



Washington DC Source-to-Pay Operations

Last updated: 02/01/2024

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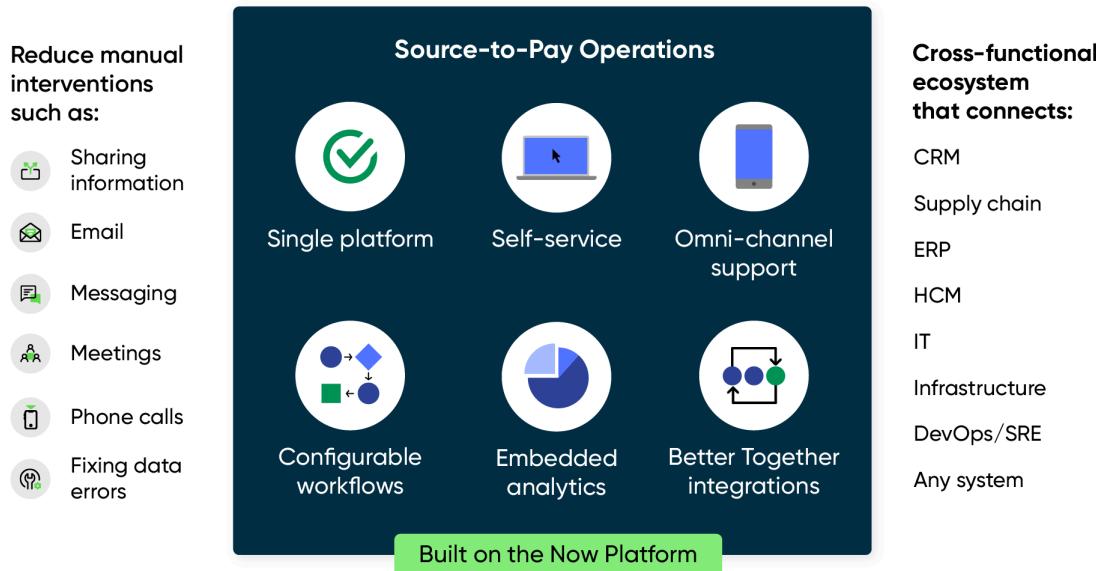
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Source-to-Pay Operations

Streamline procurement for employees and enable work team efficiencies. Connect the source-to-pay process end-to-end.



Automate and simplify the source-to-pay process

Source-to-Pay Operations is a powerful solution that automates and simplifies the source-to-pay process. It enables a seamless purchasing and case management process across work teams, allowing procurement to focus more on strategic priorities. Built on the Now Platform, Source-to-Pay Operations integrates seamlessly with existing ERP and procurement technologies to deliver faster time-to-value, while streamlining fulfillment and reducing the potential for errors or delays.

With Source-to-Pay Operations, you can orchestrate work across teams and systems with real-time governance. This enables you to:

- Refocus teams to higher value work by capturing and automating repeatable non-structured work in cases.
- Shorten onboarding and qualification cycle times with guided collaboration and configurable step-by-step playbooks.
- Improve compliance and contract utilization with centralized catalogs and end-to-end order creation automation.
- Improve the days payable outstanding (DPO) by automating low value invoice processing work, thus enabling reprioritization of teams to more strategic tasks.

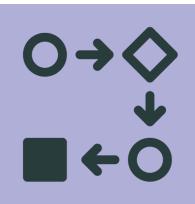
With this solution, you can also increase engagement with collaboration, self-service, and omni-channel access, which enables you to:

- Deflect low-focus requests from employees and suppliers with self-service interactions.
- Streamline intake to improve first-time request automation.
- Meet employees and suppliers where they work, to improve governance and spend management.

You can also leverage intelligence to enable continuous process improvement. This allows you to:

- Improve supplier compliance and spend governance through enhanced transparency.
- Enable suppliers to better help you by letting them audit, define, and update their own information.
- Drive better outcomes by continually improving people, processes, and behavior.
- Achieve real-time self service access to purchase orders and invoices, and deflect invoice-related inquiries from employees and suppliers.

Procurement is in the scope of most enterprise transformation initiatives. As procurement leaders assess their priorities, organizations are looking for transformable ways to evolve their procurement processes, while leveraging their existing investments. Organizations can use the Source-to-Pay Operations solution to address several of their use cases.

| | |
|---|---|
|  | <p>Improve procurement processing and drive compliant outcomes</p> <p>Make it easy for employees and procurement to make procurement processes easier and trackable, with omni-channel guidance.</p> |
|  | <p>Accelerate supplier qualification and enhance accuracy</p> <p>Enhance the supplier experience by enabling suppliers to complete onboarding tasks, raise requests, and get answers to questions quickly.</p> |
|  | <p>Transform supplier management with digital experiences</p> <p>Access supplier information easily, identify key supplier contacts, and collaborate in real time to resolve issues that impact production.</p> |
|  | <p>Streamline end-to-end invoice processing and expedite the payment process</p> <p>Enable accounts payable teams to simplify and speed up the invoice processing cycle and ensure timely and accurate payment of invoices.</p> |

Improve procurement processing and drive compliant outcomes

Home

Work to review

Priority: Critical High Filter by All work types

| | | | | |
|-------------------------|---|--|--|--|
| Needs final action 7 | SRC0001004 for 4cabling 0.5m cat 6 ... Planning Business owner Shirley Ross State Requires Decision Opened Mar 25 - Updated Mar 25 | SRC0001022 for BrightCarbon Presen... Critical Business owner Shirley Ross State Requires Decision Opened Mar 22 - Updated Mar 23 | SRC0001023 for BrightCarbon Presen... Critical Business owner Shirley Ross State Requires Decision Opened Mar 22 - Updated Mar 23 | SRC0000065 for 210-akwufreedom a... Low Business owner Susan Bell State Requires Decision Opened Mar 22 - Updated Mar 23 |
| New this week 21 | NED001001 Test negotiation event Low Business owner Shirley Ross State Planned Opened Apr 07 - Updated Apr 07 | SRC0001011 for BrightCarbon eLearn... Planning Business owner Shirley Ross State Pending Review Opened Mar 22 - Updated Apr 07 | NE0001021 Demo: Consulting services Low Business owner Shirley Ross State Planned Opened Mar 22 - Updated Mar 31 | PR0001055 New \$300.00 purchase from BH Photo Low Business owner Shirley Ross State Pending Approval Opened Mar 30 - Updated Mar 30 |

Tasks

Filter by All due dates

| | | | | |
|--|--|---|--|---|
| PSTSK0001005 Review existing spend with this supplier Due Date 2023-03-21 21:37:13 Task type Procurement Task | PSTSK0001006 Review contracted scope with this suppl... Due Date 2023-03-22 21:37:41 Task type Procurement Task | SRCTSK0001004 Please provide more information Bruce Due Date 2023-03-28 12:28:19 Task type Sourcing Task | PSTSK0001007 Review supplier diversity requirements Due Date 2023-03-28 21:38:48 Task type Procurement Task | APRTSK0001002 Follow up required: A... Due Date 2023-03-29 17:00:00 Task type Approval |
|--|--|---|--|---|

[View all](#)

Summary

Distribution of your work

| Priority | Number of records |
|--------------|-------------------|
| 1 - Critical | ~2 |
| 2 - High | ~5 |
| 3 - Moderate | ~10 |
| 4 - Low | ~15 |
| 5 - Planning | ~10 |

[View all](#)

Recently updated

Last refreshed 1m ago.

| Number | Short description | Updated by | State |
|--------------|--|------------|----------------------------|
| NEG0000040 | NEG0000040 with Amazon Web Services, LLC | admin | Awaiting Supplier Response |
| NEG0000021 | NEG0000021 with AVI-SPL | admin | Negotiation in Progress |
| NEG0000010 | NEG0000010 with DemoEasel, LLC. | admin | Negotiation in Progress |
| PC0001128 | Edit Request: PR0001060 from Fusionstorm | buyer.1 | Work in progress |
| SCASE0001002 | Supplier onboarding request for TestFlow7890 | system | Work in progress |

[View all](#)

Quick links

- [Procurement dashboard](#)
- [Supplier directory](#)
- [Knowledge articles](#)
- [Open Employee Center](#)
- [Open ShoppingHub](#)

Help employees self service their requests through intuitive workflows, knowledge base, and virtual agents. Increase spend under management and employee engagement with omni-channel guided experiences that meet employees where they work. Use step-by-step playbooks to make processes easier and trackable. Increase contract utilization and compliance by including controls in digital workflows.

Accelerate supplier qualification and enhance accuracy

Extend procurement processes to include supplier qualification and onboarding. Orchestrate workflows to include cross-functional teams, from legal to finance. Improve supplier data quality by enabling suppliers to manage their own data. Accelerate issue resolution by empowering suppliers to engage with cases and tasks.

Transform supplier management with digital experiences

The screenshot shows the ServiceNow Source-to-Pay workspace. At the top, there are quick actions: Create case, Create task, Create new supplier, and Manage my suppliers. Below this is a dashboard titled 'My Work' with five cards: High priority cases (1), Overdue cases (10), Tasks to review (0), Tasks created by me (7), and Overdue Tasks (0). Under 'Cases' (Last refreshed 1m ago), there is a table with columns: Number, Supplier, Priority, Case type, Short description, State, Assigned to, and Due date. The table lists five cases related to Bridgestone India. Under 'Tasks' (Last refreshed 1m ago), there is a similar table structure.

Manage and collaborate with suppliers on cases, in real time. Use case management for diverse issues like quality resolutions, supplier shortages, engineering changes, and so on. Centralize all supplier demographic, performance, and Environmental, Social, and Governance (ESG) intelligence. Better manage supplier data by centralizing supplier information. Leverage third-party supplier intelligence to increase the depth and breadth of supplier information.

Streamline end-to-end invoice processing and expedite the payment process

The screenshot shows the ServiceNow Accounts Payable workspace. It features a personalized summary of accounts payable with a greeting 'Hello Gilly!' and a dashboard titled 'Review your work'. The 'My invoices' section displays counts for various invoice statuses: Overdue (1), Ingestion error (5), Missing information (8), Suspected duplicate (6), Matching error (7), Exceptions found (9), and Rejected (2). Below this is a donut chart titled 'Top invoice exception types' and a bar chart titled 'Invoices due soon'.

Save time and increase productivity by consolidating all Accounts Payable workstreams into a single experience. Enable Accounts Payable teams to work seamlessly with suppliers and cross-functional teams to resolve invoice-related inquiries and to process invoices quickly and accurately. Ingest invoices via different channels and capture invoice data using Document Intelligence to reduce manual invoice data entry. Perform end-to-end invoice processing using workflows to identify and resolve exceptions, obtain approvals, and post the invoices into ERP systems to process payments.

Source-to-Pay Operations Integration with SAP

Source-to-Pay Operations Integration with SAP provides integration workflows for integrating the following products with SAP:

Sourcing and Procurement Operations Integration with SAP [↗](#)

Provides the ability to send purchase orders, receipts, and returns created in Sourcing and Procurement Operations to SAP ECC and SAP S4 HANA.

Supplier Lifecycle Operations Integration with SAP [↗](#)

Provides you the ability to send suppliers that are created or updated in Supplier Lifecycle Operations to SAP ECC and SAP S4 HANA.

Accounts Payable Operations Integration with SAP [↗](#)

Provides you the ability to send payables invoices created in Accounts Payable Operations synchronously or asynchronously to SAP ECC and SAP S4 HANA.

Learn

- <https://www.servicenow.com/products/procurement-service-management.html> [↗](#)
- <https://www.servicenow.com/workflows/creator-workflows.html> [↗](#)

Get started

- Work with an implementation specialist to achieve your desired business outcomes. To learn more, visit the [Customer Success Center](#) [↗](#).
- Explore which other tools can optimize your Source-to-Pay Operations experience, like [Virtual Agent](#) [↗](#), and [Knowledge Management](#) [↗](#).

Notice regarding use by organizations

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All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Products

- [Sourcing and Procurement Operations](#)
- [Supplier Lifecycle Operations](#)
- [Accounts Payable Operations](#)

- Source-to-Pay Workspace
- Source-to-Pay Integration with SAP ECC and SAP S4 HANA

Sourcing and Procurement Operations

With ServiceNow Sourcing and Procurement Operations (SPO), you can provide your employees with a simple automated tool that they can use to shop for goods and services that they need at work.

SPO value proposition

Provide a seamless procurement experience ...



SPO applications

SPO comprises the following applications:

Shopping Hub

With this application, provide a streamlined, e-commerce like experience for your employees to self-service requests, and source or purchase products and services through the procurement organization. This is an add-on experience to Employee Center.

Shopping Hub enables you to do the following:

- Manage a catalog of goods and services that your employees can use to order items that they need for their jobs.
- Simplify and streamline the way employees request help in sourcing or procuring goods and services.
- Suggest and guide employees to the correct suppliers.
- Provide transparency into the procurement process with regular updates.

For more information on these, see [Use ShoppingHub](#).

Source-to-Pay Common Architecture

With this application, provide an architecture to store purchase orders, requisitions, sourcing requests, and other objects that are commonly used across the source-to-pay business processes.

For more information on these, see [Components installed with Sourcing and Procurement Operations](#).

Sourcing and Purchasing Automation

With this application, provide workflows and automation for sourcing requests, negotiations, and purchase requisitions.

For more information on these, see [Sourcing and Purchasing Automation](#).

Procurement Case Management

With this application, enable all your employees to request services from the procurement team, and allow the procurement team to manage those requests.

For more information on these, see [Procurement Case Management](#).

Playbooks for Sourcing and Procurement Operations

With this application, provide a set of pre-built playbooks, workflows, and experiences for your employees, sourcing, and procurement to automate work that is typically managed through emails and spreadsheets.

For more information on these, see [Purchase revision flows](#).

Source-to-Pay Workspace

With this application, provide a single environment for your Procurement Specialists to work on purchase requisitions, sourcing requests, negotiations, procurement requests, and more.

For more information on these, see [Source-to-Pay Workspace](#).

Advanced Work Assignment for Source-to-Pay Operations

With this application, provide configurations to support automatic routing, queuing, and assignment of procurement cases, emails, and live agent chat conversations.

For more information on these, see [Advanced Work Assignment for Source-to-Pay Operations](#).

Performance Analytics for Sourcing and Procurement Operations

With this application, provide a set of pre-configured metrics and dashboards to assess spend, operational efficiency, and team performance across the Sourcing and Procurement Operations product.

Visually analyze how you are placed with your work and achievements over a given period of time, with the Procurement Buyer Dashboard. For more information on these, see [Procurement Buyer Dashboard](#).

Visually analyze how your organization is placed strategically and operationally, over a given period of time, with the Procurement Strategy & Ops Dashboard. For more information on these, see [Procurement Strategy & Ops Dashboard](#).

Visually analyze how your team is performing on sourcing requests, purchase requisitions, negotiated savings, and negotiation outcomes, over a given period of time, with the Procurement Team Performance Dashboard. For more information on these, see [Procurement Team Performance Dashboard](#).

i Note: Activation of this application on your production instance may require a separate Performance Analytics license.

Shopping Hub Mobile

With this application, enable Shopping Hub and other employee experiences for procurement within the Now Mobile application.

For more information on these, see [Shopping Hub Mobile](#).

Virtual Agent for Sourcing and Procurement Operations

With this application, provide pre-configured topics for sourcing and procurement within a conversational interface, for employees to raise requests, find knowledge, and complete tasks.

For more information on this, see [Virtual Agent for Sourcing and Procurement Operations](#).

Natural Language Understanding Models for Sourcing and Procurement Operations

With this application, provide Natural Language Understanding (NLU) models to enhance the virtual agent conversation interface, using natural human utterances to detect the correct conversations intended by employees.

For more information on this, see [NLU support for Sourcing and Procurement Operations Virtual Agent](#).

Common Service Delivery

With this back-end application, store Service Task and Service Request tables, as well as other infrastructure that forms the basis of the Finance and Supply Chain Workflows products.

Finance Common Architecture

With this application, maintain primary data such as Enterprise Resource Planning (ERP) sources, legal entities, accounting periods, and so on.

For more information on these, see [Components installed with Finance Common Architecture](#).

SPO integrations

SPO supports the following integrations:

ERP Integration Framework

With this application, provide integration support between the Platform and common ERP systems.

Project Costing for Sourcing and Procurement Operations

With this application, provide a set of capabilities to automate the calculation of planned versus actual cost by linking purchase orders to cost plans within Project Portfolio Management.

For more information on this, see [Sourcing and Procurement Operations integration with Project Management](#).

Risk Assessments Integration for Sourcing and Procurement Operations

With this application, provide a set of capabilities to trigger risk assessments on a supplier during the sourcing or purchase requisition workflow using Vendor Risk Management.

For more information on this, see [Sourcing and Procurement Operations integration with Vendor Risk Management](#).

Source-to-Pay Integration Framework

With this application, provide a set of staging tables, transform maps, and workflows to integrate sourcing, third-party catalogs, ordering, shipments, and invoicing with Sourcing and Procurement Operations.

For more information on this, see [Spendint API](#).

Procurement File Transfer Framework

With this application, extend the Source-to-Pay Integration Framework with Secure File Transfer Protocol (SFTP) and File Transfer Protocol (FTP) functionality, designed for integrating with systems that do not support Representational State Transfer (REST) or Simple Object Access Protocol (SOAP) based integration methods.

For more information on this, see [Procurement File Transfer Framework](#).

Primary Data Integration with SAP

With this application, provide your customers with the ability to fetch entity data like legal entity, cost center, material, supplier, and so on, from SAP ECC and SAP HANA into ServiceNow.

For more information on this, see [Source-to-Pay Integration with SAP ECC and SAP S4 HANA](#).

Sourcing and Procurement Operations Integration with SAP

With this application, provide your customers with the ability to send purchase orders, receipts, and returns created in Sourcing and Procurement Operations to SAP ECC and SAP S4 HANA.

For more information on this, see [Source-to-Pay Integration with SAP ECC and SAP S4 HANA](#).

Procurement for Field Service Management

With this integration application between Shopping Hub Mobile and Field Service Management, help your field service agents to order a part or item that isn't available on inventory, from a vendor or supplier.

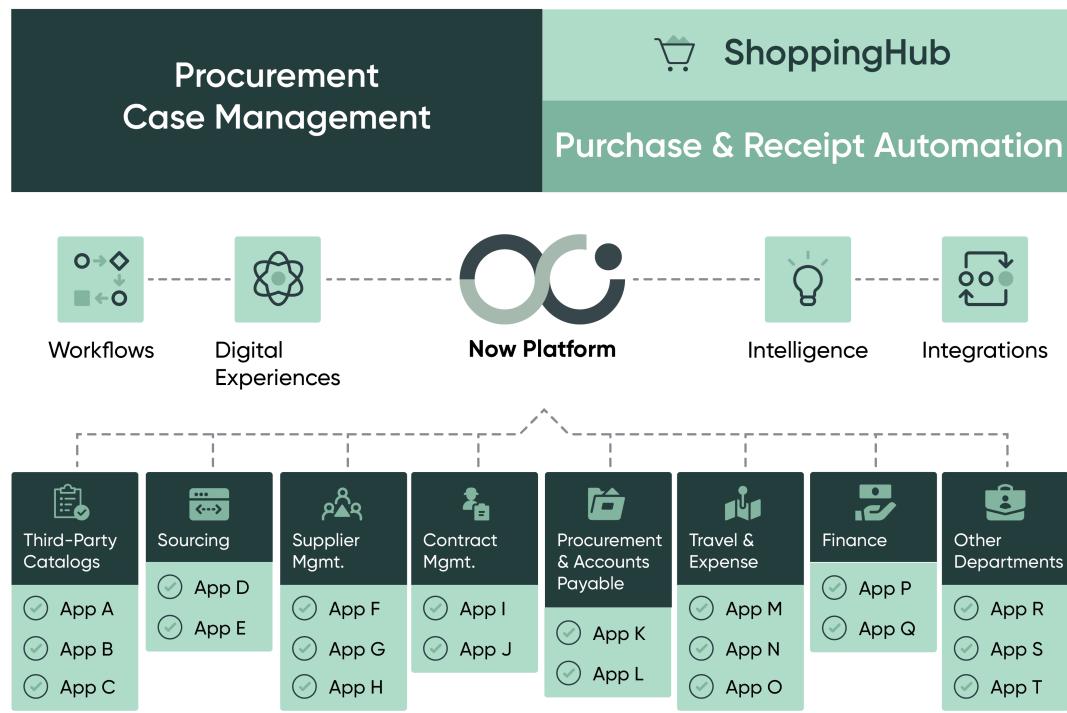
For more information on this, see [Sourcing and Procurement Operations integration with Field Service Management](#).

 Note: This application is owned by the Field Service Management team.

SPO product platform

The Platform for Digital Purchasing Workflows

Deliver intelligent & contextual shopping experiences to automate work across organizational silos & systems



Install Sourcing and Procurement Operations

Install Sourcing and Procurement Operations and its dependent applications from the ServiceNow Store.

Before you begin

Role required: admin

About this task

Install the following applications in the suggested sequence to get started with Sourcing and Procurement Operations:

1. Finance Common Architecture [com.sn_fin]
2. ERP Integration Framework [com.sn_fcms_integrations]
3. Common Service Delivery [com.sn_spend_sdc]
4. Procurement Case Management [com.sn_spend_psd]

Note: You must use the November 2023 version of the Document Template plugin [sn_doc] for using the November 2023 versions of the Procurement Case Management and Playbooks for Sourcing and Procurement Operations plugins.

5. Source-to-Pay Workspace [com.sn_spend_workspace]
6. Source-to-Pay Common Architecture [com.snc.sn_shop]
7. Sourcing and Purchasing Automation [com.snc.sn_pr]

Note: If you want to leverage the demo data, you must repair the Sourcing and Purchasing Automation plugin. You can repair it now or after you have completed installing all the plugins.

8. [Optional] Shopping Hub [com.snc.sn_spend_uib]

Important: If you're an existing customer who has upgraded, you may choose to continue with the existing Source-to-Pay Common Architecture plugin and skip this one. However, for the UI Builder (UIB) experience, you must install this Shopping Hub plugin. Remember that you can't go back to the existing Source-to-Pay Common Architecture plugin after you've installed this Shopping Hub plugin.

Tip: If you see the Shopping Hub UIB page not found error even after installing all the applications for Sourcing and Procurement Operations, repair the sn_shop and sn_pr applications, change the scope of the application to Sourcing and Purchasing Automation, and run these fix scripts:

- Update Old SH Links in Mobile - Aug
- Update Old SH Portal Links in RP - Aug
- Update Old SH Portal Links in PCA - Aug
- Update Old SH Portal Links in PSD - Aug
- Update Old SH Portal Links in SPA - Aug
- Update Old SH Portal Links in VA - Aug
- Update Old SH Portal Links in WS - Aug

9. Shopping Hub Mobile [com.sn_shop_mobile]

10. Playbooks for Sourcing and Procurement Operations [com.sn_spend_cp]

11. Virtual Agent for Sourcing and Procurement Operations [com.sn_shop_va]

12. Natural Language Understanding Models for Sourcing and Procurement Operations [com.sn_spend_nlu]

13. Source-to-Pay Integration Framework [com.sn_spend_intg]

14. Procurement File Transfer Framework [com.sn_spend_ftp_intg]

15. Performance Analytics for Sourcing and Procurement Operations [com.sn_spend_pa]

16. Advanced Work Assignment for Source-to-Pay Operations [com.snc.sn_spend_awa]

For more information on these applications and their dependencies, see [Application plugin installation sequence](#).

Procedure

1. Navigate to **System Applications > All Available Applications > All**.

2. In the search bar, use the filter criteria to find the application.

You can search for the application by its name or ID. If you can't find an application, you can request it from the ServiceNow Store. Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

3. Select **Install**.

4. In the Application installation dialog box, review the application dependencies.

If your application requires other applications, you must install them first if they are not already installed.

If the dependent applications or plugins are not installed already, installing your application automatically installs them.

5. Select **Load demo data** if demo data is available and you want to install it.

Some applications include demo data, which are sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

6. Select **Install**.

Application plugin installation sequence

The following table provides the consolidated list of plugins for Sourcing and Procurement Operations, a high-level description of each plugin, and the dependencies that are required before installing each plugin.

Application plugin list

| Plugin name | Description | Dependencies |
|---|--|---|
| Finance Common Architecture [com.sn_fin] | Maintains primary data such as Enterprise Resource Planning (ERP) sources, legal entities, accounting periods, and so on. | Finance Applications – Common Dependencies Fiscal Calendar Scoped Application Restricted Caller Access Insert Multiple Web Service |
| ERP Integration Framework [com.sn_fcms_integrations] | Provides integration support between the Platform and common ERP systems. | Scope Application Restricted Caller Access Insert Multiple Web Service |
| Common Service Delivery [com.sn_spend_sdc] | Contains Service Task and Service Request tables, as well as other infrastructure that forms the basis of Finance and Supply Chain workflows products. | Process Automation Designer Core Process Automation Designer for App Engine Playbook Experience |
| Procurement Case Management [com.sn_spend_ps] | Enables all employees to request services from the procurement team, and allows the procurement team to manage those requests. | Common Service Delivery Source-to-Pay Workspace |
| Source-to-Pay Workspace | Provides a single environment for Procurement | None |

Application plugin list (continued)

| Plugin name | Description | Dependencies |
|--|--|---|
| [com.sn_spend_workspace] | Specialists to work on purchase requisitions, sourcing requests, negotiations, procurement requests, and more. | |
| Source-to-Pay Common Architecture [com.snc.sn_shop] | Provides an architecture to store purchase orders, requisitions, sourcing requests, and other objects that are commonly used across the source-to-pay business processes. | Procurement Case Management Common Service Delivery GraphQL Plugin Finance Common Architecture User Criteria Scoped API Source-to-Pay Workspace Employee Center |
| Sourcing and Purchasing Automation [com.snc.sn_pr] | Provides workflows and automation for sourcing requests, negotiations, and purchase requisitions. | Source-to-Pay Common Architecture Supplier Common Architecture |
| Shopping Hub [com.snc.sn_spend_uib] | Provides a streamlined, e-commerce like experience for employees to self-service requests, and source or purchase products and services through the procurement organization. This is an add-on experience to Employee Center. | Sourcing and Purchasing Automation Common UIB Wrapper Components |
| Shopping Hub Mobile [com.sn_shop_mobile] | Enables Shopping Hub and other employee experiences for procurement within the Now Mobile application. | Sourcing and Purchasing Automation Mobile Plugin Mobile Agent Native Client |
| Playbooks for Sourcing and Procurement Operations [com.sn_spend_cp] | Provides a set of prebuilt playbooks, workflows, and experiences for employees, sourcing, and procurement to automate work that is typically managed through emails and spreadsheets. | Source-to-Pay Common Architecture Sourcing and Purchasing Automation |

Application plugin list (continued)

| Plugin name | Description | Dependencies |
|---|--|---|
| Virtual Agent for Sourcing and Procurement Operations [com.sn_shop_va] | Provides pre-configured topics for sourcing and procurement within a conversational interface, for employees to raise requests, find knowledge, and complete tasks. | Source-to-Pay Common Architecture Glide Virtual Agent |
| Natural Language Understanding Models for Sourcing and Procurement Operations [com.sn_spend_nlu] | Provides Natural Language Understanding (NLU) models to enhance the virtual agent conversation interface, using natural human utterances to detect the correct conversations intended by employees. | Source-to-Pay Common Architecture Glide Virtual Agent Virtual Agent for Sourcing and Procurement Operations |
| Source-to-Pay Integration Framework [com.sn_spend_intg] | Provides a set of staging tables, transform maps, and workflows to integrate sourcing, third-party catalogs, ordering, shipments, and invoicing with Sourcing and Procurement Operations. | Source-to-Pay Common Architecture |
| Procurement File Transfer Framework [com.sn_spend_ftp_intg] | Extends the Source-to-Pay Integration Framework with Secure File Transfer Protocol (SFTP) and File Transfer Protocol (FTP) functionality, designed for integrating with systems that don't support Representational State Transfer (REST) or Simple Object Access Protocol (SOAP) based integration methods. | Source-to-Pay Integration Framework ServiceNow IntegrationHub Action Step – SSH ServiceNow IntegrationHub Action Step - SFTP ServiceNow IntegrationHub Flow Trigger - REST |
| Performance Analytics for Sourcing and Procurement Operations [com.sn_spend_pa] | Provides a set of pre-configured metrics and dashboards to assess spend, operational efficiency, and team performance across the Sourcing and Procurement Operations product. | Source-to-Pay Common Architecture Sourcing and Purchasing Automation |
| Risk Assessments Integration for Sourcing and Procurement Operations [com.sn_spend_vrm] | Provides a set of capabilities to trigger risk assessments on a supplier during the sourcing or purchase requisition workflow using Vendor Risk Management. | Source-to-Pay Common Architecture Vendor Risk Management |

Application plugin list (continued)

| Plugin name | Description | Dependencies |
|--|--|--|
| Project Costing for Sourcing and Procurement Operations [com.sn_spend_ppm] | Provides a set of capabilities to automate the calculation of planned versus actual cost by linking purchase orders to cost plans within Project Portfolio Management. | Source-to-Pay Common Architecture Project Portfolio Suite with Financials |
| Advanced Work Assignment for Source-to-Pay Operations [com.snc.sn_spend_awa] | Provides configurations to support automatic routing, queuing, and assignment of procurement cases, emails, and live agent chat conversations. | Procurement Case Management Advanced Work Assignment Agent Chat |
| Primary Data Integration with SAP [com.sn_sap_data_int] | Provides the ability to fetch entity data like legal entity, cost center, material, supplier, and so on, from SAP ECC and SAP HANA into ServiceNow. | com.glide.hub.integrations.enterprise com.sn_fcms_intg com.sn_sap_ecc_idoc_sp com.sn_sap_s4_hana_rfc com.sn_shop com.sn_utility_spoke |
| Sourcing and Procurement Operations Integration with SAP [com.sn_psm_sap_int] | Provides the ability to send purchase orders, receipts, and returns created in Sourcing and Procurement Operations to SAP ECC and SAP S4 HANA. | com.sn_fcms_intg com.sn_shop com.sn_sap_ecc_idoc_sp com.sn_sap_s4_hana_rfc com.sn_sap_data_int |

Installation sequence

It is recommended that you install the plugins in the following sequence to avoid incomplete demo data and other installation issues:

1. Finance Common Architecture [com.sn_fin]
2. ERP Integration Framework [com.sn_fcms_integrations]
3. Common Service Delivery [com.sn_spend_sdc]
4. Procurement Case Management [com.sn_spend_psd]

Note: You must use the November 2023 version of the Document Template plugin [sn_doc] for using the November 2023 versions of the Procurement Case Management and Playbooks for Sourcing and Procurement Operations plugins.

5. Source-to-Pay Workspace [com.sn_spend_workspace]

6. Source-to-Pay Common Architecture [com.snc.sn_shop]

7. Sourcing and Purchasing Automation [com.snc.sn_pr]

i Note: If you want to leverage the demo data, you must repair the Sourcing and Purchasing Automation plugin. You can repair it now or after you have completed installing all the plugins.

8. [Optional] Shopping Hub [com.snc.sn_spend_uib]

i Important: If you're an existing customer who has upgraded, you may choose to continue with the existing Source-to-Pay Common Architecture plugin and skip this one. However, for the UI Builder (UIB) experience, you must install this Shopping Hub plugin. Remember that you can't go back to the existing Source-to-Pay Common Architecture plugin after you've installed this Shopping Hub plugin.

i Tip: If you see the Shopping Hub UIB page not found error even after installing all the applications for Sourcing and Procurement Operations, repair the sn_shop and sn_pr applications, change the scope of the application to Sourcing and Purchasing Automation, and run these fix scripts:

- Update Old SH Links in Mobile - Aug
- Update Old SH Portal Links in RP - Aug
- Update Old SH Portal Links in PCA - Aug
- Update Old SH Portal Links in PSD - Aug
- Update Old SH Portal Links in SPA - Aug
- Update Old SH Portal Links in VA - Aug
- Update Old SH Portal Links in WS - Aug

9. Shopping Hub Mobile [com.sn_shop_mobile]

10. Playbooks for Sourcing and Procurement Operations [com.sn_spend_cp]

11. Virtual Agent for Sourcing and Procurement Operations [com.sn_shop_va]

12. Natural Language Understanding Models for Sourcing and Procurement Operations [com.sn_spend_nlu]

13. Source-to-Pay Integration Framework [com.sn_spend_intg]

14. Procurement File Transfer Framework [com.sn_spend_ftp_intg]

15. Performance Analytics for Sourcing and Procurement Operations [com.sn_spend_pa]

16. Risk Assessments Integration for Sourcing and Procurement Operations [com.sn_spend_vrm]

17. Project Costing for Sourcing and Procurement Operations [com.sn_spend_ppm]

18. Advanced Work Assignment for Source-to-Pay Operations [com.snc.sn_spend_awa]

19. Primary Data Integration with SAP [com.sn_sap_data_int]

20. Sourcing and Procurement Operations Integration with SAP [com.sn_psm_sap_int]

21. Procurement for Field Service Management

i Note: This application is owned by the Field Service Management team.

Components installed with Sourcing and Procurement Operations

Several types of components are installed with the activation of Sourcing and Procurement Operations, including tables, user roles, and scheduled jobs.

Demo data is available for this feature.

Roles installed

| Role title [name] | Description | Contains roles |
|--|---|--|
| ShoppingHub Admin [sn_shop.shopping_hub_admin] | Access to all modules of the Source-to-Pay Common Architecture application. | <ul style="list-style-type: none"> • decision_table_admin • sn_fin.procurement_user • model_manager • category_manager |
| Shopper [sn_shop.shopper] | Access to the ShoppingHub portal to make requests and purchases. | None |
| Procurement Administrator [sn_shop.procurement_administrator] | Access to the primary data and administration sections of the Purchase Automation module. | <ul style="list-style-type: none"> • sn_fin.procurement_primary_data_admin • sn_shop.procurement_specialist |
| Procurement Specialist [sn_shop.procurement_specialist] | Access to all the data of the Purchase Automation module, except the primary data. | <ul style="list-style-type: none"> • sn_fin.procurement_user • contract_manager |
| Accounts Payable Viewer [sn_shop.accounts_payable_viewer] | Read access to purchase orders, invoices, and other task-related objects that arise from purchase order creation. | None |
| Purchasing Task Owner [sn_shop.purchasing_task_owner] | Access to all purchase orders, requisitions, | None |

| Role title [name] | Description | Contains roles |
|--|---|-----------------------------------|
| | negotiations, sourcing requests, and purchasing tasks. | |
| Acknowledgment Task Owner [sn_shop.acknowledgment_task_owner] | Access to all purchase orders and purchase requisitions. Read-only access to the main objects, but can update assigned tasks. | None |
| Procurement Common Administrator [sn_shop.procurement_common_admin] | Access to all tables, including deletion of records, in the Source-to-Pay Common Architecture application. | sn_shop.procurement_common_user |
| Procurement Common Reader [sn_shop.procurement_common_reader] | Read access to all tables available in the Source-to-Pay Common Architecture application. | sn_fin.procurement_user |
| Procurement Common User [sn_shop.procurement_common_user] | Access to perform, create, and update operations on all tables in the Source-to-Pay Common Architecture application. | sn_shop.procurement_common_reader |

Scheduled jobs installed

| Scheduled job | Description |
|---|--|
| [PSM] Approval Due Date Breached | Creates a breached approvals review task if a due date for an approval is breached. |
| [PSM] Clear Recently Viewed Data | Clears the recently viewed data in ShoppingHub. This data comprises entries that were created more than 90 days ago by the logged-in user. |
| [PSM] Create Receiving Task | Creates receipt tasks against the purchase order, grouped by calendar month and recipient, on the first of every month. |
| [PSM] Create Service Acknowledgment Task | Creates service acknowledgment tasks on a monthly basis. This job automatically picks all purchase order lines that have started and are yet to reach their end dates, and have some remaining amount or percentage or quantity to be delivered. |
| [PSM] Execute Credit Allocation Rules | Runs the credit allocation rules that are set up. Employee credit records are created as per this rule. |
| [PSM] Execute Shopping Controls | Runs the shopping controls that are set up. User control records are created as per the shopping controls, and the respective supplier products are updated as well. |
| [PSM] Monitor Milestone Tasks | Fetches any active milestone whose completion date is today and updates the state of the milestone to Confirmation Required. |
| [PSM] Populate Spend Task – Due Date Bucket | Calculates the due date bucket of purchasing tasks to determine the category to which they belong to. The categories are Others, Due within 7 Days, and Overdue. |
| [PSM] Purchasing Data Aggregation | Populates the following aggregate tables: Product Purchases by Job Code, Supplier Use by Shopper, and Supplier Use by Department. |
| [PSM] Retiring Supplier Products | Updates the Published flag on the supplier product to False when the current date is the same as the sales end date on the supplier product. |
| [PSM] Revoke Expired Credits | Sets the credit status to Credit Expired after the expiration date on the credit is reached. |

Tables installed

Note: The following tables are commonly available, within the Source-to-Pay Common Architecture application.

| Table | Description |
|----------------------------------|--|
| Attribute [sn_shop_attribute] | Stores specific attribute types and the values that are associated with a product model. For example, a laptop can have an attribute for the type of memory used, which can be SSD or Hard disk. |
| Attribute Set | Stores a group of attribute types that can later be associated with a supplier product. For example, |

| Table | Description |
|----------------------------------|--|
| [sn_shop_attribute_set] | Memory, Graphic card, and CPU can be an attribute set that can be associated with a product group. |
| Attribute Type | Stores the various types of attributes that are used when creating a product attribute. |
| [sn_shop_attribute_type] | |
| Delivery Location | Stores the delivery location for a given shop line or cart line. |
| [sn_shop_delivery_location] | |
| ERP Address Mapping | Stores the mapping between the ERP address and the location. |
| [sn_shop_erp_address_map] | |
| ERP Asset Category Mapping | Stores the mapping between the ERP source and the capitalization policy. |
| [sn_shop_erp_asset_category_map] | |
| ERP Material Group Mapping | Stores the mapping between the ERP source, model category, and material group. |
| [sn_shop_erp_material_group_map] | |
| Integration Error | Stores integration errors that might occur when communicating or processing a request with ERP. |
| [sn_shop_erp_error_task] | |
| Invoice | Stores the invoice that is associated with a purchase order. |
| [sn_shop_invoice] | |
| Invoice Line | Stores the invoice lines for each corresponding purchase order line. |
| [sn_shop_invoice_line] | |
| Job Code | Stores the job codes that are associated with business owners that primarily drive the approval hierarchy. |
| [sn_shop_job_code] | |
| Milestone | Extends the Acknowledgment Task table and stores the acknowledgment of services received. |
| [sn_shop_milestone] | |
| Office Location | Stores delivery locations marked as office. |
| [sn_shop_office_location] | |
| Order Line Template | Extends the Shop Line table and stores the purchase order line for any purchase order. |

| Table | Description |
|-------------------------------------|---|
| [sn_shop_order_line] | |
| Order Template | Stores all purchase orders. This is a base table. |
| [sn_shop_order] | |
| Order to Contract Relationships | Stores the mapping between the purchase order and contract. |
| [sn_shop_m2m_order_contract] | |
| Payment Terms | Stores the term in which a payment would be made. For example, a term could be seven days after the invoice date. |
| [sn_shop_payment_term] | |
| Price Break | Stores the price divided based on the number of quantities purchased for a given supplier product contract. |
| [sn_shop_price_break] | |
| Pricing | Stores the mapping of a supplier product and its price that is based on the associated contract. |
| [sn_shop_m2m_product_contract] | |
| Product Group | Stores the name that is associated with an attribute set that is then referenced by the supplier product and product model. |
| [sn_shop_product_group] | |
| Product Visuals | Stores the artifacts that are used to display product appearances on the user interface. |
| [sn_shop_supplier_product_artifact] | |
| Purchase Order | Extends the Order Template table and stores the purchase order for a given purchase. |
| [sn_shop_purchase_order] | |
| Purchase Order Line | Extends the Order Line Template table and stores the purchase order line for a purchase. |
| [sn_shop_purchase_order_line] | |
| Receipt | Stores the receipt of a supplier product received as part of a purchase order line. |
| [sn_shop_receipt] | |
| Shipment Details | Stores the shipment details that are associated with a purchase order line. |
| [sn_shop_shipment_details] | |
| Shipment Product | Stores the shipment product details that are associated with a purchase order line. |
| | |

| Table | Description |
|--|--|
| [sn_shop_shipment_product] | |
| Shipping Method [sn_shop_shipping_method] | Stores the shipping method details that are associated with a purchase order line. |

i Note: The following tables are installed as part of the Sourcing and Purchasing Automation application.

| Table | Description |
|--|---|
| Acknowledgment Task [sn_shop_acknowledgment_task] | Stores acknowledgments such as the milestone and receipt task. This is a parent table within the Common Service Delivery (SDC) application. |
| Approval Plan [sn_shop_approval_plan] | Stores the approval plan details for a purchase requisition such as the approval routing method and approval decision method. |
| Approval Plan Detail [sn_shop_approval_plan_detail] | Stores an instance of the approval record for a purchase line that is created based on the approval plan. |
| Approval Rule [sn_shop_approval_rule] | Stores the rule that triggers the creation of an approval record. It uses a condition builder to build the trigger condition for approvals. |
| Capitalization Policy [sn_shop_capitalization_policy] | Stores the condition based on which an asset is capitalized, and a fixed asset record is created. |
| Cart Line [sn_shop_cart_line] | Stores the details of a purchase line that is added to a cart. It has various details such as the supplier product selected, checkout type, business owner, delivery location, and so on. |
| Contract Task [sn_shop_contract_task] | Extends the Purchasing Task table and stores instances of various types of contract tasks that are associated with a purchase line. |
| Cost Allocation [sn_shop_cost_allocation] | Stores the type of cost allocation, associated cost center, and the amount that is allocated for a shopper that can be used to buy a supplier product. |
| Credit Allocation Rules [sn_shop_credit_allocation_rules] | Stores the credit allocation rules that are based on how a credit is allocated to an individual shopper. The allocation can be based on the inventory asset or user condition. |

| Table | Description |
|---|---|
| Delivery Address Task [sn_shop_delivery_address_task] | Extends the Purchasing Task table and stores the tasks that are associated with verifying and validating the delivery location for a purchase line. |
| Employee Credit [sn_shop_employee_credit] | Stores the credit amount that is allocated for a user with supporting information such as the responsible cost center and credit allocation rule. |
| Finance Task [sn_shop_finance_task] | Extends the Purchasing Task table and stores finance-related tasks such as reviewing an account or reviewing a budget for a purchase line. |
| Ledger Assignment Rules [sn_shop_ledger_assignment_rule] | Stores the rules that apply to the supplier products, product model or product category, and cost center. These rules are based on the accounting details, such as the capex and expense accounts, that are populated on a purchase line. |
| Model Map [sn_shop_m2m_model_map] | Stores the mapping between a CMDB model and a third-party category. |
| Negotiation [sn_shop_negotiation] | Stores the negotiation object that is created for a supplier product in a sourcing activity. |
| Negotiation Event [sn_shop_negotiation_event] | Stores the negotiation events that are created for a supplier product in a sourcing activity. |
| Non Catalog Intake [sn_shop_non_catalog_intake] | Extends the Import Set Row table and acts like a staging table for the non-catalog intake flow. |
| Order Permission [sn_shop_m2m_order_users_covered] | Stores the mapping between the purchasing permission and purchase order. |
| Paycheck Periods [sn_shop_paycheck_periods] | Stores the number of paychecks through which a payment would be made. |
| Payment Methods [sn_shop_payment_method] | Stores the payment method that is selected by the shopper and the cost center or person responsible for the payment. |
| Percent Complete Configuration | Stores the configurations to determine the percentage of payment that is completed for an order. |

| Table | Description |
|--|--|
| [sn_shop_percent_complete_config] | |
| Pre-Payment [sn_shop_pre_payment] | Stores a record of prepayment done for a purchase line as per a contract. |
| Product Purchases by Job Code [sn_shop_user_product_purchase] | Stores the aggregation of products purchased by the job code. |
| Product Stage [sn_shop_imp_product] | Extends the Import Set Row table. This staging table is used to import supplier products. |
| Properties [sn_shop_properties] | Stores the ShoppingHub-specific properties such as the requisition auto order. |
| Purchase [sn_shop_purchase] | Stores the purchase record that is created for each purchasing or sourcing activity. |
| Purchase Line [sn_shop_purchase_line] | Extends the Request Line table and stores the purchase line that is associated with a purchasing or sourcing activity. |
| Purchase Order History [sn_shop_order_history] | Extends the Order Template table and stores the older purchase order record when an order is revised. |
| Purchase Order Line History [sn_shop_order_line_history] | Extends the Order Line Template table and stores the older purchase order line record when a purchase order line is revised. |
| Purchase Requisition [sn_shop_purchase_requisition] | Stores the purchase requisition for a purchase or sourcing activity. |
| Purchases by Category [sn_shop_user_category_purchase] | Stores the analytical data for purchases by product category. |
| Purchasing Permission [sn_shop_covered_user] | Stores the purchasing permission for a user, group, cost center, or department. |
| Purchasing Task | Stores the various tasks that are associated with a purchase such as finance and contract |

| Table | Description |
|---|--|
| [sn_shop_task] | tasks. This is a base table within the Common Service Delivery (SDC) application. |
| Receipt Task [sn_shop_receipt_task] | Extends the Acknowledgment Task table and stores the state of a receipt confirmation. |
| Request Line Template [sn_shop_request_line] | Extends the Shop Line table and stores the purchase request line items. |
| Requisition Permission [sn_shop_m2m_purchasing_users_covered] | Stores the mapping between the purchasing permission and purchase requisition. |
| Requisition to Contract Relationships [sn_shop_m2m_requisition_contract] | Stores the mapping between the requisition and contract. |
| Revision Line [sn_shop_rev_request_line] | Extends the Request Line Template table and stores the revision line for a purchase. |
| Revision Request [sn_shop_revision_request] | Extends the Purchasing Task table and stores the state of a revision request for a purchase. |
| Service Acknowledgment [sn_shop_service_acknowledgment] | Stores the acknowledgment tasks of services received. |
| Shop Line [sn_shop_line] | Stores the order line template and request line template. This is a base table. |
| Shopper's Top Suppliers [sn_shop_usr_preferred_supplier] | Stores the mapping between the shopper and preferred supplier. |
| Shopping Control [sn_shop_shopping_control] | Stores the security rules that determine the access of supplier products for a given user. |
| ShoppingHub API Cache [sn_shop_shopnow_api_cache] | Stores the cached data for quicker access by APIs. An example is the CachedCategoryMap. |
| ShoppingHub Configuration | Stores configurations that determine certain aspects of the application appearance |

| Table | Description |
|---|---|
| [sn_shop_shopnow_content] | and behavior. An example is the terms and conditions page URL. |
| Sourcing Bid Stage [sn_shop_imp_sourcing_bid] | Stores the bids that are received for a supplier product by the third-party providers. This is a staging table. |
| Sourcing Line Outbound Queue [sn_shop_sourcing_line_out_queue] | Stages the sourcing line for the third-party providers. |
| Sourcing Outbound Queue [sn_shop_sourcing_out_queue] | Stages the sourcing request for the third-party providers. |
| Sourcing Request [sn_shop_sourcing_activity] | Stores requests to source for supplier products. |
| Sourcing Task [sn_shop_sourcing_task] | Extends the Purchasing Task table and stores the tasks that are related to a sourcing request. |
| Sourcing Vendor [sn_shop_sourcing_vendor] | Stores the mapping between the sourcing vendor code and sourcing vendor name. |
| Supplier Product [sn_shop_supplier_product] | Stores the supplier products that represent goods or services that can be listed on the portal. |
| Supplier Product View [sn_shop_supplier_product_view] | Stores the analytics of the number of views for a supplier product. |
| Supplier Task [sn_shop_supplier_task] | Extends the Purchasing Task table and stores the tasks that are associated with a supplier such as onboarding or risk assessment. |
| Supplier Use by Department [sn_shop_dept_supplier_purchase] | Stores the analytics of suppliers that are used by departments. |
| Supplier Use by Shopper [sn_shop_user_supplier_purchase] | Stores the analytics of suppliers that are used by shoppers. |
| Third-Party Category | Stores an external category that is provided by a supplier that maps to an existing model. |

| Table | Description |
|---|--|
| [sn_shop_third_party_category] | |
| User Controls [sn_shop_user_control] | Stores the mapping of a user and a shopping control. |
| | |

Purchasing properties

The following list contains the purchasing properties that are used by Sourcing and Procurement Operations.

| Property | Description |
|---|--|
| sn_shop.atf.threshold.days | Number of days before an expected delivery date for goods, or a start date for services and blankets, in which time a purchase requisition would be considered after the fact. |
| sn_shop.credit.allocation.batchsize | Total number of employee records that are processed in a batch, during credit allocation. |
| sn_shop.default.contract.model.type | Default contract model when creating contracts. |
| sn_shop.default.purchasing.time | Initial value of the purchasing time in days. |
| sn_shop.default.shipping.estimate | Default shipping estimate, in percentage. |
| sn_shop.default.sourcing.time | Initial sourcing time in days. |
| sn_shop.default.supplier.onboard.time | Initial supplier onboarding time in days. |
| sn_shop.non.pricing.contract | List of non-pricing contracts. The default is NDA. |
| sn_shop.shipping.estimate.inclusion | Shipping estimate included in purchase request approvals. |
| sn_shop.approval.reassessment.resend | Approvals that must be reassessed during a revision if the same approval rule is triggered. It applies to both purchase requisition and purchase order revisions. |
| sn_shop.log.property | Logging level for Sourcing and Purchasing Automation. |
| sn_shop.spend.requisition.autoorder | Purchase order that can be automatically created on completion of purchasing tasks without having to undergo a manual final review. |
| sn_shop.spend.requisition.autoorder.threshold | Dollar amount threshold above which a final review is required before a purchase order is created even when the automatic creation of purchase orders property is set to Yes. |
| sn_shop.spend.sla.due.days | Minimum due date for SLA calculation. |

| Property | Description |
|------------------------------------|--|
| sn_shop.supported.artifact.formats | Formats that are supported for supplier product artifacts. |
| sn_shop.tax.estimate.inclusion | Includes generated tax estimate in purchase requests for the approval process. |

Components installed with ERP Integration Framework for Sourcing and Procurement Operations

Several types of components are installed with the installation of the ERP Integration Framework application, including tables and user roles.

Roles installed

| Role title [name] | Description | Contains roles |
|---|---|----------------|
| Integration user [sn_fcms_intg.integration_user] | Configure integration setup for Sourcing and Procurement Operations with ERP. | None |

Scheduled jobs installed

| Scheduled job | Description |
|---------------|---|
| ERP User Sync | Fetches the list of users mapped under an ERP role in the ERP Role Mapping table. Assigns the ServiceNow user role to users based on the mapping. |

Tables installed

| Table | Description |
|---|---|
| ERP Role Mapping [sn_fcms_intg_erp_role_map] | Stores mapping of ServiceNow and ERP journal roles. The mapping helps to assign users to the Journal preparer and approver roles in ServiceNow Sourcing and Procurement Operations when they are granted the corresponding role in ERP. |
| ERP User Mapping [sn_fcms_intg_erp_user_map] | Stores ServiceNow and ERP User ID mapping that is required for integration to work. The mapping is maintained for all active users who have the journal preparer or approver role in ERP. |
| Park Post Response [sn_fcms_intg_parkpostresponse] | Stores the park and post response from ERP. |
| Reverse Response | Stores the reverse response from ERP. |

| Table | Description |
|---|--|
| [sn_fcms_intg_reverse_response] | |
| Service Element Map [sn_fcms_intg_service_element_map] | Stores the mapping of the ERP journal Header and Line fields with those of the Sourcing and Procurement Operations fields payload. |
| Service Map [sn_fcms_intg_service_map] | Stores mapping for all services to the ERP such as Journal Post, Journal Reverse, and Fetch Users. |
| Service Queue [sn_fcms_intg_service_queue] | Stores the requests being sent to ERP. |
| ERP Source Configuration [sn_fcms_intg_source] | Maintains ERP details such as credentials and web service details. |

Components installed with Finance Common Architecture

Several types of components are installed with the installation of the Finance Common Architecture application, including tables and user roles.

Roles installed

| Role title [name] | Description | Contains roles |
|---|--|---------------------|
| Finance admin [sn_fin.finance_admin] | Generate fiscal and accounting periods. | sn_fin.finance_user |
| Finance user [sn_fin.finance_user] | View and edit accounting and fiscal periods. | None |

Tables installed

| Table | Description |
|--|---|
| Account Access [sn_fin_gl_access] | |
| Account Access Rule [sn_fin_gl_access_rule] | |
| Account Group Mapping [sn_fin_gl_group_mapping] | |
| Accounting Periods | Stores the generated accounting periods based on the fiscal period set up in ERP. |

| Table | Description |
|--|--|
| [sn_fin_accounting_period] | |
| Balance [sn_fin_balance] | |
| Currency Conversion Setting [sn_fin_gl_currency_setting] | |
| Due Date Rule [sn_fin_gl_due_rule] | |
| ERP Source [sn_fin_erp_source] | Stores the available ERPs. |
| Excel Data Import [sn_fin_excel_data_import] | Supports the asynchronous excel data import for a journal entry. |
| Finance Exchange Rates [sn_fin_fx_rate] | |
| Fixed Asset [sn_fin_fixed_asset] | |
| GL Rule [sn_fin_gl_rule] | |
| GL Support [sn_fin_gl_support] | |
| Import Error [sn_fin_import_error] | |
| Industry [sn_fin_industry] | |
| Ledger [sn_fin_ledger] | |
| Ledger Account [sn_fin_gl_account] | |
| Ledger Account Group | |

| Table | Description |
|----------------------------|--|
| [sn_fin_gl_group] | |
| Ledger Balance | |
| [sn_fin_gl_balance] | |
| Legal Entity | Stores organizational entities defined in the application. |
| [sn_fin_legal_entity] | |
| Threshold Rule | |
| [sn_fin_gl_threshold_rule] | |

Properties installed with Finance Common Architecture

Use these properties to configure various settings in the Sourcing and Procurement Operations application.

For more information on how to configure these properties, see [Configure properties in Finance Common Architecture](#).

Properties for Finance Common Architecture

| Property | Description |
|--------------------------|---|
| default_je_sheet_name | Default sheet name of a Microsoft Excel file used to import journal entries. |
| number_of_future_periods | Number of future periods that are available in the Period filter list on the Finance Workspace. |
| number_of_prior_periods | Number of prior periods that are available in the Period filter list on the Finance Workspace. |

Configure properties in Finance Common Architecture

Configure properties for various settings used in Sourcing and Procurement Operations application.

Before you begin

Role required: sn_fin.finance_admin

Procedure

1. Navigate to **Finance Common > Properties**.
2. Open a property to edit or select **New** to create one.
3. On the form, fill in the fields.

Properties form

| Field | Description |
|-------|------------------------------|
| Name | Unique name of the property. |

| Field | Description |
|-------------|--|
| Description | Short description of the property. |
| Application | Name of the application to which the property applies. |
| Value | Value for the property. |

4. Select **Submit**.

Use ShoppingHub

Use the ShoppingHub module to request pricing or place an order for products and services. You can also request for products or services that you don't see in the catalog, revise, replace, or return your ordered products and services, customize your top suppliers, work on your to-dos, and much more.

i Note: If you're an existing customer who has upgraded, you may choose to continue with the existing Source-to-Pay Common Architecture (sn_shop) (formerly ShoppingHub) plugin for your regular Shopping Hub portal experience. However, for the UI Builder (UIB) experience, you need to install the Shopping Hub (sn_spend_uib) plugin. Remember that you can't go back to the older non-UIB Shopping Hub portal (Source-to-Pay Common Architecture plugin) after you've installed the Shopping Hub plugin.

The Shopping Hub (sn_spend_uib) application provides configurable experiences using the Now Experience UI Builder (UIB). This allows you greater flexibility to provide streamlined employee experiences to meet your specific business needs. Some of the things that you can do here include, but isn't limited to:

- Customize your portals by adding new filters and badges, renaming labels, branding, and so on.
- Expose additional fields or hide fields as required, to meet your business needs.
- Streamline the quick checkout flow using record producer.
- Add pages to provide new experiences.

For detailed information on how to configure your experience with UIB, see [Working in UI Builder](#).

Setting up primary data for ShoppingHub

Create primary data of your suppliers and office locations that your suppliers deliver to. Define your product catalog with data of your product categories, product models, and supplier products. Define shopping controls to control the supplier product visibility to your employees.

Add a supplier

Add suppliers and their products to populate your primary data.

Before you begin

Role required: sn_shop.shopping_hub_admin or sn_shop.procurement_administrator

About this task

You can add a supplier to the primary data and add products under that supplier. The suppliers that you add, appear on the ShoppingHub portal under Suppliers.

Procedure

1. Navigate to **All > ShoppingHub > Primary Data > Suppliers**.
You can also navigate to **Purchase Automation > Primary Data > Supplier**.
2. Select **New**.
3. On the form, fill in the fields.

Supplier form

| Field | Description |
|-------------------|--|
| Number | System-generated unique identifier for the supplier. |
| Legal name | Legal name of the supplier that corresponds to its operating location. |
| ERP supplier code | Company code of the supplier in the ERP system. |
| Parent entity | Parent organization of the supplier. |
| Global company | Global company that the supplier is linked to. |
| Industry | Industry to which the supplier belongs. |
| Image | Image of the supplier's logo. |
| Description | Detailed description of the supplier. |

4. To add an image of the supplier's logo, select **Select to add....**
5. Select the **Relationship Summary** tab and fill in the fields.

Relationship Summary form

| Field | Description |
|----------------------------|---|
| Onboarded | Status of whether the supplier is onboarded into the ERP system. The options are Yes or No . |
| Valid NDA | Status of whether the supplier has a valid non-disclosure agreement. The options are Yes or No . |
| Valid risk assessment | Status of whether a valid risk assessment has been performed for the supplier. The options are Yes or No . |
| Tiering assessment needed? | Whether a tiering assessment is required for the supplier. |
| Customer number | Unique identifier for the organization to the supplier. |
| On-boarded by | The person responsible for onboarding the supplier. |
| On-boarded date | Onboarding date of the supplier. |
| Off-boarded date | Termination date of the supplier from the organization. |
| Relationship manager | Person responsible for managing the relationship with this supplier. |
| Relationship status | Business relationship that is designated to the supplier. The options are Strategic , Valued , Tactical , or Excluded . |

| Field | Description |
|-----------|--|
| Preferred | Whether the supplier is preferred. The options are Yes or No . |

6. Select the **Contact Information** tab and fill in the fields.

Contact Information form

| Field | Description |
|----------------------|--|
| Street address | Street where the supplier is located. |
| PO box number | Post office box number where the supplier correspondence and payments are made. |
| City | City where the supplier is located. |
| State/Province | State or province where the supplier is located. |
| County/District | County or district where the supplier is located. |
| Zip/Postal code | Zip code or postal code where the supplier is located. |
| Country | Country where the supplier is located. |
| Region | Region where the supplier is operating. Options are AMS , APAC , EMEA , or LATAM . |
| Primary phone number | Phone number of the primary contact from the supplier side. |
| Fax number | Number to which documents can be faxed to the supplier. |
| Website | Website of the supplier. |

7. Select the **Purchasing Automation** tab and fill in the fields.

Purchasing Automation form

| Field | Description |
|--|---|
| Shipping time in days | Estimated number of days to ship products to the delivery location. For more information, see Lead time calculations . |
| Shipping estimates for products from this supplier (percent of negotiated price) | Default shipping estimate from the supplier. |
| Incoterm | <p>Set of 11 internationally recognized rules that define the responsibilities of sellers and buyers. It specifies who is responsible for paying for and managing the shipment, insurance, documentation, customs clearance, and other logistical activities. Select one of these options:</p> <ul style="list-style-type: none"> ◦ Carriage and Insurance Paid to (CIP) ◦ Carriage Paid to (CPT) ◦ Cost and Freight (CFR) ◦ Cost, Insurance, and Freight (CIF) |

| Field | Description |
|----------------------|---|
| | <ul style="list-style-type: none"> ◦ Delivered at Place (DAP) ◦ Delivered at Terminal (DAT) ◦ Delivered Duty Paid (DDP) ◦ Ex Works (EXW) ◦ Free Alongside Ship (FAS) ◦ Free Carrier (FCA) ◦ Free on Board (FOB) |
| Goods shipped from | Location from where the supplier ships out the products. |
| Supplier delivers to | Approved shipping countries for the supplier. |
| Purchasing entities | Purchasing entities that are allowed to purchase from this supplier. |
| Legal entities | Legal entities that are allowed to buy from this supplier. |

- 8.** Select the **Accounting Details** tab and fill in the fields.

Accounting Details form

| Field | Description |
|------------------------------|--|
| Payment term | Agreed time and conditions for paying the supplier. |
| Tax jurisdiction | Taxation authority that imposes the taxes. |
| Accepted purchasing currency | Currency value in which purchase orders for this supplier must be created. |
| General ledger account | Accounts payable reconciliation account for this supplier. |

- 9.** Select **Submit**.

What to do next

- Use the related lists of the supplier form to view the supplier products and contracts that are associated with this supplier.
- Add a supplier product. For more information, see [Add a supplier product](#).

Add office locations

Add all the office locations that your suppliers deliver to in your primary data. That way, your employees using ShoppingHub can select any of these pre-approved office locations for delivery while placing an order for a product.

Before you begin

Role required: sn_shop.shopping_hub_admin

Procedure

1. Navigate to **All > Purchase Automation > Primary Data**.
2. Select **Office Locations**.
3. Select **New**.

- On the form, fill in the fields.

Office Location form

| Field | Description |
|--------------|--|
| Name | Name of the office. |
| Country | Country of the office location. |
| Location | Address of the office location. |
| Default | Option to make this office location default. If you select this option, this office location appears as the default delivery address for a new user of ShoppingHub. |
| Legal Entity | Legal entity that is responsible for this office location. |

- Select **Submit**.

Manage delivery to valid address

As an administrator, you can define one or multiple valid countries where a supplier can deliver the products.

Before you begin

Role required: admin

Procedure

- Navigate to **All > Purchase Automation > Primary Data > Suppliers**.
- Alternatively, navigate to **All > Purchase Automation > Primary Data > Supplier Product**.

Valid values defined at the supplier product take precedence over the values defined at the supplier level.

- Select countries by unlocking the **Supplier delivers to** field.

- Select **Save**.

The products are now available for delivery only for the selected countries. When you leave the field blank, the products are eligible for delivery in all countries.

Once you select valid countries, employees can view and select the list of delivery locations associated with the valid countries in **ShoppingHub**.

Related topics

[Valid countries for delivery](#)

[Delivery location options](#)

[Select a delivery location](#)

Add delivery locations

Add the address that can be selected by the user to have the product delivered. You can add multiple delivery locations.

Before you begin

Role required: sn_shop.shopping_hub_admin

Procedure

1. Navigate to **All > Purchase Automation > Primary Data**.
2. Select **Delivery Locations**.
3. Select **New**.
4. On the form, fill in the fields.

Delivery Location form

| Field | Description |
|-------------------------|--|
| Address | Displays the value of the combination of recipients name and location details. |
| Shopper | The logged-in user who saved this address. |
| Recipient | The user who is the recipient of this address. |
| User default location | Determines whether this is user's default location or not. |
| User saved location | Indicates that the user saved the address to be used for future purchases. |
| Address verification | Indicates that this delivery address is a valid shippable location. |
| Address approval | Indicates that this delivery address can be used for user purchases. |
| Location Details | |
| Location | The common location used for integration with third-party systems. |
| Work address | The address of the office location. |
| Street | The street address of the delivery location. |
| City | The city of the delivery location. |
| State / Province | The state of the delivery location. |
| Zip / Postal code | The zip code of the delivery location. |
| Country | The country of the delivery location. |

5. Select **Submit**.

Setting up your product catalog

You can set up your product catalog by grouping the supplier products that you want to appear on the ShoppingHub portal into product categories and product models.

Create product categories to group product models

Create categories for your product models to group your product models.

