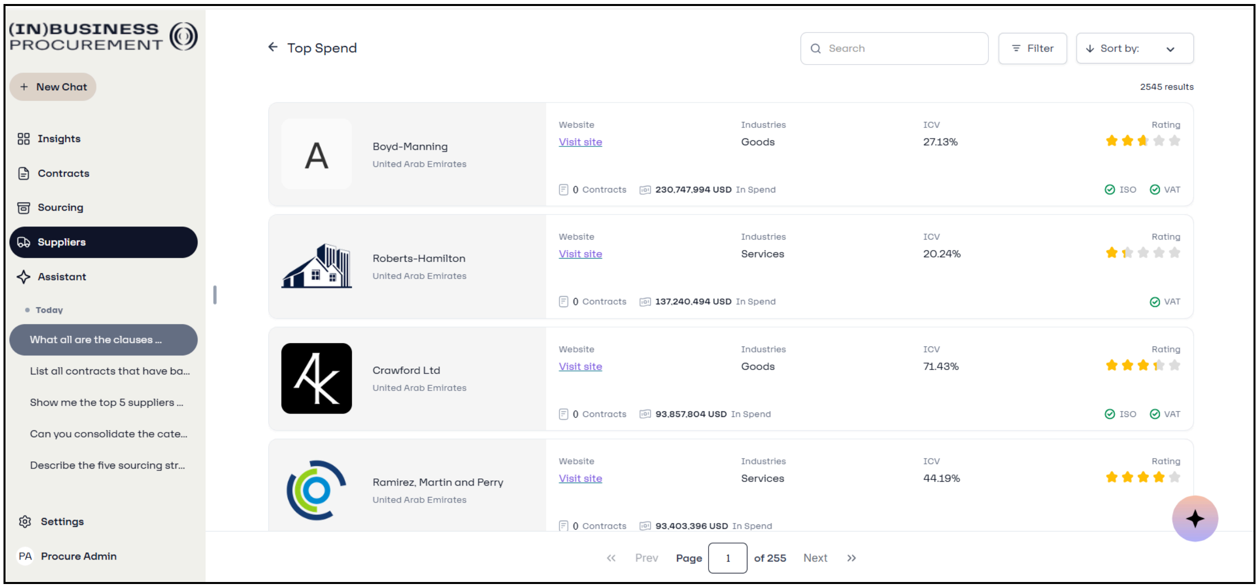
- **Supplier name**: Hyperlinked entries providing direct access to detailed supplier profiles.
- **Website**: A direct link accompanied by a status indicator such as active, suspended, inactive, pending, or onboarding.
- **Active contracts**: Numerical count with drill-down functionality for contract details.
- **Total spend**: Cumulative financial commitment with configurable time-based filters.
- **ICV rating**: Normalized ICV scores for supplier localization assessment.

Table rows feature interactive elements:

- Select a row to view the supplier overview page.
- Hover the pointer to view tooltips with recent risk incidents.
- View status icons for audit flags and preferred vendor status.

Search, sort, and filter capabilities

This feature enables comprehensive data manipulation through intelligent full-text search with partial matching and synonym recognition. You can apply multi-parameter filtering for ICV certification and supplier classification. To ensure consistent reporting, use persistent templates. To sort results by various dimensions (including spend, risk score, contract volume, and ICV metrics), select column headers.


(IN)BUSINESS PROCUREMENT
+ New Chat
Insights
Contracts
Sourcing
Suppliers
Assistant
Today
What all are the clauses ...
List all contracts that have ba...
Show me the top 5 suppliers ...
Can you consolidate the cate...
Describe the five sourcing str...
Settings
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Top Spend
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A
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Roberts-Hamilton
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United Arab Emirates
Website
Visit site
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ICV
44.19%
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0 Contracts
93,403,396 USD In Spend
Prev
Page
1
of 255
Next

View supplier overview

The supplier overview page offers a comprehensive, 360-degree view of each supplier. It consolidates operational, contractual, risk, compliance, and financial information to understand a supplier's past and present performance.

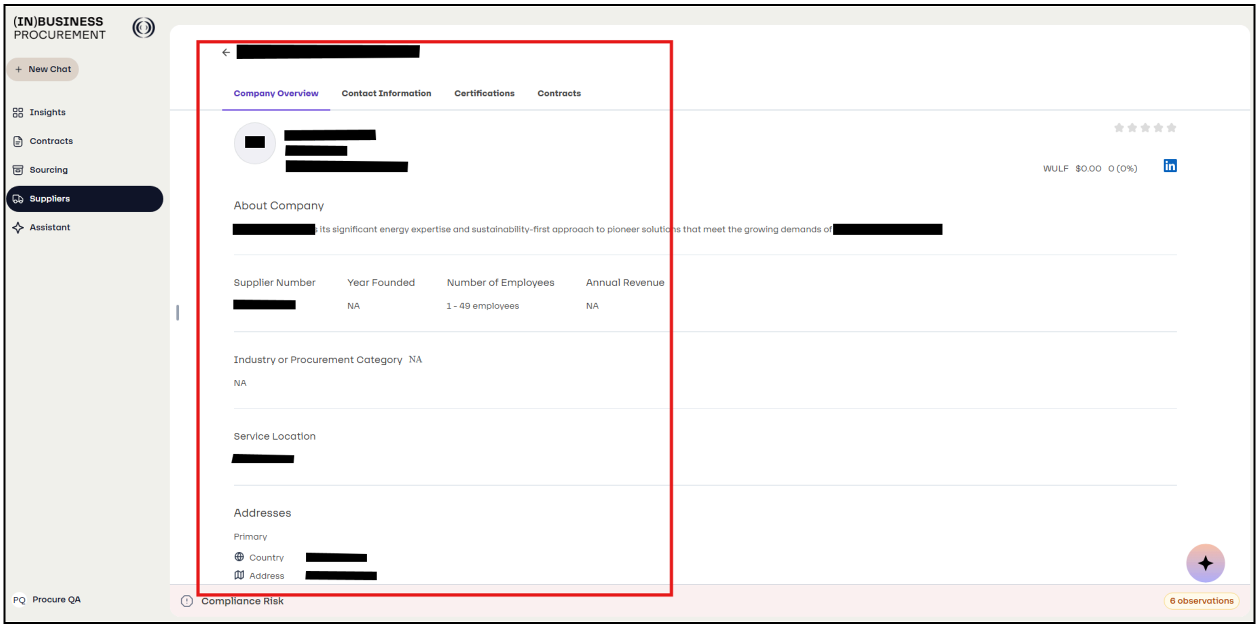
Company overview

This section delivers critical business intelligence metrics to assess supplier stability and capacity.

Company details

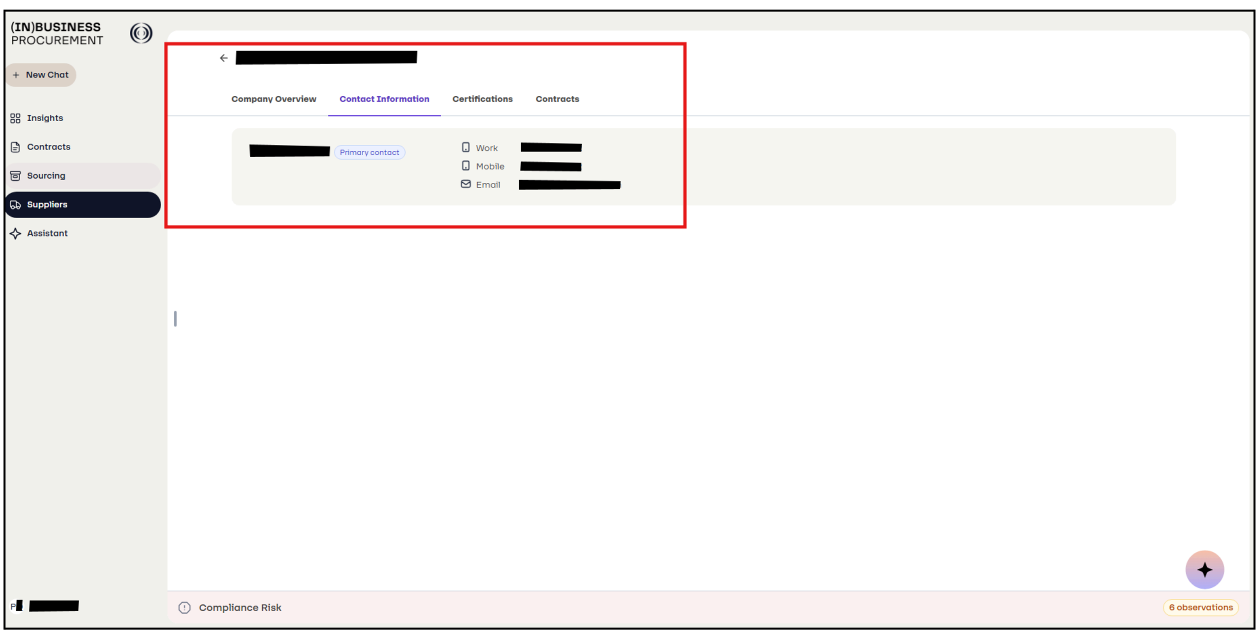
Information	Description
Company Logo	High-resolution company logo display with zoom capability for detailed inspection.
Company Name	Official registered business name with any relevant trade names.
Company Location	Primary headquarters location with geographic coordinates for mapping integration.
Company Website	Direct link to the supplier's official website with an SSL verification indicator.
ICV Rating	Current ICV certification level with a visual indicator of the rating trend.
ESG Category	Environmental Social and governance (ESG) classification with a green designation highlighting environmentally responsible suppliers.
Supplier Number	Supplier identifier.
Year Founded	Company establishment date with automatic calculation of years in operation.
Number of Employees	Current employee count with quarterly trend indicators highlighting workforce growth or reduction.
Annual Revenue	Latest reported annual revenue figures with a multi-year comparison chart highlighting financial trajectory.
Procurement Category	Primary and secondary industry classifications, such as research and information.
Service Location	Global location of the country.

Company Address	Complete street address with postal or zip code.



Contact information

Displays the work phone number with extension, phone number, and email address.



Certifications

Value Added Tax (VAT) Certificate

This section displays a unique identifier for tax verification, an issue date with historical validation, an expiry date with automated renewal alerts, and a real-time validation status with compliance indicators.