Before you begin

Role required: sn_shop.shopping_hub_admin

Procedure

1. Navigate to **All > Product Catalog > Model Categories**.
2. Select **New**.
3. On the form, fill in the fields.

Model Category form

| Field | Description |
|-------------------------|--|
| Name | Display name of your product category on the ShoppingHub portal. |
| Parent category | Existing category that you select as the parent of this category. |
| UNSPSC code | United Nations Standard Products and Services Code of the product category. |
| Picture or icon | Visual representation of the product category. |
| Purchasing Automation | |
| Spend categorization | Products of this category that can be sourced or not sourced. Select Addressable or Not Addressable . |
| Product type | Product that is of the type Good or Service. Based on the product type, appropriate workflow options are initiated. |
| Goods receipt required | Goods receipt that is required or not required. This field appears only if the product type is set to Good . |
| Acknowledgment type | Receipt of confirmation and the type of receipt. The options are Milestones , Service Acknowledgment , or Two Way Match . This field appears only if the product type is set to Service . i Note: If you're an existing customer continuing with the Source-to-Pay Common Architecture (sn_shop) plugin, and skipping the Shopping Hub (sn_spend_uib) plugin, service acknowledgment is replaced with invoice acknowledgment for you. |
| Goods sourcing checkout | References the record producer used for sourcing requests of goods from this category. |

| Field | Description |
|----------------------------------|--|
| Services sourcing checkout | References the record producer used for sourcing requests of services from this category. |
| Contract type | <p>Contract types that are applicable to this product category.</p> <p>Related contracts, based on the specified contract models, are created for any purchase requisition of a product of this category.</p> |
| Display pricing? | Determines if pricing is to be displayed in ShoppingHub for supplier products associated to this category. |
| Sourcing time in days | <p>Number of days that are required to source a product of this category from the supplier.</p> <p>For details, see Lead time calculations.</p> |
| Supplier onboarding time in days | <p>Number of days that are required for a new supplier of a product in this category to onboard.</p> <p>For details, see Lead time calculations.</p> |
| Purchasing time in days | Number of days that are required to complete a purchase order for products in this category. |
| Enterprise Asset Configuration | |
| CI class | <p>Configuration item (CI) class that represents any product of this category.</p> <p>You can't add the CI class to the model category later.</p> |
| Asset class | <p>Asset that represents any product of this category. Setting the asset class triggers the creation of assets depending on the model category selected.</p> <p>If you select Consumable or Software License, the CI class field becomes read-only because consumables and software licenses don't create CIs. If you specify a CI class and then select Consumable or Software License, the CI class field is changed to None automatically.</p> <p>If you don't select an asset class, the product category doesn't create any asset.</p> |

| Field | Description |
|----------------------|---|
| | You can select an asset class from these options: <ul style="list-style-type: none"> ◦ Asset: An item that can be tracked individually. ◦ Consumable: An asset not tracked individually, such as keyboards. ◦ Hardware: A physical piece of computer equipment, such as a laptop or server. ◦ Software License: A legal statement that defines the uses of software, such as the number of installations that are allowed or the terms of distribution. |
| Allow pre-allocation | Option to determine if you want to track items in this category as pre-allocated assets. |
| Allow as primary | Option to determine if assets of this product category can be primary components of a bundle. |
| Allow in bundle | Option to determine if assets of this product category can be components of a bundle. |

4. Select **Submit**.

Result

The product category is created and the form reopens with its related lists.

What to do next

Use the related lists of the model category form to view the product models, supplier products, and ledger assignment rules that are associated with this category.

Related lists of a product category

| Name | Description |
|-------------------------|---|
| Product Models | Product models that are associated with this product category. |
| Supplier Products | Supplier products that come under this product category. Select New to create a supplier product. |
| Ledger Assignment Rules | Ledger assignment rules for this product category. Select New to add a ledger assignment rule . |

Create product models to group supplier products

Create product models to group your supplier products.

Before you begin

Role required: sn_shop.shopping_hub_admin

Procedure

1. Navigate to **All > ShoppingHub > Model Management > All Models**.
2. Select **New**.
3. Select a model type that you want to create from the following options:
 - Application
 - Bundle
 - Consumable
 - Contract
 - Facility
 - Hardware
 - Service Model
 - Software Model
 - Other Product Model
4. On the form, fill in the fields.

The following table describes the fields that appear on all models, regardless of the type of model.

| Field | Description |
|-------------------------|---|
| Display name | Name of the model. i Note: The Display name field is auto-populated with the values of the Manufacturer and Name fields. |
| Manufacturer | Name of the manufacturer of the model. |
| Name | Manufacturer-assigned name of the model or abstract name that is specified by the model manager, such as Field Agent Laptop. |
| Short description | Brief description of the model. |
| Model categories | Categories to which the model is assigned. |
| Asset tracking strategy | Process by which the model can be tracked. Select one of these options: <ul style="list-style-type: none"> ◦ Leave to Category: Model is transparent and the category defines the asset class. ◦ Create Consumable Asset: Model forces the asset class to be consumable, regardless of what the category defines as the asset class. ◦ Don't create assets: Model blocks asset instantiation, regardless of what the category defines as the asset class. |
| Acquisition method | Method for purchasing the model. Select Both , Buy , or Lease . |
| Cost | Cost of a single unit of the model. |
| Depreciation | Depreciation scheme for the model. |

| Field | Description |
|------------------------------|---|
| Salvage value | Estimated value that an asset realizes after its sale at the end of its useful life. This value must be less than or equal to the cost of the asset. |
| Model number | Specific model number that is assigned to the item by the manufacturer. |
| Barcode | Barcode number that is assigned to the model by the manufacturer. |
| Owner | Person responsible for the model. |
| Status | Status of the model. Select In Production , Retired , or Sold . |
| Expenditure type | Type of expenditure. Select one of these options: <ul style="list-style-type: none"> ◦ Capex: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. ◦ Opex: Operational expenditure is an on-going expenditure. For example, toners for the photocopier. |
| Picture | Picture or icon to represent this product model. |
| Certified | Model that has an approval for its use. |
| Comments | Additional information about the model that is good to know. |
| Assets | Assets that are created from this model. You can have any combination of assets and configuration items. For example, with a single hardware model, you can have assets and no configuration items, configuration items and no assets, or both configuration items and assets. |
| Configuration Items | Configuration items that are created from this model. You can have any combination of assets and configuration items. |
| Purchasing Automation | |
| Product category | Category to which this product belongs. |
| Spend categorization | Products of this category that can be sourced or not. The default value is based on the selected product category. |
| Product type | Type Good or Service. The default value is based on the selected product category. |
| Good receipt required | Goods receipt that is required or not. This field appears only if the product type selected is Good . The default value is based on the selected product category. |
| Acknowledgment type | Receipt of confirmation and the type of receipt. The options available are Milestones , Service Acknowledgment , and Two Way Match . The default value is based on the selected product category but the value provided here can override it. This field appears only if the product type selected is Service . |

| Field | Description |
|-------------------------|---|
| | <p>Note: If you're an existing customer continuing with the Source-to-Pay Common Architecture (<code>sn_shop</code>) plugin, and skipping the Shopping Hub (<code>sn_spend_uib</code>) plugin, service acknowledgment is replaced with invoice acknowledgment for you.</p> |
| Sourcing time in days | <p>Number of days that are required to source a product of this category from the supplier.</p> <p>This field is auto-populated based on the selected product category.</p> <p>For details, see Lead time calculations.</p> |
| Purchasing time in days | <p>Number of days that are required to complete a purchase order for products in this category.</p> <p>This field is auto-populated based on the selected product category.</p> <p>For details, see Lead time calculations.</p> |

5. Select **Submit**.

What to do next

- Use the related lists of the model category form to view the product models, supplier products, and ledger assignment rules that are associated with this category.
- Create ledger assignment rules for this product model. See [add a ledger assignment rule](#).

Add a supplier product

Add supplier products to populate the primary data.

Before you begin

To add a supplier product, you must have already added a supplier, product category or model category, and product model to the primary data. For more information on how to add them, see [Add a supplier](#), [Create product categories](#), and [Create product models](#).

Role required: `sn_shop.shopping_hub_admin` or `sn_shop.procurement_administrator`

About this task

You can add a supplier product and choose to publish it on the ShoppingHub portal. The products that you add, appear on the portal under various categories. You can add multiple products that are available with the suppliers.

Procedure

1. Navigate to **All > ShoppingHub > Supplier Products > Published Products**.
You can also navigate to **Purchase Automation > Primary Data > Supplier Product**.
2. Select **New**.
3. On the form, fill in the fields.

Supplier product form

| Field | Description |
|-------|--|
| Name | Name of the product at the supplier's end. |

| Field | Description |
|----------------------|---|
| Supplier | Supplier for this product. |
| Supplier part number | Unique number that is used by the supplier to identify this product. |
| Product model | Standardized definition for this product across suppliers. |
| Product category | Category to which this product belongs. |
| Sales start date | Date when the supplier product is active and available for purchase in the catalog. This is a read-only field. |
| Sales end date | Date when the supplier product is discontinued and no longer published in the catalog. This is a read-only field. |
| Published | Option for specifying if the product is to be listed on the ShoppingHub portal. |

i Note: The **Sales start date** and **Sales end date** fields are populated through third-party integration from the Catalog API using Source-to-Pay Integration Framework (PIF).

4. Select the **Details** tab and fill in the fields.

Details form

| Field | Description |
|-------------------|--|
| Units available | Number of units of the product in stock with the supplier. |
| Unit | Unit or rate in which the product is sold by the supplier. |
| Short description | Brief description of the product for the buyer. |
| Description | Detailed description of the product for the buyer. |

5. Select the **Purchasing Automation** tab and fill in the fields.

i Note: These cascade down from the model category to the product model, to the supplier product, but can be overridden at the leaf level.

Purchasing Automation form

| Field | Description |
|------------------------|---|
| Spend categorization | Product that is addressable for negotiation. You can select one of these options: <ul style="list-style-type: none"> ◦ Addressable: Can be considered for negotiation. ◦ Not Addressable: Cannot be considered for negotiation. |
| Product type | Type of product. The options are Good or Service . |
| Goods receipt required | Purchase and receipt of goods that are automated. The options are Yes or No . |

| Field | Description |
|----------------------|--|
| Acknowledgment type | <p>Type of receipt confirmation, if any, required for services. You can select one of these options:</p> <ul style="list-style-type: none"> ◦ None ◦ Milestones ◦ Service Acknowledgment ◦ Two Way Match <p>i Note: If you're an existing customer continuing with the Source-to-Pay Common Architecture (sn_shop) plugin, and skipping the Shopping Hub (sn_spend_uib) plugin, service acknowledgment is replaced with invoice acknowledgment for you.</p> |
| Capex account | General ledger account where capital expenses are posted on purchase. |
| Expense account | General ledger account where operational expenses are posted on purchases. |
| Pre-paid account | General ledger account where purchases of this product are posted when they are prepaid. |
| Sourcing required? | Option to mark if sourcing is required for this product. This is determined based on if there is an active contractual price for this supplier product or not. |
| Supplier delivers to | Countries where the suppliers can deliver the product. |

For more information, see [Manage delivery to valid address](#).

6. Select the **Lead Time** tab and review the fields.

Lead Time form

| Field | Description |
|-------------------------|--|
| Total lead time in days | Estimated number of days to process the purchase order and deliver the product. |
| Sourcing time in days | Estimated number of days to process the sourcing request. |
| Purchasing time in days | Estimated number of days to complete the purchase requisition and create a purchase order. |
| Shipping time in days | Estimated number of days to ship the product to the delivery location. |

For more information, see [Lead time calculations](#).

7. Select **Submit**.

What to do next

Use the related lists of the supplier product form to view the pricing, purchase order lines, product visuals, and ledger assignment rules that are associated with this supplier product.

Lead time calculations

Lead time (in days) of a supplier product consist of the time for sourcing, supplier onboarding, purchasing, and shipping for a supplier product, product model, or a product category. Each of these durations are used to calculate the total lead time which determines the number of days to execute a purchase order.

Supplier onboarding time

Supplier onboarding time indicated the average number of days to onboard a new supplier for a product of a category. The initial default value is 15 days, as defined in the `sn_shop.default.supplier.onboard.time` property of the purchasing properties table.

When a purchase requisition is created for a supplier product, it can have a purchasing task of type supplier onboarding. Over time, as purchase requisitions are completed, the onboarding time for a supplier is updated automatically as follows:

For a product category: Supplier onboarding time = Sum [Actual Duration of supplier tasks for purchase requisitions with purchase lines in a category]/Number of Supplier onboarding tasks.

Example calculation of supplier onboarding time:

| Purchase Requisition A for Supplier A | Purchase Requisition B for Supplier B | Purchase Requisition C for Supplier C |
|---|---|---|
| <ul style="list-style-type: none"> Supplier Task = Onboarding; Actual duration = 13 days Purchase line 1: Product Category = Hardware Purchase line 2: Product Category = Software | <ul style="list-style-type: none"> Supplier Task = Onboarding; Actual duration = 15 days Purchase line 3: Product Category = Hardware | <ul style="list-style-type: none"> Supplier Task = Onboarding; Actual duration = 21 days Purchase line 4: Product Category = Software |

Calculated supplier onboarding time in days

- Hardware product category = $(13+15)/2 = 14$
- Software product category = $(13 + 21)/2 = 17$

Note: If the calculation produces a decimal, always round up regardless of the value.

Sourcing time

Sourcing time indicates the average number of days taken to source a product from a supplier, if sourcing is required for products of a category.

The initial default value is three days, as defined in the `sn_shop.default.sourcing.time` property of the purchasing properties table. This value is updated over time, as sourcing requests for a supplier product are completed.

The sourcing time for a product category, product model, or supplier product is updated as follows:

1. The actual duration values of all sourcing requests for supplier products are considered. An average of these values is calculated. This average is the new default sourcing time for this supplier product.
2. When the sourcing time is updated for a supplier product, it is recalculated for the related product model as an average of the sourcing times of all its supplier products.
3. When the sourcing time is updated for a product model, it is recalculated for the related product category as an average of the sourcing times of all its product models.

For any new product model, the sourcing time is the same as its referenced model category. For any new supplier product, the sourcing time is the same as its referenced product model.

i **Note:**

- If **Spend categorization** of a product category is **Not Addressable**, the sourcing time is always 0.
- If the Purchase Line is of the state **Closed Canceled**, it indicates that sourcing did not occur for that purchase line. In this case, the average sourcing time of the supplier product is not updated.

Example calculation of sourcing time:

Sourcing Request A for MacBooks

Actual duration = 16 days

| | | |
|--|---|---|
| Purchase line 1 – Reseller A MacBook <ul style="list-style-type: none"> • Purchase requisition line (PRL) State = Closed Rejected • Product Model = MacBook • Product Category = Hardware | Purchase Line 2 – Reseller B MacBook <ul style="list-style-type: none"> • PRL State = Pending Approval • Product Model = MacBook • Product Category = Hardware | Purchase Line 3 – Apple MacBook (assume current sourcing time is 11 days) <ul style="list-style-type: none"> • PRL State = Closed Canceled • Product Model = MacBook • Product Category = Hardware |
|--|---|---|

Sourcing Request B for Lenovo Think Pads

Actual duration = 22 days

| | |
|---|---|
| Purchase line 4 – Reseller A Lenovo Think Pad <ul style="list-style-type: none"> • PRL State = Closed Rejected • Product Model = MacBook • Product Category = Hardware | Purchase Line 5 – Reseller B Think Pad <ul style="list-style-type: none"> • PRL State = Pending Approval • Product Model = MacBook • Product Category = Hardware |
|---|---|

Calculated sourcing time in days

- Reseller A MacBook = 16
- Reseller B MacBook = 16
- Apple MacBook = 11

- MacBook Product Model = $(16 + 16 + 11)/3 = 15$
- Reseller A Lenovo ThinkPad = 22
- Reseller B Lenovo ThinkPad = 22
- Lenovo ThinkPad Product Model = $(22 + 22)/2 = 22$
- Hardware Product Category = $(15 + 22)/2 = 19$

i Note: If the calculation produces a decimal, always round up regardless of the value.

Purchasing time

Purchasing time indicates the average number of days taken to complete the purchase requisition workflow and create purchase orders for products in a category.

The initial default value is five days, as defined in the `sn_shop.default.purchasing.time` property of the purchasing properties table. This value is updated over time, as purchase requisitions for a supplier product are completed.

The purchasing time for a product category, product model, or supplier product is updated as follows:

1. The actual duration values to complete all purchase requisitions for supplier products are considered. An average of these values is calculated. This average is the new default purchasing time for this supplier product.
2. When the purchasing time is updated for a supplier product, it is recalculated for the related product model as an average of the purchasing times of all its supplier products.
3. When the purchasing time is updated for a product model, it is recalculated for the related product category as an average of the purchasing times of all its product models.

If the purchase requisition is of the Blanket order type, the purchase time for its purchase lines is not updated. Example calculation of purchasing time:

| Purchase Requisition A for Reseller A | Purchase Requisition B for Reseller B | Purchase Requisition C for Reseller B | Purchase Requisition D for Reseller A |
|--|---|---|--|
| <ul style="list-style-type: none"> • Actual duration = 16 days • Purchase line 1 <ul style="list-style-type: none"> ◦ Supplier product = Reseller A Apple MacBook ◦ Product Model = MacBook ◦ Product Category = Hardware • Purchase line 2 | <ul style="list-style-type: none"> • Actual duration = 13 days • Purchase line 3 <ul style="list-style-type: none"> ◦ Supplier Product = Reseller B MacBook ◦ Product Model = MacBook ◦ Product Category = Hardware | <ul style="list-style-type: none"> • Actual duration 21 days • Purchase line 4 <ul style="list-style-type: none"> ◦ Supplier Product = Reseller B Office 365 ◦ Product Model = Office 365 ◦ Product Category = Software | <ul style="list-style-type: none"> • Actual duration = 7 days • Purchase line 5 <ul style="list-style-type: none"> ◦ Supplier Product = Reseller A Lenovo ThinkPad ◦ Product Model = Lenovo ThinkPad ◦ Product Category = Hardware |

- Supplier Product = Reseller A Office 365
- Product Model = Office 365
- Product Category = Software

Calculated purchasing time in days

- Reseller A MacBook = 16
- Reseller B MacBook = 13
- MacBook Product Model = $(16+13)/2 = 15$
- Reseller A Lenovo Think Pad = 7
- Lenovo Think Pad Product Model = 7
- Hardware Product Category = $(15+7)/2 = 11$
- Reseller A Office365 = 16
- Reseller B Office365 = 21
- Office 365 Product Model = $(21+16)/2 = 19$
- Software product category = 19

i Note: If the calculation produces a decimal, always round up regardless of the value.

Shipping time

Shipping time indicates the estimated number of days taken to ship a supplier product to a delivery location. This value is retrieved from the shipping time of a supplier.

Whenever the shipping time for a supplier is updated, the shipping times of all the supplier products belonging to that supplier reflect the same.

If the supplier product is created through a third-party integration, then the shipping time is updated from the values of the integration, and not from the supplier record.

i Note: If the product type of the supplier product is **Service**, then the value of shipping time is always 0.

Total lead time

Total lead time indicates the numbers of days taken to execute the purchase order of a supplier product and deliver it to the employee.

For a supplier product, the total lead time is calculated as:

- If sourcing and supplier onboarding are required,

Total lead time = [Supplier onboarding time from the referenced product category] + [Sourcing time of the supplier product] + [Purchasing time for the supplier product] + [Shipping time of the supplier product].

- If sourcing is required but supplier onboarding is not required,

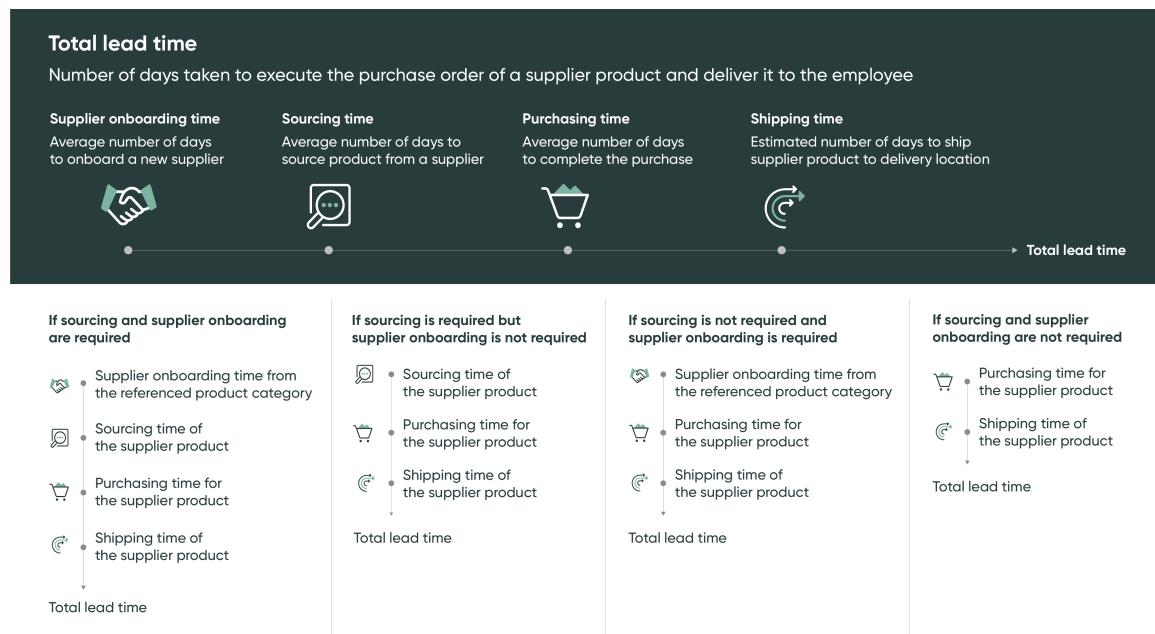
Total lead time = [Sourcing time of the supplier product] + [Purchasing time for the supplier product] + [Shipping time of the supplier product].

- If sourcing is not required and supplier onboarding is required,

Total lead time = [Supplier onboarding time from the referenced product category] + [Purchasing time for the supplier product] + [Shipping time of the supplier product].

- If sourcing and supplier onboarding are not required,

Total lead time = [Purchasing time for the supplier product] + [Shipping time of the supplier product].



The total lead time of a supplier product is recalculated every time the values of the above fields on the supplier product form are updated.

Note: All the lead times are recalculated and refreshed after completion of each purchase requisition. For these calculations, only the purchase requisition data of the recent 12 months is considered.

Ledger assignment rules

When a purchase line is created for a purchase requisition on the ShoppingHub portal, the details of capex account, expense account, and pre-paid account are auto-populated based on applicable ledger assignment rules.

The legal entity from a purchase requisition or a sourcing request determines its ERP source. This ERP source determines the appropriate ledger assignment rule for a product category, product model, supplier product, and a cost center.

For a purchase line, if rules are found for the supplier product, the related product model, and its product category, then the priority of in which those rules are triggered is in this order:

1. Supplier product with cost center
2. Product model with cost center

3. Product category with cost center
4. Supplier product
5. Product model
6. Product category

Note: If you have multiple ERP sources, you can create multiple rules but each rule can correspond to only one ERP source.

Create ledger assignment rules

Automate ledger account assignment for a purchase line by relating ledger accounts to a product category, product model, supplier product, and cost center.

Before you begin

Role required: sn_shop.procurement_administrator

Procedure

1. Open the record of a product category, product model, or supplier product to which you want to add the ledger assignment rules.
2. From the Ledger Assignment Rules related list, select **New**.
3. On the form, fill in the fields.

Ledger Assignment Rules form

| Field | Description |
|---------------------------------|--|
| Applies to specific cost center | Controls if general ledger accounts are used for one or more specific cost centers. |
| Cost center | Add cost centers. This field is visible only if the Applies to specific cost center check box is selected. |
| Capex account | Ledger account to post the capital expenses of this product after the purchase completion. |
| Expense account | Ledger account to post the operational expenses of this product after the purchase completion. |
| Pre-paid account | Ledger account to post the purchase expenses of this product after the purchase completion. |

4. Select **Submit**.

Create shopping controls

Set conditions to control the visibility of supplier products for an employee or a department who visits the ShoppingHub portal. ShoppingHub administrators can manage access to products based on categories, suppliers, or any attribute related to a supplier product.

Before you begin

Role required: sn_shop.shopping_hub_admin

About this task

Employees who meet these conditions cannot see products from specified suppliers or product categories while browsing or searching on the ShoppingHub portal.

For example, you define a shopping control for an employee, Jane Doe, to exclude visibility for all products of the Apparel and Bags category. So, Jane Doe cannot see any products of this category on the ShoppingHub portal.

Also, these supplier products are not visible on the ShoppingHub portal when another employee shops as a delegate on behalf of Jane Doe.

Shopping controls can be overridden with employee credits. For details, see [Shopping controls overridden by credits](#).

Procedure

1. Navigate to **All > ShoppingHub > Administration > Shopping Controls**.
2. Select **New**.
3. On the form, fill in the fields.

Shopping Control form

| Field | Description |
|-------------------------------------|--|
| Short description | Description of the shopping control For example, Shopping Control for Jane Doe . |
| Active | Check box to determine if this shopping control is active. |
| Employee Exclusion Criteria section | |
| User criteria | Select from existing user criteria to whom the controls must apply. |
| User conditions | Define conditions to identify the user to whom the shopping controls must apply. For example, User ID is jane.doe . |
| Supplier Product Criteria section | |
| Exclude supplier products if | Define conditions to identify products that must not be visible to the employees who meet the defined user conditions. For example, Product Category is Computer Displays OR Max known price is 1000 USD. |

***i* Note:**

If the shopping control is set to **Active**, a scheduled job is run once per day to find and update any new users or supplier products with the appropriate controls. This job considers:

- Users created after the last scheduled job run time.
- Supplier products created after the last scheduled job run time

4. Select Submit.

What to do next

- Apply the shopping control to your users and product catalog:
 1. Open the shopping control record you created.
 2. Select **Implement control**.
 3. Reload the form:
 - The User Control related list is populated with the records of users as defined in Employee Exclusion Criteria.
 - The Supplier Products related list is populated with the records of supplier products that meet the conditions in Supplier Product Criteria.
- You can choose to deactivate any active shopping control.
 1. Deselect the **Active** check box.
 2. select **Update**

Any user which references to this shopping control is then updated so that this control is no longer applied to that user. On reloading the form, you can see that the User Control and Supplier Products related lists are empty.

Configure delegate for a shopper

Configure your employees as delegates to shop on behalf of someone else. For these employees, the **Shopping as** option is available on the ShoppingHub homepage to shop as a delegate.

Before you begin

Role required: sn_shop.shopping_hub_admin

About this task

When shopping as a delegate, the user can see the previous purchases and top supplier preferences of the delegate. The user can place orders and request pricing for the catalog and non-catalog items on ShoppingHub on the behalf of the delegate.

For example, if Jo Sparks is shopping on behalf of a business owner Alan Edwards, Jo selects Alan Edwards from the **Shopping as** option. The scope of products available for purchase on ShoppingHub is then based on Alan Edwards' permissions and not Jo's. For all purchases that Jo submits on behalf of Alan, Alan Edwards is listed in the **Business Owner** field and Jo is listed in the **Submitted by** field.

With appropriate delegate properties, Jo can also view and act on the to-dos and approvals on behalf of Richard.

***i* Note:** You can configure delegates to shop on your behalf only from ShoppingHub, and not from Employee Center.

Procedure

1. Navigate to **All > User Administration > Delegates**.
2. Select **New**.
3. On the form, fill in the fields.

Delegate form

| Field | Description |
|---------------------|--|
| User | The employee who the shopper can delegate as. For example, Alan Edwards. |
| Delegate | The employee who can shop on behalf of the user. For example, Jo Sparks. |
| Starts | The date from which the shopper can delegate. |
| Ends | The date at which the shopper stops being the delegate. |
| Shopping as | Indicates if the user can shop as the selected delegate on ShoppingHub. Ensure to select this check box. This field is visible only in the purchasing view. |
| Approvals | Indicates if the user can have the delegate authority for approvals. |
| Assignments | Indicates if the user can delegate task assignments. |
| CC notifications | Indicates if the user can receive notifications. |
| Meeting invitations | Indicates if the user can receive meeting invitations. |

ShoppingHub configuration

As an admin, you can create and modify ShoppingHub configurations to offer a standardized experience.

To provide a better end-user experience, use the ShoppingHub configuration to create the records. You can standardize the shopper experience procurement workflows such as request modifications and sourcing checkouts. These records provide you more control and flexibility in your business process.

When you enable Edit or Cancel configuration options, your shoppers can raise revision requests in a self-service way from Service Catalog or ShoppingHub.

Related topics

[Configure sourcing checkout details](#)

[Enable user actions](#)

Purchase modification configuration

As an admin, you can configure the conditions that must be met for the purchase modification records to be available to the shopper for editing or canceling.

The **Appearance conditions** condition builder for each purchase modification record allows you to define these conditions based on your requirements and business needs. You can add conditions pertaining to credit purchase, purchase requisition or purchase order states, purchase requisition line or purchase order line states, product type, and much more.

Configure purchase modification record producers

Configure the conditions to make the purchase modification records available for the shopper to edit or cancel. You can leverage the condition builder to set specific conditions from the ShoppingHub Configuration table.

Before you begin

Role required: sn_shop.shopping_hub_admin or sn_shop.procurement_administrator

Procedure

1. Navigate to **All > ShoppingHub > Administration > ShoppingHub Configuration**.
2. Open the user interface configuration record you want to set conditions for.
3. In the **Appearance conditions** section, add or remove the desired conditions with values that must be met for the record to be available to the shopper to edit or cancel.
4. Select **Update**.

Configure sourcing checkout details

Manage the ShoppingHub configuration to standardize the request fulfillment at the checkout. You can ensure the accuracy and availability of the required items in the procurement catalogs.

Before you begin

Role required: sn_spend_psd.admin, sn_shop.procurement_administrator

Procedure

1. Navigate to **All > ShoppingHub > Administration > ShoppingHub Configuration**.
2. Select **New**.
3. On the form, fill in the fields.

ShoppingHub Configuration

| Field | Description |
|--------------------|---|
| Name | Name of the configuration |
| Configuration type | Select the type from the available list. For example, user interface. |
| Display label | Display label of the ShoppingHub configuration |
| Active | Check box to determine the active status of this configuration |
| Page | Page information for ShoppingHub configuration |

| Field | Description |
|-----------------------------------|---|
| Section | Section information for ShoppingHub configuration |
| Record producer used for checkout | Select the record producer. For example, Shoppinghub sourcing a service checkout |

4. Select **Edit sourcing checkout** to modify the details.

5. Select **Submit**.

Related topics

[Sourcing checkout](#)

[Configure sourcing checkout](#)

Enable user actions

Configure the edit and cancel options to enable modifications to the purchases.

Before you begin

Role required: sn_spend_psd.admin, sn_shop.procurement_administrator

Procedure

1. Navigate to **All > ShoppingHub > Administration > ShoppingHub Configuration**.
2. Select purchase modification type, for example, **Cancel purchase order** to modify the details.
3. On the form, fill in the fields.

ShoppingHub Configuration

| Field | Description |
|----------------------------|--|
| Name | Name of the configuration |
| Configuration type | Select the type from the available list. For example, user interface |
| Active | Check box to determine the active status of this configuration |
| Page | Page information for ShoppingHub configuration |
| Section | Section information for ShoppingHub configuration, for example, User actions |
| Object | Details of the object name, for example, Purchase order |
| Purchase modification type | Details of the modification, for example, Cancel |
| Content type | Details of the content type, for example, Label |
| Display label | Name of the configuration label, for example, cancel purchase order |
| Buttons | Details of the available options |

| Field | Description |
|-----------------|---|
| Record producer | Select the record producer. For example, Cancel purchase order |

4. Select **Update** or select **Save** from the additional actions menu.

What to do next

Use the same steps to modify the following user action configurations:

- Edit purchase order
- Cancel purchase order line
- Edit purchase order line
- Edit purchase request
- Cancel purchase request
- Edit purchase request line
- Cancel purchase request line

You may add additional configurations to suit your business requirements.

Sourcing checkout

As a ShoppingHub or Procurement administrator, you can configure checkouts for sourcing requests to collect information that is relevant to the product, product model, or category. Your teams can automate the sourcing processes, share more information, and improve operational efficiency.

Using the catalog builder, you can create the record producer for mapping the **Sourcing Checkout** during the checkout on ShoppingHub.

You can use the following capabilities:

- Configure the sourcing checkout when initiating a sourcing event.
- Enable the sourcing checkout flow by Supplier Product, Product model, Product Category.
- Provide better visibility into the procurement processes and checkout experience.

You can use the default or add a new sourcing checkout and customize the questions in an existing sourcing checkout based on your sourcing and procurement policies.

Related topics

[Configure sourcing checkout](#)

[Complete sourcing checkout](#)

Create sourcing checkout record

Create a custom checkout to use for sourcing requests for a specific product, product model, or product category.

Before you begin

Role required: sn_shop.procurement_administrator

About this task

Utilize record producers to create a custom set of questions to ask Shoppers during checkout while initiating a sourcing request.

- You can use a sourcing checkout for all the goods or services using the default checkout from ShoppingHub Configuration.
- You can use a sourcing checkout for a specific supplier product, or a product model, or a product category from the **Purchase Automation** tab on each record.

Procedure

1. Navigate to a supplier product, a product model, or a category section.
For supplier model, **All > Purchase Automation > Primary Data > Supplier Product > Create new sourcing checkout.**
Catalog builder opens.
2. Select **Details** to update basic information about the record producer such as the name and description.
3. On the form, fill in the fields.
4. Select the **Destination** tab and fill in the fields.
5. Select the **Location** tab and select a catalog and category where requesters can find the item.
Fill in the fields or use the available information.
6. Select the **Questions** tab and create custom or select from the preconfigured questions.
The following questions are available in the default sourcing checkouts.

| Question set | Description |
|--|---|
| ShoppingHub: Product & Other data for Checkout | Collects data about the product that is sourced from the ShoppingHub product details page. Includes multiple variables that map to the cart line and purchase line. This is included in every ShoppingHub checkout which cannot be removed when using the catalog builder template. |
| ShoppingHub Checkout Delivery Date for Goods Selector | Select a delivery date or create a blanket PR for a good. Includes multiple variables that map to the cart line and purchase line. |
| ShoppingHub Checkout Delivery Date for Services Selector | Select a start date and end date or create a blanket PR for a service. Includes multiple variables that map to the cart line and purchase line. |
| ShoppingHub Delivery Location Selector | Select an office location or add a new location for a product or service to be delivered to. Includes multiple variables that map to the cart line and purchase line. |
| ShoppingHub More Info Request | Provide additional info while sourcing a product. Maps to the sourcing request details field in the cart line and sourcing. |
| ShoppingHub Other Request | Provide details about "something else" when sourcing a product. Maps to the sourcing request details field in the cart line and sourcing request. |

| Question set | Description |
|--|---|
| ShoppingHub Purchase Reason | Provide a reason for purchase. Maps to the purchase reason field in the cart line and sourcing request. |
| ShoppingHub Sourcing Intent | Select whether they want to receive a quote, a POC, more info, or something else about a good or service being sourced. Maps to the request type field in the cart line and sourcing request. |
| ShoppingHub: Good Delivery Date (only) | Select a delivery date for a good. Maps to the estimated delivery date field in the purchase line. |
| ShoppingHub: Service End Date (only) | Select an end date to a service. Maps to the end date field in the purchase line. |
| ShoppingHub: Service State Date (only) | Select a start date to a service. Maps to the start date field in the purchase line. |

7. Select the **Settings** tab and fill in the fields.

8. Select **Review and Submit**.

Related topics

[Configure sourcing checkout](#)

[Record Producer ↗](#)

[Create a record producer ↗](#)

Edit sourcing checkout record

Edit the default sourcing checkout used for all sourcing requests or create a custom checkout for sourcing requests for a specific product, product model, or product category.

Before you begin

Role required: sn_shop.procurement_administrator

About this task

Use record producers to create a custom set of questions to ask shoppers during checkout while initiating a sourcing request.

- You can use a sourcing checkout for all the goods or services using the default checkout from ShoppingHub Configuration.
- You can use a sourcing checkout for a specific supplier product, or a product model, or a product category from the **Purchase Automation** tab on each record.

Procedure

1. Navigate to the default sourcing when sourcing a goods or product from **All > ShoppingHub > Administration > ShoppingHub Configuration > Edit sourcing checkout**. The default source checkout opens on the catalog builder.
2. Select **Details** to review and update fields about the record producer.
3. Review the **Destination and Location** tabs.
4. Select the **Questions** tab and add from the pre-configured questions.
See [Create sourcing checkout record](#) for more information.

5. Select the **Settings** tab and fill in the fields.
6. Select **Review and Submit** for a final review and submit the record producer.

Result

Edits to an existing sourcing checkout are now complete.

Related topics

[Record Producer](#)

[Create sourcing checkout record](#)

[Create a record producer](#)

Configure sourcing checkout

As an administrator, you can configure the sourcing checkout to collect information that is relevant to a specific product, product model, or product category. You can also change the default sourcing checkout used universally. The additional information at the sourcing checkout helps understand the requirement better and enable quicker processing.

Before you begin

Role required: sn_shop.shopping_hub_admin

Configure sourcing checkouts in ShoppingHub to change all sourcing requests for a product or service throughout the system. Or you can configure for specific products and categories.

To configure a sourcing checkout for a product or service, you must first create the sourcing checkout from the purchasing automation tab of product, product model, or category.

Simply select **Create new sourcing checkout**, for more information, see [Create sourcing checkout record](#).

- **Supplier Product:** Create or change the sourcing checkout for a specific product from a specific supplier. For example, MacBook Pros 15 inch sold by a specific supplier, for example, Apple.
- **Product Model:** Create or change the sourcing checkout for a product model. For example, MacBook Pros 15 inch sold by any supplier.
- **Product Categories:** Create or change the sourcing checkout for a product category. For example, Laptops.
- **Default Sourcing Checkout:** Change the sourcing checkout for all sourcing requests of goods or services in ShoppingHub Configuration. From **Catalog builder**, edit the default checkout and submit.

 **Note:** Values defined at the supplier product take priority over the values defined at other levels.

About this task

Configure the relevant questions in this manner.

Procedure

1. Select a sourcing checkout to use in one of the following locations:
 - **Supplier Product:** Navigate to **Purchase Automation > Primary Data > Supplier Product**.
 - **Product Model:** Configure the details from **ShoppingHub > Model Management > All Models**.
 - **Product Category** Configure the details from **ShoppingHub > Category Management > Product Categories**.

2. From the **Purchasing automation** tab, select the **Sourcing checkout** field.
3. Select one from the available list and select **Save**.
The questions are now configured. When you leave the field blank, the default sourcing checkout questions appear at the time of checkout. When you have multiple sourcing checkouts defined, the following priority is applicable:
 - Values defined at the supplier product take precedence over the values defined at the model or product level.
 - Values defined at the product model take precedence over the product category.
 - Values defined at the product category take precedence over default.

Note: If you do not configure the sourcing checkout value, the default sourcing checkout is applicable.

Once you select sourcing checkout, shoppers can view, select, and provide relevant information associated with the procurement of the product or service.

Related topics

[Record Producer](#)

[Create a record producer](#)

[Create sourcing checkout record](#)

Customize your ShoppingHub theme

You can customize the theme of your ShoppingHub to match your brand. You can change the color palette, banner, primary and secondary navigation bars, text color, border radius of the product cards, and so on. The overall look and feel of your application can be customized as per your requirements from the UX theme record.

Before you begin

Note: If you're a new customer, or an existing customer who has upgraded and installed the Shopping Hub (sn_spend_uib) plugin, this task isn't applicable for you.

Role required: ui_builder_admin or admin

Procedure

1. Navigate to **All > Now Experience Framework > Themes > UX Themes**.
2. Open the **ShoppingHub theme** record.
3. In the **Theme** field, update the color palette values as desired.

Note: The color palette is in the additive Red-Green-Blue (RGB) color model.

4. Select **Update**.

To know more about themes and how to work with them, see [Work with themes](#)

Configure your ShoppingHub images

You can configure the images that display on your ShoppingHub to match your brand. You can upload your images to the database Image table and use them for the respective pages or scenarios, from ShoppingHub Configurations.

Before you begin

- Note:** If you're a new customer, or an existing customer who has upgraded and installed the Shopping Hub (sn_spend_uib) plugin, this task isn't applicable for you.

The following images are provided by default with ShoppingHub:

- Landing page
- No search results
- Order confirmation
- To-dos complete
- Supplier product empty state
- Empty state
- 404 error: Page not found
- 500 error: Unable to load

Role required: admin

Procedure

1. Navigate to **All > ShoppingHub > Administration > ShoppingHub Configuration**.
2. Filter the **Content type** column by **Image**.
3. Open the record for the image that you want to change.
4. Select **here** to edit the record.
5. In the **Image** field, select the search icon.
The images that you've already uploaded to the database Image table are shown here.
6. Select the image that you want to use for that record.
7. Select **Update**.

Order a product with quick checkout

Order a product or service that you want to purchase from the product catalog available on ShoppingHub Home.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
If you're shopping for someone else as a delegate, select the appropriate shopper from the **Shopping as** list.
- Note:** This option is visible only if you're [configured to delegate for another employee shopper](#).
2. Browse for the required product or service using the **Categories** or the **Suppliers** list on the ShoppingHub homepage, or search for it.
If you're a returning shopper, you can also find your recently viewed items on the homepage.
On the product details page, you can see the price of the product and the probable date of its delivery.

If pricing isn't available and the supplier must be contacted for it, you can see the probable date by which you can get the pricing details. For more information, see [Complete sourcing checkout](#).

3. To place an order for a product or service that has pricing:

- Select **Quantity** or **Budget** as appropriate.
- Enter the quantity that you need or the budget at your disposal.

i Note: The budget you provide automatically calculates the quantity for the product and the corresponding price. While entering the price, you can change your currency type from the list.

c. Do one of the following actions:

- Select **Request to buy** to perform a quick checkout with your selected product.
- Select **Add to cart** to save your product to your cart and continue shopping.

i Note: For more information on how to use your shopping cart, see [Shopping cart](#).

d. On the quick checkout form, fill in the fields.

| Field | Description |
|-----------------------------------|---|
| Where do you want this delivered? | <p>Location where you want your product to be delivered. The options are:</p> <ul style="list-style-type: none"> ▪ To a saved location <p>i Note: The recipient is the logged-in user or the delegated user.</p> <ul style="list-style-type: none"> ▪ To a work address (already approved) ▪ To somewhere else |
| When do you need this product? | <p>Date range when you want your product to be delivered. The options are:</p> <ul style="list-style-type: none"> ▪ As soon as possible: For the quickest delivery slot possible for the product. This is calculated based on the product category of the selected product. ▪ A specific date ▪ I have a time frame in mind (a blanket order) <p>i Note: You can select a date or date range that is in the past, present, or future. If you select a date range, you must enter your requested start and end dates to proceed.</p> |
| Payment method | <p>Method of making the payment. Select a cost center from the list, which is defaulted with your assigned cost center. You can also add multiple cost centers, if necessary, and save them for future use.</p> <p>i Note: Ensure that the total percentage of all the cost centers doesn't exceed 100%.</p> |

| Field | Description |
|-------|---|
| | <p>You can view the cost center and allocation breakup from the purchase requisition that is created, by navigating to the Cost Allocations related list of the associated purchase requisition line.</p> <p>If you have available credits, the same is displayed here as a mode of payment. For details, see Shop with employee credits.</p> |

i Note: If you change the quantity or delivery location during checkout, the shipping and tax estimates are recalculated and updated accordingly. The cart line is also updated with the new estimates.

- e. Based on whether the purchase is for an existing project, select one of these options.

| Field | Description |
|-------|---|
| No | Purchase isn't for an existing project. |
| Yes | Purchase is for an existing project. Enter the project details as required. |

i Note: You must have the Procurement with Project Management (sn_spend_ppm) application installed, and also have the IT Project User role. For more information, see [Sourcing and Procurement Operations integration with Project Management](#).

- f. In the **Purchase reason** field, provide your reason for making the purchase.

- g. Add any supporting documents for this purchase as attachments, if applicable.

i Note: You can download, remove, or rename the attachments, as required. These attachments are also appended to the associated purchase requisition for reference.

- h. Select **Submit request**.

What to do next

- Review your purchase. After you complete your checkout, select **Review your purchase** to view the details of your order.
- To review your orders anytime later, you can select **My purchases** from your profile on ShoppingHub.
 - View the list of all purchases placed from your shopping account.
 - Track the progress of an order, review to-dos, and so on.

i Note: For more information, see [My purchases](#).

Complete sourcing checkout

As a shopper, you can request pricing or more information about a product or service in the ShoppingHub catalog that doesn't have contractual pricing.

Before you begin

Role required: sn_shop.shopper

About this task

During checkout, you can provide information that the procurement team needs about the selected product, product model, or category. Your responses can improve the sourcing processes and overall operational efficiency in procurement.

Share additional sourcing request info such as pricing details, budget, quotation, delivery address, and timeframe. Follow these steps to provide the sourcing team with the necessary information required to collect quotes or more info for your product or service:

Procedure

1. Browse or search for the required product or service from **ShoppingHub > ShoppingHub Home**.

2. At **Request pricing**, specify the quantity or budget.

Here, you can enter the quantity or the price. While entering the price, you can change your currency type from the list. You can also see the date by which you can get the pricing details on the product details page. This is the sourcing time for the displayed product.

3. Select **Request pricing or info**.

Your administrator may have configured this button to read differently.

Information relevant to the product or service is displayed in the contextual side panel.

4. Follow the on-screen workflow and specify the required information:

- I need a quote
- I need a proposal
- I need a proof of concept
- I need more information about the products or suppliers

For example, when you select **I need a quote**, provide the following information based on whether you're looking for products or services:

- What project is this request for?

i Note: This field is available only when you have the Procurement with Project Management (sn_spend_ppm) application installed, and also have the IT Project User role. For more information, see [Sourcing and Procurement Operations integration with Project Management](#).

- Why do you need these products?
- Why do you need these services?
- Supplier information

i Note: If you've already contacted the supplier regarding your request, select the appropriate option, and enter details of the supplier contact such as first and last names, job title, and registered email ID. Before you save the supplier contact details, ensure that your admin has set up the email domains for the supplier contacts, and the corresponding records are available in the Supplier Email Domain table.

For more information on adding suppliers, see:

- From Platform: [Add a supplier](#).
- From the supplier catalog: [Add a supplier contact using the supplier catalog](#).
- From Source-to-Pay Workspace: [Add a supplier contact from the Source-to-Pay Workspace](#).
- How much do you potentially need?
- When would you like this delivered? For products, select from these options.
 - **As soon as possible** for the quickest delivery slot possible. This is calculated based on the product category of each selected product.
 - **A specific date** if you have a specific delivery date in mind.
 - **I am not sure (estimated timeframe)** to select a time frame for the product based on date range or term.
- When do you need this service? For services, select from these options.
 - **Within a specific timeframe** to provide the start date and end dates of the service.
 - **I am not sure (estimated timeframe)** to select a time frame for the service based on date range or term.

i Note: You can select a date or date range that is in the past, present, or future. If you select a date range, you must enter your requested start and end dates to proceed. You can specify the term length of the product or service and the term value in days, weeks, months, quarters, or years. Also, when you select a time frame, the order becomes a blanket type order, and you don't need to specify a payment method during checkout.

- Where do you want this delivered? Select from these options.
 - **To a saved location:** In this case, the primary saved address of the logged-in user is displayed.
 - **To a work address (already approved):** In this case, you must select who is receiving the item, or the business owner.
 - **To somewhere else**

i Note: Based on your configuration, you may see additional information, such as details and attachments. This additional information can help source the service or product quickly.

5. Select **Submit Request**.

Related topics

[Order a product with quick checkout](#)

Shopping cart

As a shopper, you can use the shopping cart to store all your shortlisted products, both goods and services, so that you can continue shopping and place your purchase request for all products at one go, when done.

In your shopping cart, services are tagged for easy identification. The tags help you differentiate them from goods.

If you have credits allocated to you for a product or category, you can use them during final checkout. Products that can be bought with credits are tagged as well.

If you want to switch to shopping as a delegate, the items in your cart are saved and an alert message stating the same is displayed.

Add products to your shopping cart

Use your shopping cart to add multiple products that you have shortlisted and wish to purchase when you are done shopping on ShoppingHub.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Browse for the required goods or services from the **Categories** or the **Suppliers** list on the ShoppingHub homepage.
For more information, see [Order a product](#)
3. Select **Add to cart**.

What to do next

When you are done adding products to your cart, you can review your shopping cart and proceed to final checkout. For more information, see [Review your shopping cart](#).

Review your shopping cart

When you are done with your shopping, review your shopping cart to ensure that you have the right products from the right suppliers in the right quantities in your cart.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the shopping cart icon.
3. Do one of the following actions:
 - Select + or – to edit the purchase quantity for the products you shortlisted.
 - Select **Remove** to remove products from your cart.

 **Note:** You can select **Undo** if you wish to add the product back to your cart.

- Select **Purchase later** if you wish to buy a product at a later date or time.
- Select **Remove all items from cart** to clear your cart.

What to do next

When you are done reviewing your cart, you can proceed with final checkout. For more information on how to proceed, see [Complete your checkout](#).

Cart line update scenarios

Cart lines are created, updated, or deleted based on the updates that you make to the products in your shopping cart.

- A new cart line is created for every new product that you add to your shopping cart.
- If an existing cart line is created through one method, and you go back to the same product details page and add more through another method, first by quantity and then by budget for example, the existing cart line is updated accordingly without creating a new cart line. In this scenario, when you add by budget, quantity is back-calculated. Similarly, when you add by quantity, the corresponding budget is calculated by multiplying the quantity with the contractual price.
- If you set a new delivery location in the secondary navigation bar or switch users while shopping, and add the same supplier product to your shopping cart, a new cart line is created.
- If the individual cart lines contain different currencies, the values are displayed in the reference currency in the Summary section. If a single currency exists for all the cart lines, the same is displayed in the Summary section. The price in the cart line continues to be in the contractual price currency.
- When you remove a product from your cart, the cart line is updated to reflect the status of the product, which is now Pending Deletion. If you wish to add the removed product back to your cart, and select **Undo**, the cart line status is updated to Visible in Cart.
- If you wish to buy a product at a later date or time, and select **Purchase later**, the cart line status is updated to Purchasing Later.
- If you move a product, some quantity of which already exists in your cart, from your Purchase later section to your shopping cart, the cart lines merge and the purchase quantity is updated accordingly.

Product selection overrides

Certain scenarios such as excluded suppliers and shopping control restrictions can override your product selection capability.

Excluded suppliers

If a supplier is marked as excluded in the **Relationship status** field under the **Relationship Summary** tab on the Supplier form view, the information is displayed under the respective purchase requisitions and purchase orders.

In your shopping cart, if you have any product from a excluded supplier, a message is displayed stating that the product has been removed and is no longer available for purchase. You can select the link in the message to view similar products from other suppliers, if they exist. An email with this information is also sent to your registered email. The visibility status of the removed product is updated to Supplier Excluded on the cart line.

Shopping controls

A ShoppingHub administrator can set shopping controls to restrict your access to specific products.

In your shopping cart, if you have any such product that has restricted access, a message is displayed stating that the product has been removed and is no longer available for purchase. You can select the link in the message to view similar products from other suppliers, if they exist. The visibility status of such a product is updated to Product Access Denied on the cart line.

Complete your checkout

Proceed to checkout when you've completed your shopping and have reviewed your shopping cart.

Before you begin

Role required: sn_shop.shopper

Procedure

1. [Select a delivery location.](#)
2. [Select a delivery date.](#)
3. [Select a payment method.](#)
4. [Provide a reason for your purchase.](#)
5. Add relevant attachments, if applicable.

i Note: You can add attachments at the entire purchase level and also at the individual product level. The purchase requisitions display the attachments added at both the levels. If approvals are required for this purchase, these attachments are available for all the approvers in both Shopping Hub and Employee Center. The automatic approval emails that are triggered also contain the attachments for reference, as needed.

6. Provide any additional information, if applicable.

i Note:

- If you decide to go back and update any of your previously selected parameters, be it delivery location, delivery date, payment method, or purchase reason, a warning message is displayed stating that this update shall undo all your selections up to checkout.
- The data you enter during checkout are lost in an incomplete checkout process. For more information, see [Checkout data loss scenarios](#).

7. Select **Complete checkout**.

Your purchase is requested, and a confirmation page is displayed with the following information:

- Message stating that your requested amount, if approved, shall be processed and sent to the supplier, and that you'll be notified of the same.
- Link to view all your purchases. This takes you to the [My purchases](#) landing page.
- What to expect, listing the next steps.

i Note: On completing your checkout, an appropriate number of cart lines are created, which then result in the creation of purchase lines. For more information, see [Purchase line creation scenarios](#).

Select a delivery location

You can select either a single delivery location or multiple delivery locations for the various products in your cart.

Before you begin

Role required: sn_shop.shopper

Procedure

1. From your shopping cart, select **Proceed to checkout**.
The Checkout page appears.

2. In the Delivery location section, select your preferred delivery location.

i Note:

- You can go with your default delivery location, which is based on what you selected from the **Deliver to** list on the primary navigation bar. You can also choose to deliver to an office location, another address, or multiple locations, if need be. For more information on these, see [Delivery location options](#).
- You can view your order details such as negotiated unit cost, purchase quantity, estimated tax, and estimated shipping on the Delivery location page as well as in the Summary section.
- If you update the quantities, the amount (including shipping) is recalculated in real time and reflected accordingly in the product header card as well as in the Summary section.

What to do next

When you are done selecting delivery locations for the products in your cart, you can select delivery dates for them. For more information, see [Select a delivery date](#).

To prevent products from being shipped to invalid locations, see [Manage delivery to valid address](#)

Delivery location options

As a shopper, you can select either a single delivery location or multiple delivery locations for the various products in your cart.

You can use the toggle feature between **entire purchase** and **product** to specify if the delivery location applies to the entire purchase or to individual products. This toggle is conditionally displayed based on predefined criteria. For example, if there is only a single item in your cart, the toggle feature does not apply and is therefore not displayed.

While you can always go with your default delivery location that is preselected for faster checkout, the following options are also available:

- **Deliver to work address:** Allows you to create a new delivery location by adding a recipient and selecting a registered office address. Select the **Save this address for future use** check box if you want to view it in your preferred delivery locations list.
- **Deliver to somewhere else:** Allows you to create a new delivery location by adding a recipient and filling out the Deliver to somewhere else form. Select the **Save this address for future use** check box if you want to view it in your preferred delivery locations list. For information on type-ahead and auto-fill suggestions, see [Delivery address suggestions](#).
- **Deliver to multiple locations:** Allows you to assign multiple delivery locations for the various products in your cart. You can also assign multiple delivery locations to just a single product in your cart and update the quantity for each defined delivery location from this page.

Related topics

[Manage delivery to valid address](#)

[Valid country location](#)

Delivery address suggestions

Improve your shopper experience with filling in a new address location through type-ahead and auto-fill, in the Deliver to somewhere else form. You can further use the StreetService script to integrate with an Address Verification Service (AVS) of your choice to get enhanced address suggestions.

This reduces the manual effort in entering each data point in an address, prevents user entered data errors, and allows you to store cleaner delivery address location records. It also helps your Procurement Specialists to easily view and complete delivery address validation-related tasks.

You can also enable your admins to easily implement their own address validation services to render address suggestions when shoppers are filling out a new address location. You can either import an XML file or select **Insert and stay** on the StreetService script to integrate with a third-party AVS in your instance. Ensure that you are in the Source-to-Pay Common Architecture scope when importing the XML file or making changes to the StreetService script. You can also import the XML file by selecting any table, right-selecting the table header, and selecting **Import XML**. Provide your own API keys and endpoints for the AVS of your choice within the StreetService script.

- i Note:** If you do not have an AVS set up at your end, this feature prompts you with address suggestions from your saved and office locations.

Valid countries for delivery

As a shopper, you can view, add, and select the delivery locations and office locations while placing an order on ShoppingHub.

When an administrator configures valid countries for shipping on the **Supplier** or **Supplier product** using the **Supplier delivers to** field, you can see the product availability at valid locations and complete the order.

On configuration, shoppers can gain the following insights:

- Display supported delivery countries and availability for each product.
- View, add, edit, and select valid delivery locations.
- Prevent products from being shipped to invalid locations.

Add, modify, and select valid delivery locations and office locations from the following flows:

- Address from **Deliver to** at primary navigation
- Address at **Request to buy**
- Address at **Add to cart**

For more information on how to configure valid countries, see [Manage delivery to valid address](#).

Related topics

[Valid country location](#)

Valid country location

As a shopper, you can select a valid delivery location based on the preconfigured countries.

Validate addresses

Based on the countries configured, you can prevent products from being shipped to invalid locations. Perform the address validation at various stages.

- See the valid countries for delivery from the product and purchase pages.
- See the product availability and unavailability when a shopper changes delivery location from the **Deliver to** list to an unsupported country on the product details page.
- Add, edit, and select the available delivery addresses and office addresses.

- See the product availability based on the office address or delivery location in the primary navigation bar.
- Add valid **Deliver to work address** and **Deliver to somewhere else** from the primary navigation bar, contextual side panel, quick checkout, and entire purchase.
- Based on your configuration, filter the list of countries and the product catalog and display the addresses and offices where delivery is available.
- Validate the saved address list, deliver to work address, and deliver to somewhere else during quick checkout and full checkout.
- Select valid addresses for each product based on the countries or office locations where the delivery is available.
- During full cart checkout, toggle between entire purchase and product to see and select available addresses.
- See the following address validation message on product and purchase pages: This item does not deliver to <countryname>.
- See the address validation message Delivery is only available for certain countries.

The following example shows how a shopper can add or select valid addresses during various stages of checkout:

Address validation flows

- Select the primary address for delivery from the primary navigation bar.
- See the product availability based on the location address on the primary navigation bar.
- Select the number of countries to see the list of valid countries.
- When your administrator configures the valid countries, you see only certain countries where delivery is available.
- You can change your location from **Deliver to** and complete the order.
- When you add a new address, the country list displays only the valid list of countries.
- When your product is available for delivery to the location you selected, you can place the order using the **Add to cart** or **Request to buy** buttons.
- When you select **Request to buy**, you can select the delivery location from a list of saved addresses.
 - When you select **Deliver to work address** to add a new address, you can add addresses from only certain countries that are preconfigured for delivery.
 - When you select **Deliver to somewhere else** to add a new address, you can add addresses from only certain countries that are preconfigured for delivery.

See the product availability on the products page. When the product is unavailable for delivery, these buttons are disabled with the following error message:This item does not deliver to <countryname> or This item does not deliver to this address.

- You can add or select the delivery location for the valid countries and complete the shopping.
- From your shopping cart, when you select **Proceed to checkout**, select valid addresses for each product based on the countries or office locations where the delivery is available.

Related topics

- [Manage delivery to valid address](#)
- [Valid countries for delivery](#)
- [Delivery location options](#)

Select a delivery date

You can select a single delivery date or multiple delivery dates for the various products in your cart. If you're unsure of a delivery date, you can provide an estimated time frame which then creates a blanket order.

Before you begin

To select delivery dates for the products in your cart, you should have first selected appropriate delivery locations for them.

Role required: sn_shop.shopper

Procedure

1. On the Checkout page, select **Continue to delivery date**.
You can also select **Delivery date** from the stepper pages to directly go to the page.
2. In the Delivery date section, select your preferred delivery date.

i Note:

- Depending on whether the product is a good or service, different delivery date options are available. For more information on this, see [Order a product](#).
- When adding a delivery date, the quantity of the product is updated accordingly. You can also specify different delivery dates for each supplier product and delivery location combination. For more information on these, see [Delivery date options](#).

What to do next

When you are done selecting delivery dates for the products in your cart, you can select payment methods for them. For more information, see [Select a payment method](#).

Delivery date options

As a shopper, you have the option to select either a single delivery date or multiple delivery dates for the various products in your cart.

If you're unsure of a delivery date, you can specify an estimated time frame for delivery. This time frame can be a term or date range. You can specify the term length and the term value in days, weeks, months, quarters, or years.

i Note: You can select a date or date range that is in the past, present, or future. If you select a date range, you must enter your requested start and end dates to proceed. Also, when you select a time frame, the order becomes a blanket type order, and you don't need to specify a payment method during checkout.

If you have a product in your cart that has an eligible credit to be used, the option to provide a time frame is not available.

You can use the toggle feature between entire purchase and product to specify if the delivery date applies to the entire purchase or to individual products. This toggle is conditionally displayed based on predefined criteria. For example, if there's only a single item in your cart, the toggle feature doesn't apply and is therefore not displayed.

While you can always go with the default delivery date for the products for faster checkout, the following options are also available:

- **Add another delivery date:** Allows you to add a new delivery date for a product in your cart. If you have just one quantity of a product in your cart, adding new delivery dates automatically adds corresponding quantities of the same product to your cart. The quantity is recalculated in real time and reflected accordingly in the product header card as well as in the Summary section.
- **Request single delivery date:** Allows you to revert to a single delivery date after you have specified multiple delivery dates for the products in your cart. A warning message is displayed stating that this update shall undo all the delivery date selections that you've done so far.

Select a payment method

You can pay using one of your preferred payment methods or use another cost center to make the payment. You can even pay using multiple cost centers for the various products in your cart.

Before you begin

To select a payment method for the products in your cart, you should have first selected appropriate delivery dates for them.

Role required: sn_shop.shopper.

Procedure

1. On the Checkout page, select **Continue to payment method**.
You can also select **Payment method** from the stepper pages to directly go to the page.
2. In the Payment method section, select your preferred payment method.

Note:

- Your preferred payment methods are displayed. These are stored in the backend in the sn_shop_payment_method table with the preferred tags against these records. You can go with your default payment method, or choose to pay using another cost center, multiple cost centers, available credits, or paychecks, if need be. For more information on these, see [Payment method options](#).
- For blanket order purchases, an information banner is displayed stating that payment methods will be determined when individual purchases are made against the blanket order.

What to do next

When you are done selecting the payment method for the products in your cart, you must provide a reason for making this purchase. For more information, see [Provide a reason for your purchase](#).

Payment method options

As a shopper, you have the option to pay using one of your preferred payment methods or use another cost center. You even have the option to pay using multiple cost centers for the various products in your cart.

If you have credits allocated to you for a particular good or service, those credits are applied here. You can pay the remaining balance, if applicable, from your future paychecks.

You can use the toggle feature between entire purchase and product to specify if the payment method applies to the entire purchase or to individual products. This toggle is

conditionally displayed based on predefined criteria. For example, if there is only a single item in your cart, the toggle feature does not apply and is therefore not displayed.

While you can always go with your default payment method that is preselected at the backend for faster checkout, the following options are also available:

- **Use another cost center:** Allows you to create a new payment method by searching for and selecting another cost center. Select the **Save this cost center for future use** check box if you want to view it in your preferred payment methods list for any subsequent purchases. A new record is created in the backend in the sn_shop_payment_method table with the preferred tag against this record.
- **Pay with multiple cost centers:** Allows you to add another cost center for making your payment. Adding a new cost center automatically sets the payment percentage to 99% for the first cost center and 1% for the newly added one. You can update the percentage for both, but the total needs to add up to 100% for you to proceed to the next step. To revert to a single cost center for payment, you can either select **Pay with one cost center** or manually delete the newly added cost center rows and update the percentage.
- Pay using credits: Allows you to use your allocated credits for specified products and services. The credits available for purchase towards the individual products are displayed accordingly. The estimated total and the amount you pay are automatically calculated by the system and displayed in the Summary section. Shipping and tax costs are excluded for both you pay and credit purchase calculations. For more information on employee credits and how to use them, see [Shop with employee credits](#).
- Pay using paychecks: Allows you to pay the remaining amount, after optimum credit consumption, through equal deductions from your future paychecks. You can choose from the list of available paycheck options and accept the terms and conditions for paycheck payments to proceed to the next step.

Provide a reason for your purchase

You must provide a reason for making your purchase. This is mandatory and allows you to complete your checkout.

Before you begin

To provide a purchase reason, you should have first selected your desired payment method.

Role required: sn_shop.shopper

Procedure

1. On the Checkout page, select **Continue to purchase reason**.
You can also select **Reason for purchase** from the stepper pages to directly go to the page.
2. In the **Reason for purchase** field, enter your purchase reason.

i Note: For purchases that have credits applied to them, the reason for purchase is defaulted with "Used employee credit". You can update this reason if desired. Also, the shipping and tax estimates are recalculated as per your quantity and delivery location updates, and reflected in the Summary section on this page.