ISO certificate

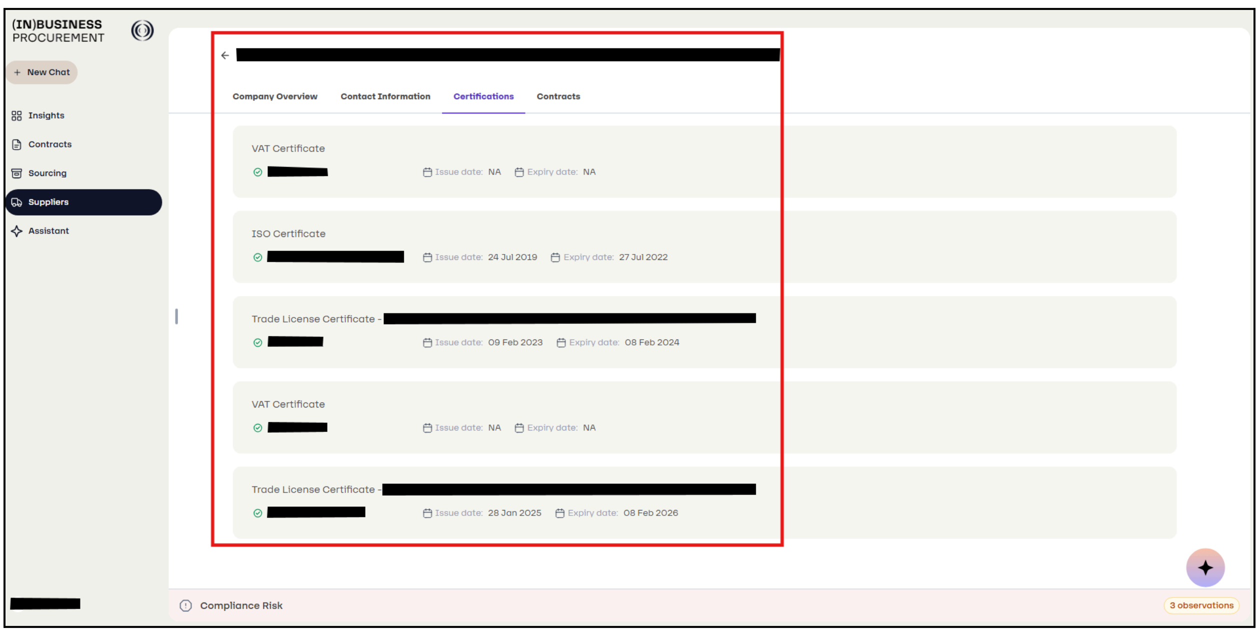
This section displays an ISO standard identification number, along with the certification level, the original achievement date, an expiry date with a countdown indicator for renewal requirements, and the specific ISO standards met, such as ISO 9001 or ISO 14001.

ICV certificate

This certificate includes a standard identification number with certification level, highlights the original certification achievement date and renewal requirement date, and features a countdown indicator for expiring certifications.

Trade license certificate

This certificate displays an official license registration identifier, the license origination date, and the end date of the validity period, along with renewal status information.

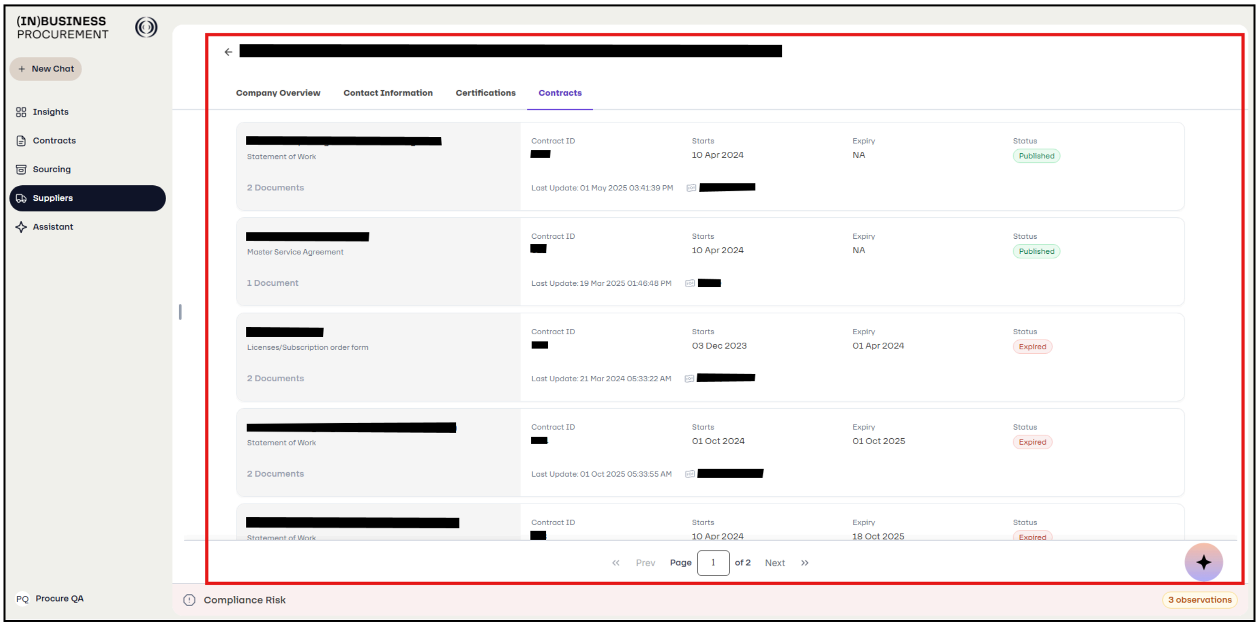


Contracts

This section delivers the following critical information about the contracts.

Information	Description
Company Name	Official registered business name with any relevant trade names.

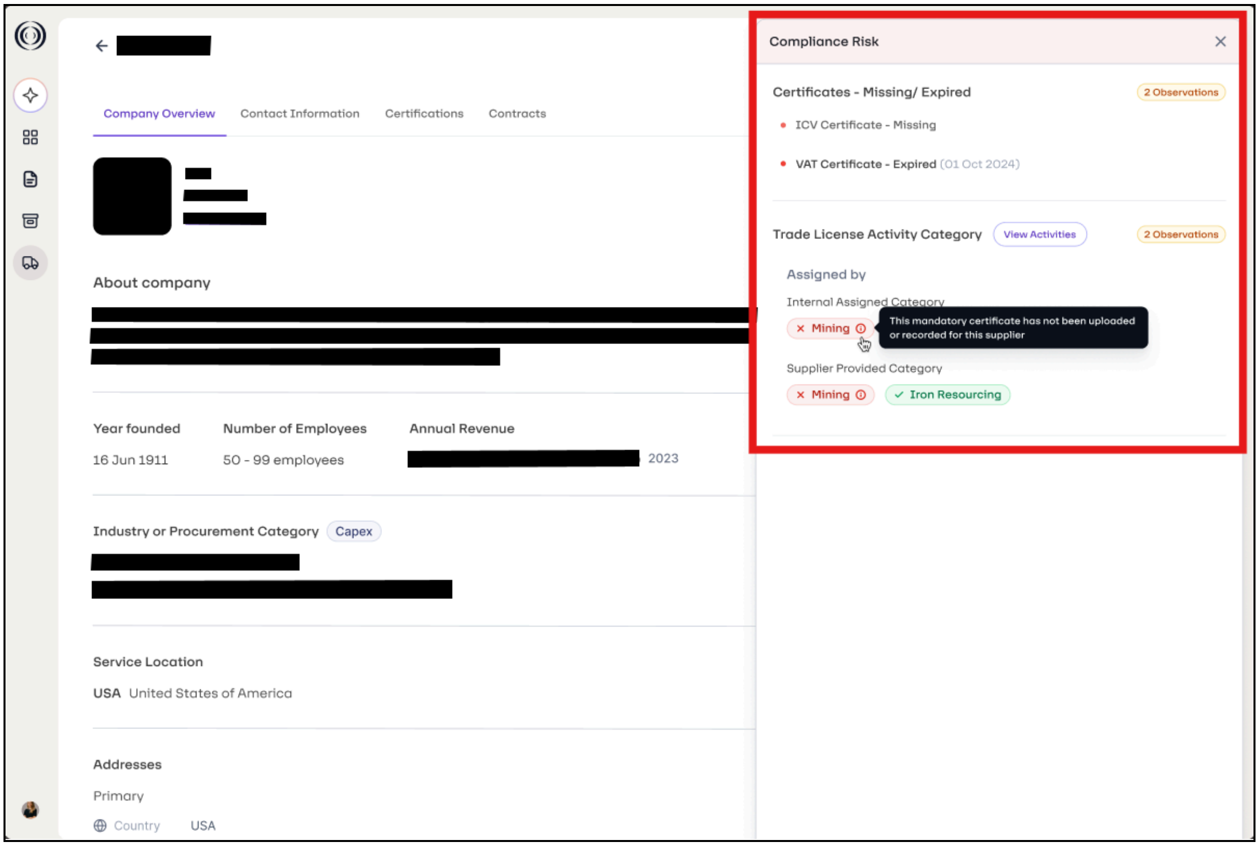
Statement of Work (SOW)	Document defining specific services, deliverables, timelines, and performance standards.
Contract Amount and Currency	Total financial value and monetary denomination of the agreement.



Compliance risk

This dynamic banner displays the issue count and further expands as the compliance risk panel. The compliance risk panel highlights certificate gaps and classification discrepancies across internal, supplier-provided, and trade license categories.

This feature gives procurement and compliance users a clear view of supplier compliance risks by detecting missing or expired certificates and trade license category mismatches. The system validates supplier-uploaded ICV, VAT, ISO, and trade license documents against a predefined list, marking missing items as `Missing` and expired items as `Expired` with tooltips and expiry dates. Any issue triggers a compliance flag, and items update automatically when suppliers upload or refresh their documents.



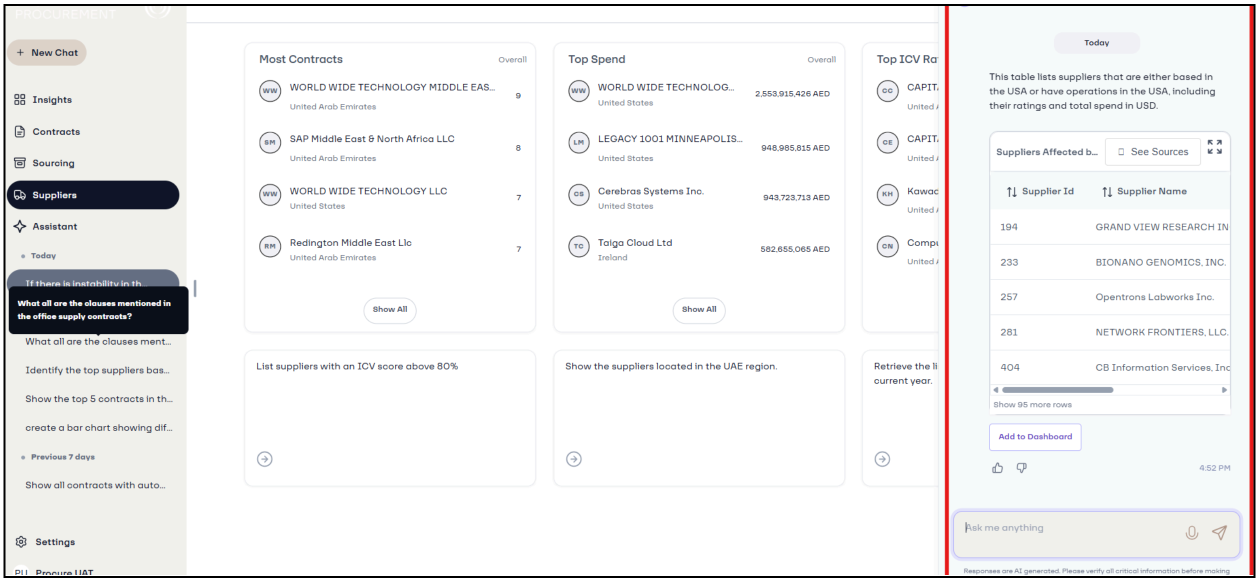
Quick prompts and assistant icon

Quick prompts provide preconfigured question templates on the landing page. Select a template to view helpful tooltips, then select it again for one-click execution and instant results. This feature streamlines common assistant tasks.