What to do next

When you are done providing your purchase reason, you can provide any additional information in the next screen, if applicable, or proceed to complete your checkout.

Configure additional questions for checkout

As an administrator, you can configure additional questions for both quick and full checkouts to collect more information from a shopper specific to a purchase. This information is first stored in the Requisition Additional Info staging table against the purchase requisition ID that is created on checkout, and then mapped to the Purchase Requisitions table for back-end consumption.

Before you begin

Role required: sn_shop.procurement_administrator

About this task

Use a record producer to create a custom set of questions to ask shoppers during checkout. Build this record producer in Catalog Builder using the **ShoppingHub additional questions for a PR** template. A record producer can contain the following question types:

- Text - Single-line
- Text - Multi-line
- Choice - Record references
- Option - Check box
- Choice - Dropdown (fixed values)
- Date

Procedure

1. Create and add the necessary columns in the Requisition Additional Info staging table.
2. Create and add the same columns in the Purchase Requisitions table.
3. In Catalog Builder, configure a record producer titled Shopping Hub Additional Questions using the **ShoppingHub additional questions for a PR** template. This record producer is used to store more information from a shopper specific to a purchase.

i Note: For information on how to create a record producer, see [Create a catalog item using a template](#).

4. Navigate to **ShoppingHub > Administration > ShoppingHub Configuration**.
5. Select the **Additional Information for a Purchase Request** configuration name associated with the **Checkout configuration** type.
6. On the **Record producer used for checkout** field, search for and select the **Shopping Hub Additional Questions** record producer.
7. Select **Update**.
8. In Flow Designer, map the fields from the Requisition Additional Info staging table to the Purchase Requisitions table.

i Note: This flow is automatically triggered when a purchase requisition ID is created as a result of a checkout.

Checkout data loss scenarios

The data you enter during checkout are lost in an incomplete checkout process.

This happens if you perform any of the following actions:

- Log out.
- Return to your shopping cart page.
- Navigate to any other page on ShoppingHub.
- Close the browser window.

However, if you refresh the page, values on the current and previous steps are retained.

Purchase line creation scenarios

On completing your checkout, an appropriate number of cart lines are created, which then result in the creation of purchase lines.

For a supplier product:

- Every new delivery location creates a separate purchase line.
- Different delivery dates create separate purchase lines.
- Different payment methods result in an appropriate number of cost allocations being created against the purchase line.

My purchases

As a shopper, you can view all the purchases made from your shopping account by selecting My purchases from your ShoppingHub profile.

You can also track the progress of an order from the progress bar within the product details page, view its activity stream, review to-dos, and view and upload attachments associated with the purchase line or purchase order line. From **My purchases**, you can view details like quantity, amount, supplier contact information, product information, expected delivery date, delivery location, and so on. You can view some information such as product and service details in the **View by purchase** tab, some others such as delivery dates, delivery locations, and supplier contact details in the **View by line** tab, and some in both. You can view, sort, filter, and search from within your purchases. For purchase requisitions, purchase lines, purchase orders, and purchase order lines, you can also view related procurement cases, if any, from the **Cases** tab.

Purchase refinement options

You can refine your purchases through filtering, sorting, searching, and perform actions from the My purchases landing page.

Filter

You can filter your orders by:

- **Open:** All purchase lines that are not in the state Closed Rejected, Closed Canceled, Closed Complete, or Closed No Decision, and the parent sourcing request, negotiation, purchase requisition not in any of the respective closed states. This option is default.
- **Supplier Evaluation:** All active purchase lines associated to an active sourcing request.

Note: Active purchase lines refer to those that are not in the state Closed No Decision, Closed Rejected, or Closed Canceled. Whereas active sourcing requests refer to those not in the state Closed No Decision or Closed Complete.

- **Processing Purchase:** All active purchase lines associated to a purchase requisition that are in the state Pending Review, Pending Approval, Awaiting Task Completion, or Final Review.

- **Purchased:** All purchase order lines that are not in the state Closed Complete, Closed Paid, or Closed Canceled.
- **Pre-approved Purchases:** All lines associated with a purchase requisition or purchase order that has an order type of blanket, and is not in the state Closed Canceled or Closed Rejected. Where a purchase order line exists, the corresponding purchase line is not visible.
- **Closed:**
 - All purchase order lines that are in the state Closed Complete, Closed Paid, or Closed Canceled.
 - All purchase lines that are in the state Closed Rejected, Closed Canceled, Closed Complete, or Closed No Decision.
 - Where a purchase order line exists, the corresponding purchase line is not visible.
- **All:** All the orders, irrespective of their state. Where a purchase order line exists, the corresponding purchase line is not visible.

Sort

You can sort your orders by:

- **Recently Updated:** Sort by the last updated date of the purchase line or purchase order line, whichever is the primary record. This option is default.
- **Date Submitted:** Sort by the created date of the purchase line or purchase order line, whichever is the primary record.
- **Upcoming deliveries:**
 - When a purchase line is related to a purchase requisition or sourcing request, sort by the earliest to the latest date based on the following criteria:
 - The expected delivery date of a line with product type as good or the start date of a line with product type as service.
 - The start date for a blanket line.
 - For purchase orders, sort by the earliest to the latest date based on the following criteria:
 - The expected delivery date of a line with product type as good or the start date of a line with product type as service.
 - The start date for a blanket line.

Search

To search for a specific purchase, enter relevant keywords or purchase numbers. Keyword search is performed on top of the existing filter criteria that you have selected.

The following fields are searchable:

- **Number**
- **Short description**
- **Supplier**
- **Supplier product**
- **Delivery location**
- **Expected delivery date**
- **Start date**

- **End date**
- **State**

Tabs

As a shopper, you can organize the purchases info into tabs for better visibility and operational ease. You can track the progress of all your purchases, service requests, purchase orders, supplier info, status, and other associated fields from a unified location at the header or line level information:

- **View by purchase:** View your purchasing activity at the purchase level — a multi item order from a supplier, an entire requisition, and sourcing requests.
- **View by item:** View your purchasing activity at the item level — each individual item ordered is displayed separately.

You can select the associated cards, view the details, and perform available actions.

User actions

You can perform the following actions from my purchase list page. Select the more options icon to see the available actions based on the state of the purchase.

- **Edit:** Revise the quantity or location for your purchases.
- **Cancel:** Cancel the purchases.
- **Add to cart:** Add all the products and line items again to your cart.
- **View your purchase:** View product summary, delivery date and location, and other details.
- **View product details:** See the details of the product.
- **Purchase details:** See the purchase order number. You can cancel the purchase or reorder from the purchase details page.

This list of actions changes based on the state of the order.

Related topics

[Shopper to-dos](#)

Purchase highlights

Your purchases, which include purchase requisitions, purchase requisition lines, purchase orders, purchase order lines, and sourcing requests, are highlighted with color coding to help you quickly understand their state and due date. The progress bar on these purchases follows a similar color coding.

A red state badge is displayed if a purchase is closed canceled or closed rejected. A yellow state badge indicates that a purchase requires decision or needs information. For all other states, a grey badge is displayed.

A red due date badge is displayed for a purchase if:

- Any of the purchasing tasks associated with the purchase requisition line or purchase order line are overdue.
- Any of the milestones associated with the purchase order line are overdue.
- Any of the receipt tasks associated to the parent purchase order are overdue.

Similarly, a yellow due date badge is displayed for a purchase if any of the above conditions have a due date approaching in three days. A green due date badge indicates that everything is on schedule.

A procurement administrator can use the sn_shop.spend.sla.due.days purchasing property to configure the number of days for displaying the yellow highlight. By default, this is set to three days of the task due date.

- **Note:** The total line amount that you see for each purchase includes the updated shipping and tax estimates.

Your purchases are also highlighted with colored information banners when approvers request for clarification, or reject your purchase requisitions, purchase orders, or sourcing requests, in whole or in part. The reason for rejection is also displayed.

Activity stream

Track the updates on a selected purchase by selecting the **Activity** tab. The activity stream shows the progress that your order has made since the time you placed it.

The activity stream on the purchase line or purchase order line displays updates for the parent sourcing request, negotiation, purchase requisition, purchase order, purchasing tasks associated with the parent, and purchasing tasks associated with the purchase line.

For each activity stream update, the following text is displayed before showing the update from the old value to the new value: "<Object name> <Number> has been updated with the following changes". For example, if the purchase line is within the context of a sourcing request, it displays: "Sourcing Request SRC0001001 has been updated with the following changes".

You can compose a message and post it as a comment in the activity stream. You can also tag a person you want to address, with "@<primary contact name>", in the **Comments** field. An instructional message is displayed above the Compose section which dynamically shows who the primary contact is for the associated purchasing task. An email notification is sent to the user who is tagged such that they know when they have been mentioned in an activity stream post.

Updates to the following fields on the respective parent objects are displayed in the activity stream of the purchase line or purchase order line:

- Sourcing request
 - **Status**
 - **Assigned to**
 - **Product name**
 - **Employee requirements**
 - **Sourcing request details**
- Negotiation
 - **State**
 - **Assigned to**
 - **Negotiation type**
 - **Negotiation outcome**
 - **Negotiation objectives**
 - **Close notes**

- Purchase requisition
 - **State**
 - **Assigned to**
 - **Cost center**
 - **Total amount**
- Purchase order
 - **Status**
 - **Cost center**
 - **Total amount**
- Purchasing tasks
 - **Assigned to**
 - **Assignment group**
 - **State**

My to-dos and purchasing to-dos

As a shopper, you can review to-dos from the **To-dos** tab.

You can select the individual to-dos from the **My to-dos** tab and work with them as required. For more information on the various types of to-dos and how to work with them, see [Shopper to-dos](#).

On the **Purchasing to-dos** tab, however, you can only view the non-shopper responsible purchasing to-dos that are associated to this purchase. For each of these to-dos, the **State**, **Due date**, **Primary contact**, **Number**, and **Last updated** fields are displayed.

On the **Purchasing to-dos** tab, you can also view all approval requests, including those that have not been requested. For example, if there is a sequential rule that has three approvers, all three purchase request approvals are displayed. Approvals are not triggered for the subsequent approvers though, and email notifications are sent only when approval is required for purchase request. If the approval is no longer required or complete, it is no longer displayed.

Light view of purchasing to-dos

You can select **View activity** on a purchasing to-do to display a light view of the to-do, where you can view its activity stream, and compose a message and post it as a comment in the activity stream. You can also tag a person you want to address, with "@<primary contact name>", in the **Comments** field. An instructional message is displayed above the Compose section which dynamically shows who the primary contact is for the associated purchasing task. An email notification is sent to the user who is tagged such that they know when they have been mentioned in an activity stream post.

My requests

As a shopper, you can view all the order revisions from your shopping account anytime by selecting **My requests** from your profile in ShoppingHub.

You can also track the progress of your request such as edit or cancel requests from your account or the ShoppingHub footer. Track the progress of the purchase modification requests, view its activity stream, review to-dos, view, and upload attachments associated with the purchase line or purchase order line.

Hide supplier pricing from ShoppingHub

When creating model categories for grouping your product models, you can decide if pricing is to be displayed in ShoppingHub for supplier products associated to a particular category.

The pricing that is displayed for supplier products on ShoppingHub is an agreed-upon contractual price between you and the supplier. As an administrator, based on your business requirement, you can decide if this pricing needs to be displayed or hidden in your ShoppingHub catalog for supplier products associated to a particular category. If you decide to hide the pricing, the shipping and taxes involved are also hidden. If there are parent and child categories, the display pricing choice made on the child category overrides its parent.

If pricing is hidden in the model category form for a product category, pricing details aren't displayed in the following instances:

- Product information card on the ShoppingHub catalog
- Product details or categories or suggestions based on your role landing page
- Supplier product card, on both ShoppingHub and Virtual Agent
- Product header card in your shopping cart
- Summary section during full checkout and also on Virtual Agent
- Quick checkout overlay
- Purchase confirmation page after quick and full checkouts
- **Total line amount** and **Budget** fields in the My purchases list view, on both desktop and mobile
- **Total line amount** in the header, and price fields **Subtotal**, **Tax**, **Shipping**, and **Total line amount** in the purchase section in the Purchase details page, on both desktop and mobile
- Activity stream in My purchases
- **Pre-payment amount** field in the **Pre-payments** tab on the purchase details page
- **Negotiated unit cost** field in the **Additional quotes** tab on the purchase details page
- **Total line amount** field in the **Submitted purchases** tab on the purchase details page
- Approval to-do in the **To-dos** tab on the purchase details page
- **Total line amount** and **Remaining amount** fields in the blanket purchase list view, on mobile
- **Total line amount** and **Remaining amount** in the blanket purchase form view header, on mobile
- **Total line amount** field in the Submitted purchases related list of a blanket purchase order, on mobile
- **Negotiated unit cost** and **Total line amount** fields in the Additional quotes related list of a blanket purchase order, on mobile
- Confirmation page after completing a select a supplier to-do
- Line amount invoiced in invoice acknowledgment

Note: This applies only if you haven't installed the Shopping Hub plugin and are still using the Source-to-Pay Common Architecture plugin.

- Invoice amount to review in invoice acknowledgment, on mobile

- Price fields **Total amount**, **Amount paid**, and **Remaining balance** in the purchase section in invoice acknowledgment, on mobile
- Price fields **Total estimated tax**, **Total estimated shipping**, and **Total amount** in the purchase section in receipt acknowledgment, on mobile
- Price fields **Subtotal**, **Estimated tax**, **Estimated shipping**, and **Total line amount** in the purchase section in milestones, on mobile
- **Payout amount** field in the to-do section in milestones, on mobile
- Activity stream and purchase summary in My to-dos
- Standard search results on Employee Center (EC) and Virtual Agent
- AI Search results on ShoppingHub, Service Portal, and EC

i Note: Even if supplier pricing is hidden, sort by price and filter by price range display search results in ShoppingHub. For sort by price low to high, for example, request pricing products are displayed first, followed by pricing hidden products, and products with price. For filter by price range, if the minimum price range is greater than zero, pricing hidden products are hidden along with request pricing products.

However, when an approval to-do is created, the pricing is visible to the approver so that an informed decision can be taken on the approval request. If display pricing is set to No, then the select a supplier to-do is assigned to the buyer instead of the person who submitted it. But, if the buyer reassigns it to the submitter, the latter can view the price in the to-do in ShoppingHub. This is applicable to both desktop and mobile versions.

Also, if you're a shopper with store credits allocated to you, you can view the pricing details even though the pricing is otherwise hidden.

i Note: This hide pricing feature doesn't impact the checkout flows, sourcing flows, or any other flows that are run in the back-end.

Customize your top suppliers on ShoppingHub

Personalize the list of suppliers to see on your ShoppingHub homepage. Update your list with the change in your preferences anytime.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
You can see the ShoppingHub homepage.
2. Scroll down on the homepage where you can see the list of suggested suppliers based on your role.
3. Select the more options icon and select **Personalize**.
4. From the list of suppliers, select those that you want to see on your ShoppingHub homepage.
You can select up to 10 suppliers.
5. Select **Save**.

Requesting for products or services that you don't see on ShoppingHub

As an employee, shopper, or business owner, you can place requests for one or more products or services that are currently not listed on the ShoppingHub portal. You can do this from ShoppingHub Home or directly from Employee Center.

Request for products that you don't see on ShoppingHub

Place a request for one or more products that are currently not listed on the ShoppingHub portal. You can do this from ShoppingHub Home or directly from Employee Center.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.

2. Select **Don't see what you need?**.

The Purchase requests page is displayed from the Employee Center catalogs.

Note: To directly access from Employee Center, navigate to **Purchases and expenses > Purchase requests**.

3. Select **I need a product**.

4. On the form, fill in the details of the products that you're looking for.

| Field | Description |
|---|--|
| Who is this request for? | <p>Name of the employee, shopper, or business owner who needs this product.</p> <p>Note: If you're logged in as a fulfills, you can raise this request for a shopper as well. Also, shoppers can select their delegates here.</p> |
| What project is this request for? | <p>Project for which this request is being raised.</p> <p>Note: This field is available only when you have the Procurement with Project Management (sn_spend_ppm) application installed, and also have the IT Project User role. For more information, see Sourcing and Procurement Operations integration with Project Management.</p> |
| What do you need for this request? | <p>Type of request. The options are:</p> <ul style="list-style-type: none"> ◦ I need a quote ◦ I need a proposal ◦ I need a proof of concept ◦ I need more information about the products or suppliers |
| What suppliers do you want to request from? | <p>Details of the suppliers you want to request from. The options are:</p> <ul style="list-style-type: none"> ◦ Existing suppliers in the system: Add one or many suppliers from the list of existing suppliers. If you've already contacted them, select the appropriate option, and enter details of the supplier contact such as first and last names, job title, and registered email ID. |

| Field | Description |
|--|---|
| | <p>Note: Before you save the supplier contact details, ensure that your admin has set up the email domains for the supplier contacts, and the corresponding records are available in the Supplier Email Domain table.</p> <ul style="list-style-type: none"> External suppliers: Add one or many suppliers, and enter details of the supplier contact such as first and last names, job title, and registered email ID. <p>Note: It is recommended that you search from the existing suppliers first, and if the supplier you're looking for doesn't exist, enter one you want to work with.</p> <ul style="list-style-type: none"> I don't have any suppliers in mind. <p>For more information on adding suppliers, see:</p> <ul style="list-style-type: none"> From Platform: Add a supplier. From the supplier catalog: Add a supplier contact using the supplier catalog. From Source-to-Pay Workspace: Add a supplier contact from the Source-to-Pay Workspace. |
| Default delivery address | <p>Address for delivery. The options are:</p> <ul style="list-style-type: none"> A saved address: In this case, the primary saved address of the logged-in user is displayed. A work address: In this case, you must select who is receiving the item, or the business owner. Somewhere else |
| Default delivery date | <p>Estimated date range for delivery. The options are:</p> <ul style="list-style-type: none"> As soon as possible: For the quickest delivery slot possible for the product. This is calculated based on the product category of each selected product. A specific date: If you have a specific date in mind for the delivery of the product. I am not sure: A time frame for the delivery of the product. <p>Note: You can select a date or date range that is in the past, present, or future. If you select a date range, you must enter your requested start and end dates to proceed.</p> |
| Add the products you'd like to request | <p>Add one or more products that you're looking for, along with details such as product category, name of the product, specific requirements, if any, link to an example of what you're looking for, quantity or budget amount, currency, delivery address, delivery date, and so on.</p> <p>Note: Here, you have the option to select different delivery addresses and dates for the individual products, as required, or go with the same options from the parent purchase.</p> |

| Field | Description |
|--|--|
| Why do you need these products? | Reason behind this product requirement. |
| Are there additional details or questions you'd like to include? | <p>Additional details, if any.</p> <p>Note: You must answer this question if you have selected I need more information about the products or suppliers in the What do you need for this request? field.</p> |

5. Optional: Select **Save as Draft** if you want to save a draft in your requests and plan to complete it later.

6. Select **Submit**.

Individual sourcing requests are created for each product that you've requested for, with individual lines for the selected suppliers.

What to do next

View your sourcing request details from the **Requested items** tab, where a complete summary of your request lines is displayed. You can also view the details from the My Purchases page in ShoppingHub.

In case of errors, check your system logs to detect any issues with the record producer submission. However, if you were able to submit successfully, check your event logs to verify whether the asynchronous event sn_shop.process_non_catalog_sourcing was triggered to initiate creation of the sourcing requests.

Request for services that you don't see on ShoppingHub

Place a request for one or more services that are currently not listed on the ShoppingHub portal. You can do this from ShoppingHub Home or directly from Employee Center.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.

2. Select **Don't see what you need?**.

The Purchase requests page is displayed from the Employee Center catalogs.

Note: To directly access from Employee Center, navigate to **Purchases and expenses > Purchase requests**.

3. Select **I need a service**.

4. On the form, fill in the details of the services that you're looking for.

| Field | Description |
|--------------------------|--|
| Who is this request for? | Name of the employee, shopper, or business owner who needs this service. |

| Field | Description |
|---|---|
| | <p>Note: If you're logged in as a fulfiller, you can raise this request for a shopper as well. Also, shoppers can select their delegates here.</p> |
| What project is this request for? | <p>Project for which this request is being raised.</p> <p>Note: This field is available only when you have the Procurement with Project Management (sn_spend_ppm) application installed, and also have the IT Project User role. For more information, see Sourcing and Procurement Operations integration with Project Management.</p> |
| What do you need for this request? | <p>Type of request. The options are:</p> <ul style="list-style-type: none"> ◦ I need a quote ◦ I need a proposal ◦ I need a proof of concept ◦ I need more information about the services or suppliers |
| What suppliers do you want to request from? | <p>Details of the suppliers you want to request from. The options are:</p> <ul style="list-style-type: none"> ◦ Existing suppliers in the system: Add one or many suppliers from the list of existing suppliers. If you've contacted them already, select the appropriate option, and enter details of the supplier contact such as first and last names, job title, and registered email ID. <p>Note: Before you save the supplier contact details, ensure that your admin has set up the email domains for the supplier contacts, and the corresponding records are available in the Supplier Email Domain table.</p> <ul style="list-style-type: none"> ◦ External suppliers: Add one or many suppliers, and enter details of the supplier contact such as first and last names, job title, and registered email ID. <p>Note: It is recommended that you search from the existing suppliers first, and if the supplier you're looking for doesn't exist, enter one you want to work with.</p> <ul style="list-style-type: none"> ◦ I don't have any suppliers in mind <p>For more information on adding suppliers, see:</p> <ul style="list-style-type: none"> ◦ From Platform: Add a supplier. ◦ From the supplier catalog: Add a supplier contact using the supplier catalog. ◦ From Source-to-Pay Workspace: Add a supplier contact from the Source-to-Pay Workspace. |
| Default address of service | Address where the service is required. The options are: |

| Field | Description |
|--|---|
| | <ul style="list-style-type: none"> ◦ A saved address: In this case, the primary saved address of the logged-in user is displayed. ◦ A work address: In this case, you must select who is receiving the item, or the business owner. ◦ Somewhere else |
| Default service dates | <p>Estimated date range for the service. The options are:</p> <ul style="list-style-type: none"> ◦ Within a specific time frame: If you have a specific date range in mind for the delivery of the service. ◦ I am not sure: A time frame for the delivery of the service. <p>Note: You can select a date range that is in the past, present, or future. If you select a date range, you must enter your requested start and end dates to proceed.</p> |
| Add the service you'd like to request | <p>Add one or more services that you're looking for, along with details such as service category, name of the service, specific requirements, if any, link to an example of what you're looking for, currency type, maximum budget amount, address of service, service date, and so on.</p> <p>Note: Here, you have the option to select different service addresses and dates for the individual services, as required, or go with the same options from the parent purchase.</p> |
| Why do you need these services? | Reason behind this service requirement. |
| Are there additional details or questions you'd like to include? | <p>Additional details, if any.</p> <p>Note: You must answer this question if you have selected I need more information about the services or suppliers in the What do you need for this request? field.</p> |

5. Optional: Select **Save as Draft** if you want to save a draft in your requests and plan to complete it later.
6. Select **Submit**.

Individual sourcing requests are created for each service that you've requested for, with individual lines for the selected suppliers.

What to do next

View your sourcing request details from the **Requested items** tab, where a complete summary of your request lines is displayed. You can also view the details from the My Purchases page in ShoppingHub.

In case of errors, check your system logs to detect any issues with the record producer submission. However, if you were able to submit successfully, check your event logs to verify whether the asynchronous event sn_shop.process_non_catalog_sourcing was triggered to initiate creation of the sourcing requests.

Configure additional attributes for I need a product or service

You can configure additional attributes on the intake for variable sets configured on the **I need a product** and **I need a service** record producers. Any new fields that are added to the variable set must be mapped in the record producer script to ensure that the information is saved in the backend.

Before you begin

Role required: admin

Procedure

1. Navigate to the **I need a product** or **I need a service** record producer, as required.
2. Go to the script section of the record producer and ensure that the intake details fields are mapped to the payload appropriately.
- i Note:** If any of the fields aren't mapped, then mapping logic must be added.
3. Go to the script include: NonCatalogIntakeService, function: createSourcingRequest. This function creates and appends the information passed from the record producer to the sourcing request record. Ensure that the sourcing request has the appropriate field in its table.
4. To save the information on the purchase request line, go to the script include: NonCatalogIntakeService. This creates an import set record in the non-catalog import set table, sn_shop_non_catalog_intake.
5. Go to the Table Transform Map: Non catalog intake, and check if the field mapping between the source and target is correct.

Submit a quote

As a shopper or requester, when an existing quotation for a product or service that you're looking for doesn't meet your expectation, you can get your own quote and submit it so that a requisition can be processed by the procurement team accordingly. You can submit a quote from ShoppingHub Home or directly from Employee Center.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select **Don't see what you need?**.
The Purchase requests page is displayed from the Employee Center catalogs.
- i Note:** To directly access from Employee Center, navigate to **Purchases and expenses > Purchase requests**.
3. Select **I need to submit a quote**.
4. On the form, fill in the details.

| Field | Description |
|--|--|
| First, search and add the supplier from the existing supplier list | List of all the available suppliers. |
| Can't find the supplier above? Add them here | Allows you to add a new supplier, who is then verified in the back-end before being added to the list of available suppliers. |
| Have you contacted this supplier about the products you're requesting? | If you've contacted the supplier already, select the appropriate option, and enter details of the supplier contact such as first and last names, job title, and registered email ID. For more information on adding suppliers, see: <ul style="list-style-type: none"> ◦ From Platform: Add a supplier. ◦ From the supplier catalog: Add a supplier contact using the supplier catalog. ◦ From Source-to-Pay Workspace: Add a supplier contact from the Source-to-Pay Workspace. |

5. From **What are you buying?** select **Add** to add one or more goods, services, or both, by filling in the Add Row form.

| Field | Description |
|---|--|
| Supplier part number (ex: SKU, product ID) | Unique product or service identifier, such as SKU. |
| Product/Service name | Details of the product or service. |
| Unit (ex: box, each, ounces)/Unit (ex: fixed fee, per hour) | Unit of measure of the product or service that you must buy. |
| Select the currency type for the quoted price | Currency type. |
| Unit price | Amount per unit of the product or service. |
| Quantity | Number of units of the product or service. |
| Tax | Estimated tax amount. |
| Shipping | Estimated shipping cost. |
| Total amount | Total amount to be paid, including tax and shipping. |
| When will this product be delivered?/When is the delivery? | Date when the product or service is needed by. Choose a delivery date or delivery period: <ul style="list-style-type: none"> ◦ Specify a delivery date if you have a specific date in mind for the delivery of the product. ◦ I am not sure to select a time frame for the delivery of the product or service. |

| Field | Description |
|--|---|
| | <p>i Note: You can select a date or date range that is in the past, present, or future. If you select a date range, you must enter some estimated start and end dates to proceed.</p> |
| Where do you think you will have this delivered? | Delivery location of the product or service. You can use one of your saved addresses, in which case the primary saved address of the logged-in user is displayed. You can choose to deliver to a work address, in which case you must select who is receiving the item. You can also choose to deliver to somewhere else. |
| Cost center for payment | Payment method, which is defaulted to your cost center. |
| Additional comments | Any additional information that you may want to add. |

6. Select **Add**.

7. In the **What project is this request for?** field, select the project for which this request is being raised.

i Note: This field is available only when you have the Procurement with Project Management (sn_spend_ppm) application installed, and also have the IT Project User role. For more information, see [Sourcing and Procurement Operations integration with Project Management](#).

8. Provide the reason behind making the purchase.

9. Add attachments of your quote for verification.

10. Optional: Select **Save as Draft** if you want to save a draft in your requests and plan to complete it later.

11. Select **Submit**.

What to do next

You can view the newly created purchase requisition details on the My Purchases page in ShoppingHub. Purchase lines are grouped based on whether the order type is standard or blanket. For more information on purchase line grouping, see [Purchase requisition merging](#).

Purchase revision flows

As a procurement administrator, you can leverage or modify the existing workflows to process the purchase modification requests raised by shoppers.

When you install the Playbooks for Sourcing and Procurement Operations application, you can automate the overall purchase revision flows. The following workflow shows how the admin facilitates the purchase modification process to create requests, resolve request, and communicate with stakeholders:

Purchase revisions flow



Admin

Configures the a seamless approach for shoppers to raise request

Configures a playbook experience for agents to process the request



Employee

Raises request from shopping hub or service catalog



Agent

Processes the requests from a unified playbook

Related topics

[Purchase revision roles and responsibilities](#)

Purchase revision roles and responsibilities

As a procurement administrator, you can create workflows that blend automation, integration, and human review to process the purchase modification requests raised by shoppers.

Purchase revision workflow involves the steps to route the request through various stakeholders. The following workflow shows how the admin facilitates the purchase modification process to create requests, resolve request, and communicate with stakeholders:

Administrator

As an admin or process owner, you can facilitate shoppers with a process to raise edit or cancel requests from Service Catalog and ShoppingHub. Define a unified task-view playbook experience for agents to process the approval workflows:

Shopper

As a shopper, you can raise the edit or cancel requests for the following objects from ShoppingHub or Service Catalog:

- **Purchase requisition:** A purchase request that tracks all tasks and approvals, and associates the purchase to a contract and supplier. Purchase requisitions contain one or more purchase line items. A purchase order is created from a purchase requisition task.
- **Purchase line:** An individual line item that includes all the details of the goods or services for procurement. Purchase requisitions contain multiple purchase line items.
- **Purchase order:** A purchase order includes one or more purchase order lines. Once the business unit approves the purchase requisition, a purchase order is issued to the supplier with the requested goods or services.
- **Purchase order line:** An individual line item that includes all the details of the goods or services for procurement. Purchase orders contain multiple purchase order line items.

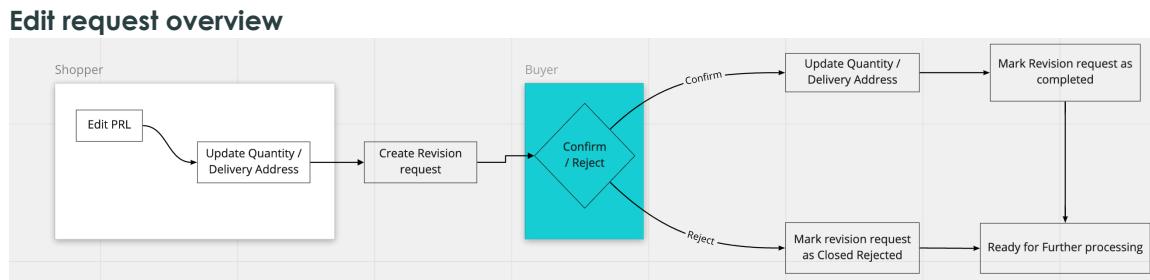
Agent

As an agent or fulfiller or buyer, you can process these requests from the procurement workspace [playbook](#):

- Approve or reject an **Edit** order with the revised quantity or delivery location of the purchase requisitions.
- Reject or approve a **Cancel** request of the entire order or line items.

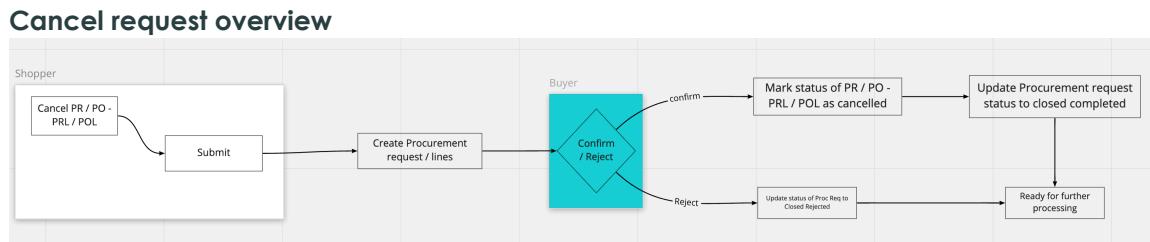
Edit flows

You can use these steps to raise an edit request for purchase line item. The following image explains the process of request creation by shopper and request resolution by buyer or agent.



Cancel flows

You can use these steps to raise a cancel request for purchase line items or an entire purchase. Here's an overview of the process from request creation and request resolution.



Add a line to an existing purchase requisition or order

You can add a new purchase line to an existing purchase requisition or order.

Before you begin

Role required: sn_spend_psd.requestor or shopper

Procedure

1. Navigate to **All > ShoppingHub Home > My purchases**.
2. Select a purchase requisition or order and select **Edit** from the **More options** icon.
The Edit a purchase page is displayed with the available purchase lines.
3. Select **Add** to add a new line.
4. On the form, fill in the fields.
When adding a new line, you can select a supplier product from the existing system catalog or request for a new supplier product from the **Would you like to:** field. The fields displayed are based on the selection of one of the following options:

- **Browse catalog**

| Field | Description |
|--|--|
| Would you like to: | Select Browse catalog to select from a pre-existent supplier and catalog. |
| Supplier | Displays the supplier name. |
| Supplier Product | Select a relevant product to purchase from the list. |
| Quantity | Enter the numerical quantity of the product to purchase. |
| Expected delivery date | Select the date by when you want the product to be delivered. |
| Where do you think you will have this delivered? | Select one of the following delivery options: <ul style="list-style-type: none"> ▪ To a saved location ▪ To a work address (already approved) ▪ To somewhere else |
| Address | Based on the delivery option selected, the address is displayed here. |
| Add a payment method | Select your preferred payment method. |
| Purchase reason | Enter your comments on the purchase. |

- **Submit a quote**

| Field | Description |
|---|--|
| Would you like to: | Select Submit a quote to add a new supplier and product that you want to purchase. |
| Supplier | Displays the supplier name. |
| Is this a quote for a goods or service? | Select if the quote is for a goods or a service. |
| Supplier Part Number | Enter the number to identify the supplier or product. For example, SKU, Product ID, and so on. |
| Product Name | Enter the name of the product that you would like to order. |
| Unit | Select from Fixed Fee or Individual unit to quantify the product. For example, box, each, ounces, and so on. |
| Select the currency type for the quoted price | Select the currency type in which you want to trade. |
| Unit Price | Enter the price per unit. |

| Field | Description |
|--|--|
| Quantity | Enter the numerical quantity of the product to purchase. |
| Tax | Enter the tax value. |
| Shipping | Enter the shipping mode. |
| Total Amount | Displays the calculated total value of the purchased. |
| Expected delivery date | Select the date by when you want the product to be delivered. |
| Where do you think you will have this delivered? | Select one of the following delivery options: <ul style="list-style-type: none"> ▪ To a saved location ▪ To a work address (already approved) ▪ To somewhere else |
| Address | Based on the delivery option selected, the address is displayed here. |
| Add a payment method | Select your preferred payment method. |
| Purchase reason | Enter your comments on the purchase. |
| Additional comments | Enter additional comments if any. |

5. Select **Add to complete the add request.**

A new purchase line is added to the purchase requisition or order. Note that for **Submit a quote** option, the PRL/POL number is not displayed.

6. Select **Submit request.**

A confirmation message screen appears.

Edit a purchase line from a purchase requisition or order

You can edit and revise the quantity of a product or delivery location of a purchase line directly from a purchase requisition or order.

Before you begin

Role required: sn_spend_psd.requestor or shopper

Procedure

1. Navigate to **ShoppingHub Home > My purchases.**

Alternatively, you can edit a purchase from **Employee Center > Purchase and Expense > Purchase Requests > Edit a purchase**.

2. Select a purchase requisition or order and select **Edit.**

You can also select the **More options** icon on the line and select **Edit** to modify the details of the purchase requisition or order.

ⓘ Note: Remember that the **Edit** option is not available for purchases in the Close state.

The Edit a purchase page is displayed with the available purchase lines.

3. Select the Open Preview icon to edit the quantity or delivery location of the purchase line.

4. Select **Update**.
The purchase line is updated with the changes.
5. Select **Submit Request** to complete the edit request.
A confirmation message screen appears.

Edit a purchase requisition line

You can edit and revise the quantity of the product, budget, or delivery location of a purchase requisition line in a purchase requisition based on your requirements.

Before you begin

Role required: sn_spend_psd.requestor or shopper

Procedure

1. Navigate to **ShoppingHub Home > My purchases**.
Alternatively, you can edit a purchase from **Employee Center > Purchase and Expense > Purchase Requests > Edit a purchase**.
2. Select a purchase requisition and a purchase requisition line in it.
- i Note:** Remember that the **Edit** option is not available for purchases in the Close state.
3. Select **Edit** on the purchase requisition line.
You can also select the **More options** icon on the requisition line and select **Edit** to modify the details of the line.
The **Edit a purchase** page displays the **Purchase summary** with the price and quantity information.
4. On the form, edit the fields:

| Field | Description |
|--|--|
| How many do you want to buy? | Change the quantity. Remember that the quantity is always higher than the delivered quantity. |
| Where do you want this delivered? | The options are: <ul style="list-style-type: none">◦ To one of my saved locations◦ To an office location◦ To a new address For example, you can select an office location. |
| Recipient | Select the name of the recipient. |
| Office location | Location for delivery. |
| Would you like to edit something else? | The options are Yes or No. |
| Tell us more about what you would like to edit | Enter any other edits that you would like to make to the purchase. |
| Why are you editing this purchase? | Reason for editing the request. |

5. Add an attachment to support your edit request, if applicable.

This file is attached to the procurement case record initially, and then to the purchase requisition associated to that procurement case when the case is closed.

6. Select **Submit Request** to complete the edit request.

A confirmation message screen appears.

Result

The step creates a procurement case with the details of the revised quantity, location, and other information. Associated request lines and tasks are created using this information.

What to do next

- Shoppers can review and edit the request details from **ShoppingHub > My requests** or **My requests** from the footer.
- Buyers can track the progress of the procurement case and procurement case line edit requests from **Procurement Workspace**.

Related topics

[Purchase revision flows](#)

[Process Automation Designer flows for playbook](#)

Edit a purchase order line

You can edit and revise the quantity of the product, budget, or delivery location of a purchase order line in a purchase order based on your requirements.

Before you begin

Role required: sn_spend_psd.requestor or shopper

Procedure

1. Navigate to **ShoppingHub Home > My purchases**.

Alternatively, you can edit a purchase from **Employee Center > Purchase and Expense > Purchase Requests > Edit a purchase**.

2. Select a purchase order and a purchase order line in it.

i Note: Remember that the **Edit** option is not available for purchases in the Close state.

3. Select **Edit** on the purchase order line.

You can also select the **More options** icon on the order line and select **Edit** to modify the details of the line.

The **Edit a purchase** page displays the **Purchase summary** with the price and quantity information.

4. On the form, fill in the fields:

| Field | Description |
|-----------------------------------|---|
| How many do you want to buy? | Change the quantity. Remember that the quantity is always higher than the delivered quantity. |
| Where do you want this delivered? | The options are: |

| Field | Description |
|--|--|
| | <ul style="list-style-type: none"> ◦ To one of my saved locations ◦ To an office location ◦ To a new address <p>For example, you can select an office location.</p> |
| Recipient | Select the name of the recipient. |
| Office location | Location for delivery. |
| Would you like to edit something else? | The options are Yes or No. |
| Tell us more about what you would like to edit | Enter any other edits that you would like to make to the purchase. |
| Why are you editing this purchase? | Reason for editing this purchase. |

5. Add an attachment to support your edit request, if applicable.

This file is attached to the procurement case record initially, and then to the purchase order associated to that procurement case when the case is closed.

6. Select **Submit Request**.

A confirmation message screen appears.

Result

The step creates a procurement case with the details of the revised quantity, location, and other information. Associated request lines and tasks are created using this information.

What to do next

- Shoppers can review and edit the request details from **ShoppingHub > My requests** or **My requests** from the footer.
- Buyers can track the progress of the procurement case and procurement case line edit requests from **Procurement Workspace**.

Related topics

[Purchase revision flows](#)

[Process Automation Designer flows for playbook](#)

Raise a cancel request

As a shopper, you can cancel an entire purchase request, purchase order, or individual line items.

Before you begin

Role required: sn_spend_psd.requestor or shopper

Procedure

1. Navigate to **ShoppingHub > My purchases**.

Alternatively, you can cancel a purchase from **Employee Center > Purchase and Expense > Purchase Requests > Cancel a purchase**.

2. Select a purchase requisition, purchase order, or purchase line.

3. Select **Cancel this purchase** or **Cancel**, as applicable from the **Edit** menu or **More options** menu.

You can also cancel a purchase requisition line using the **Remove** button in the **Edit a purchase** page. It will internally create a new procurement case for the buyer to confirm or reject.

4. Specify a reason for the cancellation.
5. Select **Submit request**.

Result

The step creates a procurement case with the details of the product for cancellation. Associated request lines and tasks are created using this information.

What to do next

- Shoppers can review and edit the request details from **ShoppingHub > My requests** or **My requests** from the footer.
- Buyers can review, edit, and process your request details from **Procurement Case Management > Procurement Workspace > Procurement Cases**, if required.

Related topics

[Purchase revision flows](#)

[Process Automation Designer flows for playbook](#)

Return a product

You can request a return for a product that has been fully or partially delivered to you.

Before you begin

Role required: sn_spend_psd.requestor or shopper

About this task

You can raise a return request for multiple products belonging to the same purchase order or purchase requisition that has been fully or partially delivered to you.

Procedure

1. Navigate to **ShoppingHub Home > My purchases**. Alternatively, you can return a purchase from **Employee Center > Purchase and Expense > Purchase Requests > Return a purchase**.
2. Select a purchase requisition, purchase order, or purchase line that has been delivered or partially delivered.
3. Select **Return** from the **More options** or **Edit** menu, as applicable.
4. On the form, fill in the fields:

| Field | Description |
|--|---|
| Who is the business owner? | Name of the business owner. This field is auto-populated. |
| Which purchase would you like to return? | Select the purchase that you would like to return, from the list. i Note: This field is displayed only for multiple product returns initiated from Employee Center. |

| Field | Description |
|--|--|
| Would you like to return the entire purchase or just one/multiple items from the purchase? | Select the appropriate check box. The options are Entire purchase and One or multiple items from the purchase . For one or multiple items, enter the quantity of items to be returned in the Edit Row window, Quantity to be Returned field. The quantity already returned before, if any, is auto-populated in the Quantity Returned field. |
| How many would you like to return? | <p>Quantity of items to return. Remember that the quantity must always be lesser than or equal to the delivered quantity.</p> <p>Note: This field is displayed only for line-level returns.</p> |
| Why are you returning this? | Reason for returning this purchase. |

Note: You can introduce new question variables to the form and enable additional validations, if required, from the respective record producer record.

5. Select **Submit Request**.

A confirmation message screen appears.

Result

The step creates a procurement case with the details of the return request, and other information. Associated request lines and tasks are created using this information.

What to do next

- Shoppers can review the request details from **ShoppingHub > My requests** or **My requests** from the footer.
- Buyers can track the progress of the procurement case and procurement case line requests from **Procurement Workspace**.

Shopper to-dos

As a shopper, you can have to-dos assigned to you, related to your purchases, for you to act on. You can view your to-dos by selecting the user icon on ShoppingHub Home.

To-dos are specific to the logged-in user, so you can view them when logged in and Shopping as Myself. When shopping as another user, you can't see any to-dos unless you're set up as a delegate for that user. If assignments and approvals are selected for the delegate, you can view and work on the to-dos and approvals accordingly.

This section includes purchase request approval tasks, purchasing tasks, procurement tasks, receipt tasks, and acknowledgment tasks. Selecting assignments also means that the delegate can view the to-dos on the purchase details page.

You can select a to-do to view the details of the task, and view and upload attachments associated with the to-do. You can also track the updates on a selected to-do by selecting

the **Activity** tab. You can also compose a message and tag a person you want to address, with "@<primary contact name>", in the **Comments** field. An instructional message is displayed above the Compose section that dynamically shows who the primary contact is for the associated purchasing task. The specified user receives an email notification.

Here's a look at the types of shopper responsible to-dos that can be listed under **My to-dos**:

- **Approvals** tab: Approval tasks: Approve your purchase requisition
- **Other to-dos** tab
 - Purchasing tasks
 - Provide more details on your purchase
 - Request clarification on a purchase request (approver task)
 - Provide clarification on your purchase
 - Compare quotes and select a supplier
 - Procurement tasks
 - View a link or video
 - Upload a document
 - Sign a document
 - Submit a form
 - Receipt tasks
 - Confirm receipt of your order and quantity
 - View shipment details of your order
 - Confirm meeting a milestone for your service
 - Review your invoice acknowledgment
 - Review your service acknowledgment

Each of these to-dos displays specific information and have a specific action for the shopper to complete.

As a shopper, you can have visibility into to-dos, attachments, and activity stream views of purchase requests and orders. You can perform similar actions from the purchase order or order line section.

To-do refinement options

You can refine your to-dos through filtering, sorting, and searching options on the My to-dos landing page.

Filter

You can filter your to-dos by:

- **Open:** This option is **Default**. All tasks with the following conditions:
 - Purchasing tasks that are in the Open state.
 - Sourcing tasks with subtype Ask a question, that are in the Work in Progress state, with sub-state as Answer Pending.
 - Sourcing tasks with subtype Select a Supplier, that are in the Work in Progress state.

- Approval tasks, for purchase requests or approvals for invoices, that are in the Requested state.
- Receipt tasks that are in the Open, Shipped, or Partially Complete state.
- Milestones that are in the Confirmation Required state.
- **Due this week:** All tasks that are due in the next seven days.
- **Overdue:** All tasks that are past their due date.

Sort

You can sort your to-dos by:

- **First due:**
 - Sort your to-dos by due dates. Those with earlier due dates are displayed first.
 - This is the default option.
- **Last due:** Sort your to-dos by due dates. Those with later due dates are displayed first.
- **Last updated:** Sort your to-dos by the last updated date. Those updated recently are displayed first.

Search

To search for a specific to-do, enter relevant keywords or to-do numbers. Keyword search is performed on top of the existing filter criteria that you have selected.

The following fields are searchable:

- **Number**
- **Short description**
- **Due date**

You can select the associated cards, view the details, and perform available actions.

To-do highlights

Your to-dos are highlighted with color coding to help you quickly understand the due dates.

A red vertical line is displayed to the left of the task card, and a badge with the same color is displayed with the number of days, if the due date of the to-do has passed.

Similarly, a yellow vertical line is displayed to the left of the task card, and a badge with the same color is displayed with the number of days, if the to-do has a due date approaching in three days.

A procurement administrator can use the sn_shop.spend.sla.due.days purchasing property to configure the number of days for displaying the yellow highlight. By default, this is set to three days of the task due date.

Approve your purchase requisition from ShoppingHub Home

Provide approvals for your purchase requisitions and invoice requests that are in pending approval state. Purchase requisition approvals are generated when an approval rule is triggered on meeting certain criteria. Invoice approvals are sent to the recipient of the line.

Before you begin

Role required: sn_shop.shopper

To provide approvals for your purchase requisitions and invoice requests, you should have received such requests. Only then, this to-do is displayed to you on ShoppingHub Home.

You can choose to reject them along with your reasons for rejection. Your action on these to-dos moves the purchase requisitions and invoices to their respective workflows.

An approver can also access the purchase details page on ShoppingHub to gather more information on a purchase request before approving it. Select the card that shows the purchase line in the approval details page to view the purchase details. Approvers are however, not allowed to revise purchase lines.

About this task

You can approve or reject your purchase requisitions and invoice requests from the **Approvals** tab.

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Approvals** tab.
4. On the **Pending approval** tab, view details of the approval requests, such as requester name, total amount or budget requiring approval, and request ID at the header level. At the line level, you can view the details of the requested items, such as product, approval amount, approval status, unit, price, quantity, total line amount, line number, reason for purchase, product type, delivery location, expected delivery date, and so on. You can also filter the purchase requisition lines by their approval status, and view associated activities and attachments in separate tabs therein.
5. Do any of these actions.

| Action | Description |
|------------------|---------------------------------------|
| Approve selected | Approves all the to-dos you selected. |
| Approve all | Approves all the to-dos. |
| Reject selected | Rejects all the to-dos you selected. |
| Reject all | Rejects all the to-dos. |

You can now view the approved and rejected to-dos on the **Approved** and **Rejected** tabs respectively.

Note: When rejecting a purchase requisition, you must provide your justification for rejection on the **Reason for rejection** window.

6. Select **Submit**.

Provide more details on your purchase from ShoppingHub Home

Provide additional information on your purchase from ShoppingHub Home by answering the follow-up questions that the procurement specialist has posted regarding your order. Your response to these to-dos ensures that the procurement specialist understands your exact requirements and has all the necessary information before proceeding with the sourcing request.

Before you begin

To provide more details on your purchase, you should have received such requests from the procurement specialist. Only then, this to-do is displayed to you on ShoppingHub Home.

Role required: sn_shop.shopper

About this task

You can provide more information on the queries that the procurement buyer has posted for them to proceed with the sourcing request.

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Select the to-do you want to work with.
5. In the **Write a response** field, provide the necessary information to address the procurement buyer's queries.
6. Select **Submit**.

Request clarification on a purchase request from ShoppingHub Home

As an approver, request clarification from the shopper on a purchase requisition if you have questions that you need answers to before approving or rejecting the purchase requisition. Purchase requisition approvals are generated when an approval rule is triggered on meeting certain criteria.

Before you begin

To request clarification on a purchase requisition, you should be assigned as an approver for the shopper requesting the purchase. Also, specific approval rules must be triggered on meeting certain criteria. Only then, this approval to-do is displayed to you on ShoppingHub Home.

An approver can also access the purchase details page on ShoppingHub to gather more information on a purchase request before approving or rejecting it. Select the card that shows the purchase line in the approval details page to view the purchase details. Approvers are however, not allowed to revise purchase lines.

- i Note:** You can also request clarification from your mobile device, virtual agent, or by selecting **Ask for Clarification** from the purchase requisition approval record in Sourcing and Purchasing Automation or from **Requisition Approvals** in Source-to-Pay Workspace.

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the to-do you want to work with.
4. Select **Request clarification** from the list.
5. In the **Ask <Shopper Name> for clarification** window, enter the questions that you require clarification for.
6. Select **Submit**.

What to do next

View the clarifications requested by you and other approvers, or ask for more clarifications if required, from the activity stream of that to-do.

Provide clarification on your purchase from ShoppingHub Home

Provide clarification on your purchase by answering the question that the approver has posted regarding your order. Your response to this clarification ensures that the approver understands your exact requirements and has all the necessary information before proceeding with approving or rejecting your purchase request.

Before you begin

To provide clarification on your purchase, you should have received a clarification request from the approver. Only then, this task is displayed to you on your My purchases page on ShoppingHub Home.

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My purchases**.
3. On the **View by purchase** tab, select **View question** on the purchase you want to provide clarification for.
4. In the **Answer question** dialog box, enter your clarification for the approver.
5. Select **Post comment**.

This correspondence is tracked through the activity stream of the corresponding purchase requisition or sourcing request here in Shopping Hub. The same is also tracked through the activity stream of the approval plan in Employee Center.

An email notification is sent to the approver that clarification is provided for the purchase. You can configure this email notification based on your requirements. For details, see [Approval email notification templates](#).

Compare quotes and select a supplier from ShoppingHub Home

Review the quotes that you have received from the various suppliers for the product you had requested sourcing for. These quotes are displayed after the sourcing requests have listed similar suppliers for the product model you requested for. You can choose to award the supplier with the quote that best fulfills your requirements.

Before you begin

To review the quotes that you have received from suppliers, you should have received at least one quote from a supplier for your product. Only then, this to-do is displayed to you on ShoppingHub Home.

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Do one of these actions.

| Action | Description |
|-------------------|---|
| Checkout now | Select the quote that works best for you and proceed to checkout. The quick checkout pane is displayed, with the details for your purchase already filled in. For more information on how to proceed, see Order a product . |
| Reject all quotes | Reject all the quotes if none of them serve your purpose. i Note: When rejecting all quotes, you must provide your justification for rejection on the Reason for rejection window. |

5. Select **Submit**.

Confirm receipt of your order from ShoppingHub Home

Provide confirmation of receipt of the items you ordered that are in pending receipt state from ShoppingHub Home, so that payment is processed to the supplier accordingly. If you have not received the complete order, you can confirm receipt of a part of your order as well with the date when you received them.

Before you begin

To provide confirmation of receipt of your orders, you should have received a part of your order at least, if not the complete order. Only then, this to-do is displayed to you on the **Pending confirmation** tab.

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. On the **Pending confirmation** tab, select the to-do you want to work with.
5. Do one of these actions.

| Action | Description |
|-------------------|--|
| Received selected | Confirms receipt of the selected orders. On the Confirm receipt window, fill in the following fields: <ul style="list-style-type: none"> ◦ Quantity received: Number of items you received from that order. ◦ Date received: Date when you received the items. |
| Received all | Confirms receipt of all the orders. |

| Action | Description |
|--------|---|
| | On the Confirm you received everything window, select the date when you received your ordered items. |

6. Select **Submit**.

View shipment details of your order from ShoppingHub Home

View the current status of your ordered items, along with the tracking number and carrier name, from the **Shipment details** tab under your receipt to-dos.

Before you begin

To view the status of your ordered items, you should have received dispatch notice regarding your orders from the supplier. Only then, this **Shipment details** tab is displayed to you on ShoppingHub Home.

Role required: sn_shop.shopper

About this task

You can view the status, tracking number, and carrier name for your ordered items that the supplier has dispatched from their end.

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Select the to-do you want to work with.
5. Select the **Shipment details** tab.

Details of the dispatched items, including tracking number, carrier name, and status, are displayed.

Confirm meeting a milestone for your service from ShoppingHub Home

Provide confirmation from ShoppingHub Home on whether the supplier has met a milestone for a service you had ordered, so that payment can be processed to the supplier for that milestone. If a milestone hasn't been met by the due date, you can raise a cancel request or propose a new completion date.

Before you begin

To provide confirmation on meeting the milestone for a service you had ordered, you should have received the service by the due date or milestone that you had defined when placing the order. The milestone is displayed on the completion date defined on the milestone.

Role required: sn_shop.shopper

About this task

You can provide confirmation on whether the supplier has met a milestone for a service you had ordered, from the **Other to-dos** tab. This confirm milestone completion task is automatically created by the system on the target completion date. This task is active for a day, after which it becomes overdue.

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Select the to-do you want to work with.
5. Do one of these actions.

| Action | Description |
|---------------------|--|
| Additional comments | <p>Provide your response, if any, and select Complete.</p> |
| Defer completion | <p>Push the milestone to a later date.</p> <p>On the Defer completion window, provide your reason for changing the due date, pick a new due date, and select Submit.</p> <p>Note: Milestones can be received in percentage and amount, but can only be deferred if not complete until they're processed for the full milestone. This is because milestones are parts of the whole, and partials aren't supported.</p> |
| Cancel milestone | <p>Cancel the milestone altogether.</p> <p>On the Cancel milestone window, provide your reason for canceling the milestone, and select Submit.</p> |

Review your invoice acknowledgment from ShoppingHub Home

Review your invoices that require acknowledgment. Invoice acknowledgments are sent to the recipient of the line and can be marked as correct or incorrect. Your action on these to-dos moves the invoices to their respective workflows.

Before you begin

Note: If you are a new customer, or an existing customer who has upgraded and installed the Shopping Hub (sn_spend_uib) plugin, this task isn't applicable for you and isn't displayed in your list of to-dos. See [Review your service acknowledgment task from ShoppingHub Home](#) to view your relevant tasks. However, if you choose to continue with the existing Source-to-Pay Common Architecture (sn_shop) plugin and skip the Shopping Hub plugin, this task is available for you to work on.

To review your invoice acknowledgments, you should have been assigned as the recipient of the order and received such requests. Only then, this to-do is displayed to you on ShoppingHub Home.

Note: This only applies to orders where the underlying services acknowledgment is defined as invoice acknowledgment.

Role required: sn_shop.shopper

About this task

You can review your invoices from the **Other to-dos** tab. The due date of your invoice acknowledgment task is calculated based on the invoice acknowledgment SLA defined in the back-end, and is configurable.

Procedure

1. Navigate to All > ShoppingHub > ShoppingHub Home.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Select the to-do you want to work with.
5. Select the attachments, if any, that you want to preview or download them.
6. Do one of these actions.

| Action | Description |
|-----------------------|---|
| View purchase | Displays the purchase details associated to that specific invoice line in a separate tab. |
| Mark as incorrect | Marks the specific invoice line as incorrect and moves it to the Rejected state. |
| Nothing is correct | Marks all the invoice lines as incorrect and moves them to the Rejected state. |
| Everything is correct | Marks all the invoice lines as correct and moves them to the Invoice Confirmed state. |

i Note: After marking an invoice line as incorrect, you must select **Send back for correction** to update the invoice state in the back-end.

Review your service acknowledgment task from ShoppingHub Home

Review and acknowledge the receipt status of your ordered service from your supplier from ShoppingHub Home.

Before you begin

i Note: If you're a new customer, or an existing customer who has upgraded and installed the Shopping Hub (sn_spend_uib) plugin, this task is applicable for you and is displayed in your list of to-dos. However, if you choose to continue with the existing Source-to-Pay Common Architecture (sn_shop) plugin and skip the Shopping Hub plugin, this task isn't available for you to work on. See [Review your invoice acknowledgment from ShoppingHub Home](#) to view your relevant tasks.

Service acknowledgment tasks are auto-created the first time on purchase order creation, and are triggered on a monthly basis by the Create Service Acknowledgment Task scheduled job. This scheduled job automatically picks all purchase order lines that have started and are yet to reach their end dates, and have some remaining amount or percentage or quantity to be delivered.

To review your service acknowledgments, your service request should have been reviewed and approved by a Procurement Specialist and converted to a purchase order. Only then, this to-do is displayed to you on ShoppingHub Home.

Role required: sn_shop.shopper

About this task

You can review your service acknowledgment tasks from the **Other to-dos** tab. The due date of your service acknowledgment task is set based on the due date defined by you when placing the order.

Procedure

1. Navigate to All > ShoppingHub > ShoppingHub Home.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. On the **Pending confirmation** tab, select the to-do you want to work with. The to-do details page is displayed with information on the order summary and order lines.
5. Do one of these actions.

| Action | Description |
|-------------------------------|--|
| Received | <p>Displays the Confirm what you received dialog box, where you can enter the received quantity of your order for that particular month (if the unit of the supplier product is individual unit), or the received percentage (if the unit of the supplier product is fixed fee). This information is now displayed in the Confirmed tab.</p> <p>Note: If the purchase order line has fixed fee as the unit, then it is automatically set up for percentage.</p> |
| I didn't receive any services | <p>Displays the Confirm you didn't receive any services dialog box to record your confirmation for that particular month. On confirmation, the task is marked as Closed Complete, and the scheduled job will run to create a new task for you the following month.</p> |
| Mark to-do as complete | <p>Displays the Confirm you didn't receive all services dialog box to record your confirmation for that particular month. On confirmation, the task is marked as Closed Complete.</p> |

Note: Every time you confirm receiving a percentage of your order, a receipt of type Services is automatically created. This receipt can be viewed by a Procurement Specialist against your purchase order on Source-to-Pay Workspace.

View a link or video from ShoppingHub Home

Complete your task by viewing a link or video that your procurement specialist has assigned to you, directly from ShoppingHub Home. This action is listed as a task under **My to-dos**.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Select the task that you want to work with.
5. View details of the task, such as the task number, due date, if any.
6. View the link or video in the task.
In case of CORS error in the network tab of your web page, ensure that your procurement specialist has provided the correct URL. For example, when rendering a YouTube video, ensure that the video source link or embedded link is provided while creating the task.
7. Select **Complete**.

Upload a document from ShoppingHub Home

Complete the task that your procurement specialist has assigned to you by uploading a document, directly from ShoppingHub Home. This action is listed as a task under **My to-dos**.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Select the task that you want to work with.
5. View details of the task, such as the task number, due date, if any.
6. Select **Select** to select one or more documents from your local drives, as required. Alternatively, you can drag and drop documents from your local drives to attach them.
7. In the **Upload a file** dialog box, select **Upload** to attach the documents.
Once attached, you have the option to download, remove, or rename the documents, if required.
8. Select **Mark as complete**.

Sign a document using DocuSign from ShoppingHub Home

Provide your consent by signing a document using DocuSign, directly from ShoppingHub Home. This action is listed as a task under **My to-dos**.

Before you begin

Role required: sn_shop.shopper, supplier

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Select the task that you want to work with.
5. View details of the task, such as the task number, due date, if any.

6. On the displayed document, select **Continue**.
7. Select **Start**.
8. Follow the arrowhead and select **Sign**.
9. Select **Finish**.

Sign a document from ShoppingHub Home

Provide your consent by signing a document, directly from ShoppingHub Home. This action is listed as a task under **My to-dos**.

Before you begin

Role required: sn_shop.shopper, supplier

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
 2. Select the user icon and select **My to-dos**.
 3. Select the **Other to-dos** tab.
 4. Select the task that you want to work with.
 5. View details of the task, such as the task number, due date, if any.
 6. On the displayed document, you can choose to type your signature or draw it.
Based on what you select, you can either write your full name in the **Full name** field, or draw a digital signature in the box provided.
- Note:** If you aren't happy with what you see in the document, you can select **I don't want to sign this document**. You must enter your reason for declining, followed by **Decline and complete** to complete the task.
7. Select **Accept and complete**.

Complete a form from ShoppingHub Home

Fill in a form that your procurement specialist has sent to you, and submit it directly from ShoppingHub Home. This action is listed as a task under **My to-dos**.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.
2. Select the user icon and select **My to-dos**.
3. Select the **Other to-dos** tab.
4. Select the task that you want to work with.
5. View details of the task, such as the task number, due date, if any.
6. On the displayed form, fill in the details as required.
7. Optional: Select **Save as** if you want to save a draft in your requests and plan to complete it later.
8. Select **Submit**.

Create an employee credit

Manage and track credits that an employee shopper is allocated to in ShoppingHub, by creating an employee credit. If a credit already exists, allocated to an employee, it shows up as a payment option in ShoppingHub, and is created as a cost allocation entry at the backend.

Before you begin

Role required: sn_shop.shopping_hub_admin

About this task

You can create a credit for an employee shopper from ShoppingHub.

Procedure

1. Navigate to **All > ShoppingHub > Manage Employee Credits > Allocated Credits**.
2. Select **New**.
3. On the form, fill in the fields.

Employee Credit form

| Field | Description |
|----------------------------|---|
| Credit name | The name you assign to an employee credit. This is visible to the shopper who is assigned the credit. |
| Number | Unique identifier for this credit. |
| Description | Additional information about the credit. This is visible to the shopper who is assigned the credit. |
| Allocated to | Search for and select the user who this authorized to shop with this allocated credit. |
| Responsible cost center | The cost center responsible for the user you selected in the Allocated to field. This is auto-populated and read-only. |
| Amount allocated | The amount of credit a shopper is allocated to spend. |
| Expiration date | The date after which a credit allocated to a shopper is no longer valid. |
| Payback options | The number of paycheck periods an employee is allowed to pay back costs in excess of the allocated credit amount. |
| Restrict Use to Categories | Search for and select the categories for which employee credits can be used to purchase products in the category. You must select a value for either the Restrict Use to Categories or Restrict Use to Products fields to create the record. |
| Restrict Use to Products | Search for and select the products for which employee credits can be used to purchase products related to the product model. You must select a value for either the Restrict Use to Categories or Restrict Use to Products fields to create the record. |
| Status | Specify the current status of a credit. The options are Pending Purchase, Credit Consumed, and Credit Expired. If you save the status as Credit Consumed or Credit Expired, the form becomes read-only. |
| Allocated | Specifies how the employee credit was allocated. The options are Manually and By Credit Allocation Rule. |

| Field | Description |
|------------------------|--|
| Allocated by | The employee who created and allocated the credit to another employee. This field is required if credit allocation is done manually. |
| Credit allocation rule | The rule that generated this employee credit. This field is visible only if allocation is done through a credit allocation rule. |

4. Select **Submit**.

Create a credit allocation rule

Assign an amount of credit that an employee shopper can use in ShoppingHub, by creating a condition-based allocation rule.

Before you begin

Role required: sn_shop.shopping_hub_admin

To create a credit allocation rule, you must have already created some credits to be assigned to employee shoppers. For more information, see [Create an employee credit](#).

About this task

You can create a condition-based credit allocation rule for an employee shopper from ShoppingHub.