The assistant icon appears throughout the supplier module for continuous support. The consistent placement lets you access help at any point in your supplier management workflow without interrupting your work.

The following conversation displays the pattern of the assistant's response:

- *User's query: Which suppliers are impacted by instability in the USA?*
- *The assistant responds to the query and displays the result.*



The following are a few examples of similar queries related to the suppliers module:

- *Will I have an issue if I procure the same services from another vendor?*
- *How many suppliers are ICV-certified? Can I get a list of them?*
- *How many suppliers did we add to the UAE region?*

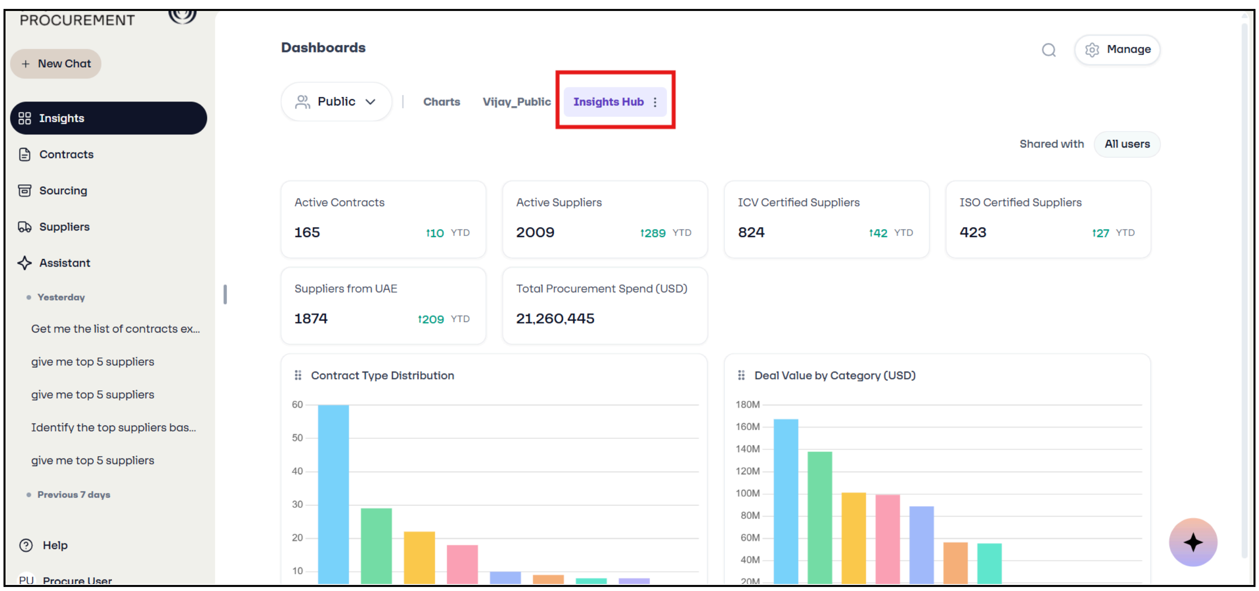
View insights module

The insights module provides clear visual representations of key performance indicators (KPIs), spending patterns, supplier performance, and other essential procurement analytics. This representation enables stakeholders across the organization to identify trends, identify opportunities for improvement, and make informed, data-driven decisions. The module addresses enterprise-wide procurement intelligence requirements.

Insights hub dashboard

The insights hub provides centralized analytics for enterprise procurement operations. The hub features preconfigured widgets that display KPIs per industry best practices. This dashboard provides immediate visibility into procurement performance by offering a single location where all stakeholders can access consistent and reliable procurement data.

The hub includes a read-only configuration that helps maintain data integrity by preventing unauthorized changes. The hub displays key metrics through optimized visualizations designed to analyze procurement data. Use the insights hub as your organization's single source of truth for procurement analytics, enabling you to make informed decisions efficiently.



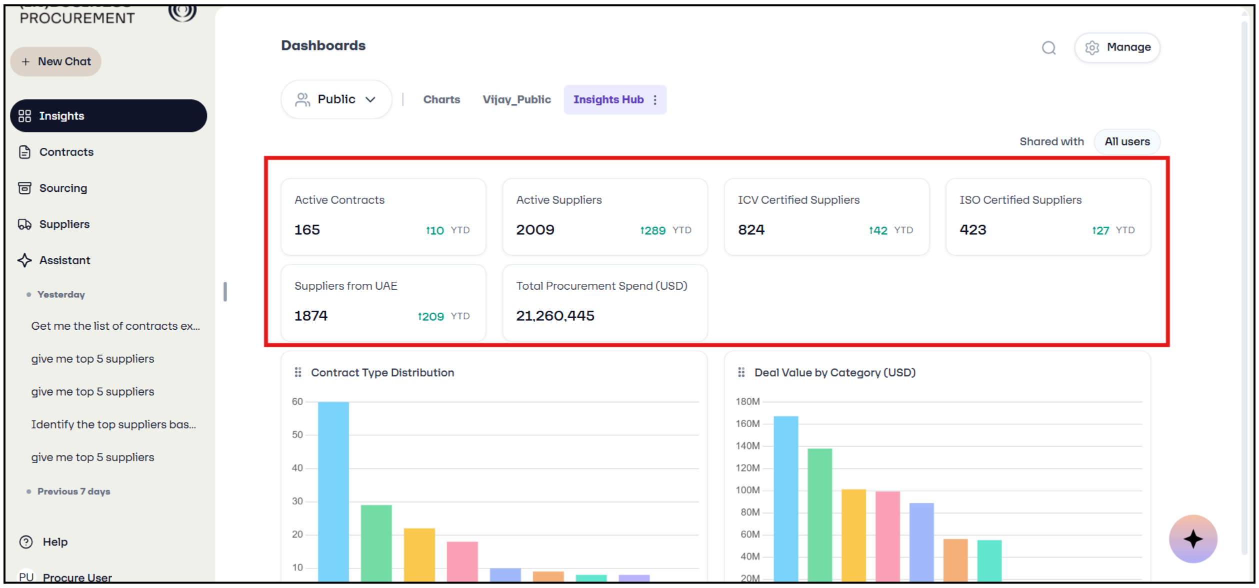
List of widgets

The insights hub contains the following prebuilt widgets.

Insight name	Description	Visual type	Key metrics and implementation details
Active Contracts	Displays the total count of contracts with Published status.	Metric card	Total active contract count. Net new contracts for the current year. Year-over-year percentage change indicator.
Total Procurement Spend	Comprehensive spending on all procurement activities.	Metric card	Total amount in USD or applicable currency. Year-over-year percentage change indicator (green - for decrease and red + for increase). Reset occurs on January 1 of each new year.
Active Suppliers	Number of suppliers marked as active.	Metric card	Total active supplier count. Year-over-year percentage change indicator (green + for increase and red - for decrease).
ICV Certified Suppliers	Suppliers with ICV certification.	Metric card	Total count of the ICV-certified suppliers. Year-over-year percentage change indicator (green + for increase and red - for decrease).
ISO Certified Suppliers	Suppliers with one or more ISO certifications.	Metric card	Total count of ISO-certified suppliers. Year-over-year percentage change indicator (green + for increase and red - for decrease).
Suppliers from UAE	Suppliers with the primary location in the UAE.	Metric card	Total count of suppliers based in the UAE. Year-over-year percentage change indicator

			(green + for increase and red - for decrease).
Contract Type Distribution	Breakdown of contracts by type classification.	Bar chart	Distribution across multiple contract types, such as master service agreements, statements of work, licenses/subscription order forms, service agreements, and purchase/blanket rate agreements.
Deal Value by Category (USD)	Total deal value broken down by procurement category.	Pie or donut chart	The chart displays a proportional distribution with total value across six categories: IT professional services (consultancy), licenses, leasing and rental, building facilities and grounds, consultancy services, and professional services (personnel). Each category's proportion is relative to the total value, providing a comprehensive view of the distribution across these service and resource areas.
Contracts fulfilling requirements	Analysis of contracts with specific clauses or attributes.	Web or radar chart	Organizations must assess contracts using three key attributes: local supplier involvement, renewal eligibility, and termination provisions. This approach enables risk management, identifies opportunities, and ensures flexibility.
Spend Analysis by Supplier (USD)	Comparative analysis of procurement spend allocation.	Bar chart	Total spending amounts per supplier. Ranked presentation highlighting top suppliers by expenditure.

Jurisdiction Distribution	Geographical segmentation of contracts by legal jurisdiction.	Pie chart	Proportional breakdown of governing jurisdictions. Percentage distribution visualization.



Dashboard controls

The dashboard control enables dashboard creation and management with role-based access controls. All users can create private dashboards, while administrators have additional privileges to publish and manage dashboards for organizational use.

Users can search for dashboards and widgets by title within the insights module. Search results display dashboard names for dashboard matches and both widget and dashboard names for widget matches. Selecting a result redirects users to the appropriate page.

Dashboards are categorized into three categories available through a dropdown filter:

- **Public:** Administrators publish these dashboards for all users based on their permissions.
- **Admin Only:** Administrators publish and restrict these dashboards to users with administrator roles.
- **Private:** Users create these dashboards for their own use.

The following table outlines the permissions and access levels granted to users.