Procedure

1. Navigate to **All > ShoppingHub > Manage Employee Credits > Credit Allocation Rules**.
2. Select **New**.
3. On the form, fill in the fields.

Credit Allocation Rules form

| Field | Description |
|--------------------------|---|
| Credit name | The name you assign to an employee credit. This is visible to the shopper who is assigned the credit. |
| Active | Option to decide if employee credits are to be created for this rule. |
| Description | Additional information about the credit. This is visible to the shopper who is assigned the credit. |
| One time credit | Option to decide if credits are to be assigned just once to employees that meet the conditions of this rule. |
| Amount allocated | The amount of credit a shopper is allocated to spend. |
| Credit expires after | The amount of time a credit remains active for a shopper to use. |
| Allocation based on | Specify the conditions that determine if credits are to be assigned automatically. The options are Inventory Asset and User. |
| Specify asset conditions | Specify the conditions that must be met for a credit to be created. This field is visible only if you select Inventory Asset in the Allocation based on field. |

| Field | Description |
|----------------------------|---|
| Specify user conditions | Specify the conditions that must be met for a credit to be created. This field is visible only if you select User in the Allocation based on field. |
| Payback options | The number of paycheck periods an employee is allowed to pay back costs in excess of the allocated credit amount. |
| Restrict Use to Categories | Search for and select the categories for which employee credits can be used to purchase products in the category. You must select a value for either the Restrict Use to Categories or Restrict Use to Products fields to create the record. |
| Restrict Use to Products | Search for and select the products for which employee credits can be used to purchase products related to the product model. You must select a value for either the Restrict Use to Categories or Restrict Use to Products fields to create the record. |

4. Select **Submit**.

What to do next

Use the related list of the credit allocation rule form to view the employee credits associated with this rule.

Create a paycheck period

Assign a time period for an employee shopper to pay back costs in excess of the allocated credit amount in ShoppingHub Home, by creating a paycheck period.

Before you begin

To create a paycheck period, you must have already created some credits to be assigned to employee shoppers. For more information, see [Create an employee credit](#).

Role required: sn_shop.shopping_hub_admin

About this task

You can create a paycheck period for an employee shopper from ShoppingHub.

Procedure

1. Navigate to **All > ShoppingHub > Manage Employee Credits > Paycheck Periods**.
2. Select **New**.
3. In the **Number of paychecks** field, enter a number to create a record for a paycheck period.
4. Select **Submit**.

Shopping controls overridden by credits

As a shopper, you can use employee credits to purchase a restricted set of supplier products based on the category or product model. At the same time, you could be restricted, via Shopping Control, from viewing those supplier products.

In this case, the employee credits allocated to you override the shopping control settings and temporarily allow you to view and shop those specific supplier products which are tied to these employee credits. Once this credit is consumed or reaches expiry, the shopping control settings resume precedence.

Consider these scenarios:

Scenario 1: A shopping control exists, according to which you, from the marketing department, cannot view and shop any supplier product in the IT hardware category. An employee credit for hardware refresh is created for you. This allows you to search, browse, and shop from the laptop category, which is a child of the IT Hardware category. You can also view any child category of the laptop category, as well as any supplier product within these categories.

Scenario 2: A shopping control exists, according to which you, from the marketing department, cannot view and shop any supplier product in the IT hardware category. An employee credit for hardware refresh is created for you. This allows you to search, browse, and shop MacBook product models, which comes under the laptop category, whose parent category is IT hardware. However, you are not able to view any other products within the laptop or IT hardware categories because the credit does not allow you access to the other products in this category.

Shop with employee credits

Shop products from the various categories in ShoppingHub Home with employee credits that are allocated to you. You can search, browse, and shop from all open categories as well as from those restricted categories for which credits have been assigned to you.

Before you begin

To shop using employee credits, you must have some employee credits allocated to you by the ShoppingHub administrator. For more information on how employee credits allow you access to restricted categories, see [Shopping controls overridden by credits](#).

Role required: sn_shop.shopper

About this task

You can search, browse, and shop products from the various categories in ShoppingHub Home with employee credits that are allocated to you for those categories.

Procedure

1. Navigate to **All > ShoppingHub > ShoppingHub Home**.

2. Select the **Available Credits** tab.

The available credits and their product categories are displayed.

 **Note:** You don't see the **Available Credits** tab if:

- You don't have any credits allocated to you.
- You've fully or partially consumed your credits.
- Your credits have expired.

3. Navigate to the credit that you want to shop with, and select **Shop this credit**.

4. On the **Filters** form, fill in the fields.

Filters form

| Field | Description |
|-----------|--|
| Get it by | Date by which you want the product. |
| Supplier | Option to filter by the type of the supplier. The options are Onboarded and Preferred. Select one or more suppliers from the list to refine your search. |
| Price | Price range of the product. Select a minimum and maximum price to refine your search. |

5. From the search results, select the product you want to shop.
The product details page is displayed.

6. In the **Purchase by** field, select one of these options.

| Option | Description |
|----------|--|
| Quantity | Number of units of the product you want to shop. |
| Budget | Budget you have at your disposal. |

7. Select **Request to buy**.

8. On the quick checkout form, fill in the fields.

| Field | Description |
|-----------------------------------|--|
| Where do you want this delivered? | Location where you want your product to be delivered. The options are: <ul style="list-style-type: none"> ◦ To a saved location ◦ To a work address (already approved) ◦ To somewhere else |
| When do you need this product? | Date range when you want your product to be delivered. The options are: <ul style="list-style-type: none"> ◦ As soon as possible ◦ On a specific date ◦ I have a time frame in mind (a blanket order) |
| Payment method | Method of making the payment. The available credits are displayed here. If the price of the product exceeds the available credit, the remaining balance amount is scheduled for deduction from future paychecks based on the configured payback options. |

9. Accept the terms and conditions for credit purchases for paycheck payments.

10. Based on whether the purchase is for an existing project, select one of these options.

| Option | Description |
|--------|---|
| No | Purchase isn't for an existing project. |

| Option | Description |
|--------|---|
| Yes | Purchase is for an existing project. Enter the project details as required. |

11. Add any supporting documents for this purchase as attachments, if applicable.

12. Select **Submit request**.

i Note: You don't have the option to shop with partial credits. Any unused credit automatically expires when you successfully place an order.

What to do next

You can view the allocation type and allocation amount breakup from the purchase requisition that is created, by navigating to the Cost Allocations related list of the associated purchase requisition line.

Alerts and email notifications from ShoppingHub

Several alerts and email notifications are triggered from ShoppingHub. This may be a result of your action, an assignment for you, or to keep you updated on the status of your purchases, including blanket contracts.

Alerts

You receive an alert triggered from ShoppingHub when:

- You switch the user that you're shopping as in ShoppingHub
- You switch to shop as someone else's delegate
- You submit a revision
- You complete a to-do that isn't an approval
- You approve a purchase
- You reject an approval
- ShoppingHub has a global fail or fails to complete an action, due to server issue

Email notifications

ShoppingHub sends out emails in a predefined template and uses flow designer to trigger the different email conditions. You can use the deep links that are provided in the emails to view relevant details. You're notified through email when:

- You submit a purchase request, irrespective of approval requirement (for one or multiple purchase lines)
- Your delegate submits a purchase request, irrespective of approval requirement (for one or multiple purchase lines)
- You submit a purchase request, irrespective of approval requirement that is automatically merged with an existing purchase request (for one or multiple purchase lines)
- A purchase request that triggers an approval rule, is submitted, and you're assigned as an approver for that purchase.

i Note: As an approver, you can approve the purchase from the email itself. For details, see [Approval email notification templates](#).

- An approver requests clarifications on your purchase request

- An approver requests clarifications on your sourcing request
- You respond to clarification requests on your purchase request
- You respond to clarification requests on your sourcing request
- A purchase is manually merged with an existing purchase, irrespective of approval requirement
- A merged purchase is approved, partially approved, or rejected
- You submit a sourcing request
- Your delegate submits a sourcing request
- Your purchase is approved, partially approved, or rejected and canceled
- Your sourcing request is approved, partially approved, or rejected
- You initiate or submit a purchase revision, irrespective of approval requirement
- Your purchase revision is confirmed, approved, rejected, or canceled
- Your purchase is ordered from a supplier
- Purchasing permissions are added for you on a blanket purchase order (for one or multiple purchase lines)
- A blanket purchase order, for which you have purchasing permissions, is created or open (for one or multiple purchase lines)
- Seven days are left for a blanket purchase order contract to expire (for one or multiple purchase lines)
- 20% budget is left on a blanket purchase order (for one or multiple purchase lines)
- No budget is left on a blanket purchase order (for one or multiple purchase lines)
- A blanket purchase order is closed (for one or multiple purchase lines)
- You're assigned as a delegate
- You're no longer assigned as a delegate
- An item is removed from your cart or Purchase later section
- You receive a delivery
- A purchasing task is assigned to you
- A breached approval review task is assigned to you
- You're mentioned in an activity stream
- A new to-do is created and assigned to you
- A to-do assigned to you is due today or overdue
- A confirm receipt to-do is assigned to you
- A confirm milestone to-do is assigned to you
- A to-do requesting you to provide more information is assigned to you
- A select supplier to-do is assigned to you
- An invoice approval to-do is assigned to you
- A purchase approval to-do is assigned to you
- A purchase approval to-do is updated or canceled
- An approval to-do is assigned to you as a result of a revision or merge reassessment

Note: You can adjust the email trigger conditions and content in flow designer or email scripts, if necessary. You can also choose to fetch and use other details that aren't displayed in the email by default, such as order type for purchase requisitions, product type or request type for sourcing requests, and so on. For detailed information on email templates and how to work with them, see [Email templates](#). You can also configure the email layout, and change the background color or font color, for example. The html field in the email layout record must be modified to achieve this. For detailed information on email layouts and how to work with them, see [Email layouts](#).

Prioritize ShoppingHub email notifications

To ensure that your customers receive the focused ShoppingHub email notifications, over the global notifications that are sent by default from the platform team, you can manually add a condition to suppress them.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Notification > Notifications**.
2. Search for and open the **Activity Stream @Mention Email** record.
3. Select the hyperlink on the information message to edit it.
4. On the **When to send** tab, add the condition: "Table does not contain sn_shop_"
5. Save the record.

Shopping Hub Mobile

The ServiceNow Shopping Hub Mobile app enables you to engage with procurement organizations from a mobile device. Shopping Hub Mobile is available on the Now Mobile app and is supported on iOS and Android devices.

To access Shopping Hub Mobile from your mobile device, you must first download the Now Mobile application on an iOS platform from the Apple App Store or on an Android platform from the Google Play Store.

Shoppers can use Shopping Hub Mobile to complete to-dos assigned to them, view, track, and revise their purchases, request for products or services that they don't see listed on the ShoppingHub portal, and submit quotes from vendors for review by the procurement team.

Features

The Shopping Hub Mobile app provides the following capabilities to shoppers:

- View and complete your to-dos: Each of these to-dos displays specific information and have specific actions for the shopper to complete.
 - Review and approve purchase requisitions
 - Provide more details on your purchase
 - Request clarification on a purchase request (approver task)
 - Provide clarification on your purchase
 - Compare quotes and select a supplier
 - Confirm receipt of your order
 - View shipment details of your order

- Confirm meeting a milestone for your service
- Review invoices associated with your purchase
- View, track, and revise your purchases
- Requesting for products or services that you don't see on ShoppingHub
- Submit quotes from vendors

Install ShoppingHub Mobile

Install the Shopping Hub Mobile application from the ServiceNow Store.

Before you begin

Role required: admin

Role required: admin

Procedure

1. Navigate to **System Applications > All Available Applications > All**.
2. Find the application using the filter criteria and search bar.
You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow store.
3. Select **Install**.
4. In the Application installation dialog box, review the application dependencies.

If your application requires other applications, you need to install them first if they are not already installed.

Installing your application also automatically installs dependent applications or plugins if they are not installed already.
5. If demo data is available and you want to install it, select **Load demo data**.
Some applications include demo data, which are sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.
6. Select **Install**.

Enable the mobile experience for ShoppingHub Mobile

Enable the mobile experience for Shopping Hub Mobile so that users can complete to-dos assigned to them and view and track their purchases from their mobile device.

Before you begin

Role required: admin

Procedure

1. Install the Shopping Hub Mobile application plugin on your instance.
2. Download the Now mobile application on an iOS platform from the Apple App Store or on an Android platform from the Google Play Store.

For more information on using this mobile app, see [Now Mobile app](#) topic.
3. Add the instance that has Shopping Hub Mobile installed to the Now Mobile application and log in to access the application data on your mobile device.

What to do next

[Log in to an instance with a mobile app](#)

Shopper to-dos on your mobile

As a shopper, you can complete actions on to-dos related to your purchases.

To-dos are specific to the logged in user.

Your to-dos are highlighted with color coding to help you quickly understand their due dates, if any. A red badge with the number of days is displayed on the to-do that is overdue. Similarly, a yellow badge with the number of days is displayed if a to-do has a due date approaching in seven days. A grey badge with the number of days is displayed if a to-do has a due date more than seven days.

You can open any to-do to view the details of the task and the purchase that led to the creation of the to-do. You can also view the entire purchase for specific to-dos.

Approve your purchase requisition from your mobile device

As a manager, provide approvals for purchase requisitions that are in pending approval state from your mobile application. Purchase requisition approvals are generated when an approval rule is triggered on meeting certain criteria. You can choose to reject them along with your reasons for rejection. Your action on these to-dos moves them to their respective workflows.

Before you begin

When a purchase approval to-do is assigned to you, it is displayed on the Now Mobile **My Tasks** tab, in addition to the ShoppingHub desktop to-dos page.

Role required: sn_shop.shopper

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the approval to-do you want to work with.
4. View details of the approval request, such as requester name, total amount or budget requiring approval, and request ID at the header level.
At the line level, you can view the details of the requested items, such as product, approval amount, approval status, unit, price, quantity, total line amount, line number, reason for purchase, product type, delivery location, expected delivery date, and so on. You can also filter the purchase requisition lines by their approval status, and view associated activities and attachments in separate tabs therein.
5. On the **To-do** tab, select **Pending approval**.
6. Do any of the following actions.

| Action | Description |
|-------------|--|
| Approve | Swipe left on the line item, and select Approve to approve it. |
| Reject | Swipe left on the line item, and select Reject to reject it. |
| Approve all | Tap on the Actions icon, and select Approve all to approve the entire purchase. |

| Action | Description |
|------------|--|
| Reject all | Tap on the Actions icon, and select Reject all to reject the entire purchase. |

You can view your approved and rejected to-dos in the **To-do** tab, listed after your pending approvals. You can also view the details of the purchase that led to the creation of this to-do in the **Purchase** tab.

- **Note:** When rejecting a line item or an entire purchase, you must provide your justification for rejection in the **Response** field.

7. Tap the Next icon.

Provide more details on your purchase from your mobile device

Provide additional information on your purchase by answering the follow-up questions that the procurement specialist has posted regarding your order from your mobile application. Your response to these to-dos ensures that the procurement specialist understands your exact requirements and has all the necessary information before proceeding with the sourcing request.

Before you begin

A procurement specialist can request for more information about a sourcing request by assigning a to-do. When this more information needed request is assigned to you, it is displayed on the Now Mobile **My Tasks** tab, in addition to the ShoppingHub desktop to-dos page.

Role required: sn_shop.shopper

About this task

You can provide more information on the queries that the procurement buyer has posted for them to proceed with the sourcing request.

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the to-do you want to work with.
4. Select **Provide more information**.
5. Provide the necessary information in the **Response** field to address the procurement buyer's queries.
6. Tap the Next icon.
You can view the details of the purchase that led to the creation of this to-do in the **Purchase** tab. Here, you also have the option to view the entire purchase if you so desire.

Request clarification on a purchase request from your mobile device

As an approver, request clarification from the shopper on a purchase requisition if you have questions that you need answers to before approving or rejecting the purchase requisition, from your mobile application. Purchase requisition approvals are generated when an approval rule is triggered on meeting certain criteria.

Before you begin

To request clarification on a purchase requisition, you should be assigned as an approver for the shopper requesting the purchase. Also, specific approval rules must be triggered on

meeting certain criteria. Only then, this approval to-do is displayed to you on the Now Mobile **My Tasks** tab.

Note: You can also request clarification from your ShoppingHub desktop, virtual agent, or by selecting **Ask for Clarification** from the purchase requisition approval record in Sourcing and Purchasing Automation or from **Requisition Approvals** in Source-to-Pay Workspace.

Role required: sn_shop.shopper

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the to-do you want to work with.
4. On the **To-do** tab, select **Pending approval**.

Note: You can view the clarification provided by the shopper by selecting **Requests for clarification**.

5. Tap on the Actions icon, and select **Request clarification**.
6. Enter the clarification you require in the **Question** field.
7. Tap the Next icon.

Provide clarification on your purchase from your mobile device

Provide clarification on your purchase by answering the question that the approver has posted regarding your order, from your mobile application. Your response to this clarification ensures that the approver understands your exact requirements and has all the necessary information before proceeding with approving or rejecting your purchase request.

Before you begin

To provide clarification on your purchase, you should have received a clarification request from the approver. Only then, this task is displayed to you on the Now Mobile **My Purchases** tab.

Role required: sn_shop.shopper

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Purchases**.
3. Open the purchase you want to provide clarification for.
4. On the **More Info** tab, select **Requests for clarification**.
5. Select the question you want to provide clarification for.
6. Tap on the Actions icon, and select **Provide clarification**.
7. Provide your clarification in the **Clarification answer** field.
8. Tap **Submit**.

Compare quotes and select a supplier from your mobile device

When you raise a sourcing request, the procurement team works with suppliers to get quotes for the good or service you are looking for. When you receive these quotes, you can review

them from your mobile application. You can choose to award the supplier with the quote that best fulfills your requirements.

Before you begin

To review the quotes that you have received from suppliers, you should have received at least one quote from a supplier for your product or service, and then have a compare quote task assigned to you. Then, the to-do is displayed on the Now Mobile **My Tasks** tab, in addition to the ShoppingHub desktop to-dos page.

Role required: sn_shop.shopper

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the approval to-do you want to work with.
4. On the **To-do** tab, select **Quotes to review**.
5. Do any of the following actions.

| Action | Description |
|----------------|--|
| Reject | Swipe left on the line item, and select Reject to reject the purchase line. |
| Request to buy | Swipe left on the line item, and select Request to buy to proceed with the supplier and perform a quick checkout. |

i Note: When rejecting a quote, you must provide your justification in the **Reason for rejection** field.

6. Tap the Next icon.

Confirm receipt of your order from your mobile device

Provide confirmation of receipt of the items you ordered that are in pending receipt state, from your mobile application, so that payment is processed to the supplier accordingly. If you have not received the complete order, you can confirm receipt of a part of your order as well with the date when you received them.

Before you begin

To provide confirmation of receipt of your orders, you should have received a part of your order at least, if not the complete order.

Role required: sn_shop.shopper

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the receipt to-do you want to work with.
4. On the **To-do** tab, select **Pending confirmation**.
5. Do one of these actions.

| Action | Description |
|---------------------------|--|
| Received | <p>Swipe left on the line item, and select Received to confirm receipt of the selected orders.</p> <p>On the Confirm receipt screen, fill in the following fields:</p> <ul style="list-style-type: none"> ◦ Quantity received: Number of items you received from that order. ◦ Date received: Date when you received the items. |
| Received (Details screen) | <p>Tap on the line item to view the Details screen with the list of all the items pending deliveries. Select Received to confirm receipt of all the orders.</p> <p>On the Confirm receipt screen, fill in the following fields:</p> <ul style="list-style-type: none"> ◦ Quantity received: Number of items you received from that order. ◦ Date received: Date when you received the items. |

You can view your received deliveries in the **To-do** tab, listed after your pending confirmation tasks. You can also view the details of the purchase that led to the creation of this to-do in the **Purchase** tab.

6. Tap the Next icon.

View shipment details of your order from your mobile device

View the current status of your ordered items, along with the tracking number and carrier name, in your receipt to-dos, from your mobile application.

Before you begin

To view the status of your ordered items, you should have received dispatch notice regarding your orders from the supplier.

Role required: sn_shop.shopper

About this task

You can view the status, tracking number, and carrier name for your ordered items that the supplier has dispatched from their end.

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the receipt to-do you want to work with.
4. On the **To-do** tab, select **Shipment details**.
Details of the dispatched items, including tracking number, carrier name, and status, are displayed.

Confirm meeting a milestone for your service from your mobile device

Provide confirmation on whether the supplier has met a milestone for a service you had ordered, from your mobile application, so that payment can be processed to the supplier for that milestone. If a milestone has not been met by the due date, you can choose to push the due date to a later date.

Before you begin

To provide confirmation on meeting the milestone for a service you had ordered, you should have received the service by the due date or milestone that you had defined when placing the order. The milestone is displayed on the completion date defined on the milestone.

Role required: sn_shop.shopper

About this task

You can provide confirmation on whether the supplier has met a milestone for a service you had ordered. This confirm milestone completion task is automatically created by the system on the target completion date. This task is active for a day, after which it becomes overdue.

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the to-do you want to work with.
4. On the **To-do** tab, do one of these actions.

| Action | Description |
|-------------------|--|
| Confirm milestone | Select Confirm milestone and provide your response, if any, in the Additional comments field. |
| Defer completion | Tap on the Actions icon, and select Defer completion to push the milestone to a later date. On the Defer completion screen, pick a new completion date and provide your reason for changing the date. |
| Cancel milestone | Tap on the Actions icon, and select Cancel milestone to cancel the milestone altogether. On the Cancel milestone screen, provide your reason for canceling the milestone. |

You can also view the details of the purchase that led to the creation of this to-do in the **Purchase** tab. Here, you also have the option to view the entire purchase if you so desire.

5. Tap the Next icon.

Review invoice acknowledgment task from your mobile device

Review invoices that require acknowledgment from your mobile application. Invoice acknowledgments are sent to the recipients of the purchases, and each line associated with an invoice can be marked as correct or incorrect. Your action on these to-dos moves the invoices to their respective workflows.

Before you begin

When you are assigned as the recipient of an order that requires invoice acknowledgment, and that invoice is sent to you for acknowledgment by the procurement team, an invoice acknowledgment task is displayed on your Now Mobile **My Tasks** tab, in addition to the ShoppingHub desktop to-dos page.

Note: This only applies to orders where the underlying services acknowledgment is defined as invoice acknowledgment.

Role required: sn_shop.shopper

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Tasks**.
3. Open the to-do you want to work with.
4. On the **To-do** tab, select **Pending approval**.
5. Do any of these actions.

| Action | Description |
|--------------------------|--|
| Mark all lines correct | Marks all the invoice lines as correct and moves them to the Invoice Confirmed state. |
| Review invoice lines | Displays the details of all the invoice lines for your review. |
| Mark as correct | Swipe left on an invoice line and select Mark as correct to move it to the Confirmed state. |
| Mark as incorrect | Swipe left on an invoice line and select Mark as incorrect to move it to the Rejected state. |
| Mark all lines correct | Tap on the Actions icon and select Mark all lines correct to move all the invoice lines to the Invoice Confirmed state. |
| Mark all lines incorrect | Tap on the Actions icon and select Mark all lines incorrect to move all the invoice lines to the Rejected state. |
| Approve | Tap on the invoice line and select Approve to move it to the Confirmed state. |
| Mark incorrect | Tap on the invoice line and select Mark incorrect to move it to the Rejected state. |

My purchases on your mobile

As a shopper, you can view all the purchases you made from your shopping account, view their statuses, and revise your purchases.

As a ShoppingHub Administrator, you can configure your mobile instance to display My Purchases on your landing page. For details, see [Display My Purchases on your mobile instance](#).

The fulfilment status of your individual purchases are flagged for your quick reference.

Your purchases are also highlighted with color coding to help you quickly understand their due dates, if any. A red badge is displayed on a purchase if:

- Any of the purchasing tasks associated with the purchase requisition line or purchase order line are overdue.
- Any of the milestones associated with the purchase order line are overdue.
- Any of the receipt tasks associated to the parent purchase order are overdue.

Similarly, a yellow badge is displayed if any of the above conditions have a due date approaching in seven days. A grey badge is displayed if any of the above conditions have a due date more than seven days.

You can open any purchase to view the details of the purchase and more information associated to your purchase, as applicable, such as additional quotes, receipts, prepayments, and other related lists.

You can track the updates on a selected order from **Activity > Activity and Attachments > Activity**. You can also compose a message and tag a person you want to address, with "@<primary contact name>", in the **Add Comment** field.

You also have the option to view and upload attachments associated with a purchase from **Activity > Activity and Attachments > Attachments**.

Filter

You can filter your orders by:

- **Open:**
 - All purchase lines that are not in the state Closed Rejected, Closed Canceled, Closed Complete, or Closed No Decision, and the parent sourcing request, negotiation, or purchase requisition not in any of the respective closed states.
 - This is the default option.
- **Closed:**
 - All purchase order lines that are in the state Closed Complete, Closed Paid, or Closed Canceled.
 - All purchase lines that are in the state Closed Rejected, Closed Canceled, Closed Complete, or Closed No Decision.
 - Where a purchase order line exists, the corresponding purchase line is not visible.
- **All:** All the orders, irrespective of their state. Where a purchase order line exists, the corresponding purchase line is not visible.

Display My Purchases on your mobile instance

As a ShoppingHub Administrator, you can configure your mobile instance to display My Purchases on your landing page. This is a one-time activity.

Before you begin

Role required: sn_shop.shopping_hub_admin

About this task

You can perform this activity only from your desktop.

Procedure

1. Navigate to **All > System Mobile > Applet Launchers**.
2. Select the **Homepage** record.
3. Select the **Body** tab.
4. Select the **My Items** section.
5. Select the hyperlink on the information message to edit it.
6. In the **Applets** field, search for and add **My Purchases**.
7. Select **Update**.

View and revise your purchase from your mobile device

View all the purchases you made from your shopping account, view their status, and revise your purchases from your mobile application.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Log in to your instance in the Now Mobile application.
2. Select **My Purchases**.
3. Open the purchase you want to work with.
4. Do one of these actions.

| Action | Description |
|--|---|
| View your purchase details | On the Purchase tab, view the details of your purchase, such as quantity, recipient, delivery location, start date, end date, subtotal, tax, purchase reason, and so on. |
| View more information on your purchase | Select the More Info tab to view more information associated to your purchase, such as additional quotes, receipts, prepayments, and other related lists. |
| Revise purchase | Tap the Actions icon to revise your purchase. On the Revise purchase screen, enter the revised quantity and delivery location, and tap the Next icon. |

Service portal configuration for ShoppingHub

As an admin, you can configure your service portal such that shoppers who are on the portal can quickly access ShoppingHub and even view purchasing and approval to-dos assigned to them.

You can perform these configurations:

- [Add a ShoppingHub Navbar link](#)
- [Add a ShoppingHub icon link](#)
- [Add a ShoppingHub widget](#)
- [Verify and update search sources](#)

Add a ShoppingHub Navbar link to your service portal

You can add a ShoppingHub Navbar link to your service portal header menu so that shoppers can navigate from the service portal to the ShoppingHub portal with a single select.

Before you begin

Role required: admin or sp_admin

Procedure

1. Navigate to **All > Service Portal > Portals**.
2. From the Service Portals list, select the active service portal.

Note: A green dot to the left of the list item indicates that it is active.

3. On the **Main menu** field, select the **Preview this record** icon.

4. Select **Open Record**.

5. Select **New**.

6. On the Menu Item form, fill in these fields:

- a. In the **Label** field, enter **ShoppingHub**.
- b. In the **Type** field, select **URL**.
- c. In the **Order** field, enter **300**.
- d. In the **HREF / URL** field, enter **/now/shopnow?ref=sp_navbar**.
- e. In the **URL target** field, enter **blank** so that it opens in a new tab.

Note: It is recommended that you use these settings. However, you can configure this otherwise as well.

7. Select **Submit**.

Add a ShoppingHub icon link to your service portal

You can add a ShoppingHub icon link to your service portal icons menu so that shoppers can navigate from the service portal to the ShoppingHub portal with a single select.

Before you begin

Role required: admin or sp_admin

Procedure

1. Navigate to **All > Service Portal > Service Portal Configuration > Designer**.
2. From the Service Portal Designer, select the Service Portal home page.
3. From **Layouts**, select **Container** and drag it onto the page.

Note: You must add a 4-column container here.

4. From **Widgets**, drag **Icon Link** and drop it in the container.
5. On the **Icon Link** container, select the **Edit** icon.
6. On the Instance with Link form, fill in these fields:

- a. On the **Type** field, select **URL**.
- b. In the **HREF / URL** field, enter **/now/shopnow?ref=sp_icon**.
- c. In the **Title** field, enter **Buy something**.
- d. In the **Short description** field, enter **Visit our procurement portal to purchase goods or services from any supplier**.
- e. On the **Glyph** field, select the **Basket** icon.
- f. On the **Template** field, select **Circle icon**.

i Note: It is recommended that you use these settings. However, you can configure this otherwise as well.

7. Select **Save**.

Add a ShoppingHub widget to your service portal

You can add a ShoppingHub widget to your service portal so that shoppers can view the purchasing to-dos assigned to them from the service portal before getting redirected to work on them in the ShoppingHub portal.

Before you begin

Role required: admin or sp_admin

Procedure

1. Navigate to **All > Service Portal > Service Portal Configuration > Designer**.
2. From the Service Portal Designer, select the Service Portal home page.
3. From **Widgets**, drag **My Purchasing To-Dos** and drop it in the page.

What to do next

You can select the individual to-dos or select **View all** to view and work on them in ShoppingHub.

Verify and update search sources on your service portal

You can verify the search sources on your service portal and update them, as required, so that the required data is queried seamlessly from the respective instance tables.

Before you begin

Role required: admin or sp_admin

About this task

Verify that the appropriate search sources, including Suppliers and Purchasing, are listed for your service portal. These should be available by default. If for some reason they aren't, you can add them manually. For more information on search sources, see [AI Search for Sourcing and Procurement Operations](#).

Procedure

1. Navigate to **All > Service Portal > Portals**.
2. From the Service Portals list, select the active service portal.

i Note: A green dot to the left of the list item indicates that it is active.

3. Verify that the Search Sources related list includes Suppliers and Purchasing.

Note: If they aren't listed, here's how you can add them manually.

4. Navigate to **Service Portal > Search Sources**.

5. From the Search Sources list, select Suppliers.

6. On the Portals related list, select **Edit**.

7. On the Edit Members page, move **Service Portal** to your Portals List for Suppliers.

8. Select **Save**.

9. Repeat steps 5-8 for the Purchasing search source.

Procurement Case Management

With the Procurement Case Management application, you can enable your employees to submit procurement cases and access your organization's knowledge base. You can also enable your procurement teams to automate their fulfillment processes so that they can manage and monitor the progress of their tasks.

The Procurement Case Management (PCM) application enables you to manage the complete life cycle of the procurement process.

By using the PCM application, your organization gets the following benefits:

- Procurement process optimization for task routing and tracking the progress of your tasks.
- Knowledge article publish and performance workflows.
- Visibility into the processes, progress, and overall efficiency of the procurement process.
- Integration with IT Asset Management, Software Asset Management, and Contract Management.

Required roles

You can configure the following roles and tasks:

- sn_spend_psd.admin: Configure and make changes to the system properties, such as creating request types and categories.
- sn_spend_psd.manager: View, create, and update procurement cases and tasks.
- sn_spend_psd.agent: Manage the workflows for fulfilling requests and knowledge articles.
- sn_spend_psd.procurement_task_owner: Access and complete task assignments to fulfill the requests.
- sn_spend_psd.requestor: Create procurement cases.

Procurement Case Management Dashboard

The Procurement Case Management Dashboard helps you to track, analyze, and manage your procurement services.

View and track your open requests, by type, department, or knowledge article views.

You can access this dashboard by navigating to **All > Platform Analytics Workspace > Analytics Center > Dashboards**.

For a detailed analysis on each component, select the respective widget or chart.

| Title | Type | Description |
|---|-------------------|--|
| Open Procurement Cases by Type | Bar chart | Track the total requests open for each type and plan fulfillment. |
| Procurement Cases Cycle Time - Last 3 Months | Stacked bar chart | Use the metrics to determine the cycle time of your open procurement cases, grouped by case type or assigned to, within the last three months. |
| Open Procurement Cases by Department | Bar chart | View the requests from each department. |
| Open Procurement Cases | List | Sort, open, and manage the open requests from a central place. |
| Procurement Knowledge Article Views - Last 3 Months | Stacked bar chart | Use the metrics to determine the usefulness of your topics and identify the articles that need improvement, within the last three months. |

For information on how to work with dashboards in configurable workspaces, see [Dashboards in Platform Analytics](#).

For information on how to work with widgets and data visualizations in configurable workspaces, see [Data visualizations in Platform Analytics](#).

Record producers and catalogs in the procurement workflow

Record producers and catalogs ensure the accuracy and availability of the required items in the procurement workflow and standardize the request fulfillment.

Record producers

As a procurement administrator or procurement manager, you can create a record producer for tables and database views that are in the same scope and define the procurement-specific records and standardize the procurement workflows. To set up record producers, perform the following steps:

- Create a new record producer for the Procurement Case Management application.
- Assign a table name as a procurement case.
- Select **Procurement** as the target catalog under **Accessibility > Catalogs**.
- Select **Procurement** under **Accessibility > Category**.

Catalogs and catalog items

Catalog and catalog items ensure the accuracy and availability of the required items in the procurement workflow and standardize the request fulfillment. To set up catalogs, perform the following steps:

- Create procurement-related catalog and catalog items.
- View the existing catalog items.
- Manage your category hierarchy.
- Associate the categories within your catalog.

Related topics

[Service catalog categories](#)

[Record Producer](#)

Create a procurement case for a service

Create a procurement case for a service that you wish to procure. The procurement organization receives your details from the request and works toward the request fulfillment.

Before you begin

Role required: sn_spend_psd.requestor

Procedure

1. Navigate to **Procurement Case Management > Requests**.
2. Select **Create New**.
3. On the form, fill in the fields.

| Field | Description |
|------------------------------|--|
| Number | System-generated unique identifier for the request. |
| Created | Creation date of the request. |
| Request type | Type of the request, such as Corporate Card Request . |
| Request by | Owner of the request. |
| State | Status of the request. |
| Priority | Urgency of the request. |
| Assignment group | Group that can fulfill the request. |
| Assignment to | Person assigned to fulfill the request. |
| Short description | Short description of the request. |
| Purchase modification reason | Reason for purchase modification. |
| Description | Detailed description of the request. |

4. Select **Submit**.

Note: You can also submit procurement cases from the Service Catalog.

What to do next

- Review and edit your request details.
- Track the progress of your request by monitoring the request fulfillment with the procurement organization.

Create a procurement task from a request

Create a task directly from a procurement case. You can also create associated tasks and assign these tasks to fulfill the request.

Before you begin

Role required: sn_spend_psd.psd_admin, sn_spend_psd.agent

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
A Source-to-Pay Workspace agent page is displayed.
2. Select the **List** button on the left pane.
The List pane expands to displays all related lists.
3. Select **Requisitions**.
4. Select the requisition number for which you want to add a task.
5. Select the **Purchasing Tasks** tab.
6. Select **New** on the associated Procurement Tasks list.
The Create a new task pop-up is displayed.
7. In the **What task would you like to create?** field, select a task type.
For information on the task types, see [Purchasing tasks and procurement cases](#).
8. Select **Create task**.
9. On the form, fill in the fields.

| Field | Description |
|-------------------|--|
| Number | System-generated unique identifier for the task. |
| Created | Creation date of the task. |
| Task type | Type of the task to fulfill the request. |
| Sub type | Subtype of the task to fulfill the request. |
| Request | Associated request for the task. |
| State | Status of the task. |
| Assignment group | Group that can fulfill the task. |
| Assignment to | Person assigned to complete the task. |
| Due date | Expected date of completion for the task. |
| Short description | Short description of the task. |
| Description | Detailed description of the tasks. |

10. Select **Submit**.

You can create multiple tasks to fulfill the procurement case. All tasks in Open state are displayed on the **Open tasks** pane of the task tab. You can access the tasks directly from this pane and perform the necessary actions.

Create a knowledge base article about procurement

Create a knowledge base article about procurement so that you can share procurement information and policies with your employees and procurement team.

Before you begin

Role required: sn_spend_psd.agent, sn_spend_psd.admin

Procedure

1. Navigate to **All > Procurement Case Management > Knowledge**.
2. Select **Create New Article**.
3. On the form, fill in the fields.

| Field | Description |
|---------------------|--|
| Number | System-generated unique identifier for the request. |
| Knowledge base | Knowledge base to which this article belongs. |
| Category | Category of the article such as procurement policy. Use the category picker to select an existing category or subcategory. You can create a category or subcategory to suit your requirements. |
| Valid to | Validity of the article. |
| Article type | Type of article such as HTML. |
| Workflow | Status of the article. |
| Source Task | Name of the article source. |
| Attachment link | Link to attachments. |
| Display attachments | Display of attachments in the article. When you do not select this option, the article does not display the attachments. |
| Short description | Short description of the article. |
| Article body | Detailed description of the article. |

4. Optional: To check if any duplicate articles are available with similar short descriptions, select **Search for Duplicates**.
5. Do one of these actions.

| Action | Description |
|--------|--|
| Submit | To submit an article for review, select Submit . |
| Save | To save an article, from the Additional actions menu, select Save . |

What to do next

- View your submitted articles by navigating to **Knowledge > My Knowledge Articles**
- Track the progress of your article from **My Knowledge Articles**.
- Manage the article workflows, such as reviewing, publishing, updating, or retiring the article.
- Monitor the performance metrics of your article by navigating to **Procurement Case Management > PSM Dashboards**.

AI Search for Sourcing and Procurement Operations

The AI Search application provides a modern consumer-grade search engine for the Service Portal, Employee Center (EC), Mobile, and Virtual Agent.

New customers automatically have the AI Search application configured with their base system for Sourcing and Procurement Operations. Existing customers can configure the PSM-specific Shopping Hub search application to use the AI Search application by following the configuration steps.

For more information, see [AI Search](#).

Configuration

For detailed information on configuring the AI Search application, see [Configuring AI Search](#).

Navigate to **AI Search > Search Applications > Search Application Configurations** to associate the AI Search engine with your Shopping Hub search application.

i Note: For more information, see [Create a search application configuration for AI Search](#).

In the **Search Application Configuration** form of your application, select a **Search Profile** to get started. A search profile determines the search sources, conditions, and criteria that power your search.

Under each search profile, there are a series of tabs that enhance the AI search. The base system provides the following that you can also modify:

- Search Sources:** Along with the default search sources, **Supplier** and **Purchasing** are provided on EC and Service Portal for Sourcing and Procurement Operations, so that the applications are capable of searching through suppliers and supplier products for purchasing as well. For the PSM-specific Shopping Hub search application however, only the **Purchasing** search source is available, allowing you to search only for supplier products. These search sources are rendered as separate tabs when you search on these applications, and are listed under **Navigation Tabs**.

***i* Note:** You can find more information on reviewing and updating your search sources [here](#).

- **Synonyms**
- **Stop Words**
- **Typo Handling**
- **Genius Results**
- **Result Improvement Rules**

***i* Note:**

For more information, see [Defining search profiles](#).

You cannot configure the UI of search results or change the available facets and filters from Shopping Hub. AI Search facetting is supported in Shopping Hub results in Employee Center and Service Portal.

Integration

AI Search is automatically integrated with Shopping Hub. For detailed information on integrating AI Search with other applications, see [Integrating AI Search into your application](#).

Administration

To learn how the AI Search features and behavior affect indexing and search, see [Administering AI Search](#).

Using

For information on how AI Search displays results, refinement filter options, and Genius Result answers, see [Using AI Search](#).

ServiceNow® Mobile

To configure AI Search for the ServiceNow® Mobile, see [Advanced text search in mobile](#).

Service Portal or Employee Center

To configure AI Search for the Service Portal or EC so that your users can take advantage of this powerful search tool, see [AI Search in Service Portal](#).

Virtual Agent

Virtual Agent uses AI Search to return search results in bot conversations when there are no relevant topics to display. For more information, see [Virtual Agent integration with AI Search](#).

Sourcing and Purchasing Automation

Sourcing and Purchasing Automation for ShoppingHub includes workflows that help support the user interface purchasing experience for the shopper. These workflows consist of sourcing requests, negotiations, purchase requisitions, contracts, purchase orders, receipts, and invoices.

Sourcing request

A sourcing request is created for when an item that a shopper, employee, or requester needs, must be sourced. This record is created when an active contractual price for the

product that the shopper intends to purchase doesn't exist. This includes items in both the product catalog and off-catalog.

A purchase line is created, which is then grouped into a sourcing request. Sourcing requests are grouped by product models.

As a procurement specialist or sourcing manager:

- To view all sourcing requests from the Source-to-Pay Workspace, navigate to **All > Procurement Case Management > Procurement Workspace**, and select the List icon () followed by **All team work > Sourcing Requests**.
- To view all sourcing requests from the Platform, navigate to **Purchase Automation > All Work**, and select **All Sourcing Requests**.
- To view sourcing requests assigned to you from the Platform, navigate to **Purchase Automation > My Work**, and select **My Sourcing Requests**.

After the shopper places a request for a catalog or non-catalog item from ShoppingHub, the information that the shopper provides is mapped to the fields of a sourcing request as follows:

Sourcing request fields

| Field | Description |
|-------------------|---|
| Number | System-generated unique identifier of the sourcing request. |
| Assigned to | User who is responsible for the purchase. Determined using purchasing assignment rules. For details, see Create a purchasing assignment rule . |
| Business owner | User who owns the sourcing request. |
| Submitted by | User who has shopped and submitted the purchase. |
| Status | Status of the sourcing request. Note: This is a read-only field. |
| Purchase | Related purchase, if any. |
| Negotiation event | Represents the type of sourcing activity needed to negotiate with each supplier, and tracks the individual negotiations with each supplier. |
| Short description | Brief description of the sourcing request. |
| Summary Details | |
| Product category | Product category that is sourced through this sourcing request. |
| Product model | Product model that is sourced through this sourcing request. |

Sourcing request fields (continued)

| Field | Description |
|--------------------------|---|
| Product name | Product that is requested for. |
| Product type | Indicates if the type of the product is a good or service. |
| Supplier responses close | Date by which the suppliers must submit their responses to the sourcing activity. |
| Benchmark price | Price point from which all starting unit costs for all the purchase lines of this sourcing requests are derived. |
| Request type | Type of request that the shopper, employee, or requester is asking for. The options are request for quote, request for information, request for proposal, and proof of concept. |
| Sourcing request details | Details of the sourcing request. |

The following are the related lists of a sourcing request record:

Sourcing request related lists

| Related list | Description |
|------------------|--|
| Purchase Lines | <p>Provides information of the individual lines under a sourcing request for the referenced supplier.</p> <p>The number of purchase lines for a sourcing request depends on the number of products or services with the same product model.</p> <p>For more details, see Purchase lines.</p> |
| Purchasing Tasks | <p>Provides information of all purchasing tasks that are related to the sourcing request. The tasks on the associated negotiation aren't displayed.</p> <p>For more details, see Purchasing tasks and procurement cases.</p> |
| Cases | Displays all the cases associated with this sourcing request. |
| Purchasing SLAs | Displays the SLAs associated to purchasing tasks against the sourcing request, along with tasks associated to the underlying purchase requisition line. |
| Negotiations | <p>Represents the task of obtaining the pricing of or negotiating the terms for the product or service requested by the shopper.</p> <p>For more details, see Negotiations.</p> |

Sourcing request related lists (continued)

| Related list | Description |
|-----------------------|--|
| Draft Contracts | Displays all the draft contracts associated with this sourcing request. For more details, see Contracts . |
| Signed Contracts | Displays all the signed contracts associated with this sourcing request. |
| Other Legal Documents | Displays all the other legal documents associated with this sourcing request. |
| Approval Plans | Displays all the approval plans created against this sourcing request. |

After a sourcing request is created, the procurement specialist can create a purchasing task of the subtype **Ask a question** if more details are needed from the shopper.

The procurement specialist can decide if a negotiation for this purchase can be created or not. If time doesn't permit for a negotiation, the supplier can be contacted directly for pricing details. After the suppliers respond with their quotes, a purchasing task is systematically created requesting the shopper to select a supplier to award. This is a sourcing task of the subtype **Select a supplier**. For an awarded supplier, the Awarded column value of a purchase line is automatically set to **Yes**, and this creates an associated purchase requisition.

A shopper can select **Cancel** to update the status of the sourcing request and its associated purchase lines to Closed Canceled.

Sourcing request state flows

Let's consider a simple scenario where qualification is needed. If a price is entered on a purchase line (PRL), the PRL indicates that the price has been added or updated, and moves to the Pricing Obtained state, where it remains in that state. All the other PRLs without price and the sourcing request (SR) continue to remain in the Qualification Needed state. Once qualified, the SR and other PRLs that are in the Qualification Needed state move to the Qualified state, while the PRL that had price remain in the Pricing Obtained state.

Manually creating a new PRL re-triggers the qualification flow. If pricing has been added to this PRL, the PRL remains in the Pricing Obtained state while qualification work is being done. The SR also remains in the Qualification Needed state, as needed.

When negotiation events (NEs) and negotiations (NEG)s are considered in the sourcing flow, consider the following scenarios:

- Qualification is needed, where NE is in the Planned state, and NEG, SR, and PRL are all in the Qualification Needed state:

If a price is entered on a PRL, the PRL indicates that the price has been added or updated, and moves to the Pricing Obtained state, where it remains in that state. All the other PRLs without price and the SR continue to remain in the Qualification Needed state. Once qualified, the SR and other PRLs that are in the Qualification Needed state move to the Qualified state, while the PRL that had price remain in the Pricing Obtained state.

- NEG is in progress, where NE is in WIP, and NEG, SR, and PRL are all in the Negotiation in Progress state:

If a price is entered on a PRL when NEG is in progress, the PRL indicates that the price has been added or updated, and moves to the Pricing Obtained state, where it remains in that state. All the other PRLs without price and the NEG and SR remain in the Negotiation in Progress state, while the NE remains in WIP.

- New SRs or suppliers are added after **Start negotiating** is selected on the NE, where NE is in WIP, and NEG, SR, and PRL are all in the Negotiation in Progress state:

This triggers qualification cases to be evaluated on the affected PRLs and move the NEG to Qualification Needed. If qualification isn't needed, both the NEGs and the newly created PRLs remain in the Negotiation in Progress state.

If qualification is needed, NEs remain in WIP even when new SRs or existing suppliers are added. Once qualification cases are complete, Individual NEGs automatically move from Qualified to Negotiation in Progress, without the need to re-select **Start negotiating** on the NE. The newly evaluated PRLs also move to Negotiation in Progress.

However, at any point, if a price is entered on any of the newly created PRLs, the PRL indicates that the price has been added or updated, and moves to the Pricing Obtained state, where it remains in that state.

For more information on NEGs and NEs, see [Negotiations](#) and [Negotiation events](#) respectively.

For information on how a supplier tiering assessment task influences SR states, see [Sourcing and Procurement Operations integration with Vendor Risk Management](#).

Negotiations

A negotiation represents individual supplier negotiations and tracks the items and activities according to supplier. These activities involve obtaining the price for the products or services requested by the shopper, or negotiating the terms.

The type and outcome of a negotiation record can be used for reporting purposes.

Here's a list of key fields of a negotiation:

Negotiation fields

| Field | Description |
|-------------------|---|
| Number | System-generated unique identifier of the negotiation. |
| Assigned to | User who is responsible for the negotiation. |
| State | Current status of the negotiation. i Note: This is a read-only field. |
| Due date | Date when this negotiation is scheduled to be completed. |
| Short description | Brief of the negotiation. |
| Summary | |
| Negotiation event | Negotiation event associated with this negotiation. |

Negotiation fields (continued)

| Field | Description |
|------------------------|--|
| Supplier | Supplier with whom you are negotiating. |
| Negotiation type | Type of negotiation with the supplier. For example, you can initiate a contract renewal or ask for a quote. |
| Negotiation outcome | Result of the negotiation. For example, you can negotiate contract terms or savings on a purchase. |
| Expected start | Expected start date of the negotiation. |
| Actual start | Actual start date of the negotiation. |
| Actual end | Actual end date of the negotiation. |
| Duration | Duration of the negotiation. |
| Negotiation objectives | Objectives or goals for the negotiation. |
| Close notes | Notes on closure of the negotiation, if any. |

The following are the related lists of a negotiation:

Negotiation related lists

| Related list | Description |
|-------------------|--|
| Sourcing Requests | View and track all the sourcing requests associated with the purchase lines in the negotiation. For details, see Sourcing request . |
| Purchase Lines | View and track all the purchase line records within the parent purchase for the supplier referenced on the negotiation. For details, see Purchase lines . |
| Purchasing Tasks | View information on all the purchasing tasks that are related to the negotiation. For details, see Purchasing tasks and procurement cases . |
| Cases | View information on all the cases that are related to the negotiation event. |
| Draft Contracts | View and track all the draft contracts for the supplier referenced on the negotiation. For more details, see Contracts . |

Negotiation related lists (continued)

| Related list | Description |
|-----------------------|---|
| Signed Contracts | View and track all the signed contracts for the supplier referenced on the negotiation. |
| Other Legal Documents | View and track all the other legal documents for the supplier referenced on the negotiation. |
| Purchasing SLAs | View all the purchasing SLAs associated to the purchasing tasks against the negotiation, along with tasks associated to the underlying purchase requisition line. |

Negotiation state flows

The status of the purchase line and the sourcing request updates automatically depending on the status of the negotiation. Negotiations are grouped by supplier.

- When the state of the negotiation is updated to Awaiting Supplier Response, all applicable purchase requisition lines, for the same supplier, of sourcing requests associated to the negotiation are also updated to Awaiting Supplier Response. The purchase requisition lines not belonging to sourcing requests associated to the negotiation aren't updated.
- When all applicable purchase requisition lines, for the same supplier, of sourcing requests associated to the negotiation are updated to Pricing Obtained, the state of the negotiation should be Closed Complete. If one purchase requisition line is in Pricing Obtained state, while another is still in Awaiting Supplier Response, the state of the negotiation remains in the Awaiting Supplier Response state.
- When the state of the negotiation is updated to Negotiation in Progress, all applicable purchase requisition lines, for the same supplier, of sourcing requests associated to the negotiation are updated to Negotiation in Progress. The purchase requisition lines not belonging to sourcing requests associated to the negotiation aren't updated.
- When the state of the negotiation is updated to Closed Complete or Closed Canceled, no state updates are affected on the purchase requisition lines.

Negotiation events

Negotiation events represent the type of sourcing activity needed to negotiate with each supplier, and track the individual negotiations with each supplier. They help sourcing managers manage multi-supplier and multi-product negotiations.

Instead of individually managing negotiations of similar item requests from various suppliers who provide that item, sourcing managers can create a negotiation event for a negotiation intent or objective to manage multi-supplier and multi-product negotiations. Multiple negotiations and sourcing requests can be mapped to a single negotiation event as child entities.

Through this negotiation event, the sourcing managers can view and effectively manage the progress of the negotiations created for each supplier. They can also discuss, follow, update, or cancel the event, as required. Further, they can award a single supplier or multiple suppliers, or even reject bids by selecting **Award**, **Award multiple suppliers**, or **Reject bids** respectively. Selecting **Award multiple suppliers** redirects them to the Source-to-Pay Workspace, where they can complete the process. For more information on this, see [Award multiple suppliers from a negotiation event](#).

Negotiation events can be best viewed from the Source-to-Pay Workspace list page.

Here's a list of key fields of a negotiation event:

Negotiation event fields

| Field | Description |
|--------------------------|---|
| Number | System-generated unique identifier of the negotiation event. |
| Assigned to | User who is responsible for the negotiation event. |
| State | Current state of the negotiation event. i Note: This is a read-only field. |
| Supplier responses close | Date by which the suppliers must submit their responses to the sourcing activity. |
| Short description | Brief of the negotiation event. |
| Description | Details of the negotiation event. |
| Summary | |
| Negotiation type | Type of negotiation event or the method used to engage with the supplier. For example, you can initiate a contract renewal or ask for a quote. |
| Negotiation outcome | Anticipated outcome or end results of the negotiation event. For example, you can negotiate contract terms or standard savings on a purchase. |
| Expected start | Expected start date of the negotiation event. |
| Actual start | Actual start date of the negotiation event. |
| Actual end | Actual end date of the negotiation event. |
| Duration | Duration of the negotiation event. |
| Negotiation objectives | Objectives or goals for the negotiation event. |
| Close notes | Notes on closure of the negotiation event, if any. |

The following are the related lists of a negotiation event:

Negotiation event related lists

| Related list | Description |
|-------------------|---|
| Sourcing Requests | View all the sourcing requests that are mapped to this negotiation event. |

Negotiation event related lists (continued)

| Related list | Description |
|-----------------------|---|
| | For details, see Sourcing request . |
| Negotiations | <p>View all the negotiations with each supplier that are mapped to this negotiation event.</p> <p>For details, see Negotiations.</p> |
| Purchase Lines | <p>View and track all the purchase line records within the parent purchase for the suppliers referenced on the negotiation event.</p> <p>For details, see Purchase lines.</p> |
| Purchasing Tasks | <p>View information on all the purchasing tasks that are related to the negotiation event.</p> <p>For details, see Purchasing tasks and procurement cases.</p> |
| Cases | View information on all the cases that are related to the negotiation event. |
| Draft Contracts | <p>View and track all the draft contracts for the suppliers referenced on the negotiation event.</p> <p>For more details, see Contracts.</p> |
| Signed Contracts | View and track all the signed contracts for the suppliers referenced on the negotiation event. |
| Other Legal Documents | View and track all the other legal documents for the suppliers referenced on the negotiation event. |
| Purchase SLAs | View all the purchase SLAs associated to purchasing tasks against the negotiation event, along with tasks associated to the underlying purchase requisition lines. |
| Purchase Requisitions | <p>View information on all the purchase requisitions that are related to the negotiation event.</p> <p>For more details, see Purchase requisition.</p> |

Purchase requisition

A purchase requisition represents a request that is sent internally within an organization to obtain purchased goods or services. It consists of items that need to be ordered, and may need to go through approvals for a purchase order to be created.

A purchase requisition is created in either of the following scenarios:

- When a shopper selects **Request to buy** from a product details page on ShoppingHub.
- When a supplier is selected after providing quotes in a sourcing request.

Through a purchase requisition, the purchasing department understands details of the items that are requested, the quantity, supplier, cost, and reason for purchase.

Purchase requisition fields

| Field | Description |
|------------------------|---|
| Number | System-generated unique identifier of the purchase requisition. |
| Requisition type | <p>Indicates if this requisition is net new or a revision.</p> <p>The shopper can revise the quantity of the product or delivery location for an order from ShoppingHub or the buyer can submit a revision from the Purchase Automation module.</p> <p>To understand how revisions are handled, see Purchase revisions.</p> |
| Assigned to | User who is responsible for the purchase. Determined using purchasing assignment rules. |
| Primary contact | Person within the procurement team working on the purchase who can be contacted with questions. This field is populated or updated with the same user in the Assigned to field on the purchase requisition. |
| Business owner | User who submitted the purchase request. |
| Submitted by | User who has shopped and submitted the purchase. |
| State | Status of the purchase requisition. |
| | i Note: This is a read-only field. |
| Purchase | Unique ID of the purchase. |
| Negotiation | Negotiation associated with this purchase requisition. |
| Purchase order | Purchase order associated with this purchase requisition. |
| Short description | Brief description of the purchase requisition. |
| Summary Details | |
| Supplier | Indicates the supplier who provides the product. |
| Order type | Indicates whether the resulting order is a standard or blanket order. |

Purchase requisition fields (continued)

| Field | Description |
|--------------------------|---|
| | <p>During the checkout of a product or service, if the shopper selects a time frame for the delivery based on date range or term, the order type is considered as Blanket.</p> <p>Otherwise, the order type is considered as Standard.</p> |
| After the fact | <p>Indicates if the purchase requisition is after the fact or not.</p> <p>After a purchase line is created and grouped into a purchase requisition, if the created on date is either within or after x number of days of the expected delivery date or start date, then the entire purchase requisition would be considered as after the fact. For a purchase requisition that has multiple purchase lines, if at least one line is after the fact, the entire purchase requisition is considered after the fact.</p> |
| Requested delivery | <p>Requested delivery date.</p> <p>i Note: This can be a date or date range that is in the past, present, or future. For the date to be in the past, the After the fact field must be set to Yes.</p> |
| Shipping method | <p>Details of the carrier, the applicable suppliers, and the valid delivery location countries for those suppliers.</p> <p>For more information on shipping methods and handling fees, see Handling fees.</p> |
| Total estimated tax | <p>The estimated sum of all taxes related to purchase lines within a purchase requisition.</p> |
| Total estimated shipping | <p>Estimated sum of all shipping costs related to purchase lines within a purchase requisition.</p> |
| Discount percentage | <p>Discount provided if the minimum spend requirement is met.</p> <p>This field isn't displayed for a blanket order type.</p> |
| Minimum spend | <p>Minimum amount that must be spent to avail a discount.</p> |

Purchase requisition fields (continued)

| Field | Description |
|--------------------|--|
| | This field isn't displayed for a blanket order type. |
| Total amount | Total cost of purchase requisition calculated as the sum from all purchase lines. |
| Accounting Details | |
| Payment term | Payment term as agreed with the supplier. This value defaults from the referenced supplier record. |
| Legal entity | This value defaults from the associated business owner. |
| Purchasing entity | This value defaults from the associated business owner. |
| Cost center | This value defaults from the associated business owner. i Note: This value must be filled on the Business Owner record for it to be populated on the purchase requisition. |

The following are the related lists of a purchase requisition:

Purchase requisition related lists

| Related list | Description |
|------------------|---|
| Purchase Lines | Provides information of the individual lines under a purchase requisition for the referenced supplier. Handling fees, if applicable, are added as a purchase line for this purchase requisition. For more details, see Purchase lines . For information on shipping methods and handling fees, see Handling fees . |
| Purchasing Tasks | Provides information of all purchasing tasks that must be completed prior to creation of a purchase order. For more details, see Purchasing tasks and procurement cases . |
| Purchasing SLAs | Provides SLA information for tasks and approvals. The underlying SLA definitions are defined through purchasing SLA definitions, which is an administration module. |

Purchase requisition related lists (continued)

| Related list | Description |
|------------------------------|--|
| Cases | Displays all the cases associated with this purchase requisition. |
| Related Contracts | Provides information of all active and draft contracts for the referenced supplier. |
| Purchasing Permissions | <p>This related list is conditionally displayed for purchase requisitions whose order type is Blanket.</p> <p>Purchasing permissions enable a user to define a list of pre-approved users, groups, departments, or cost centers. Any purchases made by these users against the blanket purchase order don't require an approval process.</p> <p>By default, the business owner on the originating purchase requisition of order type Blanket is added as a user that can create a standard release against a blanket purchase order.</p> |
| Related Purchase Requisition | This related list is conditionally displayed for revised requisitions. It shows the relationship between the original and revised purchase requisitions. |
| Approval Plans | Displays all the approval plans created against this purchase requisition. |
| Approvals | Displays the list of approvers that must approve the purchase requisition. |

The key purchasing properties relevant to a purchase requisition are:

- sn_shop.atf.threshold.days
- sn_shop.spend.requisition.autoorder
- sn_shop.spend.requisition.autoorder.threshold
- sn_shop.approval.reassessment.resend

For the list of all purchasing properties, see [Purchasing properties](#). If you have the role of a procurement administrator, you can access the Purchasing Properties module by navigating to **Purchase Automation > Administration**.

Handling fees

As an administrator, you can configure the conditions of a purchase request, which when met, adds a handling fee to that purchase request. Any field on the Purchase Request table can be used as part of the conditions to determine if a handling fee is to be applied for a purchase.

If multiple handling fees are generated based on the configurable conditions, the handling fee with the lowest rank is applied. A Procurement Administrator can leverage the Pricing table to apply handling fee pricing. In the Pricing table, handling fees can be set as a fixed

price or as a percentage-based price. When percentage-based pricing is not applied, the handling fee line amount is a percentage of the total amount of all the lines on the purchase request.

If there is a handling fee rule associated with a purchase requisition, a new purchase line is created with product type as handling fee. You can also view the details of this view-only handling fee purchase line from the **My purchases** tab.

Shipping method

As an administrator, you can create shipping methods and associate them with various suppliers and delivery locations. If a shipping method is defined by the admin for a specific supplier and a specific delivery location, it is prompted to the shopper during checkout. When multiple shipping methods are available, the user can select any one for the purchase. Shipping method is only applicable for product type goods. Shipping method records store the details of the carrier, the applicable suppliers, and the valid delivery location countries for those suppliers. If no countries are defined for a supplier to deliver, the shipper delivers to all countries.

The shopper is required to select the shipping method, if applicable, during both quick and full checkout to proceed. In full checkout, it is a mandatory field on the Delivery date page. During checkout, a shipping method is available for selection if both these conditions are met:

- If the supplier in a given shipping method is listed in that shipping method's **Supplier** field.
- If the delivery location country in a given shipping method is listed in the **Supplier delivers to** field.

Shipping method is stored in each cart line and purchase line. It is also stored on each purchase requisition generated during full checkout, and is referenced in the purchase order and purchase order lines.

Shipping method is one of the criteria for grouping purchase requisitions, along with supplier, business owner, and blanket requisition. All purchase lines with the same shipping method are grouped together.

Purchase lines

Purchase lines provide information of the individual lines under a purchase requisition or a sourcing request for the referenced supplier.

A procurement specialist or procurement administrator can manually create a purchase line, in Pending Review state. Populate the following fields on the purchase line:

- Legal entity and cost center, based on the specified business owner
- General ledger account fields, based on the ledger assignment rules
- Starting unit cost and Negotiated unit cost, based on the supplier product's underlying contractual price
- Unit, based on the underlying product model of the supplier product

If an ineligible supplier product is selected based on existing shopping controls and the "supplier delivers to" criteria, an error is displayed to the shopper when trying to save the purchase line.

A purchase line can also be created from the intake process. It captures the employee request details for the item that needs to be sourced or purchased.

If sourcing is required for the selected supplier product, a sourcing request is created on saving the purchase line. Updating the status of the sourcing request to Closed Canceled or Closed No Decision corresponds to an update in the status of the associated purchase lines. Credit purchases aren't enabled in this scenario. The grouping logic determines if the line can be automatically merged with an existing purchase requisition.