Role	Permission	Public dashboard	Private dashboard	Admin dashboard
Admin	View	✔	✔	✔
	Edit	✔	✔	✔
	Delete	✔	✔	✔
Procurement officer	View	✔ (RBAC)	✔	✖
	Edit	✖	✔	✖
	Delete	✖	✔	✖
Business users	View	✔ (RBAC)	✔	✖
	Edit	✖	✔	✖
	Delete	✖	✔	✖

Manage dashboard

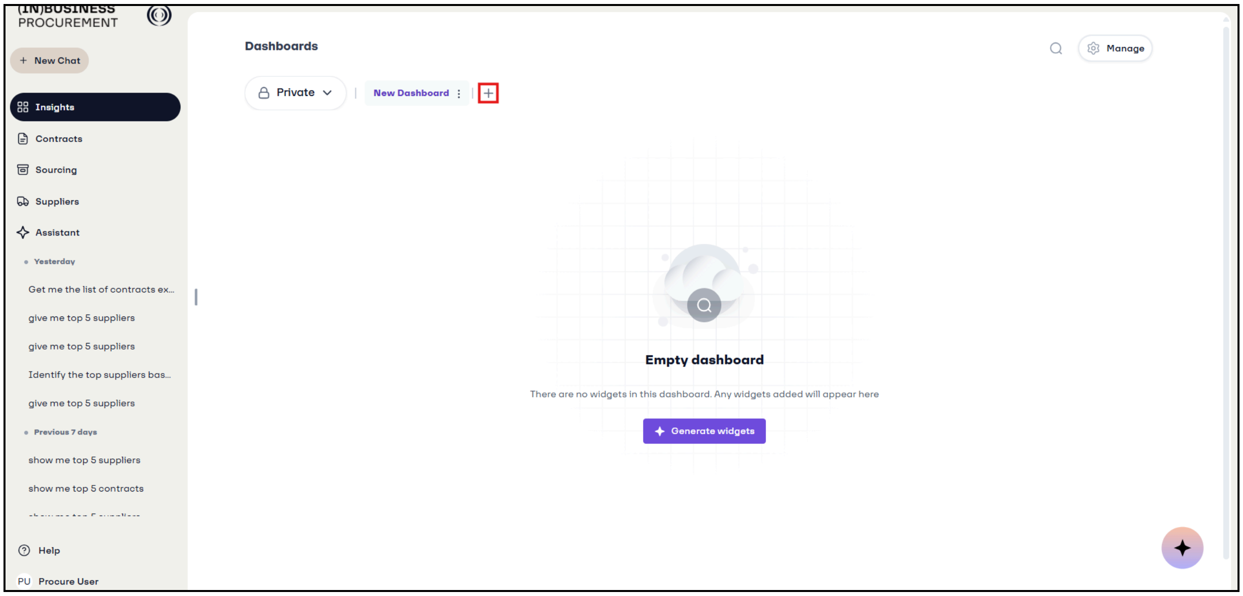
In the insights module, use the dashboard control to view and manage dashboards based on your role. When you add or move widgets, select a space (public, admin only, or private) and then select a target dashboard. You can create new dashboards only in admin-only or private spaces. Procurement officers and business users can create private dashboards, but you can't share private dashboards.

Create dashboards

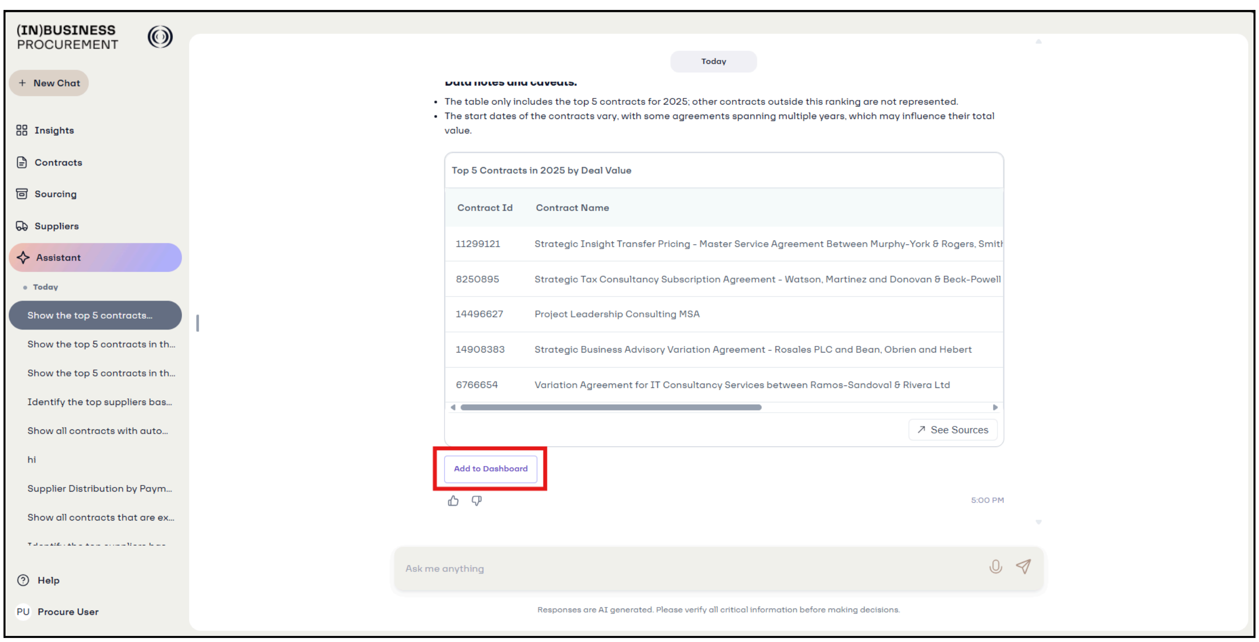
This section helps users to create custom dashboards for various purposes, extending beyond its standardized hub to provide personalized information. Users can leverage AI-powered natural language commands through the integrated assistant to generate sophisticated visualizations. The dashboard offers intuitive drag functionality for optimal widget arrangement and comprehensive lifecycle management, including cross-dashboard movement and data export capabilities. Each user's custom dashboards are secure within their workspace, ensuring complete privacy.

Customers can create a dashboard using any one of the following methods:

- **Create a dashboard using the interface**: Select the plus (+) icon and provide a unique name.



- **Create a widget using the assistant:**
    1. **Ask the query**: Query your analytical needs and tell the AI assistant what you want to analyze using plain language. The app interprets your request and pulls data from relevant sources.
    2. **Review the generated visualization**: Review the system-selected best chart type for your data and automatically create the visual insight.
    3. **Save your widget**: Write a descriptive name for your widget, then add it to a dashboard. You can use an existing dashboard or create a new one.



Query examples:

The following conversation displays the pattern of the assistant's response:

- *User's query: Give the total spend value of the top four suppliers in a donut chart.*
- *The assistant responds to the query and displays the result.*

The following are a few similar queries in the insights module:

- *Create a dashboard of contracts with a value of 10 million.*
- *How many suppliers are ICV-certified? Can you compare and create a chart?*
- *Create a chart based on the types of businesses of suppliers.*

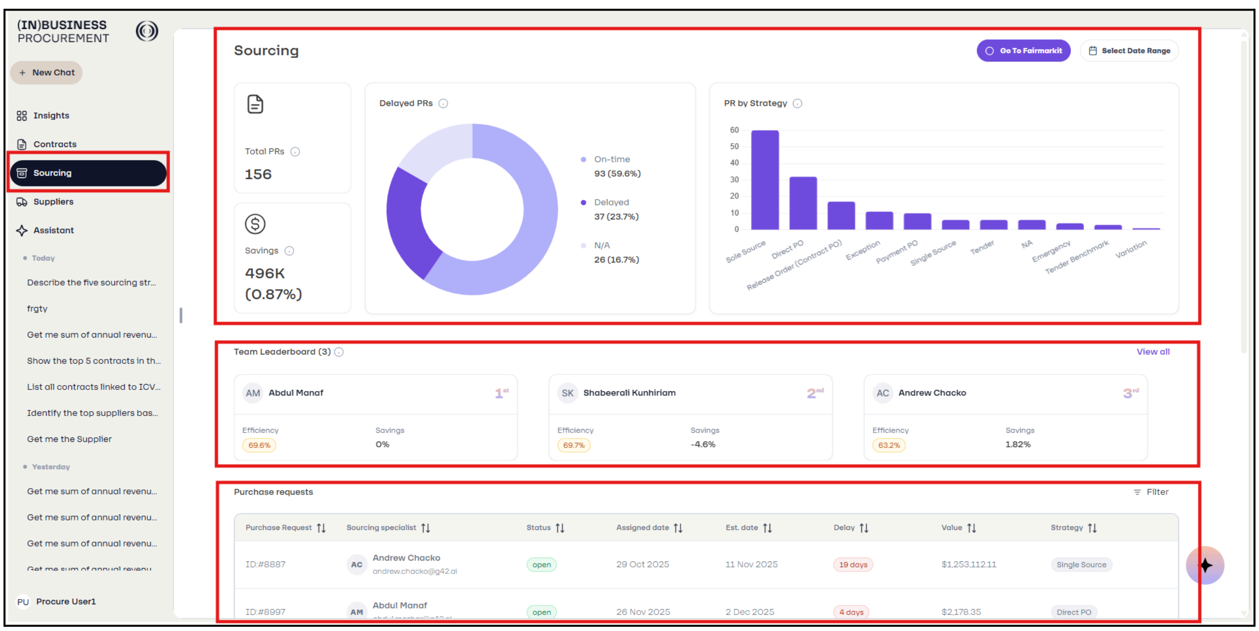
View sourcing module

The sourcing module provides real-time visibility of procurement activity, performance metrics, and team efficiency by connecting users, procurement officers, and suppliers throughout the purchase request lifecycle. Users create requests through the ERP or P2P system and procurement officers manage sourcing by engaging suppliers and tracking fulfillment.

User access determines how each role interacts with the dashboard:

- Business users are redirected to Fairmarkit for their operations.
- Procurement officers have full dashboard access with tabs for personal and organization-wide purchase requests.
- Admins view an org-level dashboard focused on oversight and overall performance.

The module also includes a date range filter that enables all dashboard widgets to display data for a specific timeframe. This filtering helps users focus on relevant activity, compare performance across periods, and make informed, time-based decisions by reviewing PR volumes, savings, delays, and sourcing trends within the selected range.



List of widgets

Sourcing widgets

The sourcing widget displays how purchase requests are distributed across different sourcing strategies used in the procurement process.

The sourcing dashboard contains the following prebuilt widgets.

Insight name	Description	Visual type
Total PRs	Displays the total number of Purchase Requests within the selected date range, providing a high-level view of procurement volume.	Number
Savings	Displays total negotiated savings and savings percentage, calculated from supplier quotes, initial budgets, and final negotiated amounts.	Amount and percentage
Delayed PRs	Displays the proportion of PRs that are delayed versus on time using a donut chart based on expected completion dates.	Donut chart
PR by strategy	Presents a bar chart that breaks down PRs by sourcing strategy, helping users understand distribution across procurement methods.	Column chart
Team leaderboard	Ranks procurement officers by combined efficiency and savings performance, highlighting top contributors.	List
Purchase requests	Displays lists all PRs with key details—status, delay, value, strategy, and assigned specialist—and supports sorting, filtering, and drill-down to PR details.	List

Team Leaderboard widget

Recognizes the highest-performing procurement officers based on a balanced assessment of process efficiency and cost savings. Procurement officers ranked based on negotiated savings and efficiency. The view all tab displays all the officers based on their ranks.

Performance is calculated using a weighted scoring model that equally balances efficiency and savings. The Efficiency Score measures time performance using the formula `((PCT Policy - PCT Actual) / PCT Policy) × 100`, where PCT Policy represents the target days to complete purchase requests and PCT Actual represents the actual average days taken. Higher percentages indicate faster completion times relative to policy targets.