The key fields of a purchase line are as follows:

Purchase line fields

| Field | Description |
|------------------|--|
| Number | System-generated unique identifier of the purchase line. |
| Supplier | <p>Supplier for which the shopper places the order.</p> <p>For a non-catalog intake, if the shopper provides a supplier name for which a supplier record doesn't exist, a new supplier record is manually created with some of these details:</p> <ul style="list-style-type: none"> • Legal name, according to the name provided by the shopper. • Onboarding status of the supplier. An onboarding playbook is triggered for new suppliers as part of Supplier Lifecycle Operations, to guide the registration process for the new supplier contact. • Relationship status of the supplier • Preferred status of the supplier <p>The contact details provided by the shopper for the supplier is also displayed as a record in the Vendor Contacts related list. This record is created with the help of the vendor contact creation API from Supplier Lifecycle Operations. For more information, see Create New Supplier Case form.</p> |
| Product category | Product category that is sourced through this purchase line. |
| Supplier product | <p>Supplier product for which the purchase line is created.</p> <p>This field isn't displayed if the product type is handling fees.</p> |
| Product name | <p>Name of the supplier product.</p> <p>For a non-catalog purchase, the information is taken from the Describe the product or Describe the service fields.</p> |

Purchase line fields (continued)

| Field | Description |
|------------------------|--|
| | This field isn't displayed if the product type is handling fees. |
| Product example | <p>Reference URL that the shopper provides.</p> <p>For a non-catalog purchase, this information is obtained from the Do you have an example of what you're looking for? field on ShoppingHub.</p> |
| | This field isn't displayed if the product type is handling fees. |
| Supplier contacted? | <p>Indicates if the shopper has already contacted the supplier.</p> <p>For a non-catalog purchase, this field is set to true if the shopper selects I've contacted them already.</p> |
| | This field isn't displayed if the product type is handling fees. |
| Supplier contact | Name of the supplier contact for this supplier. |
| Supplier contact email | Registered email ID for this supplier contact. |
| Non-catalog purchase? | <p>Indicates if a non-catalog intake workflow is initiated.</p> <p>The value is true when a shopper uses the Don't see what you need? option on ShoppingHub.</p> |
| | This field isn't displayed if the product type is handling fees. |
| State | <p>Current status of the purchase line.</p> <p>Note: This is a read-only field.</p> |
| Purchase | Parent purchase associated with this purchase line. |
| Sourcing request | Sourcing request associated with this purchase line. |
| Negotiation event | Negotiation event associated with this purchase line. |
| Negotiation | Negotiation associated with this purchase line. |
| Purchase requisition | Purchase requisition associated with this purchase line. |

Purchase line fields (continued)

| Field | Description |
|---------------------------|--|
| Short description | Brief description that is visible to the shopper on ShoppingHub. This field isn't displayed if the product type is handling fees. |
| Purchase reason | Reason for the purchase that the shopper provides before checkout. For a non-catalog purchase, this information is obtained from the Why do you need this? field on ShoppingHub. This field isn't displayed if the product type is handling fees. |
| Handling fee | Charges added for a specific supplier when a rule is triggered as a result of certain configurable conditions for a purchase requisition being met. For more information on handling fees, see Handling fees . This field is displayed only if the product type is handling fees. |
| Specific requirements | Requirements that the shopper specifies. For a non-catalog purchase, this information is given in the Any specific requirements field on ShoppingHub. |
| Purchasing Details | |
| Spend categorization | Indicates whether negotiation with the supplier is addressable or not. |
| Negotiated by | Indicates who is responsible for negotiation. |
| Product type | Indicates whether the ordered product type is a good, service, or handling fee. |
| Goods receipt required | Indicates if a receipt is required in addition to the invoice. This field is visible only if the product type is Good . |
| One-time pricing | Indicates if the pricing created for a service can be reusable in subsequent purchase requests. When created in the context of a sourcing request or negotiation for a service, the default value is Yes . This field is visible only if the product type is Service . |

Purchase line fields (continued)

| Field | Description |
|------------------------|--|
| Expected delivery date | <p>Expected date for the delivery that the shopper requests.</p> <p>Note: This date can be in the past, present, or future. For the date to be in the past, the After the fact field in the associated purchase requisition table must be set to Yes.</p> |
| Acknowledgment type | <p>Indicates if receipt of confirmation is necessary and the type of receipt. The available options are Milestones, Service Acknowledgment, and Two Way Match.</p> <p>This field is displayed as Invoice if the product type is handling fees.</p> <p>Note: If you're an existing customer continuing with the Source-to-Pay Common Architecture (sn_shop) plugin, and skipping the Shopping Hub (sn_spend_uib) plugin, service acknowledgment is replaced with invoice acknowledgment for you.</p> |
| Milestone payout type | <p>Indicates the type of milestone payout. The options available are Amount and Percentage.</p> <p>This field is visible only if the acknowledgment type is set to Milestones.</p> |
| Start date | <p>Expected start date of the service that the shopper provides.</p> <p>Note: This date can be in the past, present, or future. For the date to be in the past, the After the fact field in the associated purchase requisition table must be set to Yes.</p> |
| End date | <p>Expected date to end providing the service to the shopper.</p> <p>End date is calculated as: Start date + [Term length * Term value].</p> |

Purchase line fields (continued)

| Field | Description |
|-----------------------------|--|
| | <p>i Note: This date can be in the past, present, or future. For the date to be in the past, the After the fact field in the associated purchase requisition table must be set to Yes.</p> |
| Term length | <p>Duration of the term.</p> <p>When the shopper selects a time frame, the order is considered a blanket type order.</p> |
| Term value | Type of the term. The options are Days , Weeks , Months , and Years . |
| Maximum budget | Maximum budget that the shopper provides for this purchase. |
| Purchased quantity | Quantity of the product that the shopper wants to purchase. |
| Estimated tax | Tax estimate for the product based on the price and delivery location. |
| Estimated shipping | Shipping cost estimate for the product based on the delivery location. |
| Total line amount | Total price of the purchased goods and services, including estimated tax and shipping. |
| Net amount | Amount included as a cost allocation on the purchase order. This doesn't include any estimates. |
| Total individual units | Number of fixed assets that are created depends on this value. |
| Individual unit cost | Cost of the individual unit. |
| Supplier Bid Details | |
| Supplier's lead time (days) | Number of days that the supplier takes to deliver the goods or provide the service. Based on this, the delivery date for goods and the start and end dates for services vary. |
| Unit | Unit in which the product is provided by the supplier. |
| Supplier's quantity | Quantity that the supplier can provide. |
| Starting unit cost | Cost per unit of the product prior to negotiation. |
| Negotiated unit cost | Cost per unit of the product after negotiation. |

Purchase line fields (continued)

| Field | Description |
|---|--|
| Total bid amount | Supplier's quantity multiplied by negotiated unit cost. It reflects the total bid amount from that particular supplier for that purchase line. |
| Negotiated savings | Total savings through negotiation. This is calculated as: (Starting unit cost - Negotiated unit cost) x Supplier's quantity |
| Supplier notes | Additional notes about the supplier, if any. |
| Delivery Details | |
| Fields in the Delivery Details section map to the information from delivery location details that the shopper provides. Shipping method is displayed as a read-only field here. However, this section isn't displayed if the product type is handling fees. | |
| Accounting Details | |
| Product category | Category to which the supplier product belongs. |
| Capex account | Ledger account to post the capital expenses of this product after the purchase completion. |
| Expense account | Ledger account to post the operational expenses of this product after the purchase completion. |
| Payment schedule | Indicates the schedule of payments to the supplier. |
| Pre-payments required | Indicates if pre-payments can be credited to the supplier against this purchase. |
| Legal entity | Internal legal entity that incurs the cost of this purchase. |
| Cost center | Cost center that incurs the cost of this transaction. |

The capex account, expense account, and pre-payment details are populated from [ledger assignment rules](#).

The following are the related lists of a purchase line:

Purchase line related lists

| Related list | Description |
|------------------|--|
| Cases | Displays all the cases associated with this purchase line. |
| Purchasing Tasks | Provides information of tasks such as obtaining more information from the requester, or awarding a supplier after quotes are received. |

Purchase line related lists (continued)

| Related list | Description |
|------------------|--|
| | For details, see Purchasing tasks and procurement cases . |
| Purchasing SLAs | Provides SLA information for tasks and approvals. The underlying SLA definitions are defined through purchasing SLA definitions, which is an administration module. |
| Pricing | Stores the relationship between supplier product, contracts, and price of a product. For more details, see Pricing . |
| Milestones | Provides information of all the milestones for this purchase. This related list is visible only if the acknowledgment type is set to Milestones . For details, see Milestones . |
| Cost Allocations | Provides the information on cost allocation type and the cost center for this purchase line. For details, see Cost allocations . |
| Pre-payments | Provides information of the pre-payment details such as the amount and the payment date for this purchase. This related list is visible only if the Pre-payments required field is checked. For details, see Pre-payments . |

Related topics

[Purchase revision flows](#)

Milestones

Milestones represent an acknowledgment that a certain deliverable is achieved for a service. You can create a milestone against the purchase line and purchase order line for a service product type, when the acknowledgment type is set to **Milestones**.

The key fields of a milestone are:

Milestone fields

| Field | Description |
|------------------|-----------------------|
| Deliverable Name | Name of the milestone |

Milestone fields (continued)

| Field | Description |
|------------------------|--|
| Number | System-generated unique identifier of the milestone. |
| Assigned to | User primarily responsible for confirming the completion of this milestone. |
| Primary contact | Person within the procurement team who can be contacted with questions about receipts, milestones, invoices, or other activities related to acknowledgment. This field is populated or updated with the same user in the Assigned to field of the parent task record, as follows: For a milestone or acknowledgment task, from the referenced purchase order. |
| Purchase line | Purchase line associated with the milestone. |
| Purchase order line | Purchase order line associated with the milestone. |
| State | Status of the milestone. |
| Due date | Expected completion date from the user this milestone is assigned to. |
| Summary Details | |
| Completion date | Scheduled completion date for the milestone. |
| Payout type | The type of the payout associated with this milestone. For example, Percentage or Amount . |
| Payout amount | Amount associated with this milestone. This field is displayed if the payout type is set to Amount . Sum of the amount across all milestones can't exceed the total amount on the purchase requisition. |
| Payout percentage | Percentage of the payout amount associated with this milestone. This field is displayed if the payout type is set to Percentage . Sum of the percentages across all milestones can't exceed 100%. |
| Cancellation reason | Reason for the cancellation of the milestone. This field is required when the recipient cancels the milestone. |

Milestone fields (continued)

| Field | Description |
|-----------------|--|
| Deferral reason | Reason for the deferral of the delivery date of the milestone. |

Milestones are assigned to the recipient of the purchase line. A recipient can either confirm, cancel, or defer milestones using **Confirm completion**, **Cancel**, or **Defer Completion** options.

- Confirming a milestone updates the state to **Closed Complete**.
- Canceling a milestone requires a cancellation reason.
- Deferring the completion of a milestone requires a completion date and the state is updated to **Pending Completion Date**.

When the status of a milestone task is **Closed Complete**, a receipt is created and the **Amount received** or **Percentage received** fields are populated accordingly on the receipt. The receipt triggers the update of the states on the purchase order line and purchase order similar to the workflow of a good receipt.

The [PSM] Monitor Milestone Tasks scheduled job monitors the completion date of each active milestone on a daily basis. On the specified date of completion, the job updates the state of the milestone from **Pending Completion Date** to **Confirmation Required**.

The UI action to confirm or defer the milestone is displayed when the state of the milestone is **Confirmation Required**.

Cost allocations

Cost allocation defines how to allocate the payment for a particular purchase line. Costs can be allocated towards a cost center, employee credit, or payroll payments.

i Note: Shipping and tax costs are excluded from cost allocation calculations.

The key fields for a cost allocation are as follows:

Cost allocation fields

| Field | Description |
|-----------------|---|
| Purchase line | The purchase line associated with this allocation. |
| Allocation type | Specifies how the cost is allocated. For example, Cost center , Employee credit , or Payroll . |
| Cost owner | The user who incurs the cost of this allocated transaction amount. |
| Cost center | The cost center that incurs the cost of this allocated transaction amount. |
| Employee credit | A reference to the employee credit to which this cost allocation is made. |
| | This field is visible only if the allocation type is set to Employee Credit . |

Cost allocation fields (continued)

| Field | Description |
|-----------------------------|--|
| Terms accepted on | The date and time at which the cost owner has accepted the terms and conditions of the organization to withhold the payroll. This field is visible only if the allocation type is set to Payroll . |
| Number of payments selected | The number of payments that the cost owner selected to pay back for a subsidized purchase. This field is visible only if the allocation type is set to Payroll . |
| Allocate by | Determines if the cost allocation is made by amount or percentage. |
| Allocation amount | Amount of the cost allocated. |
| Allocation percentage | Percentage of the cost allocated. This field is visible only if the allocation type is set to Percentage . |

If a purchase line is created from:

- ShoppingHub portal, the cost allocation is created from the payment method that the shopper selects during checkout.

Employee credits and paycheck payments also result in the creation of a cost allocation.

- Purchase Automation module, a default cost allocation entry is created with 100% allocation to the cost center of the business owner.

The procurement specialist can add a new entry and update the allocation as needed.

Pre-payments

A prepayment is the amount paid for services before their receipt or invoiced due date. When an invoice is issued for a pre-payment, it is against the pre-paid account. During the defined pre-paid period, the amount is amortized accordingly against the capex or expense account.

The **Pre-payments required** field on the purchase line indicates if pre-payments can be credited to the supplier against a purchase. Selecting this field also results in the display of the Pre-payments related list on the purchase line. The pre-payment information is carried over to a purchase order line whenever a purchase order is created.

The following are the key fields of a prepayment:

Pre-payment fields

| Field | Description |
|------------------------|--|
| Number | System-generated unique identifier of the pre-payment. |
| Contract | Contract to which this pre-payment is associated. |
| Purchase line | The purchase line associated with this pre-payment. This field is auto-populated when created from the pre-payments related list on purchase line. |
| Purchase requisition | The purchase requisition associated with this pre-payment. This field is referenced from the purchase line. |
| Purchase order line | The purchase order for which pre-payments are authorized up to the specified amount. This field is auto-populated when a purchase order line is created from the purchase line. |
| Purchase order | The purchase order associated with this pre-payment. This field is referenced from the purchase order line. |
| Authorized by | The user who authorizes this pre-payment. This field is populated based on the user who creates the pre-payment. |
| Authorized on | The date on which the pre-payment is authorized. |
| Accounting Details | |
| Amount | Total purchase line amount. |
| Currency code | Currency code of the total line amount. |
| Pre-pay on | Date on which the specified amount is pre-paid. |
| Pre-pay by | The type of pre-payment. For example, Amount or Percentage . |
| Pre-payment percentage | The percentage of the total line amount for the pre-payment. This field is visible only if the pre-payment type is set to Percentage . |
| Pre-payment amount | The portion of the total line amount for the pre-payment. |
| Pre-paid period start | The start date of the pre-payment period, from which the pre-payments start. |
| Pre-paid period end | The end date of the pre-payment period, after which no pre-payments are made. |

Multiple pre-payments related to one line can be made. For example, you can pre-pay 50% of the total line amount on X date and another 50% on Y date. The total of the pre-payment amounts must not exceed the line amount.

Purchase requisition merging

Purchase requisitions can be merged if certain criteria are met. This avoids multiple purchase orders from being created unnecessarily and also helps enforce approval rule limits.

Consider these various scenarios for purchase requisition grouping.

Scenarios for merging purchase requisitions

A procurement buyer can group new products by the same supplier into an existing requisition so that multiple orders are not sent to the supplier. Consider the following scenarios:

Scenario 1: A Purchase Requisition (PR1) for Supplier A exists, in state Pending Approval. Purchase Order (PO) has not been created.

- Sourcing not required:

If the shopper adds a supplier product from the same Supplier A in ShoppingHub, and it has the same submitted by, supplier, cost center, and business owner as PR1, then the lines are automatically grouped with PR1 with the state Pending Approval. PR1 remains in Pending Approval state. Approvals are re-assessed similar to revisions. If the line was created more than 24 hours after PR1, it is not grouped automatically and is created under a new purchase requisition.

- Sourcing required:

If the shopper adds a supplier product from the same Supplier A in ShoppingHub that does not have an active contractual price, a sourcing request is created. In the sourcing request, assuming that the line was awarded to the same Supplier A, and there is an existing purchase requisition with the same submitted by, supplier, cost center, and business owner, and the newly sourced line was created not more than 24 hours after PR1, the purchase line references PR1 when the supplier is awarded, and a purchase requisition is created. The line is added into PR1 with the state Pending Approval. PR1 remains in Pending Approval state. Approvals are re-assessed similar to revisions.

Scenario 2: PR1 for Supplier A exists, in state Awaiting Task Completion. PO does not exist yet.

- A procurement specialist has to manually merge the purchase requisitions.

- Sourcing not required:

- An annotation is displayed on the header of PR2 indicating that this purchase requisition can be merged with another existing requisition <purchase requisition number>, where <purchase requisition number> is a link to PR1 that has the same submitted by, supplier, cost center, and business owner as PR2. This annotation is cleared once an order is created against PR1.

- The user can select **Merge** on the PR2 header to move the lines from PR2 to PR1. If there are no other requisitions or sourcing requests belonging to the purchase request that PR2 belongs to, then the purchase request and PR2 are deleted. The merged lines are in the state Pending Approval, and the purchase requisition is also reverted to Pending Approval. However, the original lines remain in their original state. Approvals are re-assessed similar to revisions.

- If there were other requisitions or sourcing requests under purchase request 2, then the purchase request is not deleted. Only purchase requisition 2 is deleted.
- The **Merge** UI action is only available if PR2 and the corresponding lines were created not more than 24 hours after PR1.
- Sourcing required: Upon awarding the sourcing request, a similar annotation is displayed on the header of the sourcing request indicating that this line can be merged with another existing requisition <Purchase requisition number>. The user can select **Merge with Existing Requisition** or **Create Requisition**. If merged, PR1's state reverts to Pending Approval.

Scenario 3: PR1 for Supplier A exists, in state Final Review. PO does not exist yet. Same as Scenario 2.

Scenario 4: PR1 in state Awaiting Task Completion, PR2 not merged with PR1 and in state Pending Approval. Another purchase is created. If the procurement specialist decides not to merge PR2 with PR1, and PR2's state is still Pending Approval, then the new purchase lines automatically merge with PR2 according to the criteria in Scenario 1.

Scenario 5: Multiple PRs in state Awaiting Task Completion or Final Review. New PR created within 24 hours with the same requested by, supplier, cost center, and business owner.

- When the user selects **Merge** on the new purchase requisition, display a list of all the purchase requisitions in the state Awaiting Task Completion or Final Review, and allow the user to select which one to merge with.
- In this scenario, an annotation is displayed on the most recent purchase requisition indicating that this purchase requisition can be merged with several other requisitions.

Scenario 6: Revisions

- Purchase requisitions of type Revision, created as a result of PO revision, are not eligible for merging.
- Purchase requisition revisions, where no PO is created, can be considered for merging using similar criteria documented in the previous scenarios.

Note: For all merge scenarios, **Merge** is only displayed on the UI on the most recently created purchase requisition.

Scenario 7: PR1 for Supplier A exists, in state Closed Canceled, Closed Rejected, or Closed Complete. A line is not grouped into a PR that has the state Closed Canceled, Closed Rejected, or Closed Complete. Instead, a new PR is created.

Scenario 8: PO already created, and supplier product(s) from the same supplier is added. Create a new purchase request and purchase requisition (PR2).

Purchase line merge

Purchase lines within a purchase requisition can also be merged under the following conditions:

- If the supplier product, business owner, cost center, submitted by, delivery date or start date/end date, delivery location, payment method, and purchase reason are identical, except the quantity, the purchase lines can be grouped into a single line instead of separate lines.
- If the delivery date, start date/end date, or delivery location is different, a new line must be created.

- If only the payment method is different, the cost allocation entries should be updated accordingly, based on the combined ratio.
- If only the purchase reason is different, append the purchasing reasons as follows:
 - Purchasing reason 1 - qty 1 (example: New hire orientation - qty 10)
 - Purchasing reason 2 - qty 2 (example: IT hardware refresh - qty 2)

Purchasing tasks and procurement cases

All automated purchasing tasks and procurement cases are created using flow designer from the Service Delivery Common (SDC) application. Flow designer uses the underlying task and case generation decision tables, and purchasing tasks and procurement cases are created based on the conditions defined in the decision tables.

Conditions and triggers for task and case creation

While the **Sourcing decision dependent on case** and **Order dependent on case** fields in the Service Case table determine the need for a procurement case to be created, the **Sourcing decision dependent on task** and **Order dependent on task** fields in the Service Task table determine the need for a procurement task to be created.

Tasks and cases are generated when the following rules are triggered, with the decision tables supporting this generation via decision inputs.

- Purchase Requisition Task and Case Generation Rule
- Sourcing Request Task and Case Generation Rule
- Negotiation Task and Case Generation Rule
- Negotiation Event Task and Case Generation Rule

Procurement case types

Here's a list of the types and subtypes of procurement cases:

- Supplier cases:
 - Conduct a Supplier Risk Assessment: Conduct a risk assessment for a supplier.
 - Onboard a Supplier: Onboard a supplier for a purchase.
 - Conduct a Supplier Tiering Assessment: Conduct a tiering assessment for a supplier.

Note: For these supplier cases, the decision templates are available only when you have the Supplier Lifecycle Operations application installed. You must also enable the Risk Assessments Integration for Sourcing and Procurement Operations application and have the GRC Vendor Risk Management license if you want the Conduct a Supplier Tiering Assessment case to be generated. For information on how a supplier tiering assessment task influences sourcing request states, see [Sourcing and Procurement Operations integration with Vendor Risk Management](#).

- Contract cases:
 - Contract Review: Review contracts for a purchase.
 - Send NDA for Signature: Send an NDA for signature to the supplier for a purchase.
- Finance cases:

- GL Coding Review: Review accounting details for a purchase line.
- Budget Review: Review budget details for a purchase requisition.
- Delivery Address Review

For procurement cases, you can also create child cases or associate child cases to parent cases. However, remember that you must close all child cases and associated child cases before you can close any parent case. Similarly, you can reopen a child case or associated child case only when the parent case is still open.

Purchasing task types

A list of the types and subtypes of purchasing tasks are listed below.

- Purchasing task
 - Select a Supplier: Ask the shopper to compare pricing from multiple suppliers and select a supplier.
 - Sourcing task
 - Ask a question: Ask the shopper for more information about the purchase.
- Procurement/Supplier task: Create a procurement task for a supplier.

You can also create child tasks or associate child tasks to parent tasks. However, remember that you must close all child tasks and associated child tasks before you can close any parent task. Similarly, you can reopen a child task or associated child task only when the parent task is still open.

The following are the key fields of a purchasing task:

Purchasing task fields

| Field | Description |
|------------------|---|
| Number | System-generated unique identifier of the purchasing task. |
| Assignment group | Group to which this purchasing task belongs. |
| Assigned to | User to which this purchasing task is assigned. |
| Primary contact | <p>Person within the procurement team working on the purchase who can be contacted with questions. This field is populated or updated with the same user in the Assigned to field of the parent task record, as follows:</p> <ul style="list-style-type: none"> • For a sourcing task, from the referenced sourcing request • For a purchasing task, from the purchasing task itself • For a contract task, from the contract task itself |

Purchasing task fields (continued)

| Field | Description |
|--|--|
| | <ul style="list-style-type: none"> For a supplier task, from the supplier task itself For a finance task, from the finance task itself |
| State | Status of the purchasing task. |
| Substate | Progress of obtaining answers from the shopper to the questions of the procurement specialist. |
| Due date | Expected date of completing the task. |
| Sourcing decision dependent on task | Determines if completion of this task is required prior to a sourcing request being created |
| Qualification dependent on task | Determines if completion of this task is required prior to a qualification request being created |
| Order dependent on task | Determines if completion of this task is required prior to a purchase order being created |
| Short description | Short description of the task. |
| Description | Detailed description of the task. |
| Detailed description | Detailed description of the task. This is specific to the Custom Task for Employee task subtype, where you can enter your instructions in html or rich text format, and even add hyperlinks or images as required. |
| Summary Details | |
| Supplier | Supplier reference for this task. |
| Sourcing request | Sourcing request associated with this task. |
| Purchase requisition | Purchase requisition associated with this task. |
| Purchase order | Purchase order for which the revision request task is raised. |
| Expected start | Expected date of starting work on the task. |
| Actual start | Actual date of starting work on the task. |
| Actual end | Actual date of completing the task. |
| Duration | Actual time taken to complete the task. |
| Question & Answer | |
| This section contains the information of the questions posed to the shopper and the responses that the shopper provides. | |

Purchasing task and procurement case creation

Create purchasing tasks and procurement cases in sourcing requests and purchase requisitions.

Sourcing request

If a negotiation does not exist, the supplier risk assessment and send NDA for signature cases are triggered when the state of the sourcing request is Awaiting Supplier Response. The procurement cases are created on the cases related list of the sourcing request.

- Conduct a supplier risk assessment: If risk assessment on the referenced supplier record is not valid, create a supplier risk assessment case for each supplier on the sourcing request.
- Send NDA for signature: If the NDA on the referenced supplier record is not valid, create an NDA case for each supplier on the sourcing request. This requires adding a supplier reference field on the case template.
- If the user skips updating the state of the sourcing request to Awaiting Supplier Response, these cases are created when the state of the sourcing request is Requires Decision.
- If the user decides to manually create contracts against the sourcing request, trigger the contract review case once a contract is created.

If a new supplier is added to the sourcing request, the risk assessment and send NDA for signature cases for that supplier are triggered when the state of the sourcing request is Awaiting Supplier Response or Requires Decision (if the user skipped the Awaiting Supplier Response state).

Purchasing tasks and procurement cases for the awarded supplier that are created on a sourcing request are also shown on the purchase requisition.

For information on how a supplier tiering assessment case influences sourcing request states, see [Sourcing and Procurement Operations integration with Vendor Risk Management](#).

Purchase requisition

The following procurement cases and purchasing tasks are created in flow designer when the state of the purchase requisition is Pending Review or Pending Approval (if approvals are triggered):

- Cases:
 - GL coding review
 - Budget review
 - Conduct a supplier risk assessment
 - Onboard a supplier
 - Send NDA for signature
 - Delivery address verification (not applicable for blanket order type scenario)
 - Delivery address approval (not applicable for blanket order type scenario)
- Tasks: Follow up required: Approval duration breached

The integration error purchasing task is created in flow designer when integration with ERP fails and the state of the purchase requisition is updated to Awaiting Task Completion.

If a purchase requisition is created directly without a sourcing request, all purchasing tasks and procurement cases are created in flow designer when the state of the purchase requisition is Pending Review or Pending Approval (if approvals are triggered), with the

exception of contract review case and integration error task. These are created when the state is Awaiting Task Completion. If the tasks and cases triggered during the Pending Review or Pending Approval state are still open after approvals are complete, the state of the purchase requisition is in Awaiting Task Completion. Only when all the **Order dependent on task** tasks and **Order dependent on case** cases are closed, the state of the purchase requisition is updated to Final Review or PO Created, based on the purchasing property.

Purchase order

A purchase order is a binding contract between a buyer and a supplier that authorizes a purchasing transaction. It contains the descriptions, quantities, prices, applicable discounts, payment terms, delivery dates, and other associated terms and conditions with the supplier.

In a purchase order, the key fields are the following:

Purchase order fields

| Field | Description |
|----------------------|--|
| Display name | Name of the purchase order for a supplier product. |
| Number | System-generated unique identifier of the purchase order. |
| ERP number | The purchase order number which is synced from ERP systems. |
| Version | The version of the purchase order. A revised purchase order has a higher version number. |
| Business owner | The user who placed the order. |
| Status | Status of the purchase order. |
| Purchase requisition | The purchase requisition associated with this order. |
| Primary contact | Person within the procurement team who can be contacted with questions about the order. This field is populated or updated with the same user in the Assigned to field on the purchase requisition. |
| Summary Details | |
| Supplier | Supplier who provides the product of this order. |
| Order type | Indicates if the purchase order is of the type Standard or Blanket . |
| Minimum spend | Minimum amount that must be spent to avail a discount. This field isn't displayed for a blanket order type. |
| Discount percentage | Discount provided if the minimum spend requirement is met. |

Purchase order fields (continued)

| Field | Description |
|---------------------------|--|
| | This field isn't displayed for a blanket order type. |
| Total amount | The total cost of purchase requisition calculated as the sum from all related purchase lines. |
| Released amount | The budget that is consumed so far. This field is visible for blanket order type. |
| Shipping method | Details of the carrier, the applicable suppliers, and the valid delivery location countries for those suppliers. For more information on shipping method and handling fees, see Handling fees . |
| Accounting Details | |
| Cost center | The cost center incurring the expense of this order. This field is carried over from the related purchase requisition. |
| Legal entity | Internal legal entity making this purchase. This field is carried over from the related purchase requisition. |
| Purchasing entity | The organizational entity associated with the business owner making this purchase. This field is carried over from the related purchase requisition. |
| Payment term | The agreed time and conditions of payment to the supplier. |
| Received amount | Indicates if the order is partially or fully delivered. This value is the sum of the receipt values in the child purchase order lines. This field is visible for standard order type. |
| Received percent | Indicates if the order is partially or fully delivered. This value is the sum of the receipt values in the child purchase order lines. This field is visible for standard order type. |
| Invoiced amount | Amount invoiced for the product ordered. While other charges are added to the |

Purchase order fields (continued)

| Field | Description |
|-------------------|---|
| | amount invoiced, discount amount is subtracted from it. This field is visible for standard order type. |
| Amount paid | Amount paid for the product ordered. This field is visible for standard order type. |
| Remaining balance | Amount due to the supplier for the order. This field is visible for standard order type. |

The receipt fields (**Received amount** and **Received percent**) on the Accounting Details section of a purchase order are summations of the receipt fields on the child purchase order lines, which are populated based on the following conditions:

- For purchase order line of goods:
 - When goods have been received: The received quantity is populated when receipt is created. The received amount and received percent are calculated based on the received quantity.
 - When goods haven't been received: The received amount is populated with the line amount invoiced (editable field) when the status of the invoice line associated to the purchase order line is Invoice Confirmed. The received quantity and received percent are calculated based on the received amount.
- For purchase order line of services:

i Note: Business rules pertaining to handling state changes, handling tax and charges, default invoice fields, populating invoice line amounts, handling line total changes, and populating supplier products are available only if you haven't installed the Shopping Hub plugin and are still using the Source-to-Pay Common Architecture plugin.

- When the acknowledgment type is milestones:
 - If the milestone payout is amount, the received amount is populated accordingly. The received quantity and received percent are calculated based on the received amount.
 - If the milestone payout is percentage, the received percent is populated accordingly. The received quantity and received amount are calculated based on the received percent.
- When the acknowledgment type is service acknowledgment: The received amount is populated based on the approved invoice line amount. The received quantity and received percent are calculated based on the received amount.
- When the acknowledgment type is two-way match: The received amount is populated with the line amount invoiced (editable field) when the status of the invoice line associated to the purchase order line is Invoice Confirmed. The received quantity and received percent are calculated based on the received amount.

For more information on purchase order lines, see [Purchase order lines](#).

The following are the key related lists of a purchase order record:

Purchase order related lists

| Related list | Description |
|-------------------------|---|
| Purchase Order Lines | Lists the standard purchase order releases for a blanket purchase order. |
| Approval Plans | Displays all the approval plans created against this purchase order. |
| Receipts | Provides details of the receipts created for this purchase order. For details, see Receipts . This related list is visible for standard order type. |
| Milestones | Provides details of the milestones for this purchase order. For details, see Milestones . This related list is visible for standard order type. |
| Invoices | Provides details of the invoices generated for this purchase order. For details, see Invoices . This related list is visible for standard order type. |
| Related Contracts | Provides details of related contracts associated for this purchase order. For details, see Contracts . This related list is visible for standard order type. |
| Purchasing Permission | Carried over from the related purchase requisition. This related list is visible for blanket order type. |
| Purchase Order Releases | This related list is visible for blanket order type. |
| Purchasing Tasks | Provides information of tasks for this purchase order. |
| Purchase Order History | List of purchase orders before the current revision. This related list is visible if the purchase order has revisions. |

Blanket purchase order workflow

During checkout, when a shopper selects **I am not sure** in the delivery date option, it creates a purchase requisition with a blanket order type, which results in the creation of a blanket purchase order.

Purchasing permissions define the list of users, groups, cost centers, or departments that are allowed to purchase against the blanket purchase order without requiring any approvals. As receipts and invoices are not applicable for blanket purchase orders, these related lists are not displayed on the purchase order form view.

For details on the various fields and related lists that are populated for a blanket purchase order, see [Purchase order](#).

Standard purchases against a blanket purchase order

A standard purchase order release is created when the following conditions are satisfied:

- User who requested the purchase is defined under the associated purchasing permission of the blanket purchase order.

The business owner who requested the original blanket purchase order can always release against the blanket purchase order even if they are not explicitly defined under the purchasing permission.

- Creation date of the standard purchase line falls within the range of the blanket line's start and end date.
- Supplier product purchased is defined as a supplier product on the blanket purchase order.
- Funds must be available on the blanket purchase order. The value of the **Released amount** field on the blanket purchase order must be less than the value in the **Total amount** field.

The standard purchase order release has a reference to the blanket purchase order and will be displayed under the Purchase Order Releases related list on the blanket purchase order.

On the blanket purchase order, the sum of the total amount of all released purchase orders is updated in the **Released amount** field of the Summary Details section. When the value of the **Released amount** field matches with the value of the **Total amount** field, the status of the blanket purchase order changes to **Closed Complete**.

If a purchase order release amount results in the blanket purchase order amount being exceeded, an approval is triggered for the delta amount to the business owner of the applicable standard purchase order release.

For example, if a blanket purchase order exists with an associated purchasing agreement contract with validity from January 1, 2019 to December 31, 2019. The amount limit on the blanket purchase order is \$1000, and the current released amount is \$800. The next standard purchase order release against the blanket is for \$500. So, an approval for the delta of \$300 is required.

To check if a request should be considered as a release against an existing blanket purchase order:

- For goods, check the creation date of the purchase request against the start and end date of the corresponding line on the blanket purchase order.
- For services, check the start and end date of the request against the start and end date of the corresponding line on the blanket purchase order.

Purchase revisions

Revisions for the quantity of the product, budget, or delivery location can be made to orders placed from ShoppingHub.

The shopper can revise an order from ShoppingHub or the procurement specialist can submit revision from the Purchase Automation module.

When a shopper updates the **Pricing** reference field on the purchase requisition line, a revision is triggered for both standard and blanket purchase requests.

- For standard purchase requests, the quantity is left as-is. The total line amount is updated, which in turn updates the total amount of the purchase request and triggers reassessment of approvals, if applicable. Budget, even if populated, is not considered as a revision attribute.
- For blanket purchase requests, the quantity is left as-is. The total line amount is updated, which in turn updates the total amount of the purchase request and triggers reassessment of approvals, if applicable. In this scenario, the revision line captures the change in the pricing reference as well as the budget.

When a purchase order is created, the pricing reference on the purchase requisition line cannot be revised.

Rewards with no purchase order

If no purchase order is created, and state of the purchase requisition is not **Closed Rejected**, **Closed Complete**, or **Closed Canceled**, you can manually revise the purchase requisition. In this case, neither a revision request nor a new purchase requisition is created. You can view the updates in the Revision Lines related list of the purchase requisition line.

The addition of a new purchase requisition or purchase order line is restricted to the same supplier and business owner for a revision process.

Purchase order revisions

- Shopper-initiated purchase order revision:
 - When the status of a purchase order is not **Closed Complete** or **Closed Canceled**, a shopper can revise the lines from ShoppingHub. A revision request is created and assigned to the procurement specialist, and the state is updated to **Closed Complete**. A procurement specialist does not have to confirm the revision request prior to creation of the revised purchase requisition.
 - A new purchase requisition of type **Revision** is created and the revision request is attached to the revised purchase requisition.
- Procurement specialist-initiated purchase order revision:
 - To initiate a revision of the purchase order, select **Revise** in the Purchase Automation module.
 - On confirmation of the revision, a new purchase requisition of type **Revision** is created and the revision request is attached to the revised purchase requisition.
- Shopper-initiated blanket purchase order revision:
 - When the status of a blanket purchase order is not **Closed Released**, a shopper can initiate a revision from ShoppingHub. Only the quantity and budget can be revised on a blanket purchase order.
 - When a budget revision is made, the quantity and total line amount of the corresponding blanket line is calculated to the nearest value using the negotiated unit cost of the supplier product. Revisions cannot be below the current released amount

against the blanket purchase order. Revising either quantity or budget results in the other being back-calculated accordingly.

- On confirmation of the revision, a new purchase requisition of type **Revision** is created and the revision request is attached to the revised purchase requisition.

For both the shopper-initiated and procurement specialist-initiated purchase order and blanket purchase order revisions, the status of the purchase requisition is updated to **Pending Revision** and delegation of authority is reassessed.

The state of the purchase order and the purchase order lines that were revised are updated to **Pending Revision**. The state of the purchase order lines which are not revised does not change.

When the state of the purchase requisition is **Final Review** and the purchase requisition is of the type **Revision**, you can select **Update Purchase Order** to update the existing purchase order and purchase order lines with the revised information.

State of the purchase requisition is then updated to **Closed Complete**.

Note:

Revision requests must be in a closed state for a purchase order to be created. For more information on purchase orders, see [Purchase order](#).

Revisions are not allowed in ShoppingHub for lines that have been fully received. Revisions can only be triggered for an amount that exceeds the received amount.

Impact of rejecting an increase in funds revision

If a purchase requisition or purchase order is revised, and the re-approval is rejected, the behavior is as follows:

- If a purchase order doesn't exist, the purchase requisition is reverted to the pre-revision state and value, for both single and multiple lines.
- If a purchase order exists, and the good or service has either been partially delivered or not delivered at all:
 - For a single line, the original purchase order remains as-is. The purchase order reverts to its state prior to revision. The resulting purchase requisition of type Revision will be in the Closed Rejected state, with no option to update the purchase order.
 - For multiple lines, if every line within the revision purchase requisition is rejected, the impact is the same as above.
 - For multiple lines, if some of the lines within the revision purchase requisition are rejected, only those rejected lines revert to their state prior to revision, upon updating the purchase order.

Purchase revision impact on cost allocations and milestones

Cost allocation behavior

- Cost allocations from the original purchase requisition are updated in the revised purchase requisition.
- If an increase or decrease in funds happens, a new cost allocation is created for the primary cost center (cost center of the business owner on the purchase requisition) on the revised purchase requisition.

This amount reflects either as an increase (positive amount) or decrease (negative amount) in funds.

- Once the purchase order is updated, the revised purchase order contains separate entries for the primary cost center, that is, the one from the original purchase requisition and another as a result of the revision, along with any additional user-defined allocations from the original purchase requisition.
- Cost allocations cannot be updated after the creation of a purchase order.

For more details on cost allocations, see [Cost allocations](#).

Milestone behavior

- Milestone details are copied from the original purchase requisition to the revised purchase requisition.
- User can create any additional milestones, as needed, on completion of the revision.
- Once the purchase order is updated, the original milestone on the purchase order is updated to the **Closed Canceled** state, as a copy is already created during the revision process.

For more details on milestones, see [Milestones](#).

Related topics

[Purchase revision flows](#)

Contracts

A contract defines the terms and conditions along with pricing agreed for a product with the supplier. An active contractual price determines if the pricing of a product or service is displayed on ShoppingHub.

Use the purchasing view to view contract details in the Purchase Automation module. You can also create a new contract with the contract_manager role.

In addition to purchase requisitions, systematic creation of a contract occurs during a sourcing request or negotiation. This is configured accordingly in flow designer. The various scenarios for pre-purchase contract creation are:

- Negotiation exists, created manually: Trigger contract creation, including NDA if required, against the negotiation when the state of the negotiation is Planned.
- Negotiation exists, created systematically through third-party sourcing integration: Trigger contract creation, including NDA if required, against the negotiation when the state of the negotiation is Negotiation in Progress.
- Negotiation does not exist: Trigger NDA contract creation, if required, against the sourcing request when the state of the sourcing request is Awaiting Supplier Response. A procurement specialist or contract team can manually create other contracts against the sourcing request before creating a purchase requisition. If contracts are not manually created against the sourcing request, they are systematically created against the awarded purchase requisition after approvals are complete.
- New supplier created from manual sourcing or third-party sourcing integration: For third-party sourcing integration, trigger contract creation when a new purchase line is created for a new supplier. For manual sourcing, contract creation follows the manual negotiation creation or negotiation does not exist scenarios.

When a supplier is awarded, contracts that were created for the other suppliers are canceled, except NDAs. Contract metadata population remain as is.

In a contract, the following are the key fields:

Contract form

| Field | Description |
|---------------------------|--|
| Contract model | Type of the contract. |
| Supplier | Supplier that is billed for this contract. |
| Contract number | Unique identifier for the contract that the vendor assigns. |
| Name | Short description of the contract. |
| Parent contract | Parent contract or agreement, if any. |
| Start date | Date from which this contract is effective. |
| End date | Date on which the contract ceases to be effective. |
| State | Status of the contract. For example, Draft , Active , Expired , or Canceled . |
| Substate | Substate of the contract. For example, Awaiting Review , Under Review , Approved , or Rejected . |
| License quantity entitled | Number of licenses included in the contract. This field is available for Maintenance and Software License contracts. |
| Contract administrator | Person responsible for managing the contract and interacting with the vendor. |
| Approver | User who approves or rejects the contract. |
| Business owner | Internal user responsible for the product in the contract. |
| Agreement type | License classification of the contract. |
| Description | Detailed description of the contract. |
| Purchasing | |
| Purchasing entity | The purchasing entity associated with the contract. |
| Payment term | The agreed to time and conditions under which a payment to a supplier is made. |
| Incoterm | Determines who assumes the liability and when a fixed asset must be capitalized. |
| Financial | |
| Invoice payment terms | Terms that explain how to pay the contract. For example, Net Monthly Account or Net 30 . |

Contract form (continued)

| Field | Description |
|------------------------|---|
| Payment schedule | Schedule that defines when to make payments. For example, Monthly or Annually . |
| Payment amount | Amount paid for this contract so far. |
| Applicable taxes | Tax applicable for this contract. Select from Exempt or Sales . |
| Effective tax rate | Tax rate applicable to the total cost. This field is visible only if the applicable taxes is selected as Sales . |
| Tax cost | Total tax on the contract. This field is visible only if the applicable taxes is selected as Sales . |
| Total cost | Final cost of the contract after adjustments have been applied. If a contract has one or more rate cards, this field shows the combined value of all rate cards. |
| Vendor account | Account of the vendor with which the contract is associated. |
| PO Number | Purchase order associated with this contract. |
| Cost center | Cost center that is financially responsible for the asset. |
| Has rate card | Determines if the contract has an associated rate card. |
| Renewal | |
| Automatically renew | Indicates if the contract can be renewed at the end of its term. |
| Options | Duration of the contract renewal or extension. For example, 1 year. |
| Renewal start date | Date on which the contract renewal or extension takes effect. |
| Renewal end date | Date on which the contract renewal or extension ends. |
| Cost adjustment type | Type of cost adjustment applied to the contract: Fixed , Manual , or CPI (consumer price index). |
| Cost adjustment amount | Numerical increase or decrease in price of contract. To indicate a decrease in price, enter a negative number. Either a Cost adjustment or Cost adjustment percentage can be specified, but not both. |

Contract form (continued)

| Field | Description |
|----------------------------|--|
| Cost adjustment percentage | Percentage increase or decrease in price of contract. To indicate a decrease in price, enter a negative percentage. Either a Cost adjustment or Cost adjustment percentage can be specified, but not both. |
| Terms and conditions | Specific legal information in the contract. |
| | |

The following are the related lists of a contract:

Contract related lists

| Related list | Description |
|---------------------------|---|
| Child Contracts | Lists any child contracts that exist for this contract. |
| Expense Lines | Lists all expense lines for this contract. |
| Assets Covered | Lists all assets covered by this contract. |
| CIs Covered | Lists all configuration items (CI) used in this contract. |
| Service Offerings | Lists all service offerings from this vendor. Activate Service Portfolio Management to see this related list. |
| Approval History | Lists all approvals for this contract. |
| Contract History | Displays the changes to the start and end dates of this contract and changes to the terms and conditions. |
| Purchase Requisitions | Lists all the purchase requisitions associated with this contract. |
| Purchase Orders | Lists all the purchase orders associated with this contract. |
| Supplier Products Covered | Lists all the supplier products covered under this contract. |
| Pre-payments | Provides information of the pre-payment details such as the amount and the payment date for this contract. |

Contract exception rules

Contract exception rules specify conditions in which a contract record is not created even if there is a corresponding contract type mapped to a model category. A procurement administrator can configure these rules from decision tables which are in the administration section of the Purchase Automation module.

Pricing

Pricing stores the relationship between supplier product, contracts, and price of a product.

You can store pricing as a single price or with a price break. Supplier quotes are stored in the Pricing table and are used to display in ShoppingHub to help with the decision of awarding a supplier.

A pricing record is created when the **Negotiated unit cost** field is populated on the purchase line within a sourcing request.

Several scenarios are documented here for clarity.

- One-time single price, no negotiations:
 - Sourcing request is automatically created.
 - Procurement specialist directly enters price into the **Negotiated unit cost** field on the purchase line.
 - Pricing record is automatically created when the **Negotiated unit cost** field is populated. Price value on the Pricing table is populated with the negotiated unit cost.
 - The state changes based on the existence of a price value in the Pricing table.
- One-time single price, with negotiations:
 - Sourcing request is automatically created.
 - Procurement specialist creates a negotiation.
 - Pricing record is automatically created when the negotiation is created, with no price value.
 - Procurement specialist directly enters price into the **Negotiated unit cost** field on the purchase line.
 - Price value on the Pricing table is populated with the negotiated unit cost.
 - The state changes based on the existence of a price value in the Pricing table.
 - Systematic contract creation on negotiation remains as-is and is linked to the pricing record.
- One-time price break, no negotiations:
 - Similar to the one-time single price, no negotiations scenario.
 - Procurement specialist confirms the quantity with the shopper, if not indicated by the shopper already, and enters the appropriate negotiated unit cost on the purchase line.

i Note: When quantity is revised on a line that has an underlying price break, the negotiated unit cost on the purchase line and purchase order line must be updated to reflect the corresponding pricing for that quantity tier.

- Pricing record is systematically created for a single price.
- Creating a price break entry in the Pricing table is optional.
- User manually changes the price type from single price to price break in the Pricing table, and enters the pricing tiers.
- One-time price break, with negotiations:
 - Similar to the one-time single price, with negotiations scenario.
 - Procurement specialist confirms the quantity with the shopper, if not indicated by the shopper already, and enters the appropriate negotiated unit cost on the purchase line.

i Note: When quantity is revised on a line that has an underlying price break, the negotiated unit cost on the purchase line and purchase order line must be updated to reflect the corresponding pricing for that quantity tier.

- Pricing record is systematically created for a single price.
- Creating a price break entry in the Pricing table is optional.
- User manually changes the price type from single price to price break in the Pricing table, and enters the pricing tiers.
- Term single price, no negotiations: Similar to the one-time single price, no negotiations scenario.
- Term single price, with negotiations: Similar to the one-time single price, with negotiations scenario.
- Term price break, no negotiations: Similar to the one-time price break, no negotiations scenario.
- Term price break, with negotiations: Similar to the one-time price break, with negotiations scenario.

i Note: For third party sourcing integration, the flow does not get impacted since both the **Negotiated unit cost** field and the Pricing table are populated systematically.

The **Original unit cost** field in the Pricing table populates the **Starting unit cost** field on a purchase line for any subsequent purchases using this active contractual price record.

Contractual Price

A price for a supplier product is considered as an active contractual price when there is a contract reference to the pricing and the contract is active. Subsequent purchases of a product with contractual pricing uses the active contractual price, and the price is displayed in ShoppingHub accordingly.

The **Price Duration Type** field determines if the price is for a one-time purchase or a term purchase. This is a read-only field, whose values are populated based on the **One-time pricing** field on the purchase line.

i Note: For a good, the value of this field on the Pricing table is always Term. This field is editable within the purchase line only when it is for a service, and the line is within the context of a sourcing request. Once a purchase requisition is created, the field becomes read-only. Any updates made to this field value on the purchase line is reflected accordingly on the Pricing table.

If there are multiple overlapping active contracts for a specific supplier product, and they are mapped to the same or different contract models, the contract with the lowest price is used to display pricing in ShoppingHub.

If there are overlapping active contracts in a blanket or release scenario, any subsequent release uses the lower price. For blanket purchase orders (not releases), the original contract associated to the blanket purchase order is not updated. The blanket line amount and quantity remain the same. Releases (after the lower contractual price is active) are associated to the contract with the lower contractual price. Contract association for releases that are complete shouldn't be changed.

If the overlapping contracts have a price break structure, use the minimum price to determine which contract to use during the overlapping period.

A reference to the pricing record is added on the purchase line to allow procurement specialists to select a different pricing record, if required. If the pricing reference is updated, the starting unit cost and negotiated unit cost are updated on the purchase line, and so is the requisition to contract association.

Receipt tasks

Receipt tasks are created when goods receipt is required for the purchase line.

A receipt task references a purchase order and is grouped by the recipient and the calendar month of the product's expected delivery date. A receipt task is created only during the month of the expected delivery date, irrespective of the purchase order creation date, and remains open until all the expected deliveries for the recipient in a calendar month are confirmed. This is done using the [PSM] Create Receiving Task scheduled job.

Consider the following example:

The current month is September 2020, and for a purchase order, there are five purchase order lines:

| Purchase order line | Expected delivery date | Recipient |
|---------------------|------------------------|-----------|
| 1 | September 10, 2020 | John |
| 2 | September 20, 2020 | John |
| 3 | October 22, 2020 | John |
| 4 | September 12, 2020 | Peter |
| 5 | October 5, 2020 | John |

On the purchase order, three receipt tasks are created as follows:

- Receipt task 1, associated to purchase order line 1 and 2, is created on September 1, 2020, with the state **Open**.
- Receipt task 2, associated to purchase order line 3 and 5, is created on October 1, 2020, with the state **Open**.
- Receipt task 3, associated to purchase order line 4, is created on September 1, 2020, with the state **Open**.

You can view all receipt tasks from the **Receipt Acknowledgment** sub-module under the Purchase Automation module. The following are the key fields of a receipt task:

Receipt task fields

| Field | Description |
|-----------------|--|
| Number | System-generated unique identifier of the receipt task. |
| Assigned to | Person primarily responsible for this receipt task. |
| Primary contact | Person within the procurement team who can be contacted with questions about receipts, milestones, invoices, or other activities related to acknowledgment. This field is populated or updated with the same |

Receipt task fields (continued)

| Field | Description |
|------------------------|---|
| | user in the Assigned to field of the parent task record, as follows: For a receipt or acknowledgment task, from the referenced purchase order. |
| Short description | Brief description of the receipt task. This description is dynamically populated based on whether there are one or multiple products to be received from the supplier. |
| Description | Detailed description of the receipt task. |
| State | Status of the receipt task. For example, Open , Shipped , Partially Complete , and so on. |
| Due date | Expected due date from the person to whom this task is assigned. |
| Summary Details | |
| Expected start | Expected start date of the receipt task. |
| Actual start | Actual start date of the receipt task. |
| Actual end | Actual end date of the receipt task. |
| Duration | Duration to complete this receipt task. |

The following are the related lists of a receipt task:

Receipt task related lists

| Related list | Description |
|----------------------|--|
| Purchase order lines | List of all the related purchase order lines for this receipt task. |
| Receipts | List of all the receipts for this task. This list is populated when the shipment of the product is partially or fully complete. For more details, see Receipts |
| Shipment details | List of all the shipment tracking numbers for this receipt task. For more details, see Shipment details . |

Receipts

Receipts reference a purchase order line. Depending on the product type of the purchase, a goods receipt or services receipt is generated.

If the product type of the purchase order is a good, then a goods receipt is generated. If the product type is services, then a services acknowledgment receipt is generated.

Note: If you're an existing customer continuing with the Source-to-Pay Common Architecture (sn_shop) plugin, and skipping the Shopping Hub (sn_spend_uib) plugin, service acknowledgment is replaced with invoice acknowledgment for you.

For a product of the type service, if the acknowledgment type is **Milestones**, then confirming a milestone also results in receipt generation. However, if the acknowledgment type is **Two way match**, receipt creation is disabled for this purchase order line.

Receipts can either be a partial or full receipt, and are used determine the status of the associated purchase order line and purchase order.

You can view all receipts from the **Receipt Acknowledgment** sub-module under the Purchase Automation module. The following are the key fields of a receipt:

Receipt fields

| Field | Description |
|------------------------|---|
| Number | System-generated unique identifier of the receipt. |
| ERP number | ERP number generated for the receipt. |
| Received by | The recipient of the product. |
| Status | Status of the receipt. The status field is visible only when the ERP integration plugin is installed. |
| Supplier product | The product for which the receipt is generated. |
| Type | Type of the receipt based on the product type. For example, Goods Receipt or Services Receipt . |
| Summary Details | |
| Purchase order line | The purchase order against which the receipt of the product is acknowledged. |
| Milestone | Milestone associated for this receipt. This field is visible only for a services receipt and if the acknowledgment type is milestones. |
| Quantity received | The quantity of the product received. This field is visible only for a good receipt. |
| Percentage received | Percentage of the service received. This field is visible only for a services receipt. |
| Amount received | Receipt amount for the service received. |

Receipt fields (continued)

| Field | Description |
|-------|--|
| | This field is visible only for a services receipt. |

Shipment details

Shipment details display tracking information of a product that is shipped to the employee shopper.

Shipments can be tracked for USPS, FedEx, UPS, or other carrier services. The tracking information from shipping details is displayed to the employee shopper on the ShoppingHub portal. Shipment details are referenced to a receipt task and a purchase order line.

You can view all shipment details from the **Receipt Acknowledgment** sub-module under the Purchase Automation module. The following are the key fields for a shipment:

Shipment details fields

| Field | Description |
|---------------------|--|
| Tracking number | Tracking number associated with the shipment. |
| Quantity shipped | Quantity of the product shipped. |
| Status | Status of the shipment. For example, Pending Shipment , Shipped , Out for Delivery , Delivered . |
| Updated | The date and time the status is last updated. |
| Summary | |
| Carrier | Shipment carrier used for the delivery. For example, USPS , FedEx , UPS , or Other . |
| Other carrier | Name of any other shipment carrier used for the delivery. This field is visible only if carrier is selected as Other . |
| Receipt task | Receipt task associated with the shipment. |
| Receipt | Receipt associated with the shipment. |
| Purchase order line | Purchase order line associated with the shipment. |

When the status of the shipment is updated to **Delivered**, a receipt is created for the quantity mentioned in the shipment.

Invoice tasks

Invoice tasks, an extension of acknowledgment tasks, lists invoice tasks in the Open, Work in Progress, and Closed Rejected status.

Note: If you are a new customer, or an existing customer who has upgraded and installed the Shopping Hub (sn_spend_uib) plugin, these tasks aren't applicable for you. However, if you choose to continue with the existing Source-to-Pay Common Architecture (sn_shop) plugin and skip the Shopping Hub plugin, these tasks are available for you to work on.

When an invoice acknowledgment is triggered, a task is created against the invoice and displayed as an Invoice Task related list on the Invoice form view.

You can view these invoice tasks from the **Receipt Acknowledgment** sub-module under the Purchase Automation module. The following are the key fields of an invoice task:

Invoice task fields

| Field | Description |
|-------------------|---|
| Number | System-generated unique identifier of the invoice task. |
| Assigned to | Person primarily responsible for this invoice task. |
| Primary contact | Person within the procurement team who can be contacted with questions about receipts, milestones, invoices, or other activities related to acknowledgment. This field is populated or updated with the same user in the Assigned to field of the parent task record, as follows: For an invoice or acknowledgment task, from the referenced purchase order. |
| Short description | Brief description of the invoice task. |
| Description | Detailed description of the invoice task. |
| State | Status of the invoice task. The options are Open , Work in Progress , Closed Complete , Closed Rejected , and Closed Canceled . If a line is acknowledged in ShoppingHub, the state of the invoice line will be Invoice Confirmed . If rejected, the state of the invoice line will be Rejected . |
| Due date | Expected due date from the person to whom this task is assigned. |
| Summary Details | |
| Invoice | Invoice for which this invoice task is created. |
| Expected start | Expected start date of the invoice task. |
| Actual start | Actual start date of the invoice task. |
| Actual end | Actual end date of the invoice task. |
| Duration | Duration to complete this invoice task. |

The following are the related lists of an invoice task:

Invoice task related lists

| Related list | Description |
|---------------|--|
| Invoice lines | List of all the related invoice lines with acknowledgment type as service acknowledgment, for this invoice task. |

Invoices

Invoices are generated for a payment against a purchase order. A purchase order can have multiple invoices depending on the payment schedule.

You can manually create invoices in the ServiceNow platform or generate invoices through integration with an external supplier portal.

i Note: Invoice matching is either done externally in the supplier portal or manually in ServiceNow. There's currently no logic to perform invoice matching systematically in the ServiceNow platform.

The following are the key fields of an invoice:

Invoice fields

| Field | Description |
|-------------------------|--|
| Number | System-generated unique identifier for the invoice. |
| ERP number | Unique identifier generated within an ERP system for the invoice. This field is applicable when there's an ERP integration. The value is populated after the invoice is posted in the ERP system through the integration. |
| Status | Current status of the invoice. |
| Supplier invoice number | Invoice number of the supplier. i Note: This is a mandatory field except when the invoice is in the Draft state. |
| Supplier tax id | Tax ID associated with the supplier. |
| Invoice date | Date on which this invoice is created. i Note: This is a mandatory field except when the invoice is in the Draft state. |
| Summary Details | |
| Supplier | Supplier from whom the product or service is procured. |
| Purchase order | Purchase order to which this invoice has been matched. |

Invoice fields (continued)

| Field | Description |
|--|--|
| Invoice date | Date on which this invoice is created. i Note: This is a mandatory field except when the invoice is in the Draft state. |
| Subtotal | Total amount of money to be paid to the supplier excluding tax and shipping charges. i Note: This is an editable field. |
| Tax rate | Tax rate percentage applied for the order. |
| Sales tax | Sales tax charges incurred for the invoice. |
| Shipping | Shipping charges incurred for the invoice. |
| Other charges | Other additional charges associated to the invoice. |
| Discounts | Discounts applied to the invoice. |
| Amount invoiced (Transaction currency) | Total amount of money to be paid to the supplier including tax and shipping charges. i Note: This is a mandatory field except when the invoice is in the Draft state. This is also an editable field. |
| Accounting Details | |
| Legal entity | The internal legal entity which incurs the cost of this invoice. |
| Remit to address | The location to which this payment is made. |

The following are the related lists of an invoice:

Invoice related lists

| Related list | Description |
|-------------------------|---|
| Invoice Lines | Captures the line amount and rolls up to the subtotal on the invoice. |
| Service Acknowledgments | Displays all the service acknowledgments associated with this invoice. |
| Approval Plans | Displays all the approval plans created against this invoice. |
| Approvals | When the services acknowledgment is set to Invoice approval , invoice approvals act as a form of receipt before issuing the payment to a supplier. |

Invoice related lists (continued)

| Related list | Description |
|---------------|---|
| | <p>In the absence of a receipt and three-way matching, invoice approvals are used to avoid an automatic two-way match.</p> <p>Invoice approvals are sent to the recipient of the line and the shopper can act on them as a to-do in ShoppingHub.</p> <p>For details, see Shopper to-dos.</p> |
| Invoice Tasks | <p>When a service acknowledgment is triggered, a task is created against the invoice and listed here.</p> <p>Note: If you are a new customer, or an existing customer who has upgraded and installed the Shopping Hub plugin, these tasks aren't applicable for you. However, if you choose to continue with the existing Source-to-Pay Common Architecture plugin and skip the Shopping Hub plugin, these tasks are available for you to work on.</p> |

To create an invoice from a supplier for a received product or service, edit the **Subtotal** field in the Invoice form to the actually received amount, add an invoice line to capture the specifics of that purchase order line, and update the **Line amount invoiced** field in that Invoice Line form to reflect the same received amount. When the invoice line and the invoice are both updated to the Paid state, an expense line is auto-generated in the Project form of Project Management for which the purchase was originally made.

For more information on Sourcing and Procurement Operations's integration with Project Management, see [Sourcing and Procurement Operations integration with Project Management](#).

Invoice calculations and state flows

Note: Business rules pertaining to handling state changes, handling tax and charges, default invoice fields, populating invoice line amounts, handling line total changes, and populating supplier products are available only if you haven't installed the Shopping Hub (sn_spend_uib) plugin and are still using the Source-to-Pay Common Architecture (sn_shop) plugin.

A field named **Amount requiring approval** on the invoice approval record distinguishes the actual invoice amount that needs to be approved, as the invoice lines within an invoice could consist of different services acknowledgment types and/or goods receipt required conditions.

When an invoice line that is sent for approval is approved, the status of the invoice line is updated to Invoice Confirmed. If any line within the invoice is rejected, the entire invoice is rejected.

The status of the invoice is updated to Invoice Confirmed only when the status of all the corresponding invoice lines are Invoice Confirmed. If the status of the invoice is updated to Invoice Confirmed, then the status of all the associated invoice lines are also updated to Invoice Confirmed. This applies to the scenario when matching is done manually in the Now Platform and the user updates the invoice header instead of updating line by line. This update is done by selecting **Confirm** on the invoice header. When the invoice state is Invoice Confirmed, the **Confirm** button isn't displayed for any subsequent state as well.

The invoice state on the invoice header is read-only as the state change is driven by the lines. In case of a multi-line invoice, if one line is in a Requires Review state, the invoice header is updated to Requires Review as well.

Create an approval rule

Approve a purchase requisition, purchase order, sourcing request, or invoice, by defining an approval strategy and creating approval rules. This is a one-place configuration that can drive any kind of approval process that your organization may need.

Before you begin

To create an approval rule, you must have set up your product catalog (with the necessary product categories, product models, and supplier products) and should be able to raise a purchase requisition or sourcing request. For more information on how to set up your product catalog, see [Create a product category](#), [Create a product model](#), and [Add a supplier product](#). You should have also set up the sys_user record appropriately to include relevant details such as job codes, managers.

Role required: sn_shop.procurement_administrator

About this task

You can create an approval rule to determine how approval plans are generated and routed when conditions are met, from the Purchase Automation module.

Procedure

1. Navigate to **All > Purchase Automation > Administration > Approval Rule**.
2. Select **New**.
3. On the form, fill in the fields.

Approval Rule form

| Field | Description |
|------------------|--|
| Number | System-generated unique identifier for the approval rule. |
| Name | Name you assign to the approval rule. |
| Active | Option to decide if this rule is used to generate approvals during the purchase requisition process. |
| Approving object | Object you're seeking approval for. The following options are available: <ul style="list-style-type: none"> ◦ Invoice ◦ Purchase Order ◦ Purchase Requisition ◦ Sourcing Request |

| Field | Description |
|--------------------------|---|
| | <p>It's defaulted based on the approving object selected. For sourcing request and purchase requisition it's purchase requisition line, for purchase order it's purchase order line, and for invoice it's invoice line.</p> <p>i Note: While full approval workflows, including approval engine, state flows, and email notifications, are provided for purchase requisitions and sourcing requests, additional implementation is required in defining state flows and email notifications for purchase order and invoice approval rules.</p> |
| Approving line | Approving object line you're seeking approval for. |
| Approval rule type | <p>Type of approval rule that determines how approval plans are generated and routed when conditions are met. The following options are available:</p> <ul style="list-style-type: none"> ◦ Dynamic Users or Groups ◦ Managerial Job Code Hierarchy ◦ Managerial Hierarchy ◦ Specified Users or Groups ◦ Cost Center Managers <p>i Note: This option is available only when the approving object is a purchase requisition.</p> <p>Depending on the rule type you select, the associated fields appear. For more information on these rules, see Approval rule types.</p> |
| Base approvals on | Business owner who the approval rule is based on. |
| Users | Specified users who should receive the approval based on the approval trigger. |
| Groups | Users in the specified groups who should receive the approval based on the approval trigger. |
| Approval sequence | Sequence in which the approval rules should be triggered. For more information on this, see Approval rule grouping and sequencing . |
| Approval required from | Determines the managers who should receive the approval request during the purchase requisition process. |
| Allow automatic approval | Determines if self-approval is to be enabled. By default, this flag is checked or set to true, enabling the self-approval functionality, where the requester has the approving authority. However, if the flag is cleared or set to false, the requester is included to be an active approver in the approval engine's generated approval list, thus overriding the default self-approval functionality. The requester now needs to provide an explicit approval decision by completing an approval task. |
| Purchasing user | User for whom approvals are triggered. |

| Field | Description |
|-----------------------------------|---|
| Send approval to purchasing users | Options to send an approval dynamically to a user or group related to the purchasing user. |
| Authorized job codes | One or more job codes that can automatically approve purchases up to the specified limit. |
| Approved purchasing limit | Reference currency threshold within which users with the specified job codes can approve purchase requisitions. |
| Approval routing method | Method of routing the approvals. The options are sequentially and in parallel. |
| Approval decision method | Method of approving the rule. You can select if all approvers must approve the rule or any approver can approve it. |
| Approval trigger conditions | Conditions based on the approving object that determine the conditions under which an approval plan is created. The trigger conditions are based on the Approving Object table and enable the user to dot-walk. For example, if the user wants to create trigger conditions from the maximum budget of a sourcing request, they should walk from maximum budget to amount, and then create the conditions. |

i Note: Approvals are individually evaluated for each approving object. For example, creating the same approval for a sourcing request and a purchase requisition results in approvals getting triggered twice. To prevent this, the admin can configure approvals from not getting created in a purchase requisition if it's backed by a sourcing request that isn't empty. This is done from the approval trigger conditions.

4. Select **Submit**.

Approval rule types

Approval rule types determine the methods by which approvals are created during the purchase requisition process.