For example, if the policy lets 21.4 days but an officer completes requests in an average of 4.5 days, their efficiency is 79%. The Savings Score is calculated as `((Total Initial Amount - Total Final Amount) / Total Initial Amount) × 100`, representing the percentage of cost reduction achieved. The Combined Score is computed by averaging both metrics: `(Efficiency Score × 0.5) + (Savings Score × 0.5)`. Officers are ranked by their combined score in descending order, with the highest scores earning top positions.

The procurement officer profile contains:

- **Rank**: Position (1–5) in the leaderboard.
- **Officer profile**: Name and email address.
- **Efficiency percentage**: Speed of purchase request (PR) completion relative to policy targets.
- **Savings percentage**: Cost reduction from initial to final amounts.
- PRs (open and close).
- Delayed PRs.

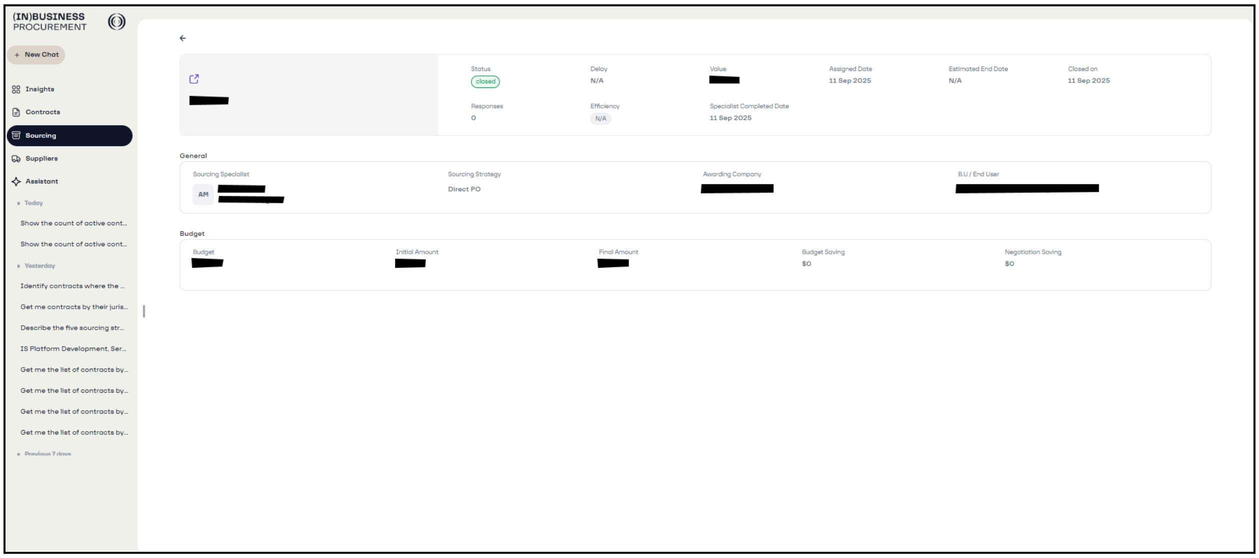
Purchase requests widgets

The Purchase Requests widget provides centralized tracking of all procurement activities with real-time monitoring of sourcing specialists, timelines, and performance metrics. Track request status with color-coded delay indicators, view assigned specialists with their contact details, and analyze procurement values by comparing initial budgets with final amounts. Apply filters for sourcing specialist, status, delay, and strategy, or sort by any column to prioritize critical items. Select any request to access complete details including budget breakdowns, timeline milestones, supplier responses, and savings calculations.

This widget displays the total number of PRs in the system and provides a quick and real-time view of procurement volume. It displays:

- Purchase Request Id
- Status
- Assigned date
- Estimated date
- Delay
- Value
- Strategy

When you select any request row to access the PR, an overview page opens and displays complete details including PR ID, status, delay, value, assigned and estimated end dates, closed date, supplier responses, efficiency, business unit and user requestor, sourcing strategy, awarding company, initial and final amounts, budget, budget savings amount, and negotiated savings amount. The PR ID also linked to the resource procurement platform (ERP).



Fairmarkit integration

The sourcing module is integrated with the Fairmarkit procurement app to provide comprehensive tail spend management capabilities. This integration addresses lower-value purchases that are often overlooked, helping procurement officers to focus on high-value and strategic contracts. This module connects (In)Business Procurement contract and supplier management capabilities with Fairmarkit's specialized tail spend automation technologies.

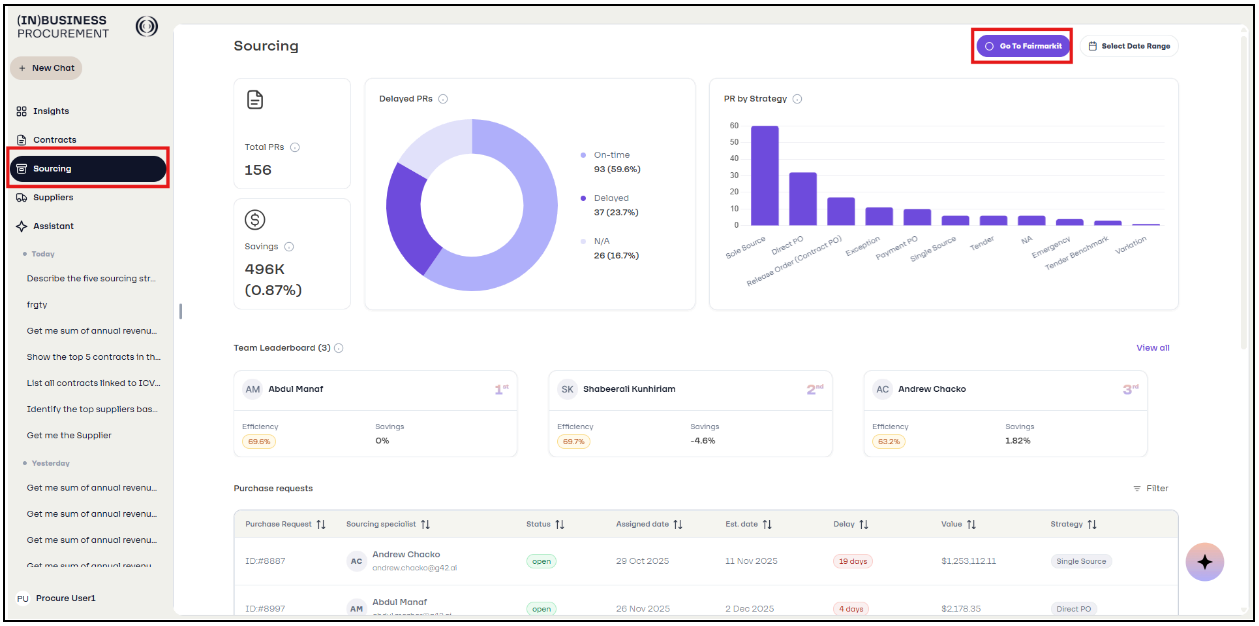
Fairmarkit specializes in automating processes through:

- Automated request for quotation (RFQ) generation.
- Streamlined vendor selection.
- Algorithmic commercial evaluation.
- Minimal procurement officer intervention.
- Standardized approval workflows.

To access the Fairmarkit:

1. In the left navigation pane of the (In)Business Procurement dashboard, select **Sourcing**.
2. Select the **Go To Fairmarkit** tab.

   Note*: Fairmarkit requires separate sign-in credentials. Users with access to the (In)Business Procurement application can sign in to the Fairmarkit portal through single sign-on (SSO) without re-entering their credentials.*



3. Complete your sourcing activities in the Fairmarkit environment.

   ***Note**: Procurement actions performed in Fairmarkit don't appear in (In)Business Procurement dashboards or analytics.*

4. Return to the (In)Business Procurement to access contract and supplier management functions.

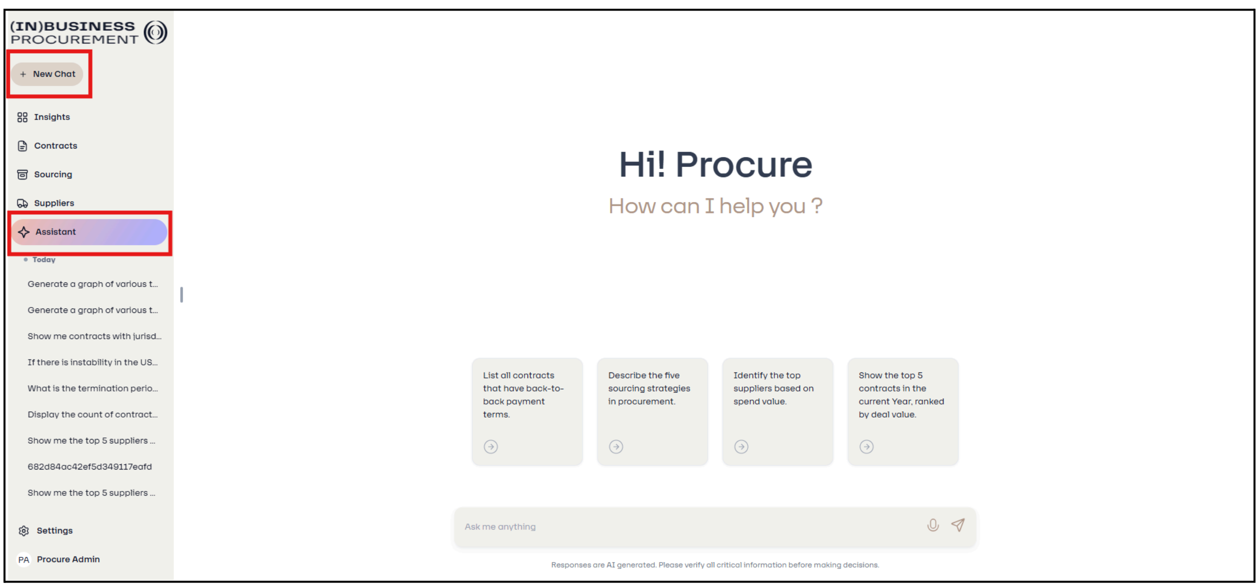
View assistant module

The AI assistant module serves as the central command hub for query processing, information retrieval, cross-module navigation, and session management. This system enables natural language dialogue between procurement professionals and their data ecosystem.

This approach eliminates traditional barriers, such as menu-driven interfaces, complex search parameters, and isolated information repositories, which can reduce procurement efficiency. Users can express their information needs in natural language through text or voice input. The assistant module reduces cognitive load, accelerates information discovery, and enables procurement teams to focus on strategic decision-making rather than navigating the system.

The AI assistant creates clean, structured summaries of its responses, including text, charts, and tables. Users can review these summaries to understand the information provided. All responses use professional business language and contain only relevant information. Enhanced security guardrails ensure safe and compliant operations.

The module operates through two interface modes: a dedicated full-screen experience within the assistant module and as a button that opens an always-present side panel. The side panel maintains consistent functionality and contextual awareness throughout all modules. This dual-interface architecture ensures procurement professionals can access intelligent assistant without disrupting their workflow or losing context.



The following are the key features of the AI assistant module:

- **Response feedback management**: Enables users to provide thumbs-up or thumbs-down ratings with predefined feedback options, capturing satisfaction levels and improving AI model performance through continuous training and analytics.

- **Title and description for the response table**: When the AI assistant generates tables in response to user queries, it displays the table title and a brief description that helps users better understand the response.

- **Row selection and pagination in AI assistant response table**: Users can select any contract or supplier table row to access its detailed overview page directly, eliminating multiple navigation steps. When tables contain more than 10 records, pagination controls appear fixed at the bottom, maintaining consistent styling throughout the application. The assistant loads all available records and distributes them across pages, highlighting the current page for easy reference.

- **Copy and download the AI assistant response**: Users can easily copy and download AI-generated tables using this feature. The copy option lets users copy the entire table structure to their clipboard for an easy import into spreadsheets or documents. The download as CSV option exports the table as a CSV.

- **Queries management:** Users can submit multiple related or unrelated queries in a single interaction or initiate additional queries in different chat sessions while previous operations are in process. This capability enables both sequential handling of complex, multi-part inquiries and parallel processing across sessions without waiting for completion.

- **Source references**: The AI assistant enhances transparency by displaying references at the end of each section. Hovering over the reference reveals its sources and sections. For more than five references, a `View all` option opens a slide-in panel. Users can open any reference without closing the assistant. The full response also displays the total number of references, and selecting it opens a slide-in panel with all sources.

- **Table sorting functionality**: This feature ensures that table data of the assistant response displays in the same order in both minimized and expanded views to standardize the sorting logic across views, so records remain consistent and easy to follow. This feature enhances data clarity, supports accurate interpretation, and provides a more reliable user experience.

- **Navigation to relevant contracts, supplier listing, or overview page**: Users can select the resulting chart elements to view relevant details. Selecting an element in an aggregated metric chart opens the contracts or suppliers listing page with the appropriate filter applied. Selecting an element in an individual entity chart opens that entity's overview page. The system determines the navigation path based on the chart type. Filters stay active on listing pages. You can modify them at any time.

- **Ambiguity detection and clarification**: The AI assistant detects ambiguous procurement queries and asks clear, context-specific follow-up questions to ensure accurate responses. Users can skip clarification with a warning, and after three attempts, the assistant proceeds with the best available information using a concise, professional tone.

- **Multi-topic context retention**: This feature lets the assistant maintain context across multiple topics within a session. Users can switch between unrelated subjects and return to previous discussions without repeating information. The assistant independently tracks each topic's context and automatically recalls relevant details, enabling seamless conversation flow without requiring users to restate previously shared information.

- **Widget creation workflows**: The assistant provides continuous support in widget creation workflows and expanded views. It helps you navigate dashboard widgets to access detailed contract or supplier pages, select interactive table rows, and open detailed pages in separate browser windows or tabs while integrating seamlessly with the insights module for data visualization.

- **Response readability:** The assistant generates enhanced summaries for table, chart, and RAG responses to improve readability for all users. This enhancement ensures complex data presentations remain available and easy to understand by users with different needs.

Today

This table lists contracts with automatic renewal clauses, detailing their start and end dates, values in USD, and names. It helps identify financial commitments and renewal timelines.

Key insights:

- The highest-value contract is "MS Azure" with a value of $2,000,000,000 USD, significantly larger than all others.
- Contracts with values exceeding $1M include "Renewal Order Form 2025" ($1,499,026.63 USD) and "Subscription Cloud Services" ($1,192,952.35 USD).
- Several contracts have a value of $0 USD, such as "TII Project G42" and "CERTIFIED CLOUD & SERVICE PROVIDER PARTNER AGREEMENT," indicating non-monetary agreements or missing data.
- The longest duration contract spans 7 years, from "Recruitment Services Agreement" (2021-11-10 to 2025-11-10).
- Contracts with renewal clauses often extend into 2026 or beyond, showing a trend of multi-year commitments.

Trends and patterns:

- Most contracts start between 2024 and 2025, indicating a concentration of agreements in recent years.
- High-value contracts tend to have longer durations, suggesting strategic investments in extended services.

Recommendations:

- Review contracts with $0 USD value to confirm their terms and ensure no hidden costs or obligations.
- Prioritize monitoring high-value contracts like "MS Azure" for renewal negotiations to optimize costs.

Data notes and caveats:

- Some end dates are listed as "1970-01-01," which may indicate missing or placeholder data.
- Contracts with $0 USD value may require clarification to understand their scope and implications.

Table Title

Contract Id	Contract Start Date	Contract End Date	Contract Value To USD	Contract Name
147	2022-11-15	2025-11-15	495000	Coupa Licenses (2 Orde
310	2024-09-11	2020-12-31	1797140.91	Data Hall Lease Agreer
311	2024-09-11	1970-01-01		MSA Service and Delive

Ask me anything

Responses are AI generated. Please verify all critical information before making decisions.

PU

Configure your app

The configuration process involves setting up both the main procurement application and the underlying App Services Platform. The procurement application serves as the user-facing interface where organizations manage their procurement activities. At the same time, the App Services Platform provides the technical foundation through specialized applications that handle AI agents, data processing, and external system integrations.

The key components of configuration include:

- **Organization settings**: Configure branding, currency preferences, and admin permissions.
- **AI/ML components**: Set up LLMs, embedding models, and RAG capabilities for intelligent automation.
- **System integration**: Connect ERP platforms (Coupa) with real-time data synchronization.
- **Performance infrastructure**: Optimize batch processing, document handling, and workflow automation.

You complete the configuration in the following two apps:

- (In)Business Procurement App
- App Services Platform

Prerequisites

Before you begin, gather the following information:

- Super administrator access to the (In)Business Procurement application.
- Access credentials for the App Services Platform.
- Required API keys and endpoints for LLM integration.
- Procure ERP credentials.
- Azure Form Recognizer (AFR) credentials (for OCR functionality).

Configure the (In)Business Procurement app

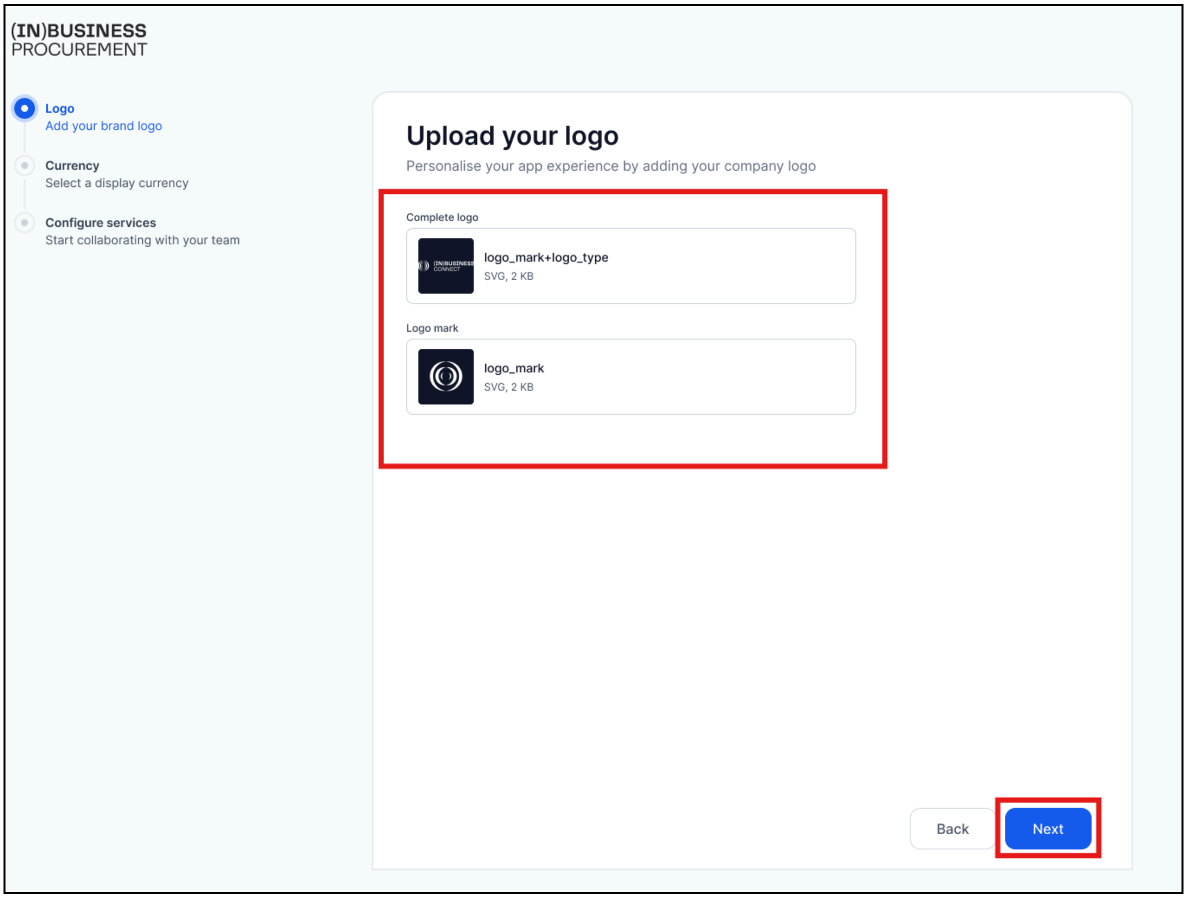
Step 1: Accept the invitation and log in

1. Check your email for the invitation from the (In)Business Procurement.
2. Select the **invitation link** to open the application.
3. Log in using your provided credentials and follow the instructions to complete the onboarding process.