As a procurement administrator, you can define an approval strategy and create approval rules to approve a purchase internally before it's converted to a purchase order and sent to a supplier. This is a one-place configuration that can drive any kind of approval process that your organization may need.

You can create these approval rule types that go on to determine the conditions under which approval plans are generated and routed:

Approval rule types

| Approval rule type | Description | Example Scenario |
|-------------------------|---|---|
| Dynamic Users or Groups | Approvals are dynamically created and sent to the | If approval is required from the purchasing user's cost |

Approval rule types (continued)

| Approval rule type | Description | Example Scenario |
|-------------------------------|--|--|
| | <p>specified user or group.</p> <p>Approvals are triggered based on the purchasing user's attributes. The approval routing method is restricted to just sending approvals in parallel.</p> | <p>center manager, then at the time when the purchase requisition is sent to pending approval, the rule looks at the record for the user in the Business Owner field, dot-walks to the referenced cost center, and sends an approval to whoever is the referenced user in the Manager field on the cost center.</p> |
| Managerial Job Code Hierarchy | <p>Approvals are triggered based on the purchasing user's job code and manager's job code. The approval routing method can be parallel or sequential, and the approval decision method can be all approvers or any approver.</p> | <p>If approval is required from all users up to the user with an authorized code, then an approval is sent to all users within a management hierarchy up to the user with an authorized job code for the approved purchasing limit that covers the total amount of the purchase requisition.</p> <p>If approval is required from the most junior user with an authorized code, then an approval is sent to the most junior user within a management hierarchy up to the user with an authorized job code for the approved purchasing limit that covers the total amount of the purchase requisition.</p> |
| Managerial Hierarchy | <p>Approvals are triggered based on the purchasing user's manager's hierarchy. The approval routing method can be parallel or sequential, and the approval decision method can be all approvers or any approver.</p> | <p>If approval is required from all managers in hierarchy, then an approval is sent to all users in the purchasing user's (business owner) management hierarchy up to the job code specified, when the approval trigger conditions are met.</p> <p>If approval is required from the direct manager alone, then an approval is sent to the user's manager in the purchasing user's (business</p> |

Approval rule types (continued)

| Approval rule type | Description | Example Scenario |
|---------------------------|---|--|
| | | <p>owner) management hierarchy.</p> <p>If approval is required from the most senior manager, then an approval is sent to the most senior manager in the purchasing user's (business owner) management hierarchy up to the job code specified.</p> |
| Specified Users or Groups | <p>Approvals are triggered based on the specified users or groups. The approval routing method is restricted to just sending approvals in parallel.</p> | |
| Cost Center Managers | <p>Approvals are triggered only for purchase requisitions, from multiple cost center managers. The approval routing method is restricted to just sending approvals in parallel.</p> | <p>If the cost of a purchase requisition is allocated across many cost centers, approvals are sent to each cost center manager for the cost allocation amount needing approval.</p> <p>If an individual item in the purchase requisition has cost allocated across multiple cost centers, all the cost center managers must provide their approval for the amount of that item to be approved. The purchase requisition can be partially or completely approved depending on the approval decision for each individual item or purchase line.</p> <p>Cost center managers receive email notifications for their approval with details of the purchase and the allocated amount needing approval. They can provide their approval directly from the email, or complete their approval in Shopping Hub, Employee Center, Virtual</p> |

Approval rule types (continued)

| Approval rule type | Description | Example Scenario |
|--------------------|-------------|--------------------------------|
| | | Agent, or Shopping Hub Mobile. |

Self-approved purchases

For requesters who possess the right purchasing authority, job code, or belong to designations that meet a defined purchasing approval matrix, their purchases are self-approved. An audit trail is made available, where an approval plan is created with the approval type as Self Approved, and in the Closed Complete state, though no actual approval tasks are created.

Such requesters can also complete approval tasks, if configured, and provide approvals for invoices from suppliers to be routed for payment. In the Approval Rules form, an admin can configure the need for a requester to provide an explicit approval decision, through the **Allow automatic approval** flag. By default, this flag is checked or set to true, enabling the self-approval functionality, where the requester has the approving authority. However, if the flag is cleared or set to false, the requester is included to be an active approver in the approval engine's generated approval list, thus overriding the default self-approval functionality. The requester now must provide an explicit approval decision by completing an approval task.

- **Note:** In case of any issues related to approvals not getting created as expected, ensure that the flag on the rule is in the correct state and the rule conditions are met.

Approval rule considerations

Factors like currency, which includes foreign exchange, reference, and transactional, decide the approval rules to be triggered. Some of the other factors are purchasing limit, line amount, and received lines, among others.

Foreign exchange and reference currency considerations in approval rules

If an approval rule has a defined approved purchasing limit, the foreign exchange currency is defaulted to the system reference currency.

To determine the approval rule to be triggered, compare the transactional currency on the **Total amount** field on the purchase requisition against the reference currency approval rule bucket that it belongs to.

If an approval rule has an approval trigger defined using the total line amount, it should be defined by dot-walking to the reference amount. The transactional currency on the purchase line's total line amount is compared against the reference currency, to determine the approval rule to be triggered.

Fully received lines consideration in approval rules

For a fully received line, the line amount is taken into consideration to determine the approval rule that needs to be triggered.

Approval rule grouping and sequencing

As a Procurement Administrator, you can associate approval rules with approval groups and define the sequence to determine when these rules should be triggered. With this association, a set of approval rules within a rule group is triggered in sequence, instead of all of them being evaluated simultaneously.

For example, when purchasing an IT-related product, a manager can first approve the purchase before sending it to the IT department for approval.

Rules within an approval group are evaluated only if all the rules within it are satisfied. If there are multiple approval groups, all groups are evaluated simultaneously. For approval rules that do not have an associated approval group, evaluation is done as-is at the same time with rules that are associated to approval groups. By default, all rules in an approval group are also evaluated independently. If a rule group is satisfied, then the individual rules do not need to be evaluated. This prevents a Procurement Administrator from creating duplicate rules that need to be evaluated independently and also within the context of an approval group.

Consider the following scenarios:

Scenario 1

- Purchase requisition amount is \$8,000
- Business owner's job code is IC3, cost center is Engineering
- Business owner's managerial job code hierarchy is IC3 => M3 => M4 => CFO

Approval rules A and B



- Without rule group and group sequencing, approval rules A and B are triggered simultaneously.
- With rule group and group sequencing, approval rule A is triggered first, followed by approval rule B when A is complete.

Scenario 2

- Purchase requisition amount is \$8,000, supplier product belongs to the XYZ product category
- Business owner's job code is IC3, cost center is Engineering
- Business owner's managerial job code hierarchy is IC3 => M3 => M4 => CFO

Approval rules A, B, and C

Rule Group 1

Approval rule A

Managerial Job Code Hierarchy
Approved purchasing limit \$10k
All users up to code CFO

Group sequence 1

Approval rule B

Specified Users or Groups
Approval trigger: Business owner's cost center <> IT
User = John Doe

Group sequence 2

Approval rule C

Specified Users or Groups
Approval trigger: Supplier product.Product category = XYZ
User = Michael Adams

- Without rule group and group sequencing, approval rules A, B, and C are triggered simultaneously.
- With rule group and group sequencing, approval rules A and C are triggered first, followed by approval rule B when A is complete.

Scenario 3

- One purchase made for \$120k
- Another purchase made for \$95k

Approval rules A, B, C, and D

Rule Group 1

Approval rule A

Managerial Hierarchy Approval
Spend > \$100k

Group sequence 1

Approval rule B

L2 Approval
Spend > \$100k

Group sequence 2

Approval rule C

CFO Approval
Spend > \$100k

Group sequence 2

Approval rule D

Managerial Hierarchy Approval
Spend < \$100k

- Without rule group and group sequencing, approval rules A, B, C, and D are triggered simultaneously.
- With rule group and group sequencing, approval rules A and D are triggered first, followed by approval rules B and C when A is complete.

Approval group details are stored in the Approval Group table. Within each approval group, there is an approval rule composition related list to define the order of approval rule evaluation within that specific group.

Impact of rule groups and sequencing on the resend approval for reassessment property

If approval rules that belong to a rule group are triggered, the resend approval for reassessment property is only applicable if the same rules within that rule group are satisfied as a result of a merge or revision.

In the scenario where there are rules that belong to a group, and are also evaluated independently, the resend approval for reassessment property is only applicable if the same rules within the group are triggered. For rules that do not belong to a group, the property behaves as-is.

For example, in scenario 2:

- If the resend approval for reassessment property is set to No, and as a result of a revision, approval rule A is satisfied, rule B is not satisfied, and rule C is satisfied, then approvals are resent to the approver for rule A.
- If the property is set to No, and rules A, B, and C are satisfied as a result of a revision, then the approvals are not resent.
- If the property is set to Yes, and rules A, B, and C are satisfied as a result of a revision, then all approvals are resent.
- If the property is set to Yes, and rules A, C, and a new rule D are satisfied as a result of a revision, then approvals A and C are resent, and a new approval D is sent.

Monitor an approval plan

During evaluation, the approval engine converts each approval rule into one or multiple approval plans. You can monitor approval plans to understand how the overall approval process is being executed, the routing and decision methods, the list of approvers involved, the status on the approvals, the list of purchase lines the approval is planned for, and so on.

Before you begin

To monitor an approval plan, you must have already defined an approval rule. For more information on how to create approval rules, see [Create an approval rule](#). You can review and update the plans if required. Approval plans are not created manually.

Role required: sn_shop.procurement_administrator

About this task

You can monitor approval plans to understand how the overall approval process is being executed, from the Purchase Automation module.

Procedure

1. Navigate to **All > Purchase Automation > Administration > Approval Plan**.
2. Select a record.
3. On the form, review these fields.

Approval Plan form

| Field | Description |
|---------------|---|
| Number | System-generated unique identifier for the approval plan. |
| Approval Rule | The approval rule you want to reference for this plan. |

| Field | Description |
|------------------------------|--|
| Purchase requisition number | The unique identifier for the record on which this approval plan is applied. |
| Approver list | User or users responsible for approving the plan. |
| Approver group list | List of groups containing the users responsible for approving the plan. |
| Approval routing method | Method of routing the approvals. The options are sequentially and in parallel. |
| Approval decision method | Method of approving the rule. You can select if all approvers must approve the rule or any approval can approve it. |
| Approval | Status of the approval plan request. The options are Not Yet Requested, Requested, Approved, and Rejected. |
| State | Work status on the requested approval plan. The options are Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped. |
| Purchase requisition line(s) | List of the purchase lines that the approval is planned for. |
| Primary contact | Business owner of the purchase who can be contacted with questions about the purchase. This field is automatically populated on creation of an approval plan with the referenced business owner of the purchase order. |
| Short description | Short description of the approval plan. This is a calculated value, in the format: Approve <total amount> purchase for <supplier name>. |

What to do next

Use the related lists of the approval plan form to view the approval plan details and approvers associated with this approval plan.

Approvals reassessment

Review the conditions for approvals reassessment and their impact on purchase automation.

Resend approvals for reassessment property

The sn_shop.approval.reassessment.resend purchasing property determines if an approval needs to be reassessed as a result of a revision or a merge. The revision could be that of a purchase order or a purchase requisition. This property is only applicable if the same approval rule is triggered. If a new rule is triggered, this property is not applicable and a new approval plan is generated.

For information on approval rule groups and sequencing, and how these impact the property, see [Approval rule grouping and sequencing](#).

A reduction in funds revision is not allowed if the amount is below what has already been shipped or delivered. Revisions are not allowed on rejected lines, and therefore reassessment of approvals is not applicable.

For information on approval rules, see [Approval rule types](#) and [Create an approval rule](#).

When an approval reassessment is sent to approvers, the approval amount to be considered must include the revised line's original amount and the increase in funds. For example, if the original line amount is \$1000 and an increase in funds revision results in the line amount to be \$1500, the amount to be considered for reassessment and approval is \$1500.

When the resend approvals for assessment property is set to Yes, if there is an existing approval plan record that is in progress, and a revision or merge occurs before the plan is completed, its status is updated to No longer required, and a new plan is created. If the property is set to No, and if the existing approval plan is in progress, it is reused.

During an approval reassessment, rejection of a fully received line is not allowed. In ShoppingHub, the fully received line is displayed under the **Approved** tab.

Population of due date on approvals

When a new approval record is generated and the state of the approval record is Requested, the due date for the record is calculated and populated using the following properties:

- sn_shop.pr.approval.duration: Duration, in hours, allocated for an approver to complete the approval request. By default, it is set to 9 hours.
- sn_shop.pr.approval.duration.schedule: The type of schedule associated to the approval duration. By default, it is set to 8-5 weekdays, excluding holidays.

Note: The sys_id of the schedule is used as the value for this property.

Parallel approval records have the same due date. For sequential approvals, the first approver's due date is populated based on the property value defined, the second approver's due date is calculated after the first approval is complete, and so on.

Creation of breached approvals review task

If a due date for an approval is breached, a new task is automatically created using the [PSM] Approval Due Date Breached scheduled job, which runs once a day. This task is a purchasing task, with subtype Approval, and is assigned to the same person to whom the purchase requisition is assigned.

For sequential approval, this purchasing task is created for each approver record that is overdue. For parallel approvals, a single task is created with a related list displaying all the relevant approver records that have breached.

The due date of this task is populated with the breach time on the SLA instance record associated to the SLA definition for the breached approvals review.

For approvals that are no longer required or are canceled, the breached approvals review task creation is not triggered. Breached approvals review SLAs are deleted as they are no longer required.

Create a purchasing assignment rule

Automatically assign a sourcing request, negotiation, or purchase requisition to a procurement specialist user or a task fulfiller's group based on pre-defined conditions by using a purchasing assignment rule.

Before you begin

To create a purchasing assignment rule, you must have set up your product catalog (with the necessary product categories, product models, and supplier products) and should be able to raise a purchase request. For more information on how to set up your product catalog,

see [Create a product category](#), [Create a product model](#), and [Add a supplier product](#). You should have also set up user attributes on the sys_user record appropriately.

Role required: sn_shop.procurement_administrator

About this task

You can create a purchasing assignment rule to route sourcing requests, negotiations, or purchase requisitions to an individual or group, from the Purchase Automation module.

Procedure

1. Navigate to **All > Purchase Automation > Administration > Purchasing Assignment Rules**.
2. Select **New**.
3. On the form, fill in the fields.

Assignment Rule form

| Field | Description |
|-------------|--|
| Name | The name you assign to the assignment rule. |
| Application | The application containing this record. In this case, it displays the default application, which is Sourcing and Procurement Operations. |
| Active | Option to decide if this rule is in use. |

4. Select the **Applies To** tab and fill in the fields.

Applies To form

| Field | Description |
|------------|---|
| Table | Name of the table for which conditions must be set. |
| Conditions | Combination of conditions that must be met before the task is assigned to a user or group. You must add at least one filter condition, select a field type, and specify a value, for the condition to be set. |

Note: The rule is applied only if the task is not already assigned to another user or group.

5. Select the **Assign To** tab and fill in the fields.

Assign To form

| Field | Description |
|-------|--|
| User | The user to whom the task is assigned. |
| Group | The group to which the task is assigned. |

6. Select the **Script** tab and fill in the fields.

Script form

| Field | Description |
|--------|---|
| Script | A script to further customize the assignment rule. Scripts provide access to the current pool of variables. |

7. Select **Submit**.

Define a capitalization policy

Create fixed asset shells automatically during purchase order creation, by defining a capitalization policy.

Before you begin

Role required: sn_shop.procurement_administrator

About this task

You can define a capitalization policy from the Purchase Automation module.

Procedure

1. Navigate to **All > Purchase Automation > Administration > Capitalization Policies**.
2. Select **New**.
3. On the form, fill in the fields.

Capitalization Policy form

| Field | Description |
|----------------------|---|
| Name | The display name of the capitalization policy. |
| Owned by | The user responsible for managing this fixed asset policy. |
| Rank | Determines the order in which a capitalization policy is processed if multiple policies are satisfied. Policies with lower ranks are honored and processed first. |
| Created | The date when this fixed asset policy is created. |
| Active | Option to decide if this policy can be used to create fixed assets. |
| Capitalize assets if | Conditions that determine the creation of a fixed asset. |

4. Select **Submit**.

Fixed asset creation

As a procurement administrator, you can create fixed assets for products that are purchased for long-term use and are not likely to be converted quickly into cash.

Fixed asset creation is automated when capitalization policy criteria are satisfied. To ensure that fixed assets are created automatically on creation of a purchase order, you must first define an applicable capitalization policy. For more information on how to define a capitalization policy, see [Define a capitalization policy](#).

Note: Blanket purchase orders cannot result in the creation of a fixed asset.

You can navigate to **Purchase Automation > Primary Data > Fixed Assets**, and review these fields.

Fixed Asset form

| Field | Description |
|------------------------|--|
| Number | System-generated unique identifier for the fixed asset. |
| ERP asset number | Unique identifier generated within the ERP system for the fixed asset. |
| Display name | System-generated unique display name for the fixed asset. This is an auto-generated value derived from concatenating the ERP number and the product name into <ERP number - Product name>, where the values are taken from the ERP asset number and Product name fields respectively. If either of these fields are null or empty, then the corresponding value is left empty. |
| Supplier | Supplier from whom this fixed asset was purchased. |
| Product name | Name of the purchased product. |
| Purchase order line | The purchase associated with this fixed asset. |
| Status | Current status of the creation of the fixed asset. The options are Submitted, Success, and Pending Deletion. This field is used in the back end for SAP integration purposes. |
| Capitalization | The date on which the requester assumes the liability of the fixed asset, depending on the supplier incoterm. |
| Original value | The amount originally paid for the fixed asset. |
| Depreciation lifecycle | The length of time in which the fixed asset is fully depreciated. |
| Depreciation term | The frequency of depreciation throughout the lifecycle of the fixed asset. |
| Depreciated amount | The amount that the fixed asset has depreciated by, over time. |
| Remaining value | The amount that the fixed asset is worth today, after factoring in depreciation. |
| Salvage value | The amount that the fixed asset is worth after it has come to the end of its useful life. |

Inventory asset creation

Inventory assets are not created upfront when fixed assets are created.

They are created only when the following conditions are satisfied:

- Asset tracking strategy on the product model is set to create assets.
- Product category referenced on the product model has an asset class defined.
- Product has been partially or fully delivered. In case of partial delivery, only the corresponding partial quantity of inventory assets are created.

Inventory assets are not created if goods receipt required is specified as no for a good, or if the acknowledgment type is a two-way match for a service.

If you have defined an asset class, the corresponding asset records are created and associated to the relevant contract model on the purchase order, which are then displayed on the assets covered related list. The applicable contract models that should have the assets covered related list are insurance, lease, maintenance, purchase order, software license, subscription, and warranty.

To view the asset related list, navigate to **Asset > Portfolios > All Assets**. A **Purchasing** tab has been added to the asset form view to capture procurement specific fields that are populated from the purchase order line of the corresponding asset.

Purchasing form

| Field | Description |
|---------------------|---|
| Purchase order | Purchase order associated with this asset. |
| ERP number | Unique number generated within the ERP system for the purchase order. |
| Purchase order line | Purchase order line associated with the asset. |
| Supplier | Supplier associated with the asset. |
| Unit | Unit used to purchase this asset. |
| Unit price | Unit price of this asset. |
| Recipient | Recipient of the asset. |
| Received | Date when the asset was received. |

For more information on asset creation, see [Create assets](#).

A fixed asset related list has also been added. It displays the fixed asset that is associated with this inventory asset if a capitalization policy was satisfied.

Shipping cost calculations

A framework to integrate shipping cost calculations into Sourcing and Purchasing Automation is implemented such that approvals can be done on the full value of purchases.

Shipping estimates can be provided by both the ShoppingHub administrator and the buyer.

Shipping estimates from ShoppingHub administrator

A ShoppingHub administrator can set a default system-wide shipping estimate as a percentage. This can then be applied to all purchases that require shipping, when no other shipping estimates or data exist. This is enabled through a system property `sn_shop.default.shipping.estimate`. Organizations that have a policy around an acceptable threshold shipping cost might want to enter the threshold in the `sn_shop.default.shipping.estimate`.

A ShoppingHub administrator can also configure shipping estimates to be included in purchase requests for the approval process. This is enabled through a system property `sn_shop.shipping.estimate.inclusion`, which is included in purchase request approvals. If this inclusion is marked as true, the shipping estimate from the cart line or checkout is included as a field in the purchase line and in the total amount in the purchase request, while the

estimate in cost allocation is not considered. However, if this inclusion is marked as false, not only would shipping be excluded in the purchase request approval process, but also not calculated at checkout, even if data is included at the product, supplier, or system levels.

- i Note:** When a purchase request becomes a purchase order, the shipping estimate is not included in the total amount.

Shipping estimates from buyer

A buyer can set shipping estimates at the following levels:

- Supplier:

Set a standard percentage estimate for shipping costs from a specific supplier. This estimate is then applied to all the orders that require shipping from that supplier, which do not have any estimate at the product level. In the **Purchasing Automation** tab of the supplier record, enter a shipping estimate value in decimal in the **Default shipping estimate for products from this supplier (calculated as percentage of negotiated unit price)** field.

- Product:

Set a default shipping estimate for a supplier product record. This is then prioritized in estimating the shipping cost of a purchase over any supplier level estimate or default shipping estimate. In the **Purchasing Automation** tab of the supplier product record, enter a shipping estimate value in decimal in the **Default shipping estimate for this supplier product (calculated as percentage of negotiated unit price)** field.

- i Note:** The entered decimal values are stored in percentage. For example, a shipping estimate value of 10.5 is stored as 10.5%.

Shipping cost calculation in cart line table

If the item in your cart is a good, a cart line shipping estimate prioritization logic is used to calculate the estimated shipping cost. If the item in your cart is a service, the estimated shipping cost shows as 0.0 in your currency.

The cart line for each item is updated with the shipping estimate.

1. Use the product level shipping estimate percentage to calculate shipping, provided the `sn_shop.shipping.estimate.inclusion` property is set to true:
 - Pull the estimated shipping as percentage value from the supplier product record.
 - Calculate shipping as [Estimated Shipping as Percentage] * [Quantity] * [Negotiated Unit Price].
2. If 1 is null, use the supplier level shipping estimate percentage to calculate shipping, provided the `sn_shop.shipping.estimate.inclusion` property is set to true:
 - Pull the estimated shipping as percentage value from the supplier record.
 - Calculate shipping as [Estimated Shipping as Percentage] * [Quantity] * [Negotiated Unit Price].
3. If both 1 and 2 are null, use the default shipping estimate percentage to calculate shipping, provided the `sn_shop.shipping.estimate.inclusion` property is set to true:

- Pull the estimated shipping as percentage value from the system properties.
 - Calculate shipping as [Estimated Shipping as Percentage] * [Quantity] * [Negotiated Unit Price].
- 4.** If 1, 2, and 3 are all null, or the sn_shop.shipping.estimate.inclusion property is set to false, shipping estimate is shown as Undetermined.

Tax calculations

A framework to integrate tax calculations into Sourcing and Purchasing Automation is implemented such that approvals can be done on the full value of purchases.

Tax estimates from ShoppingHub administrator

A ShoppingHub administrator can configure tax estimates to be included in purchase requests for the approval process. This is enabled through a system property sn_shop.tax.estimate.inclusion, which is included in purchase request approvals. If this inclusion is marked as true, the tax estimate from the cart line or checkout is included as a field in the purchase line and in the total line amount. However, if this inclusion is marked as false, not only would tax be excluded in the purchase request approval process, but also not calculated at checkout. This applies even when a customer has made the effort to set up the tax calculation API, but has not marked the purchasing property to true.

i Note: When a purchase request becomes a purchase order, the tax estimate is not included in the total amount.

Tax calculation integration process

- Tax integration is triggered when a shopper adds a product to the cart, and the sn_shop.tax.estimate.inclusion property to include tax in the purchase request approval process is marked as true.
- A flow designer tax estimate responsible for making the API call, is triggered.
- The flow designer evaluates if the SAP integration is configured or not.
- If the SAP integration is configured, the flow designer sends the relevant parameter information to the SAP tax engine API, and receives the retrieved tax information to the calling function.
- The received tax estimate is updated in the cart line as well as on the final checkout page.
- If the SAP integration is not configured or there are integration errors, the flow designer does not receive any information from the SAP API, and the estimated tax is reflected as undetermined.

i Note: Here, the customer is open to integrate with any other tax engine, as desired.

Tax calculation API

A tax calculation API is created to provide specific parameters to a tax calculator engine, SAP in this case.

The following parameters are to be used in a tax calculation generic API:

- Cart line:
 - Delivery location (from the checkout cart line)
 - System date
 - Purchase quantity (from the checkout cart line)

- Total line amount (from the checkout cart line)
- Currency (from the **Fx Currency** field in the cart line)
- Supplier record:
 - Street address, City, State, County, Zip, Country, Region (from the vendor's supplier record)
 - Legal name (from the vendor's supplier record)
- Supplier product record: Model category (from the product model)
- Product model: Unit (from the cart line)

A staging table is also created that includes the following output parameters for the API:

- Tax amount
- Tax jurisdiction
- Tax type/description
- Tax percentage

Tax calculation integration with SAP

SAP's tax engine API consumes necessary parameters from the tax calculation generic API to provide tax estimates.

Parameter and field mapping between ServiceNow and SAP

| Parameter | ServiceNow Field | SAP Field |
|-------------------------|---|-------------------------|
| Ship to | Delivery Location | Delivery Address Number |
| Date | System Date | Tax Posting Date |
| Quantity | Purchase Quantity | Quantity |
| Net price | Total Line Amount | Net Amount |
| Ship from | Street Address, City, State, County, Zip, Country, Region | Shipping Address |
| Vendor name | Legal Name | Vendor Code |
| Material/Material group | Model Category | Material/Material Group |
| Unit of measure | Unit | Base Unit of Measure |
| Entity | Entity | Company Code |

The tax estimates are consumed by ServiceNow and updated in the **Estimated Tax** field on the cart line.

Performance Analytics for Sourcing and Procurement Operations

With this application, you can use a set of pre-configured metrics and dashboards to assess spend, operational efficiency, and team performance across the Sourcing and Procurement Operations product.

Visually analyze how you're placed with your work and achievements over a given period of time, with the Procurement Buyer Dashboard. For more information on these, see [Procurement Buyer Dashboard](#).

Visually analyze how your organization is placed strategically and operationally, over a given period of time, with the Procurement Strategy & Ops Dashboard. For more information on these, see [Procurement Strategy & Ops Dashboard](#).

Visually analyze how your team is performing on sourcing requests, purchase requisitions, negotiated savings, and negotiation outcomes, over a given period of time, with the Procurement Team Performance Dashboard. For more information on these, see [Procurement Team Performance Dashboard](#).

You can access these dashboards by navigating to **All > Platform Analytics Workspace > Analytics Center > Dashboards**.

Procurement Buyer Dashboard

Visually analyze how you're placed with your work and achievements over a given period of time.

Note: This dashboard is available only if you install the Performance Analytics for Sourcing and Procurement Operations application.

You can use the Procurement Buyer Dashboard to view all your open sourcing requests, negotiations, purchasing tasks, purchase requisitions, and expiring contracts, in widgets that distinguish these by due dates. You can also view your achievements, which include your year-to-date total spend, further broken down by spend categorization, total savings, negotiation outcomes, and the average cycle time of your assigned sourcing requests and purchase requisitions.

End user and roles

| End user and goal | Required role |
|---|--|
| Procurement Specialist: View your work and achievements. | sn_shop.procurement_specialist |
| Procurement Specialist Manager: View your work and achievements. This role contains the specialist role, and hence has access to the buyer dashboard. | sn_shop.procurement_specialist_manager |
| Procurement Administrator: View and make configuration changes to the widgets. | sn_shop.procurement_administrator |

Indicators

- Number of Open Purchasing Task
- Number of Open Purchase Requisition
- Number of Closed Purchase Requisitions - Monthly
- Purchase Requisition - Avg Cycle Time (Days) - Monthly
- Number of Closed Sourcing Requests - Monthly
- Number of Open Sourcing Request
- Number of Open Negotiations
- Sourcing Request - Avg Cycle Time (Days) - Monthly
- Number of Expiring Contracts

Breakdowns

- Cost center
- Department
- Negotiation - AssignedTo
- PurchaseRequisition - AssignedTo
- PurchaseTask - AssignedTo
- SourcingRequest - AssignedTo
- (PSM) Contract End Date Breakdown
- (PSM) Due Date Breakdown

Reports

The Procurement Buyer Dashboard is segregated into the following tabs:

- **My Work:** View all your open sourcing requests, negotiations, purchasing tasks, purchase requisitions, and expiring contracts.
- **My Achievements:** View your achievements, which include your year-to-date total spend, spend categorization, total savings, negotiation outcomes, and average cycle times for sourcing request and purchase requisition.

Note: All the reports pertain to tasks that the logged-in user is assigned to.

For a detailed analysis on each component, select the respective widget or chart.

| Title | Type | Description |
|---------------------------------------|-----------|--|
| My Work | | |
| My Open Sourcing Requests | Widget | View your total number of sourcing requests that aren't in a closed state. |
| My Open Negotiations | Widget | View your total number of negotiations that aren't in a closed state. |
| My Expiring Contracts | Widget | View your total number of contracts, associated to purchase requisitions in any state, that have an end date of 90 days out. |
| My Open Sourcing Requests by Due Date | Pie chart | View the breakdown of the count of your open sourcing requests by due date range. |
| My Open Negotiations by Due Date | Pie chart | View the breakdown of the count of your open negotiations by due date range. |
| My Expiring Contracts by Due Date | Pie chart | View the breakdown of the count of your expiring |

| Title | Type | Description |
|--------------------------------------|-------------------|--|
| | | contracts by end date range. |
| My Open Purchasing Tasks | Widget | View your total number of purchasing tasks that aren't in a closed state. |
| My Open Purchasing Tasks by Due Date | Pie chart | View the breakdown of the count of your open purchasing tasks by due date range. |
| All Open Task Types | Stacked bar chart | View the count of the open purchasing tasks that aren't assigned to the logged-in user, by task type and due date range. The parent purchase requisition however is assigned to the logged-in user. |
| My Open Purchase Requisitions | Widget | View your total number of purchase requisitions that aren't in a closed state. |
| My Aging Purchase Requisitions | Stacked bar chart | View the breakdown of the count of your purchase requisitions by age (that is the number of days since opened) and state. |
| My Achievements | | |
| My YTD Total Spend | Widget | View the year-to-date sum of all the spend for purchase lines managed by the buyer, excluding blanket purchase orders. |
| My YTD Spend Categorization | Pie chart | <p>View the breakdown of your total year-to-date spend by addressable and non-addressable categories.</p> <p>The total spend is the sum of the total line amount on the purchase order line, excluding blanket purchase orders, where the logged-in user is also the one assigned, the state of the purchase order isn't closed canceled, and the spend categorization is either addressable or non-addressable.</p> |

| Title | Type | Description |
|--|-------------------|--|
| My YTD Total Savings | Widget | View the year-to-date sum of the negotiated savings across all closed complete purchase requisition lines assigned to the buyer. |
| My YTD Negotiation Outcomes | Stacked bar chart | <p>View your year-to-date negotiation outcomes against the negotiation count, grouped by negotiation type.</p> <p>Some of the possible negotiation outcomes are contract renewal, quote, RFx, and so on. Negotiation types can be cost avoidance, standard savings, contract terms negotiations, or unsuccessful negotiations.</p> <p>This report shows negotiation outcomes where the corresponding negotiation state is either Closed Complete or Closed Canceled.</p> |
| My Average Sourcing Request Cycle Time | Bar with line | <p>View the average time from when a sourcing request is created to when its state is Closed Complete or Closed No Decision.</p> <p>The report pulls all the sourcing requests that went into Closed Complete or Closed No Decision state for the month, and takes the cycle time from when they were opened. This data is retrieved from the Duration field on the sourcing request.</p> |
| My Average Purchase Requisition Cycle Time | Bar with line | <p>View the average purchase requisition cycle time from when a purchase requisition is created to when its state is Closed Complete, Closed Rejected, or Closed Canceled.</p> <p>The report pulls all the purchase requisitions that</p> |

| Title | Type | Description |
|-------|------|--|
| | | went into Closed Complete, Closed Rejected, or Closed Canceled status for the month, and takes the cycle time from when they were opened. This data is retrieved from the Duration field on the purchase requisition. |

For information on how to work with dashboards in configurable workspaces, see [Dashboards in Platform Analytics](#).

For information on how to work with widgets and data visualizations in configurable workspaces, see [Data visualizations in Platform Analytics](#).

Procurement Strategy & Ops Dashboard

Visually analyze how your organization is placed strategically and operationally, over a given period of time.

Note: This dashboard is available only if you install the Performance Analytics for Sourcing and Procurement Operations application.

You can use the Procurement Strategy & Ops Dashboard to view your organization's strategic performance, which includes year-to-date total spend, spend categorization, total savings, negotiation outcomes, spend by category and supplier, and utilization of active blanket purchase orders. On the operations side, you can view your organization's open sourcing requests, negotiations, expiring contracts, and purchase requisitions and their details. You can filter by cost center or department and select specific elements to view relevant details.

On the SLA side, you can view the basic cycle times for different record types, time taken for each state, comparison of breached versus unbreached records, breached time in comparison with standard SLA time, and team performance in terms of processing records and also the excess time taken for breached records. You can filter the records by task type.

Note: The widgets plot metrics or data from the day the upgrade is taken, as the triggers for collecting metrics are enabled only after the upgrade. So, historical data isn't available automatically after the upgrade but is accumulated thereafter. Also, if any new case types are introduced in the system and you want to add its metrics to the SLA dashboard, ensure that you update the indicator source.

End user and roles

| End user and goal | Required role |
|---|--|
| Procurement Specialist Manager: View your organization's strategic and operational performance. You can view your organization's SLA-related details. This role has the same access as a procurement specialist, except that they have access to the manager dashboards. | sn_shop.procurement_specialist_manager |

| End user and goal | Required role |
|--|-----------------------------------|
| Procurement Administrator: View and make configuration changes to the widgets. | sn_shop.procurement_administrator |

Indicators

- Number of Expiring Contracts
- Number of Open Negotiations
- Number of Open Purchase Requisition
- Number of Open Sourcing Request
- Number of Total (ATF) Purchase Requisition
- Order Line Revisioned Line Amount
- Order Line Total Line Amount(History Line)
- PSM - Average cycle time for record types
- PSM - Average cycle time in each state for record types
- PSM - Breached SLA by record type
- PSM - Number of closed record types
- PSM - Procurement Team Performance.Count
- PSM - ProcurementSLA.duration of records
- PSM - ProcurementSLA.standard time
- Purchase Order - Total Line Amount
- (ATF) Purchase Line - Total Line Amount

Breakdowns

- Cost center
- Department
- Negotiation - AssignedTo
- ProcurementSLA - HasBreached
- ProcurementUsers - AssignedTo
- Product Category
- PurchaseRequisition - AssignedTo
- PurchaseTask - AssignedTo
- SourcingRequest - AssignedTo
- State
- Supplier
- Task type
- (PSM) Contract End Date Breakdown
- (PSM) Due Date Breakdown

Reports

The Procurement Strategy & Ops Dashboard is segregated into the following tabs:

- **Strategic:** View your organization's strategic performance, which includes year-to-date total spend, spend categorization, total savings, negotiation outcomes, spend by category and supplier, and utilization of active blanket purchase orders.
- **Operations:** View your organization's open sourcing requests, negotiations, expiring contracts, and purchase requisitions and their details.
- **SLA:** View your organization's average time to complete records, breached SLA by record type, and a comparison between average time and SLA time of breached records.

Note: By default, YTD is configured to start from January. However, this can be configured to start from any month if need be.

For a detailed analysis on each component, select the respective widget or chart.

| Title | Type | Description |
|----------------------------|-----------|--|
| Strategic | | |
| Total Spend - YTD | Widget | <p>View the total year-to-date amount across the organization for all standard purchase orders, excluding blanket and closed canceled purchase orders. Only standard purchase orders and purchase order releases are considered.</p> |
| Spend Categorization - YTD | Pie chart | <p>View the breakdown of the total year-to-date spend across the organization by addressable and non-addressable categories.</p> <p>The total spend is the sum of the total line amount on the purchase order line, excluding blanket purchase orders, where the state of the purchase order isn't closed canceled, and the spend categorization is either addressable or non-addressable.</p> |
| Total Savings - YTD | Widget | <p>View the year-to-date sum of the negotiated savings across the organization for all standard purchase orders, excluding blanket and closed canceled purchase orders. Only standard purchase orders</p> |

| Title | Type | Description |
|---|-------------------|---|
| | | and purchase order releases are considered. |
| Negotiation Outcomes - YTD | Stacked bar chart | <p>View the year-to-date negotiation outcomes across the organization against the negotiation count, grouped by negotiation type.</p> <p>Some of the possible negotiation outcomes are contract renewal, quote, RFx, and so on. Negotiation types can be cost avoidance, standard savings, contract terms negotiations, or unsuccessful negotiations.</p> <p>This report shows negotiation outcomes where the corresponding negotiation state is either Closed Complete or Closed Canceled.</p> |
| Spend by Category - YTD | List | View the year-to-date committed spend, that is purchase order created, across the organization, grouped by the category associated to the supplier product on the purchase order line. |
| Total Spend by Supplier - YTD | List | View the total year-to-date amount across the organization for all standard purchase orders, excluding blanket and closed canceled purchase orders, grouped by supplier. Only standard purchase orders and purchase order releases are considered. |
| Utilization of Active Blanket Purchase Orders | List | View the released or subtotal percentage of the active blanket purchase orders across the organization that are within the end date. |
| Operations | | |
| Open Sourcing Requests | Widget | View the total number of sourcing requests across the organization that aren't in a closed state. |

| Title | Type | Description |
|--|-------------------|--|
| Open Negotiations | Widget | View the total number of negotiations across the organization that aren't in a closed state. |
| Expiring Contracts | Widget | View the total number of contracts, associated to purchase requisitions in any state, across the organization, that has an end date of 90 days out. |
| Open Sourcing Requests by Due Date | Pie chart | View the breakdown of the count of open sourcing requests across the organization by due date range. |
| Open Negotiations by Due Date | Pie chart | View the breakdown of the count of open negotiations across the organization by due date range. |
| Expiring Contracts by End Date | Pie chart | View the breakdown of the count of expiring contracts across the organization by end date range. |
| Open Purchase Requisitions | Widget | View the total number of purchase requisitions across the organization that aren't in a closed state. |
| Aging Purchase Requisitions | Stacked bar chart | View the breakdown of the count of purchase requisitions across the organization by age (that is the number of days since opened) and state. |
| After-the-Fact (ATF) Purchase Requisitions | Bar with line | <p>View the count and \$ value of After-the-Fact (ATF) purchase requisitions.</p> <p>\$ value is the value of purchase lines that satisfy the ATF criteria. For example, if there's one ATF purchase requisition with two lines (purchase requisition line 1 is ATF with line amount \$10, and purchase requisition line 2 isn't ATF with line amount \$5), the count of ATF purchase requisitions is 1 and the \$ value is \$10).</p> |

| Title | Type | Description |
|-----------------------------------|-------------------|---|
| | | Revised ATF purchase requisitions and their values aren't considered. |
| SLA | | |
| Average time to complete record | Bar with line | <p>View the average cycle time and count for record types such as sourcing request, purchase requisition, negotiation, and cases. While the count is shown on the Y-axis and is represented by the bar, the line represents the time.</p> <p>Fact data for this widget is derived from database views created from metric definitions that track psm_unique_state and active fields of PSM record types.</p> |
| Average time to complete by state | Stacked bar chart | <p>View the breakup of the time taken in each state of the record.</p> <p>For example, if a sourcing request took three days to complete, then the time taken in each state of the sourcing request like pending review, requires decision, awaiting response, and so on, is displayed here.</p> <p>This widget should be read in conjunction with the previous widget to get an understanding of the average time, and the breakup of this average time into various states.</p> <p>Data for this widget is derived from database views created from metric definitions that track psm_unique_state and active fields of PSM record types.</p> |
| Breached SLA by record type | Stacked bar chart | View a comparison between the records that were processed within the SLA |

| Title | Type | Description |
|--|--------------------|---|
| | | <p>time versus those that weren't. This gives an idea of the percentage work done that is within the SLA and the percentage that is breaching it.</p> <p>For example, if 100 records were processed in a week and 70 records were processed within the SLA time, then 70% of the work is done within the SLA and 30% is breaching it.</p> <p>Data for this widget is derived from the Task SLA table that is fed by SLA definitions created on the active fields of PSM record types.</p> |
| Average time vs SLA time of breached records | Time series column | <p>View the actual time taken versus the allotted SLA time. This gives an understanding of the extra time that is taken when compared to the SLA time.</p> <p>Data for this widget is derived from the Task SLA table that is fed by SLA definitions created on the active fields of PSM record types.</p> |
| Employee performance by record type | Stacked bar chart | <p>View the count of records of types sourcing request, purchase requisition, negotiation, and cases that have been processed by your team.</p> <p>Data for this widget is derived from database views created from metric definitions that track active fields of PSM record types.</p> |
| Employee performance breaches in durations | Stacked bar chart | <p>View the time taken for the breached records of the team.</p> <p>The Procurement Specialist Manager can not only see the time taken for the</p> |

| Title | Type | Description |
|-------|------|---|
| | | <p>breached records, but can also drill down to get the exact duration and the SLA time to get the details of time exceeded by SLA.</p> <p>Data for this widget is derived from the Task SLA table that is fed by SLA definitions created on the active fields of PSM record types.</p> |

For information on how to work with dashboards in configurable workspaces, see [Dashboards in Platform Analytics](#).

For information on how to work with widgets and data visualizations in configurable workspaces, see [Data visualizations in Platform Analytics](#).

Procurement Team Performance Dashboard

Visually analyze how your team is performing on sourcing requests, purchase requisitions, negotiated savings, and negotiation outcomes, over a given period of time, with the help of the Procurement Team Performance Dashboard.

Note: This dashboard is available only if you install the Performance Analytics for Sourcing and Procurement Operations application.

End user and roles

| End user and goal | Required role |
|--|--|
| Procurement Specialist Manager: View your organization's overall performance. This role has the same access as a procurement specialist, except that they have access to the manager dashboards. | sn_shop.procurement_specialist_manager |
| Procurement Administrator: View and make configuration changes to the widgets. | sn_shop.procurement_administrator |

Indicators

- Number of Total Cost Avoidance Negotiations
- Number of Total Negotiations
- Number of Closed Purchase Requisitions - Monthly
- Number of All Purchase Requisition - Monthly
- Purchase Line Total Negotiated Savings
- Purchase Requisition - Avg Cycle Time (Days) - Monthly
- Number of Closed Sourcing Requests - Monthly
- Purchase Line Negotiated Savings

- Number of Total Contract Terms Negotiations
- Number of Total Negotiation Unsuccessful
- Sourcing Request - Avg Cycle Time (Days) - Monthly
- Number of All Sourcing Request - Monthly
- Parent Line Negotiated Savings
- Number of Total Standard Savings Negotiations

Breakdowns

- Negotiation - AssignedTo
- PurchaseRequisition - AssignedTo
- SourcingRequest - AssignedTo

Reports

Note: By default, YTD is configured to start from January. However, this can be configured to start from any month if need be.

For a detailed analysis on each component, select the respective widget or chart.

| Title | Type | Description |
|--|---------------|--|
| Average Sourcing Request Cycle Time | Bar with line | <p>View the average time from when a sourcing request is created to when its state is Closed Complete or Closed No Decision.</p> <p>The report pulls all the sourcing requests across the organization that went into Closed Complete or Closed No Decision state for the last five months, and takes the cycle time from when they were opened. This data is retrieved from the Duration field on the sourcing request.</p> <p>You can set a target cycle time that serves as a benchmark for the organization, and easily visualize how current cycle times compare against it.</p> |
| Sourcing Request Cycle Time - Last Month | List | <p>View the average cycle time for sourcing requests by buyer across the organization.</p> |

| Title | Type | Description |
|--|---------------|--|
| | | You can also view the number of open sourcing requests that were assigned to the buyer as of last month, which were either closed last month or open throughout the duration of the month. |
| Average Purchase Requisition Cycle Time | Bar with line | <p>View the average purchase requisition cycle time from when a purchase requisition is created to when its state is Closed Complete, Closed Rejected, or Closed Canceled.</p> <p>The report pulls all the purchase requisitions across the organization that went into Closed Complete, Closed Rejected, or Closed Canceled status for the last four months, and takes the cycle time from when they were opened. This data is retrieved from the Duration field on the purchase requisition.</p> <p>You can set a target cycle time that serves as a benchmark for the organization, and easily visualize how current cycle times compare against it.</p> |
| Purchase Requisition Cycle Time - Last Month | List | <p>View the average cycle time for purchase requisitions by buyer across the organization.</p> <p>You can also view the number of open purchase requisitions that were assigned to the buyer as of last month, which were either closed last month or open throughout the duration of the month.</p> |
| Negotiated Savings by Buyer - YTD | List | View the sum of the year-to-date negotiated savings across all closed complete |

| Title | Type | Description |
|-------------------------------------|------|--|
| | | purchase lines across the organization. |
| Negotiation Outcomes by Buyer - YTD | List | <p>View the list of buyers across the organization along with their corresponding year-to-date negotiation outcomes, where the corresponding negotiation state is either Closed Complete or Closed Canceled.</p> <p>Some of the possible negotiation outcomes are contract renewal, quote, RFx, and so on. Negotiation types can be cost avoidance, standard savings, contract terms negotiations, or unsuccessful negotiations.</p> |

For information on how to work with dashboards in configurable workspaces, see [Dashboards in Platform Analytics](#).

For information on how to work with widgets and data visualizations in configurable workspaces, see [Data visualizations in Platform Analytics](#).

Advanced Work Assignment for Source-to-Pay Operations

Use the Advanced Work Assignment for Source-to-Pay Operations feature to automatically assign work items to agents based on availability and capacity.

Advanced Work Assignment for Source-to-Pay Operations pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. For more information, see [Exploring Advanced Work Assignment](#).

Prerequisites for installing Advanced Work Assignment for Source-to-Pay Operations

Before you install Advanced Work Assignment for Source-to-Pay Operations, ensure that you activate the Agent Chat application and load the demo data during installation. For more information see, [Activate Agent Chat and load demo data](#).

Required plugins

Install the Advanced Work Assignment for Source-to-Pay Operations (com.snc.sn_spend_awa) plugin if you have the admin role. Installing this plugin also installs the following dependent plugins:

- Advanced Work Assignment (com.glide.awa)
- Agent Chat (com.glide.interaction.awa)
- Procurement Case Management (com.snc.sn_spend_psd)

Setting up Advanced Work Assignment for Source-to-Pay Operations

Plan and configure your implementation of Advanced Work Assignment for Source-to-Pay Operations.

Setting up Advanced Work Assignment for Source-to-Pay Operations involves configuring the following components:

- Service channels: A means of providing optimum service to employees, shoppers, and requesters. Advanced Work Assignment (AWA) offers base system channels for chats, cases, incidents, and walk-up centers. You can assign the work to an appropriate skilled group. The quantum of work can also be assigned more equitably among the group. For each channel, you can set attributes such as agent capacity and utilization conditions to control the work handled in the channel.
- Work item: A single piece of work handled by an agent from start to completion.
- Work item queue: A queue that stores a specific type of work item for a service channel.
- Assignment groups: Agents belong to specific groups organized by the type of work assigned to them.
- Assignment rules: Criteria that determine how work items are pushed to the appropriate agent within a qualified assignment group.
- Agent capacity: The maximum number of work items on a particular service channel that an agent may actively work on at a time. If you want to set a maximum capacity for an agent across all service channels, define the maximum universal capacity for that agent.
- Agent availability: States that indicate agent presence, and whether the agent is available for work, busy, or offline. AWA uses the agent availability state to determine if an agent is able to receive work.
- Inbox layout: A configuration tied to a service channel that defines which fields of a record representing a work item are shown in agent inboxes. A layout defines what the agent sees in the Source-to-Pay Workspace.

For more information, see [Exploring Advanced Work Assignment](#).

Configure Advanced Work Assignment for Source-to-Pay Operations

Configure various components, such as service channels, work item queues, and assignment rules that determine how emails and chat interactions should be routed to agents.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Advanced Work Assignment**.
2. Create a service channel to automatically route incoming work to agents.

For more information, see [Create or configure a service channel](#).

The following service channels are specific to Advanced Work Assignment for Source-to-Pay Operations.

- Procurement Cases: For more information, see [Automatic case creation from emails](#).
- Chat. For more information, see [Using Advanced Work Assignment for Source-to-Pay Operations](#).

Note: Procurement administrators can also configure custom service channels for any work that may come through modes other than emails and chat, like SMS, or phone, for example.

After you've created a service channel, do the following:

- a. Configure the agent capacity to determine the number of work items that can be automatically assigned to agents supporting a service channel. For more information, see [Override agent capacity for selected agents](#).
 - b. Create or change an inbox layout to determine the information shown on work item cards displayed in an agent's inbox. For more information, see [Create or change an inbox layout](#).
 - c. Create a work item size override if you want to calculate an agent's workload using a work item size other than the default. For more information, see [Create or change a work item size override](#).
3. Define or modify a queue so that you can determine which work items are routed automatically to agents through a given service channel.
For more information, see [Create a work item queue](#).
4. Set the Advanced Work Assignment criteria for assigning work items to agents.
For more information, see [Configure agent assignment rules](#).
5. Optional: Configure the following parameters to improve your Advanced Work Assignment functionality:
- a. Create or modify the availability states that agents use to indicate whether they can receive work, or are offline or away. Agents set these states in their Workspace Inbox. For more information, see [Configure agent presence states](#).
 - b. Define the reasons that agents can use to decline work assignments that they receive in their Workspace inbox. For more information, see [Configure reasons for rejecting work items](#).
 - c. Prevent an agent from being assigned too many work items by configuring the agent's maximum universal capacity. For more information, see [Configure an agent's maximum universal capacity](#).
 - d. Create or manage groups that have associated Advanced Work Assignment queues.
For more information, see [Create or change groups for Advanced Work Assignment queues](#).

For detailed instructions on how to configure Advanced Work Assignment, see [Configuring Advanced Work Assignment](#).

Configure the Sourcing and Procurement Operations queues

Configure the Advanced Work Assignment for Source-to-Pay Operations queues to ensure that email and chat requests are routed and assigned to specific agents belonging to defined groups.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Advanced Work Assignment > Queues**.
2. Select one of these queues specific to Advanced Work Assignment for Source-to-Pay Operations.

- General Ledger Accounting Queue
- Legal Review for Procurement Queue
- Strategy Sourcing Queue
- Service Desk & Others Queue

3. In the Assignment Eligibility related list, select **New**.

- a.** In the **Agent assignment rule** field, select **Chat - Most Capacity**.
- b.** Select the lock icon () next to the **Groups** field.
- c.** Select the look-up icon () to view the list of groups.
- d.** Select **New**.
- e.** In the **Name** field, enter a name for the group.
- f.** Fill in the remaining fields, as appropriate.
- g.** Select **Submit**.
- h.** Select the lock icon () to lock the **Groups** field.
- i.** Right-select and select **Save**.

4. Next to the **Groups** field, select the link to the group, which opens the group record.

- a.** In the Group Members related list, select **Edit** to add members to the group.
- b.** Select one or more users in the Collection list and move them to the Group Members List.
- c.** Select **Save**.

i Note: The users that you add to this assignment group are automatically granted the awa_agent role.

5. Repeat steps 3 and 4 for the remaining Advanced Work Assignment for Source-to-Pay Operations queues.

Configure Agent Chat for Source-to-Pay Workspace

Use Agent Chat Settings to configure Agent Chat for Source-to-Pay Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Conversational Interfaces > Settings > Agent Chat**.
2. In the User Experience section, swipe the **Agent names and avatars** toggle switch to the right to enable this option.
3. In the Configurable Toolbar Controls section, select **View All**.
The Quick Action Toolbar Controls is displayed.

Add or update the quick action shortcuts for live agents in Agent Chat. For more information about configuring the toolbar controls, see [Set up quick action toolbar controls](#).

- 4.** Select **Save**.

Using Advanced Work Assignment for Source-to-Pay Operations

Enables shoppers or requesters to interact with agents to resolve their issues and get answers to their questions.

The Advanced Work Assignment for Source-to-Pay Operations application enables the following:

- Shoppers or requesters can start chat sessions using Virtual Agent from Employee Center to interact with live agents. For more information, see [Virtual Agent for Sourcing and Procurement Operations](#).
- Agents, when online, get notified of incoming requests on new work items. By default, no more than five work items are assigned to an agent at a time. They can accept chat requests from the Source-to-Pay Workspace Inbox page to interact with shoppers or requesters. They also have the option to reject the chat requests, or transfer them to other queues or agents with more expertise on that topic, if needed.
- Agents can use various features like response templates, knowledge base articles, Agent assist, and so on, to complete their work and resolve the queries or questions from the shoppers. For more information on these features, see [Email composer with quick messages and response templates in Source-to-Pay Workspace](#) and [Agent assist in Source-to-Pay Workspace](#).
- Agents can also create cases out of these interactions if any work item needs more analysis and help from the fulfills. For more information on interactions, see [Create a procurement case](#).

Automatic case creation from emails

Cases are automatically created from incoming emails from shoppers based on the keywords used by them in the subject lines and bodies of the emails.

As an admin, you can set an email ID where all emails from shoppers are to be received. You can do this by navigating to **All > Procurement Case Management > Administration > Procurement Properties**.

i Note: The following are some examples of cases created from emails with specific keywords.

- GL coding review cases are created from the keyword "accounting"
- Contract review cases are created from the keyword "contract"
- Sourcing related cases are created from the keyword "sourcing"
- General inquiry cases are created from the keyword "information"

ERP source validation on Sourcing and Procurement Operations objects

Sourcing and Procurement Operations supports multi-ERP integration that enables you to use different ERP systems for different regions or lines of business, as required.

Whenever Sourcing and Procurement Operations integrates with multiple ERPs, it validates the ERP from where the primary data is being fetched. It also ensures that the transaction data is routed to the right ERP with the right set of attributes. To validate ERP source to select correct attributes for Sourcing and Procurement Operations objects, and to support multi-ERP integration, these updates are enabled.

Fx currency and conversion rates

Conversion rates from the Finance Exchange Rates (sn_fin_fx_rate) table are used. This table has an ERP Source column, and records like purchase requisition and purchase order are also tied to the ERP Source column. By taking the legal entity and getting an ERP source from the legal entity, the right conversion rate is derived.

Fx2 currency amount is converted into your legal entity local currency amount and legal entity reporting currency amount by using the conversion rate from the Finance Exchange Rates table. All these converted values are stored in the PSM FX Currencies (sn_shop_fx_currency_instance) table.

Shopping Hub

Foreign currency transactions are supported. A foreign currency transaction is one where the contract currency, also known as the transaction currency, is different from the local currency of the legal entity. For example, if an employee whose legal entity has a local currency of USD, purchases something which is in the contract currency of EUR, then it becomes a foreign currency transaction. In such cases, the contract amount is converted into the legal entity local currency in the shopping cart by using the exchange rate from the Finance Exchange Rates (sn_fin_fx_rate) table, where the ERP source in the Finance Exchange Rates table matches with the ERP source or legal entity of the employee.

Also, purchase requisitions are split based on currency of the purchase requisition lines. Legal entity local currency is used to do the conversions during checkout.

Cost center and GL account

Cost center and GL account values are restricted by the ERP source on the object. The legal entity from the object is considered, and the ERP source is fetched. When a user updates the record, only those cost centers that have matching ERP sources are displayed in the Source-to-Pay Workspace.

Note: These validations are enforced only when a legal entity has been set up for integration with ERPs. If you've set up integration with an ERP, then you'll see the data having the same ERP source, thereby preventing downstream errors during integration.

If there's any record with different ERP sources, then an integration error task is raised. This is an indicator for your fulfiller to correct the record before processing it further.

Sourcing and Procurement Operations integration with Employee Center

As an employee, shopper, or requester, you can view all procurement case types available to you, knowledge articles, open to-dos and purchasing tasks assigned to you, track your requests, and even access your purchases on the Employee Center (EC) portal by integrating Sourcing and Procurement Operations with Employee Center.

Ensure that your admin has installed Employee Center, which is available as a zBoot plugin, for you to enjoy the seamless unified employee portal experience. Further, they may choose to install the employee content taxonomy plugin to access a prebuilt taxonomy for your service catalog, including the Purchases and Expenses topic.

Note: To know more about EC and how to set it up as an admin, visit the [Employee Center](#) home page.

Purchase and expense

You can view the following subtopics from the **Purchase and Expense** tab:

- Invoices
- Supplier Services
- Corporate Cards
- Purchase Requests
- Travel and Expenses

Each subtopic includes both catalog items and knowledge articles. Procurement Service Management's applications pre-populate some of these subtopics with content.

Select **Browse all** to view all the above subtopics across categories. These include invoices, supplier services, catalog and off-catalog products and services, knowledge base articles, travel and expenses, and so on. You can set filters and avail the sorting options to refine your search results.

Note: These subtopics are configured by the admin from the Employee taxonomy, where the search items are mapped to relevant connected content.

From **Purchase Requests** in particular, you can do a bunch of things that include editing, canceling, or returning a purchase, buying something, requesting for a product or service, submitting a quote, requesting a copy of a contract, asking any queries to the procurement team, understanding what a sourcing request or purchase order is, and so on.

From **Quick links**, you can directly visit ShoppingHub or go to your list of purchases on ShoppingHub.

My tasks

As an approver, you can view your open and completed approval tasks, and also work on your open items, from **My tasks**. If you're logged in as an employee or shopper instead, you can work on completing your procurement tasks.

Note: Admins can create new to-do widgets to show up in Employee Center, or configure existing widgets from **Employee Center > Activity Configurations**. For more information, see [Employee tasks page](#).

In **My tasks**, you can filter your search by the following:

- Task type
 - Approval
 - Invoice
 - Milestone
 - Receipt
 - Sourcing
- Due date
 - Overdue
 - Due soon: Tasks that are due in the next seven days.
- Priority

- Critical
- High
- Medium
- Low
- Created: Tasks that are created within the last four hours.

(i) Note: These filters are inactive by default. You can enable them by navigating to **All > Employee Center > Administration > To-do filter categories**.

For detailed information on how to work with configurable task filters, see [Configurable task filters](#).

My active items

As a shopper, you can view specific items from the widgets under the **My active items** section. Some of these are:

- **Tasks:** List of open tasks assigned to you, along with reminders on their statuses. You can update the fields to be displayed in the task cards by adding them to the to-dos configuration record.
- **Purchases:** Number of purchases made by you.
- **Requests:** Number of requests raised by you.

Others include surveys, invoices, purchase orders, risk assessments, issues, shipments, and so on. Selecting these takes you to their details page on ShoppingHub, where you can work with them as required.

(i) Note: Admins can also configure these active items widgets in Employee Center. For more information, see [My active items widget configuration](#).

Tracking your procurement requests in Employee Center

As a shopper, you can enjoy complete visibility into the progress of your requests by tracking your procurement cases in Employee Center.

As a shopper or employee, you can view the current status and track the progress of your procurement requests or cases in Employee Center. Not only can you view the complete list of steps involved in closing a case, but also those that have been passed or skipped on the way to closure.

You can navigate to your cases from **All > Self-Service > Employee Center > My Requests**. Alternatively, you can go to **All > ShoppingHub > ShoppingHub Home**, and select **My purchases** from your profile list. Here, you can view all the procurement cases created against your purchases in the corresponding **Cases** tab. Select **View details** on a specific case to view the current state of the case, details on when it was created and last updated, progress, and so on. In both cases, you're directed to your request details page in Employee Center.

(i) Note: You can track the progress for only those cases that have playbooks associated with them, such as edit or cancel a purchase, return goods to a supplier, and so on.

For your shoppers to view the complete list of steps on procurement cases or requests, relevant activities are provided with the Playbook status (`sn_spend_sdc_playbook_status`) table by default, with steps to be displayed to the shoppers mapped against the playbook

steps that are displayed to the procurement specialists. Your administrators can add new activities and mappings, or edit these existing configurations, if required.

Note: To view the progress bar on the case details page in Employee Center, ensure that a playbook is associated to that case, and that playbook status configuration records are created for the steps to be displayed in the Playbook status table.

For more information on these playbooks available on Source-to-Pay Workspace, see:

- [Process a purchase order edit in playbook](#)
- [Process an edit request in playbook](#)
- [Process a return request in playbook](#)
- [Process a cancel request in playbook](#)

Approve a request from Employee Center

Approve, reject, or request clarification on open purchase requisition lines and sourcing requests that are assigned to you, directly from Employee Center.

Before you begin

Approval workflows are provided for purchase requisitions and sourcing requests by default. However, you can create approval workflows for other objects from Employee Center to-do configurations.

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. Select the approval task that you want to work with.
3. View details of the approval request, such as requester name, total amount or budget requiring approval, and request ID at the header level.
At the line level, you can view the details of the requested items, such as product, approval amount, approval status, unit, price, quantity, total line amount, line number, reason for purchase, product type, delivery location, expected delivery date, and so on. You can also filter the purchase requisition lines by their approval status, and view associated activities and attachments in separate tabs therein.
4. Do one of these actions.

| Action | Description |
|-----------------------|--|
| Request clarification | Opens a confirmation dialog box, where you can enter your questions regarding the selected purchase request lines or sourcing request. An email notification is sent to the requester that some clarification is sought for the purchase, and a provide clarification to-do is created for their action. |

| Action | Description |
|-------------|--|
| | <p>i Note: This correspondence is tracked through the activity stream of the approval plan here in Employee Center. The same is also tracked through the activity stream of the corresponding purchase requisition or sourcing request in Shopping Hub.</p> |
| Reject | <p>Opens a confirmation dialog box, where you can enter your reason for rejecting only the selected purchase request lines. An email notification is sent to the requester with this information.</p> |
| Reject all | <p>Opens a confirmation dialog box, where you can enter your reason for rejecting all the purchase request lines or sourcing request. An email notification is sent to the requester with this information.</p> <p>i Note: You're redirected here if you select Reject on the approval email notification.</p> |
| Approve | <p>Opens a confirmation dialog box, where you can approve only the selected purchase request lines. An email notification is sent to the requester with this information.</p> |
| Approve all | <p>Opens a confirmation dialog box, where you can approve all the purchase request lines or sourcing request. An email notification is sent to the requester with this information.</p> <p>i Note: You can review the details and approve the purchase request directly from the email notification.</p> |

You can now view the approved and rejected approval tasks on the **Completed** tab. Shoppers can view the same from their requests in Shopping Hub.

i Note: You can configure the above email notification based on your requirements. For details, see [Approval email notification templates](#).

Approval email notification templates

Email notifications are triggered for new, due soon, and overdue approval to-dos in configurable templates. As an approver, you can review the details and approve the purchase requests directly from the email notifications.

When a purchase request that triggers an approval rule, is submitted, and you're assigned as an approver for that purchase, a record is created in the sysapproval_approver table, and an email notification is sent to you. You can review the details of the purchase request

therein, view the attachments if needed, and provide your approval directly from the email notification. This makes the approval task experience seamless for you, and at the same time expedites the purchase experience of the requester or shopper who immediately receives the approval notification.

- Note:** When providing your approval from the email notification, ensure that the subject line of the response email has "approve" in it. Also ensure that there's no mismatch in the approver's email address.

You may also reject the request, which redirects you to Employee Center to complete the action. Here, you can also request clarification on the purchase request from the requester, if need be. For more information on this, see [Approve a request from Employee Center](#).

These email notifications are triggered for new, due soon, and overdue approval to-dos in templates that customers can easily configure to meet their specific business requirements.

- Customers can modify the email content in flow designer or email scripts, according to their requirements.
- They can also choose to fetch and use other details that aren't displayed in the email by default, such as order type for purchase requisitions, product type or request type for sourcing requests, and so on. For detailed information on email templates and how to work with them, see [Email templates](#).
- Customers can also configure the email layout, and change the background color or font color, for example. The html field in the email layout record must be modified to achieve this. For detailed information on email layouts and how to work with them, see [Email layouts](#).

Provide more details on your purchase from Employee Center

Provide additional information on your purchase from Employee Center by answering the follow-up questions that the procurement specialist has posted regarding your order. Your response to these to-dos ensures that the procurement specialist understands your exact requirements and has all the necessary information before proceeding with the sourcing request.