Step 2: Upload your organization's logo

1. In the onboarding wizard, select **Upload your Logo**.

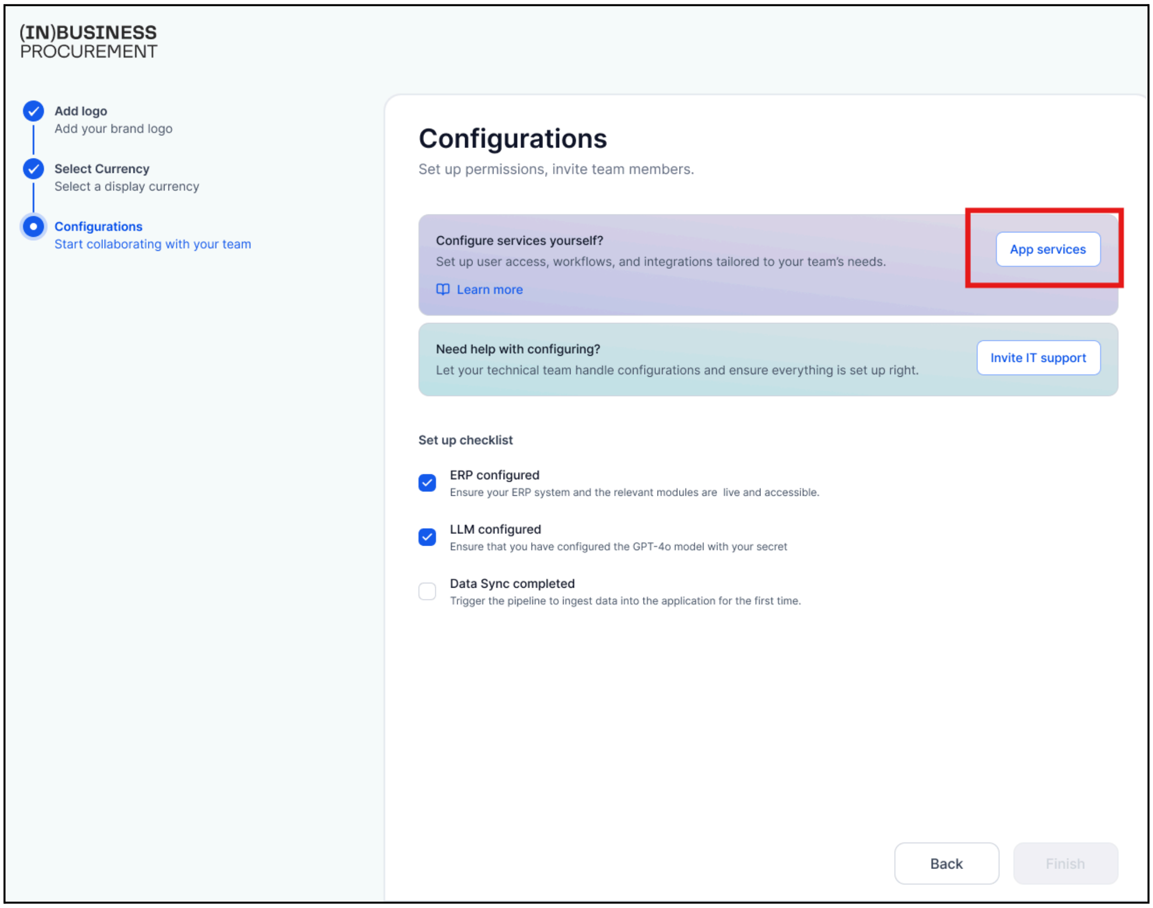
2. Upload your complete organization logo and logo mark. Alternatively, skip this step to use default logos and update them later through **Admin settings** > **Go To Admin Console** > **(In)Business Procurement** > **General Settings**.
3. Select **Next**.



Step 3: Configure currency settings

1. Review the default currency setting.
2. Select the preferred currency from the currency list and select **Next**.

Step 4: Select **App Services** to access the App Services Platform for configuration.

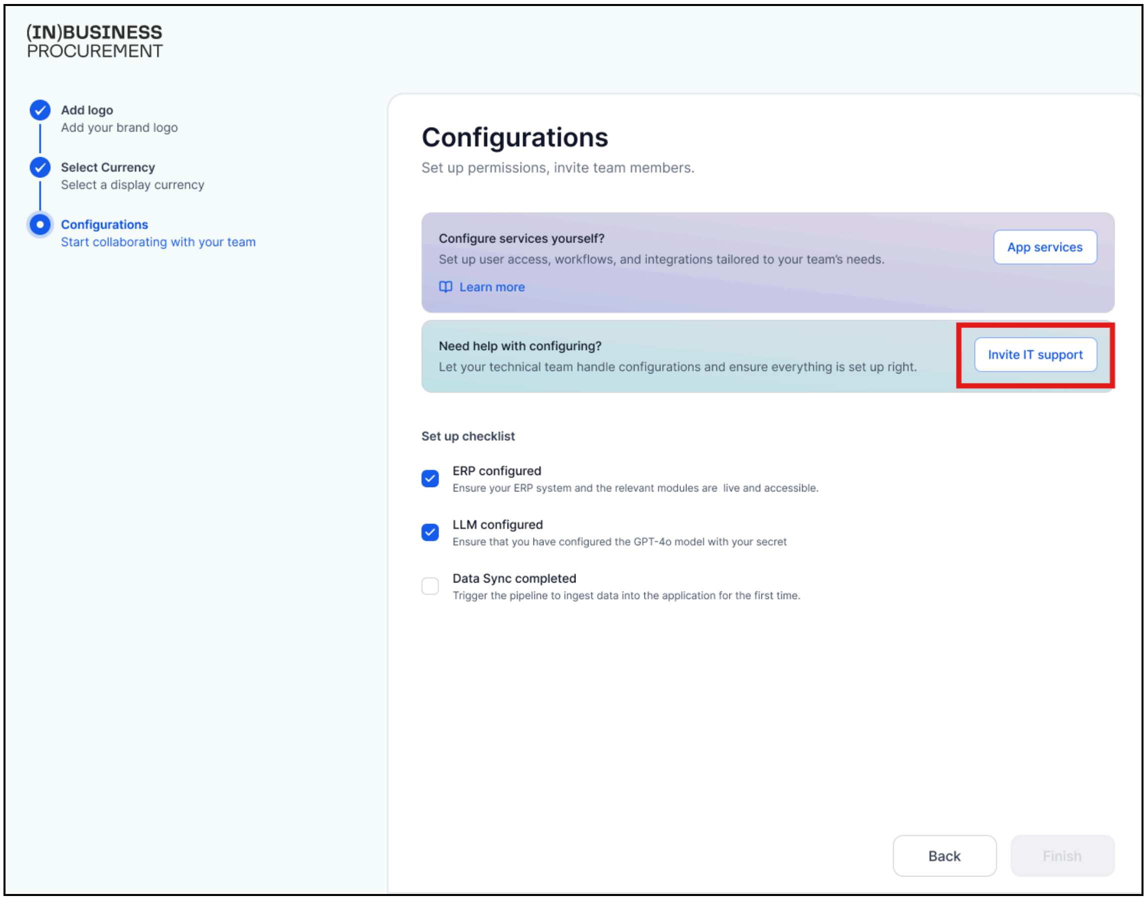


Step 5: Invite IT administrators (optional)

Super administrators can invite IT administrators to help with the initial setup. When an IT admin receives an invitation via email, they can accept it and create a new password. After registering, the IT admin can then sign in to the (In)Business Procurement application. Within this application, they can also find the app services redirection button.

To invite IT admins, follow the below steps:

1. Select **Invite IT support**.



2. Enter the email addresses of IT administrators.
3. Select **Finish**.

Configure the App Services Platform

1. Log in to the App Services Platform using the (In)Business Procurement app credentials.
2. Navigate to the **All Apps** section.
3. Locate the following preconfigured apps:
    - **Configuration App** (agentic-configuration)
    - **Workflow App** (procure API services)

Configure the configuration app (Agentic-configuration)

The configuration app manages agent prompts, model configurations, and Retrieval Augmented Generation (RAG) settings.

To configure the agentic-configuration app:

Step 1: Review agent prompts

1. From the App Services Platform, select the **Configuration App (agentic-configurations).**

2. Navigate to the **Agent Prompts**.
3. Review the ready-to-use prompts for each agent in the workflow.
4. To modify prompts to align with your organization's requirements, select **Edit config**.
5. Select **Save.**

   Note: *Modifying prompts might cause unexpected agent behavior. Test all changes before implementation.*

Step 2: Configure RAG settings

1. Select **RAG Config Values**.
2. Configure the embedding LLM model details using the following format.

JSON
```json
{
  "default_model_name": "gpt-4o-mini",
  "embedding_model_name": "text-embedding-ada-002",
  "api_key": "your_llm_api_key",
  "endpoint": "your_llm_endpoint",
  "api_version": "2024-02-01"
}
```

3. Enter details in the following required fields.

Field	Description	Example value
`Passage_embeddings_collection`	Module name.	Contracts or suppliers
`policy_embeddings_collection`	Policy name.	Policies
`descriptions_embeddings_collection`	Description.	Description
`azure_openai_api_key`	OpenAI key.	`589f77fdbe7f4d20b***************`
`azure_openai_endpoint`	Azure endpoint address.	<LLM endpoint>
`azure_openai_api_version`	Azure OpenAI API version.	2024-02-01
`azure_openai_embedding_model_name`	Azure OpenAI embedding model.	text-embedding-ada-002

`azure_openai_default_model_name`	OpenAI default model name.	gpt-4o-mini
`embedding_model_configuration`	Embedding model configuration details.	`{'model': 'text-embedding-ada-002', 'api_type': 'azure', 'api_key': '589f77fdbe7f4d20bd4f0fa186b879b5', 'base_url': 'https://oai-rnd-kore.openai.azure.com/', 'api_version': '2024-02-01'}`

4. Select **Save**.

Step 3: Configure agent model settings

1. Navigate to the **Agents-Model-Config**.
2. Select your preferred model from the supported options that are Azure GPT-4o, Azure GPT-4o Mini, OpenAI GPT-4o, and OpenAI GPT-4o Mini.
3. Configure the model details using the following format.

```json
{
  "model": "gpt-4o",
  "api_type": "azure or openai",
  "api_key": "your_api_key",
  "base_url": "https://{host_url}.openai.azure.com/",
  "api_version": "2023-05-15"
}
```

4. Select **Save**.

Step 4: Configure source preference configuration

1. Navigate to the **Source Preference Configuration**.
2. Select your preferred source of inputs from api or the document using the toggle button.

   Note*: When you select the document as your preferred source, edit the default description.*
3. Select **Save Tab**.

Configure the workflow app (data-pipeline-app)

The workflow app contains predefined workflows for data retrieval and processing.

Note: *To exemplify the use cases, we're using Coupa as an Enterprise Resource Planning (ERP) system for configuration. You can configure any ERP system by using the configuration keys and values.*

Step 1: Access the key-value store

1. From the App Services Platform, select the **Workflow app (data-pipeline-app).**
2. Select **Key Value Store** from the left navigation menu.

Step 2: Configure integration keys

- **Coupa**: Enter values in the following configuration keys.

Configuration key	Description
`coupa_client_id`	Your ERP API application client ID.
`coupa_client_secret`	Your Coupa API application client secret.
`coupa_token_url`	Coupa token endpoint URL for access tokens.
`coupa_host`	Base URL of your Coupa instance.
`coupa_scopes`	Space-separated OAuth2 scopes (see the following Coupa scopes).

The following are the required Coupa scopes.

```JSON
core.contract.read core.contracts_template.read
core.sourcing.read
core.sourcing.response.read
core.supplier_information_sites.read
core.supplier_information_tax_registrations.read
core.supplier_sharing_settings.read
core.supplier_sites.read core.supplier.read
core.purchase_order_only.read
core.requisition.read core.contract_party_role.read
```

- **(In)Business Procurement helper keys:** Enter values in the following configuration keys.