Before you begin

To provide more details on your purchase, you should have received such requests from the procurement specialist. Only then, this to-do is displayed to you on Employee Center.

Role required: sn_shop.shopper

About this task

You can provide more information on the queries that the procurement buyer has posted for them to proceed with the sourcing request.

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as task number, due date, state, primary contact, requested supplier, requested product, quantity, total line amount, and so on.
You can track the updates on the selected task from the **Activity** tab. You can also view and upload attachments associated with the task from the **Attachments** tab.
4. In the **What is the purpose of this purchase?** field, provide the necessary information to address the procurement buyer's queries.
5. Select **Submit**.

What to do next

You can view the completed task in the **Completed** tab.

Confirm meeting a milestone for your service from Employee Center

Provide confirmation from Employee Center on whether the supplier has met a milestone for a service you had ordered, so that payment can be processed to the supplier for that milestone. If a milestone hasn't been met by the due date, you can raise a cancel request or propose a new completion date.

Before you begin

To provide confirmation on meeting the milestone for a service you had ordered, you should have received the service by the due date or milestone that you had defined when placing the order. The milestone is displayed on the completion date defined on the milestone.

Role required: sn_shop.shopper

About this task

This confirm milestone completion task is automatically created by the system on the target completion date. This task is active for a day, after which it becomes overdue.

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as task number, due date, state, primary contact, milestone, expected completion date, payout amount, and so on.
You can track the updates on the selected task from the **Activity** tab. You can also view and upload attachments associated with the task from the **Attachments** tab.
4. Do one of these actions.

| Action | Description |
|-----------------------------|---|
| Comments | Provide your response, if any, and select Confirm . |
| Request to cancel | Request to cancel the milestone altogether. On the Request to cancel milestone window, provide your reason for canceling the milestone, and select Submit . |
| Propose new completion date | Push the milestone to a later date. On the Propose a new expected completion date window, pick a new completion date, provide your reason for changing the date, and select Submit . i Note: Milestones can be received in percentage and amount, but can only be deferred if not complete until they're processed for the full milestone. This is because milestones are parts of the whole, and partials aren't supported. |

What to do next

You can view the completed task in the **Completed** tab after the fulfiller has also reviewed and confirmed that the task is complete.

Review your service acknowledgment task from Employee Center

Review and acknowledge the receipt status of your ordered service from your supplier from Employee Center.

Before you begin

Service acknowledgment tasks are auto-created the first time on purchase order creation, and are triggered on a monthly basis by the Create Service Acknowledgment Task scheduled job. This scheduled job automatically picks all purchase order lines that have started and are yet to reach their end dates, and have some remaining amount or percentage or quantity to be delivered.

To review your service acknowledgments, your service request should have been reviewed and approved by a Procurement Specialist and converted to a purchase order. Only then, this task is displayed to you on Employee Center.

Role required: sn_shop.shopper

About this task

The due date of your service acknowledgment task is set based on the due date defined by you when placing the order.

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. On the **Pending confirmation** tab, select the task that you want to work with.
3. View details of the task, such as task number, due date, state, primary contact, purchase order number, supplier, order created, total amount, remaining amount, and so on.
You can track the updates on the selected task from the **Activity** tab. You can also view and upload attachments associated with the task from the **Attachments** tab.
4. Do one of these actions.

| Action | Description |
|-------------------------------|--|
| I didn't receive any services | Displays the Confirm you didn't receive any services dialog box to record your confirmation for that particular month. On confirmation, the task is marked as Closed Complete and moved to the Completed tab. The scheduled job will run to create a new task for you the following month. |
| Mark as received | Displays the Specify the quantity you received dialog box, where you can enter the received quantity for the selected purchase line for that particular month (if the unit of the supplier product is individual unit), or the received percentage (if the unit of the supplier product is fixed fee). This information is now displayed in the Confirmed tab. |

| Action | Description |
|----------------------------|--|
| | <p>i Note: If you select multiple purchase lines, you can't specify individual amounts or percentages for them, and the entire lines must be marked as received. Also, if the purchase order line has fixed fee as the unit, then it's automatically set up for percentage.</p> |
| Mark this task as complete | <p>Displays the Confirm you didn't receive all services dialog box to record your confirmation for that particular month. On confirmation, the task is marked as Closed Complete and moved to the Completed tab.</p> |

i Note: Every time you confirm receiving a percentage of your order, a receipt of type Services is automatically created. This receipt can be viewed by a Procurement Specialist against your purchase order on Source-to-Pay Workspace.

What to do next

You can view the completed task in the **Completed** tab.

Confirm receipt of your order from Employee Center

Provide confirmation of receipt of the items that you ordered that are in pending receipt state from Employee Center, so that payment is processed to the supplier accordingly. If you have not received the complete order, you can confirm receipt of a part of your order as well with the date when you received them.

Before you begin

To provide confirmation of receipt of your orders, you should have received a part of your order at least, if not the complete order. Only then, this to-do is displayed to you on the **Pending confirmation** tab.

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. On the **Pending confirmation** tab, select the task that you want to work with.
3. View details of the task, such as task number, due date, state, primary contact, purchase order number, and so on.
You can view the current status of your ordered items, along with the tracking number and carrier name, from the **Shipment details** tab. You can also track the updates on the selected task from the **Activity** tab. Further, you can view and upload attachments associated with the task from the **Attachments** tab.
4. Select the purchase line that you received and select **Mark as received**.
Displays the **Specify the quantity and date you received this product** dialog box, where you can enter the received quantity and date when you received the selected purchase line. This information is now displayed in the **Confirmed** tab.

i Note: If you select multiple purchase lines, you can't specify individual quantities or dates for them, and the entire lines must be marked as received with a single date.

What to do next

You can view the completed task in the **Completed** tab.

View a link or video from Employee Center

Complete your task by viewing a link or video that your procurement specialist has assigned to you, directly from Employee Center. This action is listed as a task under **My Tasks**.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as the task number, due date, if any.
4. View the link or video in the task.
In case of CORS error in the network tab of your web page, ensure that your procurement specialist has provided the correct URL. For example, when rendering a YouTube video, ensure that the video source link or embedded link is provided while creating the task.
5. Select **Complete**.

What to do next

You can view the completed task in the **Completed** tab.

Upload a document from Employee Center

Complete the task that your procurement specialist has assigned to you by uploading a document, directly from Employee Center. This action is listed as a task under **My Tasks**.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as the task number, due date, if any.
4. Select the attachment icon to select one or more documents from your local drives, as required.
Alternatively, you can drag and drop documents from your local drives to attach them.
5. In the **Upload a file** dialog box, select **Upload** to attach the documents.
Once attached, you have the option to download, remove, or rename the documents, if required.
6. Select **Mark as complete**.

What to do next

You can view the completed task in the **Completed** tab.

Sign a document using DocuSign from Employee Center

Provide your consent by signing a document using DocuSign, directly from Employee Center. This action is listed as a task under **My Tasks**.

Before you begin

Role required: sn_shop.shopper, supplier

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as the task number, due date, if any, and so on.
4. On the displayed document, select **Continue**.
5. Select **Start**.
6. Follow the arrowhead and select **Sign**.
7. Select **Finish**.

What to do next

You can view the completed task in the **Completed** tab.

Sign a document from Employee Center

Provide your consent by signing a document, directly from Employee Center. This action is listed as a task under **My Tasks**.

Before you begin

Role required: sn_shop.shopper, supplier

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as the task number, due date, if any, and so on.
4. On the displayed document, you can choose to type your signature or draw it.
Based on what you select, you can either write your full name in the **Full name** field, or draw a digital signature in the box provided.

Note: If you aren't happy with what you see in the document, you can select **I don't want to sign this document**. You must enter your reason for declining, followed by **Decline and complete** to complete the task.

5. Select **Accept and complete**.

What to do next

You can view the completed task in the **Completed** tab.

Complete a form from Employee Center

Fill in a form that your procurement specialist has sent to you, and submit it directly from Employee Center. This action is listed as a task under **My Tasks**.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. Select the task that you want to work with.
3. View details of the task, such as the task number, due date, if any, and so on.
4. On the displayed form, fill in the details as required.
5. Optional: Select **Save as** if you want to save a draft in your requests and plan to complete it later.
6. Select **Submit**.

What to do next

You can view the completed task in the **Completed** tab.

Raise a general inquiry for procurement

As a shopper, raise an inquiry for any pre-existing purchase or for any other queries that you may have regarding any procurement function.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All > Employee Center > Purchase and Expense > Purchase Requests**.
2. Select the **Ask Procurement** card.
3. On the form, fill in the details of the query.

| Field | Description |
|------------------------------------|---|
| Is this about a specific purchase? | <p>Based on your requirement, select one of these.</p> <ul style="list-style-type: none"> ◦ If your inquiry is about a pre-existing purchase, select Yes. <p>Note: You can also raise this inquiry from All > ShoppingHub Home > My purchases, by selecting Inquire from the more actions icon on a purchase.</p> <ul style="list-style-type: none"> ◦ If your inquiry is about something else, select No. |
| Which purchase is this about? | <p>If you have selected Yes above, select the purchase request number from the list.</p> <p>Note: This number is automatically populated if you raise this inquiry from All > ShoppingHub Home > My purchases.</p> |
| How can the procurement team help? | Describe your query. Based on your input here, related search results are displayed with relevant knowledge base articles. |

Note: Customers can configure the questions in the Ask Procurement form, introduce new questions, or enable additional validations, if required, from the respective record producer records.

- Select **Submit** to submit your inquiry, if none of the related search results have answered your query.

What to do next

A procurement case of type Inquiry is created under **Procurement Cases** in Source-to-Pay Workspace, which is assigned to a fulfiller. The fulfiller can then help you with your inquiry.

Virtual Agent for Sourcing and Procurement Operations

ServiceNow® Virtual Agent for Sourcing and Procurement Operations enables shoppers to quickly find and purchase products that they're looking for from a vendor on ShoppingHub, by interacting with a virtual agent from Employee Center. It also allows shoppers to view purchases, procurement tasks, procurement cases, and even work on their to-dos. They can also get help from the procurement team using Virtual Agent.

For more information on Virtual Agent in general, its components, benefits, and basic user interface, see [Virtual Agent](#).

Sourcing and Procurement Operations Virtual Agent conversations and topic blocks

A topic conversation defines the dialog between the Virtual Agent (chat support bot) and the user, which enables you to gather information for a specific business need.

You can create and reuse topic blocks to simplify the topic authoring and maintenance process. Topic blocks enable you to reuse standard procedures across conversation topics.

As part of the Sourcing and Procurement Operations product, the following Virtual Agent topic conversation and reusable topic blocks are provided:

- Request to purchase from a vendor
 - ShoppingHub: Product Search
 - ShoppingHub: Checkout - Delivery Location
 - ShoppingHub: Checkout - Quantity
 - ShoppingHub: Checkout - Shipping Method
 - ShoppingHub: Checkout - Delivery Date
 - ShoppingHub: Checkout - Purchase Reason
 - ShoppingHub: Checkout - Payment Method
- See my purchases
 - View PR or PO
 - View Purchase Details
- See my procurement tasks
 - More Info
 - PSM Select Supplier Task
 - PSM Purchase Approval
 - PSM Invoice Review Task

- PSM Confirm Receipt Task
- PSM Confirm Milestone Task
- See my procurement cases: View Procurement Case
- Get help from procurement: Browse PSM Content

To view just the reusable topic functions, navigate to the Topics page in Virtual Agent Designer and select the **Topic Blocks** tab. For detailed information, see [Reusable topic blocks](#).

Install Virtual Agent for Sourcing and Procurement Operations

Install Virtual Agent for Sourcing and Procurement Operations from the ServiceNow Store.

Before you begin

Role required: admin, virtual_agent_admin

About this task

Activate the following plugins:

| Name | Description |
|--|--|
| Glide Virtual Agent (com.glide.cs.chatbot) | Activates the Virtual Agent framework and other necessary plugins. This is a prerequisite for the Shopping Virtual Agent plugin to work. |
| Virtual Agent Experience Pack for Sourcing and Procurement Operations (com.sn-shop_va) | Activates a conversational bot platform for providing user assistance through conversations for Sourcing and Procurement Operations. |

Procedure

1. Navigate to **System Applications > All Available Applications > All**.
2. Find the application using the filter criteria and search bar.
You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store.

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

3. Select **Install**.
4. In the Application installation dialog box, review the application dependencies.
Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed.
5. Optional: If demo data is available and you want to install it, select **Load demo data**.
(Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Enable Virtual Agent for Sourcing and Procurement Operations

Enable Virtual Agent for Sourcing and Procurement Operations to start chatting with the Virtual Agent.

Before you begin

Role required: admin, virtual_agent_admin

The base system provides predefined Virtual Agent topics (chatbot conversations). To customize, duplicate, and edit a topic, see [Virtual Agent Designer](#).

Procedure

1. Navigate to **All > Conversational Interfaces > Virtual Agent > Designer**.
2. In the **Category** field, select **PSM Virtual Agent Topics**.
3. In the **Type** field, select **Topics**.
4. Select any topic to open it and view the conversation flow.
 - To use the topic in a conversation with no changes, select **Publish**.
 - To test the active, published conversation topic, select **Test**.
 - To duplicate the topic so you can customize it, select **Duplicate**. Enter a name for the duplicate topic and select **Save**.

Note: It is recommended that you use the conversation flow as delivered for optimum results.

NLU support for Sourcing and Procurement Operations Virtual Agent

You can set up Sourcing and Procurement Operations Virtual Agent to use Natural Language Understanding (NLU) to understand word meanings and word contexts to infer user intent.

NLU provides information that your virtual agent uses to determine what users want to do and to extract relevant values from their input. With NLU, your virtual agent offers a more natural and engaging conversational experience.

For more information, see [Natural Language Understanding in Virtual Agent](#).

The following intents are provided as part of the Sourcing and Procurement Operations Model:

- #Browse Shoppinghub
- #ViewPurchase
- #Purchasing task
- #ViewProcurementCase
- #Get help from procurement

Set up NLU for Sourcing and Procurement Operations Virtual Agent

Set up Natural Language Understanding (NLU) for Sourcing and Procurement Operations Virtual Agent before chatting with the Virtual Agent to optimize the search experience.

Before you begin

Role required: admin, virtual_agent_admin

You must have the following plugin installed on your instance: Natural Language Understanding Models for Sourcing and Procurement Operations. For information on how to install the plugin, follow this [procedure](#).

Procedure

1. Train and publish the NLU model.

- a. Navigate to **NLU Workbench > Models**.
- b. Select **Sourcing and Procurement Operations Model**.
- c. Select **Train** to train your prediction server for the first time before you get started.
- d. Select **Publish** to publish the NLU model.

2. Enable NLU for Sourcing and Procurement Operations Virtual Agent.

Note: This is a one-time activity that you must perform to ensure that NLU is enabled for Virtual Agent in your instance.

- a. Navigate to **Conversational Interfaces > Virtual Agent > General Settings**.
 - b. Select the **Enable NLU in Virtual Agent** radio button to enable NLU.
 - c. In the **NLU service provider** field, select **ServiceNow NLU**.
 - d. Select **Save**.
3. Integrate NLU with Sourcing and Procurement Operations Virtual Agent.
- a. Navigate to **Conversational Interfaces > Virtual Agent > Designer**.
 - b. In the **Category** field, select **PSM Virtual Agent Topics**.
 - c. In the **Type** field, select **Topics**.
 - d. Select any topic to open it.
 - e. Select the **Properties** tab.
 - f. In the **Set up Natural Language Understanding (NLU)** section, **NLU Model** field, select **Sourcing and Procurement Operations Model**.
 - g. In the **Associated Intent** field, select the relevant intent.
 - h. Select the **Flow** tab.
 - i. Select the first input entity.
 - j. In the **User Input Properties** section, **Name** field, enter **Product service term**.
 - k. In the **Associated Entity** field, select **SupplierProduct**.
 - l. Select the **Enable NLU at Input Node** radio button.
 - m. Select the **Skip confirmation for recognized entity** radio button.
 - n. Save and publish the topic.

Sourcing and Procurement Operations integration with third-party sourcing solutions

ServiceNow can integrate with third-party sourcing solutions to automate the sourcing process within the Sourcing and Procurement Operations product. A generic, easily configurable sourcing integration framework is provided within Source-to-Pay Integration

Framework to enable users to specify the business criteria for triggering an integration. This integration framework can also integrate with multiple third-party sourcing solutions based on different criteria.

Customers can either build the connector to that third-party tool or find one in the ServiceNow store.

For example, Fairmarkit, a third-party solution, built and certified their own ServiceNow application to the store, which leverages the integration framework to connect with the Fairmarkit system. For more information on this integration, visit [store](#).

Decision configuration

The Sourcing Event Generation Rule decision table in Sourcing and Procurement Operations helps the sourcing managers and procurement teams to configure the business criteria on demand, which provides them with flexibility to decide on the types of requests that should be integrated with a third-party sourcing solution. If no decisions are configured, then sourcing requests aren't sent to any external applications.

When a shopper requests pricing for an item that must be sourced in ShoppingHub, the following decision inputs are automatically evaluated in ServiceNow:

- Sourcing request
- Purchase line

To configure a decision:

1. Navigate to **Purchase Automation > Administration > Decision Tables**.
2. Select the Sourcing Event Generation Rule decision table.
3. On the Decisions related list, select **New**.
4. In the **Label** field, enter a name for the label.
5. In the **Answer** field, select an answer record for the given external application from the Third-Party Sourcing Registration table.

Note: If there are no existing external application records in the Third-Party Sourcing Registration table, create one with the following:

- Third-Party Sourcing Registration Code: User-defined code to be associated to the third-party sourcing registration.
- Third-Party Sourcing Registration Name: Name of the third-party sourcing registration to be integrated with ServiceNow.

6. In the **Condition** field, configure the conditions using the sourcing request and purchase line decision inputs.

Note: To successfully send sourcing requests to the applicable external third-party application, these conditions must be evaluated to be true.

Integration tables

Integration tables are used to interact with the third-party sourcing application.

Relevant information that is required to conduct a Request for anything (RFx) in the third-party application is staged within ServiceNow and transferred through APIs to the third-party application. The following integration tables are used to achieve this:

- Sourcing Outbound Queue, which stores the sourcing requests. It captures the items that need to be sourced along with the shopper, employee, or requester's requirements from sourcing intake.
- Sourcing Line Outbound Queue, which stores the purchase lines associated with the sourcing requests. It captures the supplier details that the shopper, employee, or requester wanted to source from. Additionally, ServiceNow sends any other suppliers that supply the same product model as the item that needs to be sourced.
- Sourcing Bid Stage, which is an inbound table used as part of the RFx process. It is used to get the supplier responses to the RFx in real time from the third-party tool, back into the ServiceNow instance.
- Awarded Supplier Outbound Queue, which stores the awarded suppliers. It captures the supplier details that are awarded in ServiceNow, and shares this data with the third-party tool for them to share the award business wins or losses with the suppliers.

Sourcing Outbound Queue

| Field | Field type | Description |
|---------------------------------|------------|---|
| City | String | Delivery city |
| Country | String | Delivery country |
| End date | Other Date | End date of the service |
| Expected delivery date | Other Date | Expected delivery date of the good |
| Grouped sourcing request number | String | ServiceNow's negotiation event record number |
| Integration status | String | Integration processing status |
| Manufacturer | String | Name of the manufacturer |
| Manufacturer part number | String | Part number of the manufacturer |
| Maximum budget | Decimal | Internal budget provided by the requester |
| Preferred currency | String | Preferred currency of transaction |
| Processing message | String | Integration processing message |
| Product category | String | |
| Product model | String | Product model name. Required for catalog items. |
| Product model short description | String | Short description of the product model |
| Product name | String | Product name. Required for off-catalog items. |
| Product type | String | Good or service |
| Purchase reason | String | Internal reason to purchase this item |

Sourcing Outbound Queue (continued)

| Field | Field type | Description |
|------------------------------------|------------|---|
| Quantity | Integer | Quantity provided by the requester |
| Start date | Other Date | Start date of the service |
| State | String | Delivery state |
| Street | String | Delivery street |
| Sourcing request number | String | ServiceNow's sourcing request record number |
| Sourcing request short description | String | ServiceNow's sourcing request short description |
| Sourcing request status | String | Status of the requester's intake record (sourcing request) |
| Supplier responses close | Other Date | Formerly named Bids end date. This is the due date for all suppliers to provide a response to an RFx. |
| Third party tool name | String | Name of the third-party tool |
| Third party tool RFx ID | String | Event number of the third-party tool |
| Third party tool RFx ID status | String | Event status of the third-party tool |
| Third party tool RFx URL | String | Event URL of the third-party tool |
| Unit | String | Unit populated on the product details |
| UNSPSC | String | UNSPSC code |
| Zip code | String | Delivery zip code |

Sourcing Line Outbound Queue

| Field | Field type | Description |
|---------------------------|------------|---|
| Integration status | String | Integration processing status |
| Processing message | String | Integration processing message |
| Purchase line number | String | ServiceNow's purchase line record number |
| Sourcing out queue header | Reference | Reference to the sourcing outbound table |
| Sourcing request number | String | ServiceNow's sourcing request record number |

Sourcing Line Outbound Queue (continued)

| Field | Field type | Description |
|------------------------|------------|---|
| Supplier company name | String | Supplier name. This can be requested by the requester or existing supplier providing a catalog item |
| Supplier email address | String | Email address of the supplier |
| Supplier ERP number | String | Identification number for the supplier in the ERP system |
| Supplier number | String | ServiceNow's supplier record |
| Supplier part number | String | Part number of the supplier |

Sourcing Bid Stage

| Field | Field type | Description |
|---------------------------------|------------|--|
| Grouped sourcing request number | String | ServiceNow's negotiation event record number |
| Integration status | String | Integration processing status |
| Manufacturer | String | Name of the manufacturer |
| Manufacturer part number | String | Part number of the manufacturer |
| Preferred currency | String | Preferred currency of transaction |
| Processing message | String | Integration processing message |
| Product category | String | |
| Product model | String | Product model name. Required for catalog items. |
| Product model short description | String | Short description of the product model |
| Product name | String | Product name. Required for off-catalog items. This is a mandatory field. |
| Product type | String | Good or service |
| Purchase line number | String | ServiceNow's purchase line record number |
| Quote number | String | Quote number back from Request for Quote (RFQ) |
| Quote price | String | Quote unit price back from RFQ |
| Shipping amount | String | Quote shipping amount from RFQ |

Sourcing Bid Stage (continued)

| Field | Field type | Description |
|------------------------------------|------------|---|
| Sourcing out queue ID | String | Reference to the sourcing outbound table |
| Sourcing request number | String | ServiceNow's sourcing request record number. This is a mandatory field. |
| Sourcing request short description | String | ServiceNow's sourcing request short description |
| Supplier address | String | Supplier location: Address |
| Supplier city | String | Supplier city found on the quote |
| Supplier company name | String | Supplier name. This is a mandatory field. |
| Supplier country | String | Supplier country found on the quote |
| Supplier County / District | String | Supplier location: County or district |
| Supplier delivery date | Date/Time | Supplier delivery date of the good |
| Supplier email address | String | Email address of the supplier found on the quote |
| Supplier end date | Date/Time | Supplier end date of the service |
| Supplier ERP number | String | Identification number for the supplier in the ERP system |
| Supplier fax number | String | Supplier fax number found on the quote |
| Supplier lead time (days) | String | Supplier lead time |
| Supplier notes | String | Notes from the supplier, if any |
| Supplier number | String | ServiceNow's supplier record |
| Supplier part number | String | Part number of the supplier |
| Supplier PO box number | String | Supplier PO box number found on the quote |
| Supplier primary phone number | String | Supplier primary phone number found on the quote |
| Supplier quantity | String | Supplier quantity found on the quote. This is a mandatory field. |
| Supplier region | String | Supplier location: Region |
| Supplier start date | Date/Time | Supplier start date of the service |

Sourcing Bid Stage (continued)

| Field | Field type | Description |
|--------------------------------|-------------------|---|
| Supplier State / Province | String | Supplier state found on the quote |
| Supplier street address | String | Supplier location: Street address |
| Supplier website | String | Supplier website, if provided on the quote |
| Supplier Zip / Postal code | String | Supplier zip code found on the quote |
| Third party tool name | String | |
| Third party tool RFx ID | String | Event number of the third-party tool |
| Third party tool RFx ID status | String | Event status of the third-party tool |
| Third party tool RFx URL | String | Event URL of the third-party tool |
| Unit | String | Unit populated on the product details. This is a mandatory field. |
| UNSPSC | String | UNSPSC code |

Awarded Supplier Outbound Queue

| Field | Field type | Description |
|-----------------------------|-------------------|--|
| Integration status | String | Integration processing status |
| Processing message | String | Integration processing message |
| Purchase line number | String | ServiceNow's purchase line record number |
| Purchase requisition number | String | ServiceNow's purchase requisition record number created after awarding |
| Quantity | Integer | Quantity amount awarded |
| Sourcing request number | String | ServiceNow's sourcing request record number |
| Supplier company name | String | Supplier awarded in ServiceNow |
| Supplier ERP number | String | Identification number for the supplier in the ERP system |
| Supplier number | String | ServiceNow's supplier record |
| Third party tool RFx URL | String | Event URL of the third-party tool |

Integration process

- If an integration is triggered, considering that applicable business criteria are defined in the decision table, and a request for pricing initiated by a shopper in ShoppingHub meets the criteria, a sourcing request and negotiation event is systematically created in the Sourcing and Purchasing Automation application.
- Relevant data is populated in the sourcing outbound queue and sourcing outbound line queue tables, which can then be processed by the third-party solution accordingly, to initiate an RFx in their platform. Negotiation event is also created for the integrated sourcing request.

Note: After a sourcing request is created and posted to the sourcing outbound queue table, the third-party tool that is responsible for processing that sourcing request is identified and stored in the **Third party tool name** field.

- A system property for the supplier responses close date (sn_spend_intg.u_bids.end.date) sets the **Supplier responses close** field value on the negotiation event and sourcing request to after the negotiation event has been created, plus the number of days defined. The default value is three days. The sourcing manager can override this value manually when updating this field on the negotiation event record.

Note: A schedule job can be set up in the ServiceNow instance to check if the supplier responses close date has been reached (aka today). When done, ServiceNow stops receiving bids from suppliers and moves all individual supplier negotiations to the Pricing Obtained state, and then to Requires Decision. The sourcing manager or fulfiller can then award a supplier with the business. The timestamp of the supplier responses close date is 23:59:59 of the day the bids close, in UTC date/time format. As the sourcing manager, you can also decide to close the bids now, with the date and timestamp of now, and proceed with the awarding flow without any wait time.

- If the supplier responses close date changes on the sourcing request, then this update is sent to the sourcing outbound queue. The **Supplier responses close** field is updated. Also, if a sourcing request or purchase line is canceled, this status is also sent back to the sourcing request or purchase line outbound tables respectively.

Note: The supplier responses close date is read-only on the sourcing request, but any change of the supplier responses close date on the negotiation event rolls up to the sourcing request.

- If there's an error inserting new or updated records to this table, then the integration status is updated to Failed. The sourcing request at this point is in the Pending Resubmission state. The error details are captured in the **Processing Message** field and the integration error task is displayed. The procurement specialist must address the error and then resubmit both the sourcing request and negotiation event by selecting the **Resubmit** button.

Note: Currently, errors are logged only on the Sourcing Outbound Queue table.

- Suppliers are invited to participate in a bid and engage through the third-party application platform.
- When quotes are returned, the sourcing bid stage table is populated by the third-party solution and the information is processed internally within ServiceNow using a transform map to populate the purchase lines on the sourcing request.

Note: When an RFx is created or awarded in the third-party tool, shoppers and sourcing managers are notified through emails and alerts from Shopping Hub and Source-to-Pay Workspace respectively. Shoppers and sourcing managers are also notified about rejected bids, irrespective of the integration.

- If additional supplier bids are returned from the third-party solution, an existing logic in ServiceNow determines if a new supplier, supplier product record, or both must be created.
- After awarding is done in ServiceNow, that information is sent back to the third party using the award outbound table. Awarding can also be done in the third-party tool, in which case the data is received by ServiceNow.

For information on the sourcing request flow, see [Sourcing request](#). For more information, see [Compare quotes and select a supplier](#).

Sourcing and Procurement Operations integration with Vendor Risk Management

Leverage relevant supplier risk assessment capabilities by integrating Sourcing and Procurement Operations with Vendor Risk Management.

The following capabilities can be leveraged by customers if they have both the Sourcing and Procurement Operations and Vendor Risk Management applications installed:

- Connection between the Company and Supplier tables through the **Related company** field. Also, leverage properties in the tables to synchronize other fields between the two tables at your own discretion.
- Viewing tiering assessments and risk assessments for a vendor in the Supplier table.
- Vendor Risk Reviewer role as a procurement specialist.
- Adding members to the Governance, Risk, and Compliance (GRC) group, containing the new Purchasing Task Owner role.
- Automation of the **Valid risk assessment** field in the Supplier table.
- Enhancements to the existing Conduct a Supplier Risk Assessment case.
- Creating a new Conduct a Supplier Tiering Assessment case. This is automatically triggered based on its requirement specified in the **Tiering assessment needed?** field in the Supplier table.

Note: This is unique to the Purchase Automation Integration with Risk Assessment application and is not available if the customer has Sourcing and Procurement Operations alone.

Purchase Automation Integration with Risk Assessment application

Customers can use the Purchase Automation Integration with Risk Assessment application for leveraging certain capabilities if they have both the Sourcing and Procurement Operations and Vendor Risk Management applications installed.

With this application, the **Related company** field is defaulted from the current application. This new reference field displays under the **Global company** field as a reference to the Company table. This field is only available when the Vendor Risk Management and Sourcing and Procurement Operations applications are installed. Also, the Tiering Assessments and

Risk Assessments related lists in the Supplier table are only available when the Vendor Risk Management and Sourcing and Procurement Operations applications are installed.

Company table connection

Two new fields are added, one in the Supplier table named **Related company**, and another in the Company table named **Supplier** that references the Supplier table.

When you open any existing supplier record in the Supplier table, you can link it to an existing record in the Company table with the **Related company** field. If that record does not exist, the procurement administrator creates a record in the Company table to establish the connection.

When you create a new supplier record in the Supplier table, a new vendor record is automatically created in the Company table with read-only reference to the Supplier table.

Valid risk assessment visibility in the Supplier table

Tiering and risk assessments on a vendor can be created on the vendor record in the Vendor Risk Management application. These assessments are made visible in the Supplier table as related lists, to validate any supplier in Sourcing and Procurement Operations. A procurement specialist, containing the Vendor Assessment Reviewer role can read any vendor risk assessment data.

For information on tiering and risk assessments on a vendor, see [Manage vendor tiering assessments](#) and [Manage vendor risk assessments](#).

Valid supplier risk assessment

To determine if a supplier has a valid risk assessment, a scheduled job is run, and the customer's system administrator can configure its frequency. This job keeps the **Valid risk assessment** field in the Supplier table up-to-date, based on the **Risk rating valid to** field on risk assessments in the Vendor Risk Assessments table.

A risk assessment is considered valid when:

- Today's date is on or before the date defined in the **Risk rating valid to** field.
- The value in the **Valid risk assessment** field in the Supplier table is Yes.

A Conduct a Supplier Risk Assessment case is created if a risk assessment is invalid. Risk assessments can be triggered manually by the Vendor Risk Manager, or automatically from any change in vendor tier rating.

Enhancing the Conduct a Supplier Risk Assessment case

A Vendor Risk Manager can be assigned the Conduct a Supplier Risk Assessment case to validate a supplier's risks and to ensure that the supplier does not pose risks to the company.

The existing Conduct a Supplier Risk Assessment case is enhanced such that:

- The GRC group contains the Purchasing Task Owner role, with visibility and access to the case.
- The case has a related list of the risk assessments, both valid and expired, for better visibility.

Creating a new Conduct a Supplier Tiering Assessment case

A new Conduct a Supplier Tiering Assessment case can be created in either of these methods, and assigned to the manager of the GRC group:

- Automatically, triggered based on its requirement specified in the **Tiering assessment needed?** field in the Supplier table. If the risk rating of the related supplier is critical, high, or empty, a Conduct a Supplier Tiering Assessment case is auto-triggered.

Note: This is unique to the Purchase Automation Integration with Risk Assessment application and is not available if the customer has Sourcing and Procurement Operations alone.

- Manually, by a customer.

You can customize this case through the Supplier Tiering Assessment case templates, by defining the **Sourcing decision dependent on case** field to decide if this case should stop the sourcing request from moving into the Requires Decision state. The default value of this field is **Yes**. In this scenario, if all purchase requisition lines are in the Pricing Obtained state, and there are other cases still open, the sourcing request moves to the Awaiting Task Completion state. When the open cases are closed, the sourcing request moves to the Requires decision state. When the **Sourcing decision dependent on case** field is set to **No**, and if all purchase requisition lines are in the Pricing Obtained state, then the sourcing request will be in the same Pricing Obtained state even if other cases are open.

If the sourcing request gets converted to a purchase request, the case is available to be completed in the purchase requisition.

Note: All tiering assessments for a supplier are displayed in related lists.

For more information on sourcing requests, purchasing tasks, and procurement cases, see [Sourcing request](#) and [Purchasing tasks and procurement cases](#).

Sourcing and Procurement Operations integration with Project Management

Eliminate manual efforts of linking purchase orders to projects by integrating Sourcing and Procurement Operations with Strategic Portfolio Management's Project Management.

The Procurement with Project Management plugin (sn_spend_ppm) provides this integration. This plugin has dependencies on the following applications:

- Source-to-Pay Common Architecture
- PPM Standard

Important: Your administrator must manually assign the IT Project User, which is a licensed role, to your shopper for them to view project details during checkout.

With this integration, project managers or shoppers can associate a purchase with a project, which provides the reason for making the purchase, but also automatically creates cost plans and expense lines for that project. This enables project managers, shoppers, and procurement specialists to easily track planned costs each time a purchase is made for a Project Management project, and realize actual costs each time an invoice is paid for a Project Management project purchase.

Impact on checkout and purchase details

When this application is installed, you must answer the additional question **Is this a purchase for an existing project?** during checkout. If your answer is in the affirmative, you must select your project from the list to proceed with the checkout.

Each project name is associated with a demand number, both of which are then auto-populated in the **Purchase Reason** field. You can add more information in the **Purchase Reason** field if you want to. On completing your checkout, these details are displayed on the purchase details page.

Note:

If this purchase isn't made for an existing project, you must mention the reason for purchase in the **Purchase Reason** field to proceed with the checkout.

During full checkout, you can select a project for the entire purchase or individually at the product level.

You can't select a project for a credit purchase.

Impact on purchase request line and purchase order line tables

When a purchase request is created, you can configure the Purchasing Details form layout on the purchase request line table to display the **Project** field. This field references the selected demand record. Similarly, when a purchase request line is converted to a purchase order line, you can configure the Summary Details form layout on the purchase order line table to display the same **Project** field.

As part of this integration, whenever a purchase is ordered as part of a demand or project, a cost plan is automatically created in association with that purchase order line. You can configure the Summary Details form layout on the purchase order line to display the new **Cost plan** field. A Purchase Order Lines related list is also added to the corresponding cost plan record. On the Cost Plan form, the **Total planned cost** field is auto-populated based on when the purchase order had been generated. The **Total actual cost** field is populated based on invoice and expense line creation.

For information on how to configure a form layout, see [Configuring the form layout](#).

Impact on invoice line and expense line tables

When an invoice is created, and both the invoice and the invoice line are in the Paid state, an expense line is automatically created for the project. This expense line has an Invoice Lines related list reference.

For more information on invoice creation, see [Invoices](#).

Impact of demand and project lifecycle on Sourcing and Procurement Operations flows

When a demand is converted to a project as part of demand and project lifecycle:

- The demand number isn't available for selection during checkout.
- When a purchase request line using that demand number is converted to a purchase order line, the latter references the project and not the demand number.
- The cost plan references the newly created project and not the one initially selected by the shopper.
- When an invoice is created, the associated expense line references the project and not the demand number.

When a demand or project is in a closed state:

- The demand or project number isn't available for selection during checkout.
- Cost plans and expense lines aren't created for closed demands and projects. However, if a cost plan is already created for a closed demand or project, expense lines continue to be auto-generated until all the invoices are paid out.

Impact on sourcing request

When requesting pricing for a product that doesn't have pricing available, you must answer the additional question **Is this a purchase for an existing project?**. If your answer is in the affirmative, you must select your project from the list to proceed with submitting the request. On successful submission, the project and demand details are displayed on the sourcing request record.

As a shopper, you can compare the pricing for your purchase, select a supplier, and proceed to checkout.

Impact on off-catalog purchase request

When requesting a quote for a product that is not available on the ShoppingHub catalog, you must answer the additional question **Is this a purchase for an existing project?**. If your answer is in the affirmative, you must select your project from the list to proceed with submitting the request.

Email notifications

When a purchase order associated to a demand or project is created, updated, or canceled, the assigned demand manager or project manager gets an email notification about its impacts on the cost plans of the demand or project.

Sourcing and Procurement Operations integration with Celonis

Identify inefficiencies in your customer business process, understand their business impact, and gain insights into the root causes, by integrating Sourcing and Procurement Operations with Celonis.

Some insights provided by Celonis are listed here.

- Inconsistent payment terms: Where the payment terms agreed with the supplier is Net 45 on the supplier primary record, but invoices have an earlier payment term like Net 15 or Net 30. Such inconsistent payment terms, if not recognized, may lead to an inefficient usage of the working capital and the days payable outstanding of the customer may get reduced.
- Duplicate suppliers: Where a same supplier is wrongly created twice, for example, "California Academy of Sciences" and "The California Academy of Sciences." Such duplicate records may confuse end users, with some invoices getting created for the first supplier and some for the second. This makes supplier account reconciliation difficult and prone to frauds, where the same invoice may be recorded for both the suppliers.
- Duplicate invoices: Where the same supplier invoice gets recorded twice. This could be because it has been entered once based on the invoice that was emailed, and reentered by another payables specialist later when the physical copy of the invoice was received from the inward mail department. Such invoices, if not identified, may result in overbooking of an invoice and double payment to the supplier.
- Invoices for late payment risk: Where some invoices are on hold as the price billed is marginally greater than the tolerance defined, for example, 0.5% above tolerance. In such cases, the has to be released so that the payment can be made on time.

- Supplier bank account missing: Where the payment method setup on the supplier is electronic, but the bank account is missing. Payments for such suppliers are identified during the payment batch run that happens around the due date. This eventually delays the payment to the supplier and impacts the relationship with the supplier. Ideally, such issues must be identified beforehand so that the missing information can be gathered from the supplier well before the due date.

These insights are valuable and have a direct impact on business, in terms of inefficient usage of money, overspending, or having an adverse impact on supplier relationship. With this integration, these insights provided by Celonis are easily consumed by the Now platform's intuitive low-code workflow to create playbook experiences that guide users through the processes on how to resolve these issues.

Workflow and playbook experience for Celonis integration

Workflows for the various insights provided by Celonis are built with the help of the Playbooks component provided by the Now platform. For more information on this component, see [Process Automation Designer](#).

Here's an example of an inconsistent payment term insight provided by Celonis, and an end-to-end system built to automate the work for the users.

Create a flow in Playbooks:

- Ingest the data from the Celonis API, create a procurement case, and assign it to a user or group. These cases are displayed in the assigned user's Source-to-Pay Workspace landing page.
- Customers can configure various options like updating the ERP directly from the case playbook, or manually logging in to the ERP to update the data.
- Customers can configure the closure steps like sending an email to the supplier with the information that the payment terms have been updated to the original agreed term recorded in the primary record. Customers can also mark a copy of this email to their manager with the case closure information.

Configure your playbook experience to include the following relevant information:

- Steps to resolve the case.
- Displaying the relevant information in the playbook so that users can take appropriate decisions.
- Ability to perform searches so that the case owner can search for knowledge articles on similar cases and learn how they were resolved.
- Embedded tasks in the playbook like directly updating the ERP, which ensures that all the work that must be done can be done from the playbook itself without the need to log in to any other ERP system.

For more information on how to configure your playbook experience, select [here](#).

Celonis triggers for Sourcing and Procurement Operations

A sample payload from Celonis for payment term mismatch is provided.

```
{
  "Supplier": "PolyTec",
  "Supplier City": "Munich",
  "Supplier Country": "DE",
  "Purchase Order": "PO10008760",
```

```

    "Invoice Number": 9350035113,
    "Payment Block Reason": "Payment Term Mismatch",
    "Due Date": "5/15/21",
    "Priority Vendor": "Yes",
    "Invoice Amount": 160725.03,
    "Payment Term (Invoice)": "NET 30",
    "Payment Term (Master Data)": "NET 60"
}

```

The incoming payload from Celonis is stored in a custom staging table, from where it is processed via a business rule or flow designer to create a case and corresponding case lines. You can leverage existing case types or create a new case type as need be, which you can then assign to users or groups. Create a new case type by adding a new choice to the Case type column. A corresponding playbook can be triggered for this case type to assist in case fulfilment, as explained above.

Sourcing and Procurement Operations integration with Field Service Management

The Procurement for Field Service Management plugin (com.snc.fsm_psm_mobile) provides an integration between the Field Service Management and Sourcing and Procurement Operations applications.

A field service agent working on completing a particular work order task could view the asset inventory, locate the parts that are available in stockrooms in real time, and source them as per requirement. With this integration, a field service agent can engage with procurement and place an order to purchase a required part from a vendor or supplier.

This functionality is available only on your mobile device through the Agent mobile application.

Note: This integration application is owned by the Field Service Management team. To use this application, a license is required for both Field Service Management and Sourcing and Procurement Operations.

Changes to the Field Service Management application

In the Field Service Management application, this integration adds a Purchase Orders related list to the part requirement form on your mobile device. This list shows the order details of the purchase made with a vendor or supplier.

Also, the **Order Part** button has been added, which enables a field service agent to purchase the part if it is not available in the inventory or any physical stockroom.

On the **Inventory** tab, **My Purchases** and **My Purchasing To-dos** applets have been added from the Shopping Hub Mobile application to provide field service agents visibility into their purchases and purchasing to-dos. However, these lists are available only if the better together application is installed.

On the **Inventory** tab, the **My Inventory** applet displays the assets that are created when creating transfer order lines from Field Service Management, as well as assets that are created when acknowledging the delivery of products from a vendor or supplier from Sourcing and Procurement Operations. Assets that are created in the Asset Usage table are also displayed here.

Integrate with Field Service Management

Field Service Management provides an integration with the Sourcing and Procurement Operations application. With this integration, a field service agent can engage with procurement and place an order to purchase a required part from a vendor or supplier.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definition > Plugins**.
2. Search for the Procurement for Field Service Management plugin (com.snc.fsm_psm_mobile).

Note: To activate this plugin, there is a dependency on the Shopping Hub Mobile application. For more information on setting up Field Service Management and additional plugins, see [Setting up Field Service Management](#).

3. Select **Activate**.

Order parts you need using the Agent mobile application

Place an order for a part that you require to complete a particular work order task, from the Sourcing and Procurement Operations flow, using the Agent mobile application.

Before you begin

To successfully order a part, verify that the product models used by Field Service Management are aligned to the supplier products.

Role required: wm_agent, wm_dispatcher, fsm_agent, or sn_shop.shopper

Procedure

1. Log in to your instance in the Agent mobile application.
2. From the **My Tasks** section, select the work order task you want to work with.
3. Tap the **Parts** tab.
4. From the **Part Requirements** section, select the part you need to complete your work order task.
5. Tap **Order Part**.
6. From the **Available to purchase** section, select the product you want to place an order for.

This section displays all the supplier products that are associated with the product model of the part requirement.

Note: Only products that have pricing available are displayed here. Also, all the criteria for products to be visible on ShoppingHub, such as shopping controls, are applied here as well.

The quick checkout flow is triggered from ShoppingHub and the checkout details are auto-populated.

Note: The **Quantity** and **Delivery date** fields are auto-populated from the part requirement, but are editable.

7. Edit the checkout fields as required.
8. Enter your reason for purchase in the **Purchase Reason** field.
9. Tap **Complete Checkout**.
A confirmation message stating that your purchase is successfully routed for approval, is displayed, along with the purchase requisition line number.

Note: As an FSM agent, if you're unable to check out products in the PSM and FSM mobile experience Agent app, install the fix script after installing the fms-psm-mobile and spend-uib-portal applications. The fix script updates the quick checkout link to the correct MESP page.

What to do next

On the order confirmation screen, tap **Return to work order task** if you want to go back to the work order task details screen.

Spendint API

The *Spendint* API provides endpoints that push the catalog, price, availability, order, shipment, and invoice information from a third party to the ServiceNow instance. This API is part of the Source-to-Pay Integration Framework application.

This API requires the Procurement Integration Framework (com.glide.sn_spend_intg) store application and is provided within the sn_spend_intg namespace.

To access this API, you must have the sn_spend_intg.procurement_integrator role.

Third-party registration for PIF and PFTF

Onboard a supplier through the third-party registration process before you get started with Source-to-Pay Integration Framework (PIF) or Procurement File Transfer Framework (PFTF).

Navigate to **Procurement Integrations > Setup > Third-Party Registration**. For third-party registration, following are the fields:

Third-Party Registration form

| Field | Description |
|-------------------------------|---|
| Provider name | Unique identifier for the supplier. |
| Supplier | Name of the supplier in the ServiceNow records. |
| Customer id | Unique identifier for the customer. |
| Import catalog | Supplier is allowed to import catalog, which includes price and availability. |
| Post order | Supplier is allowed to post orders. |
| Import invoice | Supplier is allowed to import invoices. |
| Allow purchase order revision | Supplier allows purchase orders to be revised after confirmation. |
| Import shipment | Supplier is allowed to import shipments. |
| Allow multi location order | Supplier allows orders to be split for multi-location shipping. |

Spendint API - POST /sn_spend_intg/spendint/catalog

Allows suppliers to post multiple catalogs for creating supplier products, model products, contracts, and pricing records.

In the *catalog* API integration, when you receive data from a third-party catalog, you can:

- 1.** Create any new third-party categories and map these categories to model categories.
 - If available, use the United Nations Standard Products and Services Code (UNSPSC) and then the category name.
 - If UNSPSC is not available, use just the category name.
- 2.** After you map a third-party category to a model category, use the Manufacturer Part Number (MPN) to find an existing product model, if one is available.
 - a.** If a product model is found for the MPN, update the product model with any changes, and then create or update any supplier products that are related to the product model.
 - b.** If a product model does not exist for the MPN, do the following:
 - i.** A product model class is usually available on the model category that is referenced by the third-party category for the product. Use this product model class to get the product model table in which the product model should be created, for example, hardware, software, consumable, and so on. If no product model class is available, create the product model in the base product model table.
 - ii.** After the correct product model class is identified, create a new product model in the correct class as follows:
 - Manufacturer, publisher, or provider should map to the manufacturer on the product model.
 - Product name from the API should map to the name on the product model.
 - MPN from the API should update the model number.
 - Product description from the API should update the description on the product model.
 - Model category should be updated with the product category referenced on the third-party category record.
 - Product category should be updated with the product category referenced on the third-party category record.
 - If there are values in the substitute products in the API, create the substitute product records between the current product model and the other product models.
 - If there are values in the compatible products in the API, create the compatible product records between the current product model and the other product models.
 - Product attributes from the API should be created or updated in the product attribute related list for the product model.
- 3.** If a product model is available, use the supplier part number to create or update the supplier products that are related to the product model.

Third-party mapping

Use the following tables to perform the third-party category, model, and unit mappings:

- Third-Party Categories: Stores all the third-party category records for the ShoppingHub administrator to map with internal existing model categories.
- Third-Party Model Mappings: Stores all the mapping information between product models and third-party model categories.

- Third-Party Units: Stores all the third-party unit records for the ShoppingHub administrator to map with supplier product units.
- Third-Party Unit Mappings: Stores all the mapping information between product models and third-party units.

Note: A third-party integration product is auto-published when both the third-party category and third-party unit are mapped appropriately.

Supplier product sales dates

A supplier product is discontinued and no longer published in the catalog when it has reached its sales end date. The **Sales start date** and **Sales end date** fields on the Supplier product form are populated through third-party integration from the *Catalog API*.

Status tables

To know the status of the bulk product import request, make a REST call into the ServiceNow database using the *Table REST API*. The response from the API lists the records where the bulk import request failed. For bulk product import response, query the Catalog Error table with the following parameter:

```
sysparm_query=outbound_error.supplier_id=<supplier_id>^outbound_error.state=20
```

Details on the customer id, supplier id, error type, unique import set id, and state can be found in the Outbound Status table, which is the parent error table.

URL format

```
/api/sn_spend_intg/spendint/catalog
```

Supported request parameters

Path parameters

| Name | Description |
|------|-------------|
| None | |

Query parameters

| Name | Description |
|------|---|
| mode | <p>Support for asynchronous and synchronous modes for third-party integration.</p> <p>Data type: String</p> <p>Valid values:</p> <ul style="list-style-type: none"> • async: Asynchronous mode. • sync: Synchronous mode. <p>Default: async</p> |

Request body parameters (XML or JSON)

| Name | Description |
|--------------------------|---|
| customer_id | <p>Identifier for the customer.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| catalog_id | <p>Identifier for the catalog content that can be purchased by a customer.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products | <p>List of objects that define products to create or update. Each transaction has a limit of 1000 products.</p> <p>Data type: Array</p> <pre>"products": [{ "available_units": "String", "available_for_country": [Array], "bundled_components": [Array], "contract_agreement": {Object}, "delivery_time": "String", "images": [Array], "manufacturer": "String", "mpn": "String", "parent_bundle": "String", "product_attributes": {Object}, "product_category_name": "String", "product_description": "String", "product_name": "String", "sku": "String", "unit": "String", "unspsc": "String", }]</pre> |
| products.available_units | Required for products that are kept in stock. This value indicates the |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|--------------------------------|--|
| | <p>quantity of units that are available for this product.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| products.available_for_country | <p>List of country codes where the supplier product can be purchased. If no country is provided, a user from any country can purchase the product.</p> <p>Data type: Array</p> <pre>"available_for_country": ["US", "IN", "GB"]</pre> |
| products.bundled_components | <p>Valid only for scenarios when sending a product bundle as part of the catalog payload, and applicable only for the parent bundle payloads. This value contains the reference to the child bundle components. The list of the MPN and quantities for the child bundle components are maintained here.</p> <p>i Note: Since the same child bundle component can be added more than once within a bundle, the entered quantity is the differentiator between the same children bundle components.</p> <p>The child bundle components and their details (MPN and quantities) should be mapped to the same supplier.</p> <p>Data type: Array</p> <pre>"bundled_components": [{ "mpn": "String", "quantity": "String" }]</pre> |
| products.contract_agreement | <p>Details of the contract for a product.</p> <p>i Note: This is not required for child bundle components.</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|---|--|
| | <p>Data type: Object</p> <pre>"contract_agreement": { "contract_end_date": "String", "contract_number": "String", "contract_start_date": "String", "negotiated_currency": "String", "negotiated_price": "String" }</pre> |
| products.contract_agreement.contract_end_date | <p>Date on which the contract term ends.</p> <p>Data type: String</p> <p>Maximum length: 40</p> <p>Format: YYYY-MM-DD</p> |
| products.contract_agreement.contract_number | <p>Required. Number of the active contract that is associated with the product.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products.contract_agreement.contract_start_date | <p>Date on which the contract term starts.</p> <p>Data type: String</p> <p>Maximum length: 40</p> <p>Format: YYYY-MM-DD</p> |
| products.contract_agreement.negotiated_currency | <p>Required. Currency of the negotiated price.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| products.contract_agreement.negotiated_price | <p>Required. Unit price of a product as negotiated through a contract with the supplier or reseller.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|-----------------------------|--|
| products.delivery_time | <p>Estimated number of days it takes to ship a product to the customer. This value must represent the number of days and be a whole integer.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| products.images | <p>List of strings that specify the image URLs for the supplier product.</p> <p>Data type: Array</p> |
| products.manufacturer | <p>Required. Company that manufactures, publishes, or provides the product. This is not the supplier or reseller of the product.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products.mpn | <p>Required. Identifier for a product that is provided by the manufacturer, publisher, or provider.</p> <p>i Note: This is not required for reseller parent bundles if the SKU value is available.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products.parent_bundle | <p>Valid only for scenarios when sending a product bundle as part of the catalog payload, and applicable only for the child bundle component payloads. In the case of a child bundle component, the reference to the parent is maintained here. The parent MPN and SKU values are also set here.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products.product_attributes | <p>List of key-value pairs that define product attributes, for example, "Color": "Space Grey". Multiple attributes for a product are allowed. However, only those attributes that</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|--------------------------------|---|
| | <p>impact pricing or stock availability should be provided through the API.</p> <p>Data type: Object</p> |
| products.product_category_name | <p>Required. Name that you enter if you are not setting the <i>unspsc</i> property. This name is the category to which a product belongs. This category name can be used in a commerce scenario to shop for the product. For example, a power strip product could belong to an Office Equipment category.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products.product_description | <p>Full description of the product that appears to a shopper within a commerce experience.</p> <p>i Note: It is recommended that the supplier be as descriptive as possible here, especially for product bundle catalog items where there are child bundle components.</p> <p>Data type: String</p> <p>Maximum length: 65000</p> |
| products.product_name | <p>Required. Name of the product.</p> <p>Data type: String</p> <p>Maximum length: 1000</p> |
| products.sku | <p>Required. Number that is generated by a supplier that uniquely identifies a product that is sold by that supplier.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products.unit | <p>Required. Unit or rate at which the product is sold by the supplier. For example, pieces, hours, and so on.</p> <p>Data type: String</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|-----------------------|--|
| | Maximum length: 40 |
| products.unspsc | <p>Required. Identifier that you enter if you are not setting the <i>product_category_name</i> property. This identifier is the UNSPSC for the category to which a product belongs. For example, UNSPSC code 43210000 is the identifier for the product category Computers.</p> <p>Data type: String</p> |
| | Maximum length: 100 |
| supplier_id | <p>Required. Identifier for the reseller or supplier with whom the customer can place orders.</p> <p>Data type: String</p> |
| | Maximum length: 100 |
| third_party_import_id | <p>Identifier that enables a third party to pass a string value to uniquely identify a set of imported data.</p> <p>Data type: String</p> |
| | Maximum length: 100 |

Headers

The following request and response headers apply to this HTTP action only or apply to this action in a distinct way.

Request headers

| Header | Description |
|--------|--|
| Accept | <p>Data format of the response body. Supported types: <i>application/json</i> or <i>application/xml</i>.</p> <p>Default: <i>application/json</i></p> |

Note: Only the *application/json* data format is supported for Procurement Integration Framework.

Response headers

| Header | Description |
|--------|-------------|
| None | |

Status codes

The following status codes apply to this HTTP action.

Status codes

| Status code | Description |
|-------------|--|
| success | Successful. The request was successfully processed. |
| failure | Unsuccessful. The request was processed with errors. |

Response body parameters (JSON)

These response body parameters are received when queried in synchronous mode.

| Name | Description |
|-----------------------------------|---|
| error_response_body | Description of the errors, listed by sku, mpn, and the error message. Data type: Array |
| error_response_body.error_message | Detailed error message. Data type: String |
| status_code | Response status such as "success" or "failure." Data type: String |

Example: cURL request

```
curl
"https://instance.service-now.com/api/sn_spend_intg/spendint/catalog" \
--request POST \
--header "Accept:application/json" \
--user 'username':'password'
{"root": [
    {
        "customer_id": "AB-1234323",
        "catalog_id": "ACME CORP-12347898",
        "supplier_id": "SUP-123456",
        "third_party_import_id": "DELL1234567",
        "products": [
            {
                "product_name": "Apple MacBook Pro 13 Core i7",
                "mpn": "Z0WQ-20004301931",
                "sku": "55788741",
                "manufacturer": "Apple",
                "product_category_name": "Computer",
                "parent_bundle": "920-0045362002",
                "bundled_components": [
                    "mpn": "Z0WQ-20004301931",
                    "quantity": "4",
                ],
            },
        ],
    }
],}
```

```

    "unspsc": "43211500",
    "product_description": "Apple MacBook Pro 13 Core i7 2.8GHz 16GB
512GB - Touch Bar - Space Gray",
    "product_attributes": {
        "Color": "Space Grey",
        "RAM": "16GB",
        "Screen Size": "13inch"
    },
    "images": ["http://test123.image1.png",
    "http://test123.image2.jpeg"],
    "unit": "Each",
    "available_units": "4",
    "available_for_country": ["US", "IN", "GB"],
    "delivery_time": "4",
    "contract_agreement": {
        "contract_number": "34567892",
        "contract_start_date": "YYYY-MM-DD",
        "contract_end_date": "YYYY-MM-DD",
        "negotiated_price": "456",
        "negotiated_currency": "USD"
    }
}
]
}
]
```

Possible responses:

```

// Success response:
{
    "result": {
        "response": "success"
    }
}

// Error response:
{
    "result": {
        "response": [
            {
                "customer_id": "AB-1234323",
                "supplier_id": "SUP-123456",
                "third_party_import_id": "DELL1234567",
                "status_code": "failure",
                "error_response_body": [
                    {
                        "sku": "55788741",
                        "mpn": "Z0WQ-20004301931",
                        "error_message": "Field Value empty/Formatting
issue Negotiated currency \n"
                    }
                ]
            }
        ]
    }
}
```

Spendint API - POST /sn_spend_intg/spendint/price

Updates any pricing for supplier product records.

When pricing is available for supplier product records, the API uses the product SKU to find an existing supplier product. If a matching supplier product exists, the corresponding contract price is updated. If no matching supplier product is found, an error message is generated, stating that the product for which you are trying to update pricing for does not exist.

Status tables

To know the status of the price import request, make a REST call into the ServiceNow database using the *Table* REST API. The response from the API lists the records where the price import request failed. For a price import response, query the Price Error table with the following parameter:

```
sysparm_query=outbound_error.supplier_id=<supplier_id>^outbound_error.state=20
```

You can find the details on the customer ID, supplier ID, error type, unique import set ID, and state can in the Outbound Status table, which is the parent error table.

URL format

```
/api/sn_spend_intg/spendint/price
```

Supported request parameters

Path parameters

| Name | Description |
|------|-------------|
| None | |

Query parameters

| Name | Description |
|------|---|
| mode | <p>Support for asynchronous and synchronous modes for third-party integration.</p> <p>Data type: String</p> <p>Valid values:</p> <ul style="list-style-type: none"> • async: Asynchronous mode. • sync: Synchronous mode. <p>Default: async</p> |

Request body parameters (XML or JSON)

| Name | Description |
|------------|---|
| catalog_id | <p>Required. Identifier for the catalog content that can be purchased by a customer.</p> <p>Data type: String</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|---|--|
| | Maximum length: 100 |
| customer_id | <p>Required. Identifier for the customer.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products | <p>List of objects that define products to create or update. Each transaction has a limit of 1000 products.</p> <p>Data type: Array</p> <pre>"products": [{ "contract_agreement": [{ "sku": "String" }] }]</pre> |
| products.contract_agreement | <p>Details of the contract for a product.</p> <p>Data type: Object</p> <pre>"contract_agreement": { "contract_end_date": "String", "contract_number": "String", "contract_start_date": "String", "negotiated_currency": "String", "negotiated_price": "String" }</pre> |
| products.contract_agreement.contract_end_date | <p>Date on which the contract term ends.</p> <p>Data type: String</p> <p>Maximum length: 40</p> <p>Format: YYYY-MM-DD</p> |
| products.contract_agreement.contract_number | <p>Required. Number of the active contract that is associated with the product.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|---|--|
| products.contract_agreement.contract_start_date | Date on which the contract term starts. Data type: String Maximum length: 40 Format: YYYY-MM-DD |
| products.contract_agreement.negotiated_currency | Required. Currency of the negotiated price. Data type: String Maximum length: 40 |
| products.contract_agreement.negotiated_price | Required. Unit price of a product as negotiated through a contract with the supplier or reseller. Data type: String Maximum length: 40 |
| products.sku | Required. Number that is generated by a supplier that uniquely identifies a product that is sold by that supplier. Data type: String Maximum length: 100 |
| supplier_id | Required. Identifier for the reseller or supplier that the customer can place orders with. Data type: String Maximum length: 100 |
| third_party_import_id | Identifier that enables a third party to pass a string value to uniquely identify a set of imported data. Data type: String Maximum length: 100 |

Headers

The following request and response headers apply to this HTTP action only or apply to this action in a distinct way.

Request headers

| Header | Description |
|--------|--|
| Accept | Data format of the response body. Supported types: <i>application/json</i> or <i>application/xml</i> . Default: <i>application/json</i> |

Note: Only the *application/json* data format is supported for Procurement Integration Framework.

Response headers

| Header | Description |
|--------|-------------|
| None | |

Status codes

The following status codes apply to this HTTP action.

Status codes

| Status code | Description |
|-------------|--|
| SUCCESS | Successful. The request was successfully processed. |
| failure | Unsuccessful. The request was processed with errors. |

Response body parameters (JSON)

These response body parameters are received when queried in synchronous mode.

| Name | Description |
|-----------------------------------|---|
| error_response_body | Description of the errors, listed by sku and the error message. Data type: Array |
| error_response_body.error_message | Detailed error message. Data type: String |
| status_code | Response status such as "success" or "failure." Data type: String |

Example: cURL request

```
curl "https://instance.service-now.com/api/sn_spend_intg/spendint/price"
  \
--request POST \
--header "Accept:application/json" \
```

```
--user 'username':'password'
{"root": [
    {"customer_id": "ACME CORP",
     "catalog_id": "AB-1234323",
     "supplier_id": "SUP-123456",
     "third_party_import_id": "DEL789876",
     "products": [
         {
             "sku": "5578874",
             "contract_agreement": {
                 "contract_number": "34567892",
                 "contract_start_date": "YYYY-MM-DD",
                 "contract_end_date": "YYYY-MM-DD",
                 "negotiated_price": "456",
                 "negotiated_currency": "USD"
             }
         }
     ]
}
]
```

Possible responses:

```
// Success response:
{
    "result": {
        "response": "success"
    }
}

// Error response:
{
    "result": {
        "response": [
            {
                "customer_id": "ACME CORP",
                "supplier_id": "SUP-123456",
                "third_party_import_id": "DEL789876",
                "status_code": "failure",
                "error_response_body": [
                    {
                        "sku": "5578874",
                        "error_message": "The product for which you are
trying to update pricing does not exist\nField Value empty/Formatting
issue Negotiated currency\nField Value empty/Formatting issue Contract
start date\nField Value empty/Formatting issue Contract end date\n"
                    }
                ]
            }
        ]
    }
}
```

Spendint API - POST /sn_spend_intg/spendint/availability

Updates the availability for supplier product records.

When supplier product records are available, the API uses the product SKU to find an existing supplier product. If a matching supplier product exists, the corresponding **available_units** field is updated. If no matching supplier product is found, an error message generates stating that the product for which you are trying to update availability for does not exist.

Status tables

To know the status of the update availability request, make a REST call into the ServiceNow database using the *Table* REST API. The response from the API lists the records where the update availability request failed. For update availability response, query the Availability Error table with the following parameter:

```
sysparm_query=outbound_error.supplier_id=<supplier_id>^outbound_error.state=20
```

The details on the customer ID, supplier ID, error type, unique import set ID, and state can be found in the Outbound Status table, which is the parent error table.

URL format

/api/sn_spend_intg/spendint/availability

Supported request parameters

Path parameters

| Name | Description |
|------|-------------|
| None | |

Query parameters

| Name | Description |
|------|---|
| mode | <p>Support for asynchronous and synchronous modes for third-party integration.</p> <p>Data type: String</p> <p>Valid values:</p> <ul style="list-style-type: none"> • async: Asynchronous mode. • sync: Synchronous mode. <p>Default: async</p> |

Request body parameters (XML or JSON)

| Name | Description |
|-------------|--|
| catalog_id | <p>Required. Identifier for the catalog content that can be purchased by a customer.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| customer_id | Required. Identifier for the customer. |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|--------------------------|---|
| | <p>Data type: String</p> <p>Maximum length: 100</p> |
| products | <p>List of objects that define the products to update. Each transaction has a limit of 1000 products.</p> <p>Data type: Array</p> <pre>"products": [{ "available_units": "String", "sku": "String", "unit": "String" }]</pre> |
| products.available_units | <p>Required for products that are kept in stock. Number of units available for this product.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| products.sku | <p>Required. Number that is generated by a supplier that uniquely identifies a product sold by that supplier.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| products.unit | <p>Required. Unit or rate at which the product is sold by the supplier. For example, pieces, hours, and so on.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| supplier_id | <p>Identifier for the reseller or supplier that the customer can place orders with.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| third_party_import_id | <p>Allows a third-party to pass a string value to uniquely identify a set of imported data.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |

Headers

The following request and response headers apply to this HTTP action only or apply to this action in a distinct way.