Configuration key	Description	Value
procure_ai_host	(In)Business Procurement AI API host address.	https://{host_url}/procureai/api/v1/
procure_helpers_api_key	Key to authenticate (In)Business Procurement AI helper APIs.	b109f3bbbc244eb82441917ed06d618b9008dd09a3a953632**********
procure_agent_host_url	Procure the agent host address.	https://{host_url}/procureai/agent/api/v1/
currency_rates_api_url	Address for currency rates APIs.	helpers/get-currency-conversions
document_category_llm_url	LLM address to get the document category.	helpers/get-document-category
get_legal_agreement_url	Address to get a legal agreement buffer.	helpers/get-legal-agreement-buffer
kie_llm_url_attachments	LLM address to get Key Information Exchange (KIE) for the contract's attachments.	helpers/get-kie-attachments
kie_llm_url_legal_agreement	LLM address to get KIE for the contract's legal agreement.	helpers/get-kie-legal-agreement
get_all_policies_url	Address to get all policies.	helpers/get-azure-blob-files
get_policy_ocr	Address to get OCR for policies.	helpers/get-policies-ocr
async_api_end_point	Address to get a legal agreement buffer.	helpers/process-async-task
get_all_policies_endpoint	Address to get all policies.	helpers/get-azure-blob-files
get_policy_ocr_endpoint	Address to get OCR for policies.	helpers/get-policies-ocr

- **LLM and Azure OCR (Optical Character Recognition) keys:** Enter values in the following configuration keys.

Configuration key	Description
`llm_url`	Your LLM endpoint address.
`llm_token`	Your LLM API token or key.
`llm_api_key`	Your LLM API token or key.
`llm_model_name`	Your LLM model name.
`aps_host`	App services host address.
`aps_token`	App services authentication token.
`ecb_url`	Address of the European Central Bank (ECB) host for current currency rates.
`AZURE_FORM_RECOGNIZER_ENDPOINT`	Azure host address for document OCR processing.
`AZURE_FORM_RECOGNIZER_KEY`	Azure OCR model authentication key.
`AZURE_FORM_RECOGNIZER_MODE`	Azure OCR model name.

- **Batch configuration keys:** Enter values in the following configuration keys.

Configuration key	Description
`max_batches`	Maximum number of batches for concurrent processing.
`doc_batch_size`	Number of documents processed per batch.
`batch_size`	Number of contracts processed per batch in a flow.
`max_records`	Maximum contracts fetched from the source.
`contract_batch_size`	Initial contract batch size for MongoDB dump.

max_doc_batches	Maximum number of document processing batches.

- **Weaviate and embedding keys:** Enter values in the following configuration keys:

Configuration key	Description	Value
creation_description_collection_endpoint	API endpoint to create a description collection.	descriptions_embeddings_collection
insert_description_endpoint	API endpoint to insert descriptions.	embeddings/table_descriptions
policy_embeddings_endpoint	API endpoint to generate and insert embeddings for a policy.	embeddings/policies
creation_policy_embeddings_endpoint	API endpoint for creating a policy embeddings collection.	policy_embeddings_collection
client_secret	Synthetic app token.	jf7kPkgPZnLvGyBYnNw6TGpTnSBXMsQ+***********E=
client_id	Synthetic app client ID.	6df8d201-f3e1-4bf7-816d-***********
synthetic_app_mask_id	Synthetic app mask ID.	eg*********

Step 3: Save all configurations: After you provide all the key-value pairs, select **Save**. After the configuration is complete, the Super administrator can configure the job to trigger the workflows.

Create and schedule jobs

After configuring the workflow keys and values, admins must schedule the workflow job.

To initiate a new job:

1. Navigate to the **Job Scheduler** in the left menu.
2. Select **Create New Job**.
3. In the dialog box, enter the following:

   Note: *Jobs execute only after you deploy the corresponding app.*

- **Job Name**: Descriptive name for your job.
- **Job Description**: Brief explanation of the job's purpose.
- **Time Zone:** Select your preferred zone.
- **Job Type**: Select your preferred job type (once or recurring).
  - **For one-time execution:** Select **Once** and choose the date and time using the calendar pop-up.
  - **For recurring execution:** Select **Recurring** and choose from the following cron patterns: minutes, hourly, daily, weekly, monthly, or custom patterns with start time.
- **Select Workflows**: Add the workflow from the list.
  Tip: You can also create a workflow using the **Create Workflows** tab.

4. Select **Create Job.**

   Note*: Jobs execute only after the corresponding app gets deployed.*

   Tip: You can also filter the existing jobs using the search options for Jobs, Status, Type, and Owner.

Workflow references

Contract workflows

Workflow name	API endpoint	Purpose
`fetch coupa contracts to process`	`/process-contracts (GET)`	Retrieves contract data from the Coupa API using delta sync.
`get_coupa_contract_attachments`	`/process-contract-attachments (GET)`	Retrieves document attachments from Coupa contracts.
`store contracts, documents data`	`/update-contracts (GET)`	Processes contract data from MongoDB and stores it in ClickHouse.
`process_contract_kie_and_document_ocr`	`/ocr-contract-docs(GET)` `(GET)/generate-document-type` `(GET)/kie-extraction-legal-agreement` `(GET)/kie-extraction-`	Processes documents using OCR and extracts key information.

	attachment (GET)	
generate_document_summary	/process-document-summary (GET)	Creates document summaries using LLM processing.
generate_contract_summary	/contract/summary (GET)	Creates contract summaries using LLM processing.
contract_classification	/contract/classify (GET)	Classifies contracts using LLM processing.
contract_currency_conversion	/contracts/run_currency_conversion (GET)	Converts contract values to standardized currency.
process_to_golden_contracts	/update-contracts-table (GET)	Transforms contract data into the client database at various stages.
process_to_golden_documents	/update-documents-table (GET)	Transforms document data in the client DB at different stages.
process_to_golden_contract_documents	/update-contract-documents-table (GET)	Processes the relationship between contracts and documents.
process_to_golden_document_pages	/update-document-pages-table (GET)	Processes individual pages of documents.
process_to_golden_contract_summary	/update-contract-summary-table (GET)	Transforms contract summary data in the client database at different stages.
process_to_golden_document_summary	/update-document-summary-table (GET)	Transforms document summary data in the client database at different stages.

Policy workflows

Workflow name	API endpoint	Purpose
policy-bronze	/policy-bronze (GET)	Retrieves policy file keys from Azure and stores unprocessed policies.

`policy-silver`	`/policy-silver (GET)`	Generates OCR-extracted data for policy documents.
`policy-golden`	`/policy-golden (GET)`	The store's policy document is available in the golden ClickHouse tables.

Suppliers workflows

Workflow name	API endpoint	Purpose
`process-suppliers-bronze`	`/process-suppliers-bronze (POST)`	Processes raw supplier data from the client database at different stages.
`process-supplier-spend-bronze`	`/process-supplier-spend-bronze (POST)`	Processes raw supplier spend data into the client database at various stages.
`process-countries-silver`	`/process-countries-silver (POST)`	Processes country data to the relevant layer of MongoDB.
`process-suppliers-silver`	`/process-suppliers-silver (POST)`	Processes supplier data to the relevant layer of MongoDB.
`process-upload-supplier-documents-silver`	`/process-upload-supplier-documents-silver (POST)`	Processes uploaded supplier documents to the relevant layer of MongoDB.
`process-ocr-supplier-documents-silver`	`/process-ocr-supplier-documents-silver (POST)`	Processes OCR for supplier documents to the relevant layer of MongoDB.
`process-supplier-kie-silver`	`/process-supplier-kie-silver (POST)`	Processes supplier documents Key Information Extraction (KIE) to the relevant layer of MongoDB.
`process-countries-golden`	`/process-countries-golden (POST)`	Processes the country into the relevant layer of the ClickHouse database.
`Process-supplier-spend-invoices-bronze`	`/Process-supplier-spend-invoices-bronze (POST)`	Processes invoice data from an external API to match invoices with existing purchase orders.

`process-suppliers-golden`	`/process-suppliers-golden (POST)`	Processes supplier data in the relevant layer of the Clickhouse DB.
`process-commodities-golden`	`/process-commodities-golden (POST)`	Processes commodities' data to the relevant layer of the Clickhouse DB.
`process-suppliers-commodities-golden`	`/process-suppliers-commodities-golden (POST)`	Processes supplier commodities data to the relevant layer of the Clickhouse DB.
`process-supplier-address-golden`	`/process-supplier-address-golden (POST)`	Processes supplier address data into the relevant layer of the ClickHouse database.
`process-supplier-contacts-golden`	`/process-supplier-contacts-golden (POST)`	Processes supplier contracts data into the relevant layer of the ClickHouse database.
`process-spend-supplier-golden`	`/process-spend-supplier-golden (POST)`	Processes supplier spend data into the relevant layer of the ClickHouse database.
`process-supplier-documents-golden`	`/process-supplier-documents-golden (POST)`	Processes supplier documents data to the relevant layer of the Clickhouse DB.
`process-supplier-license-golden`	`/process-supplier-license-golden (POST)`	Processes supplier license data into the relevant layer of the ClickHouse database.
`process-supplier-vat-golden`	`/process-supplier-vat-golden (POST)`	Processes supplier VAT data into the relevant layer of the ClickHouse database.
`process-supplier-iso-golden`	`/process-supplier-iso-golden (POST)`	Processes supplier ISO data into the relevant layer of the ClickHouse database.
`process-supplier-icv-golden`	`/process-supplier-icv-golden (POST)`	Processes supplier ICV data into the relevant layer of the ClickHouse database.

Note: *To view the status of scheduled jobs on the Job Scheduler page, navigate to* ***App Services Platform dashboard*** > ***Workflow App*** > ***Jobs Scheduler.***

Deploy your application

1. Navigate to the **Apps** section.
2. Select the configured **Workflow App or Configuration App** that you want to deploy.
3. Select **Deploy** and verify that the app status is **Enabled**.

***Important**: Make sure to enable both apps and deploy them to achieve full functionality.*

Complete the setup

1. Go to the (In)Business Procurement application.
2. Open the configuration checklist.
3. Mark all the checklist items as completed:
    - ✅ LLM configuration.
    - ✅ ERP integration setup.
    - ✅ Data ingestion/synchronization.
4. Select **Finish** to complete the setup process and verify system functionality.

After configuring the (In)Business Procurement application, you can:

- Access all modules within the app.
- Invite additional users.
- Monitor job execution status in the job scheduler.

Troubleshoot

If you encounter issues:

- Ensure that you have correctly configured the API keys and endpoints.
- Make sure that you deploy and enable App Services Platform apps.
- Check job scheduler logs for execution errors.
- Confirm availability and the network connectivity to external services, such as Coupa, Azure, and LLM providers.

Next steps

Following successful configuration, the (In)Business Procurement system is available for the following designated operations:

- Process contracts and extract key information.
- Manage procurement policies.
- Generate automated summaries and classifications.
- Convert currencies and standardize data formats.

- Monitor procurement workflows and performance.

For additional support or advanced configuration options, consult your system administrator or contact technical support.