Request headers

| Header | Description |
|--------|--|
| Accept | Data format of the response body. Supported types: <i>application/json</i> or <i>application/xml</i> . Default: <i>application/json</i> |

Note: Only the *application/json* data format is supported for Procurement Integration Framework.

Response headers

| Header | Description |
|--------|-------------|
| None | |

Status codes

The following status codes apply to this HTTP action.

Status codes

| Status code | Description |
|-------------|--|
| success | Successful. The request was successfully processed. |
| failure | Unsuccessful. The request was processed with errors. |

Response body parameters (JSON)

These response body parameters are received when queried in synchronous mode.

| Name | Description |
|-----------------------------------|---|
| error_response_body | Description of the errors, listed by sku and the error message. Data type: Array |
| error_response_body.error_message | Detailed error message. Data type: String |
| status_code | Response status such as "success" or "failure." Data type: String |

Example: cURL request

```
curl
  "https://instance.servicenow.com/api/sn_spend_intg/spendint/availability" \
--request POST \
--header "Accept:application/json" \
--user 'username':'password'
{"root": [
  {"customer_id": "AB-1234323",
   "catalog_id": "ACME CORP",
   "supplier_id": "SUP-123456",
   "third_party_import_id": "DEL6789876",
   "products": [
     {
       "sku": "5578874",
       "unit": "Each",
       "available_units": "20"
     }
   ]
}
]
```

Possible responses:

```
// Success response:
{
  "result": {
    "response": "success"
  }
}

Error response:
{
  "result": {
    "response": [
      {
        "customer_id": "AB-1234323",
        "supplier_id": "SUP-123456",
        "third_party_import_id": "DEL6789876",
        "status_code": "failure",
        "error_response_body": [
          {
            "sku": "5578874",
            "error_message": "The product for which
you are trying to update availability does not exist\nField Value
empty/Formatting issue Unit\n"
          }
        ]
      }
    ]
  }
}
```

Spendint API - POST /sn_spend_intg/spendint/orderack

Updates order information for when a user shops for a product from a third-party catalog. When the user checks out, a purchase line is created so that approvals or other tasks for the purchase can be completed.

When a purchase order is generated in the ServiceNow database, the order is pushed into the following tables:

- Outbound Order: Contains the order header.
- Outbound Order Line: Contains the order lines.

Suppliers need to query these tables and fetch the orders that are pending against them. Suppliers should create a scoped app for Flow Designer actions for integrating with the ServiceNow database.

Query the tables with the following parameters:

- `sysparm_query=supplier_id=<supplier_id>^purchase_order.status=20` for header
- `sysparm_query=purchase_order.supplier_id=<supplier_id>^purchase_order.status=20` for header

When a purchase line is converted to a purchase order line, the following processes are run:

1. The purchase order and purchase order line are submitted to the Enterprise Resource Planning (ERP), if applicable.
2. The purchase order and purchase order line are transferred through integration to the third party with the customer ID, supplier ID, purchase order number, order date, purchase order amount, purchase order amount currency, and purchase order lines.
3. The purchase order and purchase order line remain in the Pending Submission state until confirmation messages are received by both the third-party catalog integration and the ERP. After confirmation is received, the state is updated to Ordered. If there is no ERP integration involved, a confirmation message is required only from the third-party integration.

Status tables

To know the status of the order acknowledgment request, make a REST call into the ServiceNow database using the `Table` REST API. The response from the API lists the records where the order acknowledgment request failed. For an order acknowledgment response, query the Order Acknowledgment Error table with the following parameter:

```
sysparm_query=outbound_error.supplier_id=<supplier_id>^outbound_error.state=20
```

The details on the customer ID, supplier ID, error type, unique import set ID, and state can be found in the Outbound Status table, which is the parent error table.

URL format

`/api/sn_spend_intg/spendint/orderack`

Supported request parameters

Path parameters

| Name | Description |
|------|-------------|
| None | |

Query parameters

| Name | Description |
|------|---|
| mode | <p>Support for asynchronous and synchronous modes for third-party integration.</p> <p>Data type: String</p> <p>Valid values:</p> <ul style="list-style-type: none"> • async: Asynchronous mode. • sync: Synchronous mode. <p>Default: async</p> |

Request body parameters (XML or JSON)

| Name | Description |
|--|--|
| customer_id | <p>Required. Identifier for the customer.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| order_number | <p>Required. Purchase order number provided by the customer for this order.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| sales_order_lines | <p>List of objects that define the sales order lines with unique updates for the purchases in this order.</p> <p>Data type: Array</p> <pre>"sales_order_lines": [{ "estimated_arrival_date": "String", "line_number": "String", "sales_order_line_number": "String" }]</pre> |
| sales_order_lines.estimated_arrival_date | Estimated arrival date of the order. |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|---|---|
| | <p>Data type: String</p> <p>Maximum length: 40</p> <p>Format: YYYY-MM-DD</p> |
| sales_order_lines.line_number | <p>Required. Purchase order line number that was generated by the customer for a particular purchase.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| sales_order_lines.sales_order_line_number | <p>Sales order line number that was generated by the supplier. This number is required only for revisions to this purchase.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| sales_order_number | <p>Number or value that is generated by the supplier for this order.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| status_code | <p>Required. Status of the submitted order that confirms if the order was successfully placed.</p> <p>Data type: String</p> <p>Valid values:</p> <ul style="list-style-type: none"> • confirmed: Order placed successfully. • rejected: Order not placed. |
| status_message | <p>Message that is attached to a status code. For example, the message could be that the order was successfully placed and is on back order.</p> <p>Data type: String</p> <p>Maximum length: 1000</p> |
| supplier_id | <p>Required. Identifier for the reseller or supplier that the customer can place orders with.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|-----------------------|--|
| third_party_import_id | <p>Identifier that enables a third party to pass a string value to uniquely identify a set of imported data.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |

Headers

The following request and response headers apply to this HTTP action only or apply to this action in a distinct way.

Request headers

| Header | Description |
|--------|--|
| Accept | <p>Data format of the response body. Supported types: <i>application/json</i> or <i>application/xml</i>.</p> <p>Default: <i>application/json</i></p> |

Note: Only the *application/json* data format is supported for Procurement Integration Framework.

Response headers

| Header | Description |
|--------|-------------|
| None | |

Status codes

The following status codes apply to this HTTP action.

Status codes

| Status code | Description |
|-------------|--|
| success | Successful. The request was successfully processed. |
| failure | Unsuccessful. The request was processed with errors. |

Response body parameters (JSON)

These response body parameters are received when queried in synchronous mode.

| Name | Description |
|-----------------------------------|--|
| error_response_body | Description of the errors, listed by the sales order number, sales order line number, and the error message. Data type: Array |
| error_response_body.error_message | Detailed error message. Data type: String |
| status_code | Response status such as "success" or "failure." Data type: String |

Example: cURL request

```
curl
  "https://instance.service-now.com/api/sn_spend_intg/spendint/orderack" \
--request POST \
--header "Accept:application/json" \
--user 'username':'password'
{"root": [
  {
    "customer_id": "ACME CORP",
    "supplier_id": "SUP-123456",
    "third_party_import_id": "undefined",
    "order_number": "PO08903323",
    "sales_order_number": "SO03323212",
    "status_code": "CONFIRMED",
    "status_message": "BACKORDERED",
    "sales_order_lines": [
      {
        "line_number": "POL6789876",
        "sales_order_line_number": "SOL5678909",
        "estimated_arrival_date": "YYYY-MM-DD"
      }
    ]
  }
]
```

Possible responses:

```
// Success response:
{
  "result": {
    "response": "success"
  }
}

// Error response:
{
  "result": {
    "response": [
      {
        "customer_id": "ACME CORP",
        "supplier_id": "SUP-123456",
        "third_party_import_id": "undefined"
      }
    ]
  }
}
```

```

        "third_party_import_id": "undefined",
        "status_code": "failure",
        "error_response_body": [
            {
                "sales_order_number": "SO03323212",
                "sales_order_line_number": "SOL5678909",
                "error_message": "Field Value empty/Formatting
issue Purchase order number\nField Value empty/Formatting issue Purchase
order line number\n"
            }
        ]
    }
}

```

Spendint API - POST /sn_spend_intg/spendint/shipment

Use this endpoint to accept updates on purchases from third parties.

When you receive data, you must match the shipment data to a purchase order line by using the sales order line number. You can use the tracking number to find an existing shipment detail record that is related to the purchase order line. If no such record is found, create a new shipment detail record. If no purchase order or purchase order line exists for the shipment data, you see an error message that states that the purchase order for this shipment does not exist.

Note: If the purchase order and purchase order lines are in the Pending Submission status, and the sales order and sales order lines are not populated, then the shipment and invoice posting from the third-party reseller is not allowed. It is only allowed when the status of the purchase order and purchase order lines are Ordered. Also, there is no sequential restriction on shipment and invoice posting.

Status tables

To know the status of the shipping request, make a REST call into the ServiceNow database using the *Table* REST API. The response from the API lists the records where the shipping update failed. To get a shipping response, query the Shipment Error table with the following parameter:

```
sysparm_query=outbound_error.supplier_id=<supplier_id>^outbound_error.state=20
```

The details on the customer ID, supplier ID, error type, unique import set ID, and state can be found in the Outbound Status table, which is the parent error table.

URL format

```
/api/sn_spend_intg/spendint/shipment
```

Supported request parameters

Path parameters

| Name | Description |
|------|-------------|
| None | |

Query parameters

| Name | Description |
|------|---|
| mode | <p>Support for asynchronous and synchronous modes for third-party integration.</p> <p>Data type: String</p> <p>Valid values:</p> <ul style="list-style-type: none"> • async: Asynchronous mode. • sync: Synchronous mode. <p>Default: async</p> |

Request body parameters (XML or JSON)

| Name | Description |
|--------------------|---|
| customer_id | <p>Identifier for the customer.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| order_number | <p>Required. Purchase order number that is provided by the customer for this order.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| sales_order_number | <p>Required. Number or value that is generated by the supplier for this order.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| shipment_lines | <p>List of shipment lines that can contain the serial number, IMEI number, and asset tag details of the assets.</p> <p>Data type: Array</p> <pre>"shipment_lines": [{ "actual_shipment_date": "String", "estimated_arrival_date": "String", "line_number": "String", "planned_shipment_date": "String", "product_details": [Array], "sales_order_line_number": "String", "shipping_address": {Object}, }]</pre> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|---------------------------------------|---|
| | <pre> "shipping_carrier": "String", "shipment_quantity": "String", "ship_to": "String", "tracking_number": "String" }]</pre> |
| shipment_lines.actual_shipment_date | <p>Date on which the shipment leaves the supplier's location.</p> <p>Data type: String</p> <p>Maximum length: 40</p> <p>Format: YYYY-MM-DD</p> |
| shipment_lines.estimated_arrival_date | <p>Date on which the shipment is expected to arrive at the specified location.</p> <p>Data type: String</p> <p>Maximum length: 40</p> <p>Format: YYYY-MM-DD</p> |
| shipment_lines.line_number | <p>Required. Purchase order line number that is generated by the customer for a particular purchase.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| shipment_lines.planned_shipment_date | <p>Date on which the shipment is planned to leave the supplier's location.</p> <p>Data type: String</p> <p>Maximum length: 40</p> <p>Format: YYYY-MM-DD</p> |
| shipment_lines.product_details | <p>List of objects that define the details about the products being shipped. Options include the serial number, IMEI number, and asset tag details.</p> <p>Data type: Array</p> <pre> "product_details": [{ "asset_tag": "String", "imei": "String", "serial_number": "String" }</pre> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|--|--|
| | <pre> }]</pre> |
| shipment_lines.product_details.asset_tag | <p>Asset tag of the shipped product.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| shipment_lines.product_details.imei | <p>IMEI number of the shipped product.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| shipment_lines.product_details.serial_number | <p>Required. Serial number of the shipped product.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| shipment_lines.sales_order_line_number | <p>Sales order line number that is generated by the supplier. This number is required only for revisions to this purchase.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| shipment_lines.shipping_address | <p>Address where the products are being shipped to.</p> <p>Data type: Object</p> <pre>"shipping_address": { "city": "String", "country": "String", "name": "String", "state": "String", "street": "String", "zip_code": "String" }</pre> |
| shipment_lines.shipping_address.city | <p>Name of the city where the products are shipped to.</p> <p>Data type: String</p> <p>Maximum length: 1000</p> |
| shipment_lines.shipping_address.country | <p>Country where the products are shipped to.</p> <p>Data type: String</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|--|--|
| | Maximum length: 40 |
| shipment_lines.shipping_address.name | <p>Name of the customer that the products are being shipped to.</p> <p>Data type: String</p> <p>Maximum length: 1000</p> |
| shipment_lines.shipping_address.state | <p>State where the products are shipped to.</p> <p>Data type: String</p> <p>Maximum length: 1000</p> |
| shipment_lines.shipping_address.street | <p>Name of the street where the products are shipped to.</p> <p>Data type: String</p> <p>Maximum length: 1000</p> |
| shipment_lines.shipping_address.zip_code | <p>Zip code or pin code where the products are shipped to.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| shipment_lines.shipment_quantity | <p>Required. Number of the products being shipped as physical goods. The number should contain the quantity of the products that are in the shipment.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| shipment_lines.shipping_carrier | <p>Shipping carrier that is delivering the product to the specified location such as FedEx, UPS, USPS, and so on.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| shipment_lines.ship_to | <p>Name of the recipient that the products are shipped to.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| shipment_lines.tracking_number | Tracking number that is provided by the shipping carrier for the whole or a portion of the purchase. |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|--------------------------|---|
| | Data type: String Maximum length: 100 |
| supplier_id | Required. Identifier for the reseller or supplier that the customer can place orders with. Data type: String Maximum length: 100 |
| supplier_shipment_number | Required. Identification number that is generated for this shipment. Typically, this number is generated by an Enterprise Resource Planning (ERP) or order tracking system. Data type: String Maximum length: 100 |
| third_party_import_id | Identifier that enables a third party to pass a string value to uniquely identify a set of imported data. Data type: String Maximum length: 100 |

Headers

The following request and response headers apply to this HTTP action only or apply to this action in a distinct way.

Request headers

| Header | Description |
|--------|--|
| Accept | Data format of the response body. Supported types: <i>application/json</i> or <i>application/xml</i> . Default: <i>application/json</i> |

Note: Only the *application/json* data format is supported for Procurement Integration Framework.

Response headers

| Header | Description |
|--------|-------------|
| None | |

Status codes

The following status codes apply to this HTTP action.

Status codes

| Status code | Description |
|-------------|--|
| success | Successful. The request was successfully processed. |
| failure | Unsuccessful. The request was processed with errors. |

Response body parameters (JSON)

These response body parameters are received when queried in synchronous mode.

| Name | Description |
|-----------------------------------|--|
| error_response_body | Description of the errors, listed by the sales order line number, sales order number, supplier shipment number, and the error message. Data type: Array |
| error_response_body.error_message | Detailed error message. Data type: String |
| status_code | Response status such as "success" or "failure." Data type: String |

Example: cURL request

```
curl
  "https://instance.service-now.com/api/sn_spend_intg/spendint/shipment" \
--request POST \
--header "Accept:application/json" \
--user 'username':'password'
>{"root": [
    {
      "customer_id" : "ACME CORP",
      "supplier_id" : "SUP-123456",
      "third_party_import_id": "DEL2134324",
      "supplier_shipment_number" : "TN-YU67898723",
      "order_number": "PO0001002",
      "sales_order_number": "SO00223002",
      "shipment_lines": [
        {
          "line_number": "POL0001005",
          "sales_order_line_number": "SOL0231325",
          "shipment_quantity": "4",
          "shipping_carrier": "FedEx",
          "tracking_number": "E-901290092",
          "shipping_address": {
            "line1": "123 Main St",
            "city": "Anytown",
            "state": "CA",
            "zip": "90210"
          }
        }
      ]
    }
  ]}
```

```

        "name" : "1640 Camino Del Rio North #202, San Diego, CA",
        "street" : "1640 Camino Del Rio North",
        "city" : "San Diego",
        "state" : "CA",
        "zip_code" : "92108-1512",
        "country" : "US"
    },
    "ship_to": "John Doe",
    "planned_shipment_date": "YYYY-MM-DD",
    "actual_shipment_date": "YYYY-MM-DD",
    "estimated_arrival_date": "YYYY-MM-DD",
    "product_details": [
        {
            "serial_number": "FL1234-23242319001",
            "imei": "2134890294",
            "asset_tag": ""
        },
        {
            "serial_number": "FL1234-23242319110",
            "imei": "245499003",
            "asset_tag": ""
        }
    ]
}
]
]
```

Possible responses:

```

// Success response:
{
    "result": {
        "response": "success"
    }
}

// Error response:
{
    "result": {
        "response": [
            {
                "customer_id": "ACME CORP",
                "supplier_id": "SUP-123456",
                "third_party_import_id": "DEL2134324",
                "status_code": "failure",
                "error_response_body": [
                    {
                        "sales_order_line_number": "SOL0231325",
                        "sales_order_number": "SO00223002",
                        "supplier_shipment_number": "TN-YU67898723",
                        "error_message": "The purchase order for this
shipment does not exist\nThe purchase order line for this shipment does
not exist\n"
                    }
                ]
            }
        ]
    }
}
```

```

    }
}
```

Spendint API - POST /sn_spend_intg/spendint/invoice

Accepts invoices from third-party providers.

If the purchase order and purchase order lines are in the Pending Submission status, and the sales order and sales order lines are not populated, then the shipment and invoice posting from the third-party reseller is not allowed. It is only allowed when the status of the purchase order and purchase order lines are Ordered. Also, there is no sequential restriction on shipment and invoice posting.

After an invoice is submitted, the invoice and invoice lines are mapped to a purchase order. On a successful mapping, the state of the invoice is set as follows:

- Awaiting Delivery: When no receipts exist, the order is partially delivered, or the invoice requires approval.
- Invoice Confirmed: When the purchase order is delivered and the amount invoiced matches the purchase order total amount.
- Requires Review: When the purchase order is delivered and the amount invoiced does not match the purchase order total amount.

When a valid invoice is posted for a line item, the same invoice cannot be updated.

If the provided invoice does not have a purchase order number, the invoice is rejected and you see an error message that states that one or more of the provided invoices does not have a purchase order number. If the provided invoice has a purchase order number, but it doesn't match the purchase order or no purchase order exists, you see an error message. The message states that one or more invoices do not have a corresponding purchase order that matches the purchase order number of the invoice. Also, if the amount invoiced sent from the third-party reseller does not match with the invoiced amount, the invoice is rejected.

Status tables

To know the status of the invoice request, make a REST call into the ServiceNow database using the *Table* REST API. The response from the API lists the records where the invoice creation failed. For invoice response, query the Invoice Error table with the following parameter:

```
sysparm_query=outbound_error.supplier_id=<supplier_id>^outbound_error.state=20
```

The details on the customer ID, supplier ID, error type, unique import set ID, and state can be found in the Outbound Status table, which is the parent error table.

URL format

```
/api/sn_spend_intg/spendint/invoice
```

Supported request parameters

Path parameters

| Name | Description |
|------|-------------|
| None | |

Query parameters

| Name | Description |
|------|---|
| mode | <p>Support for asynchronous and synchronous modes for third-party integration.</p> <p>Data type: String</p> <p>Valid values:</p> <ul style="list-style-type: none"> • async: Asynchronous mode. • sync: Synchronous mode. <p>Default: async</p> |

Request body parameters (XML or JSON)

| Name | Description |
|---------------|---|
| currency | <p>Required. Currency for subtotal, tax, and shipping. The subtotal, tax, and shipping should be in the same currency.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| customer_id | <p>Identifier for the customer.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| discounts | <p>Discounts that are applied toward the invoice. This is an editable field.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| invoice_date | <p>Required. Date on which the customer was invoiced.</p> <p>Data type: String</p> <p>Maximum length: 40</p> <p>Format: YYYY-MM-DD</p> |
| invoice_lines | <p>List of objects that define the lines that are being invoiced for purchases within this order.</p> <p>Data type: Array</p> <pre>"invoice_lines": [{ "invoiced_line_amount": "String", "invoiced_quantity": "String", "line_id": "String", "line_type": "String", "order_id": "String", "product_id": "String", "product_name": "String", "unit": "String" }]</pre> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|--|--|
| | <pre> "line_number": "String", "supplier_invoice_line_number": "String", "sales_order_line_number": "String" }] </pre> |
| invoice_lines.invoiced_line_amount | <p>Required. Total cost, excluding taxes and shipping, that a customer is being invoiced for a given purchase order line.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| invoice_lines.invoiced_quantity | <p>Required. Quantity of goods or services that a customer is being invoiced for.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| invoice_lines.line_number | <p>Required. Purchase order line number that is generated by the customer for a particular purchase.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| invoice_lines.sales_order_line_number | <p>Required. Sales order line number that is generated by the supplier.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| invoice_lines.supplier_invoice_line_number | <p>Required. Identification number that is generated by a supplier for this invoice line.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| other_charges | <p>Other additional charges associated to the invoice. This is an editable field.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| order_number | Required. Purchase order number that is provided by the customer for this order. |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|-------------------------|--|
| | <p>Data type: String</p> <p>Maximum length: 40</p> |
| remit_to_address | <p>Required. Location to which a payment is made.</p> <p>Data type: String</p> <p>Maximum length: 1000</p> |
| sales_order_number | <p>Required. Number or value that is generated by the supplier for this order.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| shipping | <p>Required. Total shipping cost for the entire purchase.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| subtotal | <p>Required. Total amount of money to be paid to the supplier excluding tax and shipping charges.</p> <p>Data type: String</p> <p>Maximum length: 40</p> |
| supplier_id | <p>Required. Identifier for the reseller or supplier that the customer can place orders with.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| supplier_invoice_number | <p>Required. Identification number that is generated by a supplier for this invoice.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |
| supplier_tax_id | <p>Tax identifier that is associated to the third party reseller. This is an editable field.</p> <p>Data type: String</p> <p>Maximum length: 100</p> |

Request body parameters (XML or JSON) (continued)

| Name | Description |
|-----------------------|---|
| tax | Required. Total amount of taxes that are billed for the purchase. Data type: String Maximum length: 40 |
| tax_rate | Tax rate percentage that is applied for the order. This is an editable field. Data type: String Maximum length: 100 |
| third_party_import_id | Identifier that enables a third party to pass a string value to uniquely identify a set of imported data. Data type: String Maximum length: 100 |
| total_amount_invoiced | Required. Total amount of money to be paid to the supplier including tax and shipping charges. Data type: String Maximum length: 40 |

Headers

The following request and response headers apply to this HTTP action only or apply to this action in a distinct way.

Request headers

| Header | Description |
|--------|--|
| Accept | Data format of the response body. Supported types: <i>application/json</i> or <i>application/xml</i> . Default: <i>application/json</i> |

Note: Only the *application/json* data format is supported for Procurement Integration Framework.

Response headers

| Header | Description |
|--------|-------------|
| None | |

Status codes

The following status codes apply to this HTTP action.

Status codes

| Status code | Description |
|-------------|--|
| success | Successful. The request was successfully processed. |
| failure | Unsuccessful. The request was processed with errors. |

Response body parameters (JSON)

These response body parameters are received when queried in synchronous mode.

| Name | Description |
|-----------------------------------|---|
| error_response_body | Description of the errors, listed by the sales order line number, sales order number, supplier invoice number, supplier invoice line number, and the error message. Data type: Array |
| error_response_body.error_message | Detailed error message. Data type: String |
| status_code | Response status such as "success" or "failure." Data type: String |

Example: cURL request

```
curl
"https://instance.service-now.com/api/sn_spend_intg/spendint/invoice" \
--request POST \
--header "Accept:application/json" \
--user 'username':'password'
>{"root": [
    {
        "customer_id": "Customer - A",
        "supplier_id": "SUP-123456",
        "third_party_import_id": "undefined",
        "supplier_invoice_number": "QAAP89873220071",
        "supplier_tax_id": "TIN0000000",
        "order_number": "POL7987633",
        "sales_order_number": "SO0000000081",
        "invoice_date": "YYYY-MM-DD",
        "subtotal": "6000",
        "tax_rate": "10%",
        "tax": "600",
        "shipping": "120",
        "other_charges": "100",
        "discounts": "200",
        "total_amount_invoiced": "6620",
    }
]}
```

```

    "remit_to_address": "1640 Camino Del Rio North #202, San Diego, CA",
    "currency": "USD",
    "invoice_lines": [
        {
            "supplier_invoice_line_number": "QA789A867877ABN32251",
            "line_number": "POL587667",
            "sales_order_line_number": "SOL00000081",
            "invoiced_quantity": "45",
            "invoiced_line_amount": "4000"
        },
        {
            "line_number": "POL587668",
            "supplier_invoice_line_number": "78987323",
            "sales_order_line_number": "SOL98769",
            "invoiced_quantity": "12",
            "invoiced_line_amount": "2000"
        }
    ]
}
]
}

```

Possible responses:

```

// Success response:
{
    "result": {
        "response": "success"
    }
}

// Error response:
{
    "result": {
        "response": [
            {
                "customer_id": "Customer - A",
                "supplier_id": "SUP-123456",
                "third_party_import_id": "undefined",
                "status_code": "failure",
                "error_response_body": [
                    {
                        "sales_order_line_number": "SOL00000081",
                        "sales_order_number": "S0000000081",
                        "supplier_invoice_number": "QAAP89873220071",
                        "supplier_invoice_line_number": "QA789A867877ABN32251",
                        "error_message": "The invoice do not have a corresponding purchase order which matches the purchase order number of the invoice provided\n"
                    }
                ]
            }
        ]
    }
}

```

Procurement File Transfer Framework

Procurement File Transfer Framework (PFTF) helps you transfer information between the ServiceNow database and a third-party reseller through a File Transfer Protocol (FTP). You can set up an FTP server for access and transfer of reseller data without any spoke development by the third-party reseller.

When the PFTF application is installed, the following applications from the ServiceNow IntegrationHub Professional Pack Installer must be auto-installed. This is a prerequisite.

- ServiceNow IntegrationHub Action Step - SSH
- ServiceNow IntegrationHub Action Step - SFTP
- ServiceNow IntegrationHub Flow Trigger - REST

FTP integration helps when you intend to transfer files between ServiceNow and your resellers.

Use Procurement File Transfer Framework for the following activities:

- Support the FTP-based integration for suppliers.
- Standardize the file structure, formats, and naming conventions for each supplier.
- Manage large-scale data through FTP import and export.
- Simplify the import and export operations with mid server and flow designer.
- Use the file transfer workflows to control the data operations.

Currently, the following integrations are supported:

Imports:

- Catalog import
- Order acknowledgment import
- Shipment import
- Invoice import

Exports:

Order export

Your suppliers can upload the files with the recommended [folder](#) structure and format on the server. ServiceNow imports and exports all the details automatically through scheduled data imports and exports.

Import data using FTP server

Import a file from a local source, a remote network server, or another instance by providing a path and authentication information. Transfer and manage procurement data in a principled structure that administrators can use for various data management operations.

Before you begin

- Understand the data import workflows and FTP functionality.
- Ensure that you install and configure an FTP client.
- Ensure that you install and configure MID Server in your ServiceNow instance to connect to the ERP server. See [Installing the MID Server](#) for details.

Note: The MID Server integration is required only for an ERP integration using SOAP services.

- Ensure you have permissions to access and pull data from FTP.

Role required: import_admin or admin

Procedure

1. Navigate to **All > System LDAP > Data Sources**.

By default, the following LDAP integrations are available:

- Example LDAP User Import
- Example LDAP Group Import

Neither example is active by default. Change these scheduled imports to meet your business needs.

2. Select **Example LDAP Group Import**.

3. On the form, fill in the fields:

File

| Field | Description |
|------------------------|--|
| Name | Enter a unique name for this data source. |
| Import set table label | Specify a label for the import set staging table to use. |
| Import set table name | ServiceNow uses the label to construct a unique table name to prevent namespace collision with an existing table. This table stores the data from any third-party sources. |
| Type | Select File as the type of data that you are importing from. |
| Format | Select JSON as format. |
| File retrieval method | Select File as format for data transfer. |
| File path | Specify the file path for querying. |

4. Set additional fields based on the selected **Type**.

See the documentation for each data source type for additional field information.

The Table transform map is associated with the table to transform the `File Based Catalog Import [sn_spend_ftp_intg_catalog_stage]` data into `Catalog Import [sn_spend_intg_imp_catalog]`. For more information on the table transform map, see the [Data source table information](#).

What to do next

- Manage the data integration by scheduled import and export jobs on a daily, weekly, or monthly basis. Perform the **Scheduled Imports** based on your business needs. See [Schedule a data import](#).
- Verify the accuracy of the data import and share the errors on the FTP server. The reseller can fix the posted errors using [Perform export steps](#).

Run scheduled imports

A scheduled import allows administrators to import data on a regular schedule. Run import operations on a daily, weekly, or monthly basis based on your business requirements. Scheduled import runs a datasource similar to how a scheduler job runs the script.

Before you begin

Role required: import_scheduler, import_admin, or admin

Procedure

1. Navigate to **All > System Import Sets > Administration > > Scheduled Imports**.
A list of available scheduled imports appears with Run, Data source, Active, and Updated information.
2. Select **Example File Based Catalog Import**
3. Follow the steps for [data import](#).

What to do next

- You can verify the data transfer records from **Procurement Integrations > Catalog > FTP Catalog Imports**. You can see all the data as one single payload content. See [Payloads](#) for more information.
- The same record is then transformed and available from **Procurement Integrations > Catalog > Catalog Imports**.

Perform export steps

Export a file from a local source, a remote network server, or another instance by providing a path and authentication information.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Procurement Integrations > File Transfer Setup > FTP Integration Configurations**.
2. Select **New**.
3. Select one of the following operations:
 - Post Purchase Order
 - Post Catalog Error
 - Post Shipment Error
 - Post Invoice Error
 - Post Price Error
 - Post Availability Error

4. Provide **Mid server connection and path details.**

The MID Server facilitates communication and the movement of data between a ServiceNow instance and external applications, data sources, and services. For more information on the MID server, see the related topics.

5. Provide **FTP server connection and path details.**

For more information on connection, path, and HTTP connection, see the related topics.

Verify the accuracy of the data, identify any discrepancies, and share the errors with the reseller on the same FTP server. You may use flow designer to move the data from your instance to external applications.

Related topics

[Configure for MID Server access](#) ↗

[Flow Designer](#) ↗

[Introduction to credentials, connections, and aliases](#) ↗

Export data to the FTP server

Export a file from a local source, a remote network server, or another instance by providing a path and authentication information.

Before you begin

You can use Data Source to pull the data from an FTP server. However, you can't use Data Source to post the data to the FTP server.

Role required: admin

About this task

Integrate your FTP Server to export all the confirmed orders using Flow Designer.

Procedure

Navigate to **All > Procurement Integration > Ordering > Outbound Orders**.

A list of outbound orders appears.

Use the Flow Designer to automate processes of data movement from ServiceNow to third-party applications. Flow Designer lets you move the procurement data between a ServiceNow instance and external applications, data sources, and services.

Example:

You can use Flow Designer subflows to move the data into a mid server and then to external resources. Here is a quick example for processing the **Purchase Order Queue**.

- Look up for FTP integration record with the supplier ID. For example, **Process Purchase Order Outbound Queue**.
- Generate Purchase Order payload.
- Push to Mid server.
- Wait for duration of time.
- Push to FTP server.
- Assign subflow outputs.

- Add an action, flow logic, or subflow as required.

Note: Based on your business requirements, add additional actions, triggers, or subflows.

Related topics

[Configure for MID Server access](#)

[Flow Designer](#)

[Introduction to credentials, connections, and aliases](#)

Data source table information

The following information can help you with the FTP import and export data.

Data source types

Data sources are used to create an import set so that data can be processed, if necessary, prior to being mapped onto a production table.

| Label | Name |
|----------------------------|--|
| File | Data is in a recognized file format, accessible locally or remotely through several file retrieval methods. |
| JDBC | Data is in a database, accessible using JDBC. ServiceNow Technical Support supports Oracle, MySQL, Sybase, DB2 Universal, and MS SQL Server drivers. |
| LDAP | Data is in an LDAP server, accessible through the LDAP or LDAPS ports, 389 and 636 respectively. |
| OIDC | Data is accessible via OIDC. |
| REST (IntegrationHub) | Data is in a REST API, accessible through IntegrationHub. |
| Data Stream IntegrationHub | Data is loaded from a Data Stream Action, accessible through IntegrationHub. |
| Custom (Load by Script) | Data is obtained using a custom script. |

Folder structure

See the following folder structure. You can use the <type>.request for taking the data and <type>.response for posting the data back to the FTP server:

```

catalog.request
catalog.response

invoice.request
invoice.response

orders.request
orders.response

```

```
shipment.request
shipment.response
```

Associated Table Transform Map

To import data, define a data source and transform map, and schedule or run an import at some regular interval.

Table transform map is associated with the table to transform the `File Based Catalog Import [sn_spend_ftp_intg_catalog_stage]` data into `Catalog Import [sn_spend_intg_imp_catalog]`. See the following table transform labels and associated table information.

| Label | Name |
|----------------------|--------------------------------------|
| Invoice Import | sn_spend_intg_imp_invoice |
| Catalog Import | sn_spend_intg_imp_catalog |
| Availability Import | sn_spend_intg_imp_availability |
| Shipment Import | sn_spend_intg_imp_shipment |
| Order Acknowledgment | sn_spend_intg_imp_purchase_order_ack |
| Price Import | sn_spend_intg_imp_price |

Payloads samples and errors

Use the following sample payloads to enable procurement data import and export.

Payloads

See the following sample payload for importing and exporting procurement records.

| Name | Sample payload |
|----------------------|--|
| Invoice Import | See Spendint API - POST /sn_spend_intg/spendint/invoice |
| Catalog Import | See Spendint API - POST /sn_spend_intg/spendint/catalog |
| Availability Import | See Spendint API - POST /sn_spend_intg/spendint/availability |
| Shipment Import | See Spendint API - POST /sn_spend_intg/spendint/shipment |
| Order Acknowledgment | See Spendint API - POST /sn_spend_intg/spendint/orderack |
| Price Import | See Spendint API - POST /sn_spend_intg/spendint/price |

Errors

This section describes the following procurement errors:

Catalog Error (Outbound)

```
{
  "root": {
    "status_message": "",
    "status_code": "Failure",
    "customer_id": "AB-1234323",
    "supplier_id": "SUP-123456",
    "error_response_body": [
      {
        "error_message": "Field Value empty/Formatting issue Negotiated currency \n",
        "mpn": "Z0WQ-20004301931",
        "sku": "55788741"
      }
    ]
  }
}
```

Price Error (Outbound)

```
{
  "root": {
    "status_message": "",
    "status_code": "Failure",
    "customer_id": "AB-1234323",
    "supplier_id": "SUP-123456",
    "error_response_body": [
      {
        "error_message": "Field Value empty/Formatting issue Negotiated currency \n",
        "mpn": "Z0WQ-20004301931"
      }
    ]
  }
}
```

Availability Error (Outbound)

```
{
  "root": {
    "status_message": "",
    "status_code": "Failure",
    "customer_id": "AB-1234323",
    "supplier_id": "SUP-123456",
    "error_response_body": [
      {
        "error_message": "Field Value empty/Formatting issue Negotiated currency \n",
        "mpn": "Z0WQ-20004301931"
      }
    ]
  }
}
```

Shipment Error (Outbound)

```
{
  "root": {
```

```

    "status_message": "",
    "status_code": "Failure",
    "customer_id": "AB-1234323",
    "supplier_id": "SUP-123456",
    "error_response_body": [
        {
            "supplier_shipment_number": "SHIPSUP00001 \n",
            "sales_order_number": "SOL0010001 \n",
            "sales_order_line_number": "SOL0010001 \n",
            "error_message": "The purchase order for this shipment does not
exist \n"
        }
    ]
}
}

```

Invoice Error (Outbound)

```

{
    "root": {
        "status_message": "",
        "status_code": "Failure",
        "customer_id": "AB-1234323",
        "supplier_id": "SUP-123456",
        "error_response_body": [
            {
                "supplier_invoice_number": "SUPINV00001 \n",
                "supplier_invoice_line_number": "SUPINVL0000001 \n",
                "sales_order_number": "SOL0010001 \n",
                "sales_order_line_number": "SOL0010001 \n",
                "error_message": "The provided invoices does not have a purchase
order line number \n"
            }
        ]
    }
}

```

Outbound Order

```

{
    "root": {
        "order_amount": "200",
        "order_number": "PO0010001",
        "currency": "USD",
        "order_date": "01-01-2021",
        "customer_id": "AB-1234323",
        "supplier_id": "SUP-123456",
        "catalog_id": "ABC780987",
        "order_lines": [
            {
                "sku": "A20002 \n",
                "line_number": "POL0010001 \n",
                "mpn": "09876789 \n",
                "purchased_quantity": "2 \n",
                "unit": "Each \n",
                "unit_price": "USD \n",
                "ship_to": "John A \n",
                "order_qty": "2 \n"
            }
        ]
    }
}

```

```
"contract_number": "VEN09000002 \n",
"organization_id": "868979 \n",
"enroll_in_abm": "yes",
"shipping_address": [
    "name": "2225 Lawson Ln, Santa Clara, CA 95054, United
States\n",
    "street": "2225 Lawson Ln \n",
    "city": "Santa Clara \n",
    "state": "CA \n",
    "zip_code": "95054 \n",
    "country": "United States of America \n"
]
}
```

Domain separation and Sourcing and Procurement Operations

Domain separation is unsupported for Sourcing and Procurement Operations. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see [Application support for domain separation](#).

Related topics

[Domain separation for service providers](#)

Supplier Lifecycle Operations

With ServiceNow® Supplier Lifecycle Operations, you can effectively collaborate with suppliers, manage supplier relationships, monitor risk, compliance, and performance across the supplier life cycle.

Supplier Lifecycle Operations value proposition

Supplier Lifecycle Operations

Simplifies the supplier experience and maximizes productivity



Supplier Collaboration

- ✓ Improve supplier master data quality by allowing suppliers to manage their own information
- ✓ Speed up issue resolution by allowing suppliers to collaborate directly with the business
- ✓ Vastly improve supplier onboarding time with structured playbooks



Supplier Management

- ✓ Centralize supplier information and provide powerful tools for managing the entire lifecycle of suppliers
- ✓ Manage supplier networks to address issues at scale
- ✓ Orchestrate complex, cross-functional workflows to increase productivity



Supplier Intelligence

- ✓ Integrate with external data sources and aggregators for a 360-degree view of suppliers that facilitates data-driven decision-making
- ✓ Improve supplier master data quality
- ✓ Evaluate supplier performance and mitigate risk

Explore



Learn about how supplier managers and supplier contacts use Supplier Lifecycle Operations.

Configure



Plan and configure your implementation.

Use



Resolve supplier inquiries with self-service, compare suppliers, onboard suppliers, and manage supplier data.

Reference



Get details about components, such as fields, tables, and properties.

Exploring Supplier Lifecycle Operations

Use ServiceNow® Supplier Lifecycle Operations to empower suppliers with self-service to simplify operations and improve productivity.

Overview

Supplier Lifecycle Operations enables you to quickly onboard suppliers, effortlessly manage supplier data, add key supplier contacts, monitor supplier performance, and enhance productivity of the teams that engage with suppliers.

Benefits

Supplier Lifecycle Operations provides the following benefits:

- Faster supplier onboarding: View details about new suppliers and onboard suppliers quickly using onboarding workflows and start purchasing goods and services. For more information, see [Using the supplier onboarding playbook to onboard suppliers](#).
- Automatically import supplier information: Supplier Lifecycle Operations integrates with the supplier Intelligence platform, Craft, which enables you to quickly import and view all the important supplier details. For more information, see [Craft.io Integration for Supplier Lifecycle Operations](#).
- Supplier self-service: Enhance the supplier experience by enabling suppliers to complete onboarding tasks, get their questions answered, and fulfill requests, such as viewing open purchase orders and submitting invoices. For more information, see [Using Supplier Collaboration Portal](#).
- Supplier data management: Provide flexibility to suppliers to manage and update their own data, ensuring that the supplier data is always current and up to date. For more information, see [Using Supplier Collaboration Portal](#).
- Supplier case and contact management: Create and manage supplier cases, add and manage supplier contacts. For more information, see [Using Source-to-Pay Workspace](#).
- Minimize risk during supplier onboarding: Identify and assess potential supplier risks when onboarding new suppliers. For more information, see [Minimize risk by assessing suppliers during the onboarding process](#) .

Supplier Lifecycle Operations applications

Supplier Lifecycle Operations includes the following applications.

| Application | Description |
|------------------------------|---|
| Supplier Common Architecture | Provides a common architecture to track data objects related to a supplier used in both Supplier Lifecycle Operations and Supplier Collaboration Portal. For more information, see Supplier Common Architecture . |
| Source-to-Pay Workspace | Enables you to centralize supplier information and collaborate with suppliers to improve performance. For |

| Application | Description |
|--|--|
| <p>i Important: Starting with the Washington D.C. release, Supplier Manager Workspace is being prepared for future deprecation. It will be hidden from the navigation and no longer be activated on new instances but will continue to be supported. Source-to-Pay Workspace provides the latest experience for this functionality.</p> | more information, see Source-to-Pay Workspace . |
| Craft.io Integration for Supplier Lifecycle Operations | Provides a pre-configured integration with Craft.io. Craft.io is a supplier intelligence platform that offers validated and comprehensive information about suppliers with which a company engages. For more information, see Craft.io Integration for Supplier Lifecycle Operations . |
| News Integration for Supplier Lifecycle Operations | Retrieve recent news and other articles from preferred news channels. There is a pre-configured integration with Microsoft Bing available with this application. For more information, see News Integration for Supplier Lifecycle Operations . |
| Advanced Work Assignment for Supplier Lifecycle Operations | Automatically assign supplier cases to agents based on availability and capacity. For more information, see Advanced Work Assignment for Supplier Lifecycle Operations . |
| Risk Assessments for Supplier Lifecycle Operations | Provides an integration with the Third-party Risk Management (TPRM) application to conduct due diligence when onboarding new suppliers. For more information, see Using the supplier onboarding playbook to onboard suppliers . |
| Supplier Collaboration Portal | <p>Provides a single, one-stop experience for suppliers to get self-service, complete tasks and make requests into an organization.</p> <p>For more information, see Supplier Collaboration Portal.</p> |

For more information about the sequence in which you need to install the applications and the dependencies that are required before installing each application, see [Supplier Lifecycle Operations plugin installation sequence](#).

Request apps on the Store

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

Source-to-Pay Workspace

As a supplier manager, you can effortlessly work on open supplier cases and grant approvals to supplier requests using the Source-to-Pay Workspace application.

i Important: Starting with the Washington D.C. release, Supplier Manager Workspace is being prepared for future deprecation. It will be hidden from the navigation and no longer be activated on new instances but will continue to be supported. Source-to-Pay Workspace provides the latest experience for this functionality. If you have upgraded to the Washington DC release and want to use the Supplier Manager Workspace, ensure that you run the `fixscript_migrate_workspace_to_smw.xml` fix script. For more information, see [Run fix script to use the Supplier Manager Workspace after upgrading](#).

Open the Source-to-Pay Workspace by navigating to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.

Alternatively, you can also navigate to **Workspaces > Source-to-Pay Workspace**.

The Source-to-Pay Workspace application is a dependent application and is automatically installed when you install the Supplier Lifecycle Operations application.

The Source-to-Pay Workspace includes a landing page and a list view that enables you to work on various aspects of the supplier management process.

For more information about using the workspace, see [Using Source-to-Pay Workspace](#).

For more information, see [Source-to-Pay Workspace](#).

Supplier Collaboration Portal

The ServiceNow® Supplier Collaboration Portal application provides a seamless unified employee portal experience for supplier contacts.

Supplier Collaboration Portal enables you to do the following:

- Resolve supplier inquiries using self-service and Knowledge articles
- Improve supplier data quality by enabling suppliers to directly manage their own data
- Accelerate case resolution by enabling suppliers to complete tasks and upload required prerequisite documents

Supplier Collaboration Portal home page

The screenshot shows the Supplier Collaboration Portal home page. At the top, there's a banner with the text "Welcome to Supplier Collaboration Portal" and a subtext "With Supplier Collaboration Portal, you can check invoice status, resolve issues, collaborate and much more!". Below the banner, there's a search bar with the placeholder "How can we help?".

My active items:

- 5 Tasks
- 9+ Requests
- 0 Surveys
- 0 Invoices
- 5 Purchase Orders
- 0 Risk Assessments
- 0 Issues
- 0 Shipments

My tasks [5]:

| Overdue 342 days | Overdue 342 days | Overdue 342 days |
|---|---|---------------------------------------|
| mark comp short desc STASK0001005 Open | view link short desc STASK0001006 Open | video short desc STASK0001007 Open |

View all

My requests [23]:

| Number | Short description | State | Updated |
|--------------|----------------------------|------------------|---------|
| SCASE0001004 | Request to add or remov... | Work in progress | 4h ago |
| SCASE0001009 | Do you have an idea?... | In review | 5h ago |
| SCASE0001046 | Update banking... | Work in progress | 5h ago |
| SCASE0001045 | Update banking... | In review | 5h ago |
| SCASE0001041 | Get an answer | Draft | 6h ago |

View all

Quick links:

- Contact Support

My company:

Adobe Systems

- Number of employees: 7,459
- Relationship manager: Deanna Gerbi
- Year Founded: -
- On-boarded date: 2005-12-29
- Industry: Information Technology

My contacts:

- Fernando Aramas

Most viewed articles:

- Environmental protection Information and CoC: 12 Views
- Feasibility Commitment Print Form: 6 Views
- Code of Conducts: 1 View

As a supplier contact, you must first self-register to access the Supplier Collaboration Portal. For more information, see [Self-register to the Supplier Collaboration Portal](#).

In the Supplier Collaboration Portal, you can view the requests assigned to you, open to-dos, and Knowledge articles.

Note: The Supplier Collaboration Portal is supported on mobile devices. To access the Supplier Collaboration Portal on a mobile device, open a mobile browser, and then navigate to your instance URL and append the /supplier suffix to the end of the URL. For example, <https://example.com/supplier>.

For more information, see [Using Supplier Collaboration Portal](#).

Supplier Collaboration Portal header

The portal header is located in the top-right corner of the home page and it contains the following options:

Options on the Supplier Collaboration Portal header

| Option | Description |
|-----------------|---|
| My Company | <p>Opens the Supplier Profile page, which shows the supplier details. You can submit a request to update the details by selecting Request Change.</p> <p>For more information, see Update company profile using the supplier catalog.</p> |
| Tasks | <p>Contains the following submenus.</p> <p>i Note: Only the primary contact can see the Tasks menu and its submenus in the portal header.</p> <ul style="list-style-type: none"> • My Tasks: Opens the My To-dos page, which lists all the tasks that are assigned to the logged-in user. <p>i Note: The secondary contact can view only the My Tasks option in the portal header.</p> <p>For more information, see Viewing supplier contact tasks from the Supplier Collaboration Portal.</p> <ul style="list-style-type: none"> • All Tasks: Opens the Supplier Task List page, which lists all the tasks that are assigned to the supplier. <p>For more information, see</p> |
| My Requests | <p>Opens the My Requests page, which lists all the requests assigned to you.</p> <p>For more information, see View all your requests from the Supplier Collaboration Portal.</p> |
| Raise a request | <p>Option that enables you to raise a request by navigating to the General category in the Supplier catalog.</p> <p>For more information, see Raising requests from the Supplier Collaboration Portal.</p> |

Supplier Collaboration Portal widgets

The Supplier Collaboration Portal contains the following widgets.

Supplier Collaboration Portal widgets

| Widget | Description |
|------------------|---|
| How can we help? | Lets you search for any information that you are looking for. |
| My active items | <p>As a supplier contact, you can view specific items from the following tiles in the My active items widget:</p> <ul style="list-style-type: none"> • Tasks: Number of open tasks assigned to you. • Requests: Number of requests raised by you. • Purchase Orders: Number of purchases made by you. |

Supplier Collaboration Portal widgets (continued)

| Widget | Description |
|-------------|---|
| | <ul style="list-style-type: none"> Shipments: Number of shipments assigned to you. Risk Assessments: Number of risk assessments assigned to you. Surveys: Number of surveys that you need to take. Invoices: Number of invoices raised by you. Issues: Number of issues opened by you. <p>Selecting an item in the widget opens the page that displays a list of that item. For example, if you select Invoices, the Invoices page is displayed, which displays a list of all the invoices. Select the link for an invoice to view details about that invoice.</p> <p>i Note: From Employee Center > Activity Configurations, the administrator can configure which activities should appear in the My active items widget.</p> <p>For more information, see My active items widget configuration.</p> |
| My tasks | Displays a list of supplier tasks assigned to you. Selecting a task directly opens it on the My To-dos page so that you can work on that task. Select View All to view a list of all the tasks assigned to you. |
| My requests | Displays a list of cases that you have submitted. Selecting a case directly opens the My Cases page so that you can work on that case. Select View All to view a list of all the cases that you have submitted. |
| Quick links | Enables the supplier to quickly access internal and external resources related to specific departments within your organization. |
| My company | <p>This section has the following fields:</p> <ul style="list-style-type: none"> Number of employees: The number of people employed by the company. Founded: The year the company was founded. Industry: The type of industry the company belongs to. Relationship manager: The name of the relationship manager for your company. Onboarded date: The date your company was onboarded. <p>Select Details to view details, contact information, payment information, and locations of your company.</p> |
| My contacts | Displays a list of members on your team. You can call a member directly or send an email to a member by selecting the phone icon () or the email icon () respectively, next to that team member's name. You can also invite new members to register to by selecting Invite . |

Supplier Collaboration Portal widgets (continued)

| Widget | Description |
|----------------------|--|
| | <p>i Note: The Invite option is available only to the primary supplier contact and the supplier administrator. Only the primary supplier contact and the supplier administrator can invite new members to access the Supplier Collaboration Portal. For more information, see Invite a member to access the Supplier Collaboration Portal.</p> |
| Most viewed articles | Displays a list of the most viewed articles. |

Configuring Supplier Lifecycle Operations

Plan and configure your implementation for Supplier Lifecycle Operations.

Supplier Common Architecture

The Supplier Common Architecture application (com.snc.sn_slm) contains tables of the Supplier Lifecycle Operations application that can be commonly used and extended by other products. The Supplier Common Architecture application also contains the roles required for the Supplier Lifecycle Operations application.

The Supplier Lifecycle Operations application and the Supplier Collaboration Portal have a dependency on the Supplier Common Architecture application.

Supplier Common Architecture is automatically installed when you install either the Supplier Lifecycle Operations application or the Supplier Collaboration Portal.

Supplier Common Architecture installs the following dependent plugins:

- Finance Common Architecture (com.sn_fin)
- External User Registration (com.snc.external_user_self_registration)
- Service Delivery Common (com.sn_spend_sdc)
- Common Vendor Core (com.snc.sn_vendor_core) and (com.snc.vendor_core)
- Document Management (com.snc.platform_document_management)

Install Supplier Lifecycle Operations

You can install the Supplier Lifecycle Operations application (com.snc.sn_supplier_mgmt) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Review the [Supplier Lifecycle Operations](#) application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The Supplier Lifecycle Operations application (com.snc.sn_supplier_mgmt) installs the following dependent plugins.

- Supplier Common Architecture (com.snc.sn_slm)
- Playbook Experience (sn_playbook_exp)
- Employee Experience Foundation (sn_ex_emp_fd)
- News Integration for Supplier Lifecycle Operations (sn_supplier_news)
- Source-to-Pay Workspace (com.snc.spend_workspace)
- Geo Map component (sn_geo_map)

i Note: For the Gep Map component (sn_geo_map) plugin, ensure that you configure the Geo map properties. For more information, see [Configure properties for Supplier Lifecycle Operations](#).

- Craft.io Integration for Supplier Lifecycle Operations (com.snc.sn_supplier_craft)

i Note: This plugin is optional. If you have installed this plugin, ensure that you configure the Craft Integration properties. For more information, see [Configure properties for Supplier Lifecycle Operations](#).

Role required: admin

About this task

The following items are installed with Supplier Lifecycle Operations:

- Plugins
- Store applications
- Roles
- Tables

For more information, see [Components installed with Supplier Lifecycle Operations](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Supplier Lifecycle Operations application (sn_supplier_mgmt) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.
Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Components installed with Supplier Lifecycle Operations

Several types of components are installed with activation of Supplier Lifecycle Operations, including tables and user roles.

The user roles and tables, even though installed along with Supplier Lifecycle Operations, reside in the Supplier Common Architecture application. For more information, see [Supplier Common Architecture](#).

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#).

Demo data is available for this feature.

Roles installed

Note: Users with the Supplier Manager [sn_slm.manager], Supplier Fulfiller [sn_slm.fulfiller], and Supplier Owner [sn_slm.owner] roles cannot access the Supplier Collaboration Portal.

| Role title [name] | Description | Contains roles |
|--|--|--|
| Supplier Administrator [sn_slm.admin] | The supplier admin can create, view, update, and delete all the suppliers, cases, and tasks. | <ul style="list-style-type: none"> decision_table_admin sn_shop.shopper awa_admin sn_vdr_risk_asmt.vendor_assessor sn_fin.supplier_payment_info_write sn_slm.manager |
| Supplier Fulfiller [sn_slm.fulfiller] | Users with this role can do the following: <ul style="list-style-type: none"> Create tasks View suppliers related to assigned cases or tasks View assigned cases and tasks, or tasks that are created by them Update assigned cases and tasks, or tasks that are created by them | <ul style="list-style-type: none"> task_editor template_read_global sn_shop.shopper workspace_user vendor_reader canvas_user sn_fin.finance_user awa_agent survey_reader sn_fin.procurement_user email_composer |

| Role title [name] | Description | Contains roles |
|--------------------------------------|--|--|
| Supplier Owner [sn_slm.owner] | <p>The supplier owner can do everything the supplier fulfiller can do, plus users with this role can:</p> <ul style="list-style-type: none"> • Create suppliers using the playbook • Create cases and tasks for suppliers they own • View the suppliers they own • View cases and tasks for the suppliers they own • Update the suppliers they own • Update the cases and tasks that are created by them or assigned to them <p>i Note: The Supplier Owner [sn_slm.owner] role can create, manage, and edit records for only the suppliers that they own.</p> | <ul style="list-style-type: none"> • personalize_responses • workspace_user • canvas_user • sn_slm.filler • sn_fin.finance_user • sn_fin.procurement_user • sn_vdr_risk_asmt.vendor_assessment_reviewer |
| Supplier Manager [sn_slm.manager] | <p>The supplier manager can do everything the supplier owner can do, plus users with this role can:</p> <ul style="list-style-type: none"> • Create suppliers using the playbook • Create cases and tasks • View all the suppliers, cases, and tasks • Update only the suppliers they manage | <ul style="list-style-type: none"> • sn_slm.owner • dm_user_criteria_read |

| Role title [name] | Description | Contains roles |
|--------------------------------------|---|---|
| | <ul style="list-style-type: none"> Update the cases and tasks that they create or that are assigned to them | |
| Supplier Agent sn_slm.agent | <p>The supplier agent can do everything the supplier fulfiller can do, plus users with this role can:</p> <ul style="list-style-type: none"> Create cases and tasks View all the suppliers, cases, and tasks Update all the tasks and assigned cases | sn_slm.fulfiller |
| Supplier Contact [sn_slm.contact] | <p>A user with this role can do the following:</p> <ul style="list-style-type: none"> Submit requests using the supplier catalog from the Supplier Collaboration Portal Complete assigned tasks using the Supplier Collaboration Portal <p>i Note: A contact can be a primary contact or secondary contact. A primary contact is a user that has the Primary contact column set to true on the Vendor Contacts page. For more information, see Set a user as the primary contact.</p> | <ul style="list-style-type: none"> sn_fin.supplier_payment_info_read snc_external |

Tables installed

i Note: The Supplier Payment Information [sn_fin_supplier_payment] table, which stores the bank account records of the suppliers, is installed with the Finance Common Architecture (com.sn_fin) application.

| Table | Description |
|---|--|
| Supplier Case [sn_slm_case] | Stores the supplier case records. Extends the Service Case [sn_spend_sdc_service_request] table. |
| Supplier Product Code [sn_slm_code_m2m_supplier] | Stores the relationships between suppliers in the Supplier [sn_fin_supplier] table and product codes in the Product Code [sn_supplier_product_code] table. |
| Supplier Email Domain [sn_slm_email_domain] | Stores the email domains of the suppliers. |
| Supplier Location [sn_slm_m2m_location] | Stores the relationships between suppliers stored in the Supplier [sn_fin_supplier] table and locations stored in the Location [cmn_location] table. |
| Product Code [sn_slm_product_code] | Stores the product and service records with universal product codes (UPC). These records do not have any relation to the supplier. |
| Supplier Task [sn_slm_task] | Stores the tasks of the suppliers. Extends the Task [task] table. |
| Supplier Document Configuration [sn_slm_document_config] | Stores the supplier document configurations. Extends the Application File [sys_metadata] table. |
| Supplier Document Type [sn_slm_document_type] | Stores the supplier document types. Extends the Application File [sys_metadata] table. |
| Supplier Document References [sn_slm_document_references] | Stores the supplier document references. Extends the Document References [ds_document_references] table. |

Supplier Lifecycle Operations plugin installation sequence

The following table provides the list of plugins for Supplier Lifecycle Operations, a high-level description of each plugin, and the dependencies that are required before installing each plugin.

Supplier Lifecycle Operations application plugin list

| Plugin | Dependency |
|---|---|
| Supplier Common Architecture [com.snc.sn_slm] | <ul style="list-style-type: none"> • Finance Common Architecture (com.sn_fin) • Service Delivery Common (com.sn_spend_sdc) • Document Management (com.snc.platform_document_management) • External User Registration (com.snc.external_user_self_registration) • Common Vendor Core (com.snc.sn_vendor_core) and (com.snc.vendor_core) |

Supplier Lifecycle Operations application plugin list (continued)

| Plugin | Dependency |
|---|---|
| Supplier Lifecycle Operations [com.snc.sn_supplier_mgmt] | <ul style="list-style-type: none"> Supplier Common Architecture (com.snc.sn_slm) Playbook Experience (com.playbook_experience) Employee Experience Foundation (com.snc.sn_ex_emp_fd) News Integration for Supplier Lifecycle Operations (com.snc.sn_supplier_news) Map UI Component for threat and alert data feeds (com.sn_fam_map) |
| Supplier Collaboration Portal [com.snc.sn_supplier_sp] | <ul style="list-style-type: none"> Supplier Common Architecture (com.snc.sn_slm) Service Portal (com.glide.service-portal) E-signature (com.snc.esign) Employee Center (com.snc.employee_center) |
| Craft.io Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_craft] | Supplier Lifecycle Operations (com.snc.sn_supplier_mgmt) |
| News Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_news] | None |
| Advanced Work Assignment for Supplier Lifecycle Operations [com.snc.sn_slm_awa] | <ul style="list-style-type: none"> Advanced Work Assignment (com.glide.awa) Agent Chat (com.glide.interaction.awa) Glide Virtual Agent (com.glide.cs.chatbot) Supplier Lifecycle Operations (com.snc.sn_supplier_mgmt) |

Supplier Lifecycle Operations plugin installation sequence

To avoid incomplete demo data and other installation issues, you should install the plugins in the following sequence:

1. Supplier Common Architecture (com.snc.sn_slm)
2. News Integration for Supplier Lifecycle Operations (com.snc.sn_supplier_news)
3. Supplier Lifecycle Operations (com.snc.sn_supplier_mgmt)

4. (Optional) Craft.io Integration for Supplier Lifecycle Operations (com.snc.sn_supplier_craft)
5. (Optional) Advanced Work Assignment for Supplier Lifecycle Operations (com.snc.sn_slm_awa)

Supplier Collaboration Portal plugin installation sequence

To avoid incomplete demo data and other installation issues, you should install the plugins in the following sequence:

1. Supplier Common Architecture (com.snc.sn_slm)
2. Supplier Collaboration Portal (com.snc.sn_supplier_sp)

Configure properties for Supplier Lifecycle Operations

Use these properties to configure settings for the Supplier Lifecycle Operations application from the Properties page.

Navigate to **All > Supplier Lifecycle Operations > Properties**.

i Note: The Properties page displays the properties for Craft only if you have installed the Craft.io Integration for Supplier Lifecycle Operations (com.snc.sn_supplier_craft) plugin. Click the question mark icon (ⓘ) beside each property field to see the property name corresponding to that field.

Supplier Lifecycle Management properties

| Property | Action |
|---|---|
| Supplier lifecycle properties | |
| Sys Id of the External User Registration Configuration for Onboarding a contact for a supplier. sn_supplier.external_registration_profile_id | <p>Auto-populated with the sys ID of the user registration configuration you specified in the Value field of the sn_supplier.external_registration_profile_id system property.</p> <p>i Note: Sys ID (sys_id) is a 32-character GUID (Globally Unique ID) that uniquely identifies each record in an instance.</p> <p>For more information, see Configure system property to send registration emails to external users.</p> |
| Automatic creation of cases from email [sn_supplier.slm_email] | <p>Automatically creates a supplier case if the incoming email address matches with the email address specified in this property.</p> <p>For more information, see Enable automatic creation of supplier cases from incoming emails.</p> |
| Decide whether or not to enable google maps API functionality on Supplier manager workspace. | Type: Yes No |

Supplier Lifecycle Management properties (continued)

| Property | Action |
|--|--|
| Enablement of Geo Map method and Geo Map key/client will still be required. [sn_supplier.geo_map_enabled] | Select the check box to enable this property. |
| Craft Integration Properties | |
| API key for craft. <i>sn_supplier_craft.craft_api_query</i> | Enter the API key that you received with your enterprise account from Craft. |
| Geo map properties | |
| Defines which method of authentication should be used for Google Maps API used in Geo map component. <i>sn_supplier.geo_map.google.method</i> | Select one of the following options from this list: <ul style="list-style-type: none">• client-id• key |
| Map key from Google for Geo map component, tied to the URL of the server. To obtain a new key, visit http://www.google.com/apis/maps/signup.html for details. <i>sn_supplier.geo_map.google.key</i> | If you select key from the Defines which method of authentication should be used for Google Maps drop-down list, enter the map key. |
| Client ID for Google Maps API for Business used in Geo map component. To obtain your own key, visit http://www.google.com/enterprise/earthmaps/maps.html for details. <i>sn_supplier.geo_map.google.client</i> | If you select client-id from the Defines which method of authentication should be used for Google Maps drop-down list, enter the client ID. |
| Defines whether to use places API from Google for Geo map component (Enable when same Google key has active places lib subscription). <i>sn_supplier.geo_map.google.use_places_lib</i> | Type: Yes No Select the check box to enable this property. |
| Supplier collaboration portal properties | |
| Allow "Activity Configurations" and "Filters" to be picked from all application scopes. <i>sn_supplier_sp.allow_all_apps_configuration</i> | Type: Yes No Select the check box to enable this property. For more information, see Set the property to configure activity configurations . |

Enable automatic creation of supplier cases from incoming emails

The supplier administrator can set this property to automatically create a supplier case from an incoming email.

Before you begin

Role required: admin

About this task

Supplier Lifecycle Operations automatically creates a supplier case if the incoming email address matches with the email address specified in this property. For more information, see [Configure properties for Supplier Lifecycle Operations](#).

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Administration > Properties**.
2. In the **Automatic creation of cases from email** field, enter the email address of the incoming email.
3. Select **Save**.

Run fix script to use the Supplier Manager Workspace after upgrading

After upgrading to the Washington DC release, you can see only the Source-to-Pay Workspace on the **All** navigation tab. You don't have to do anything if you choose to continue to use the Source-to-Pay Workspace.

Before you begin

Role required: admin

About this task

After upgrading to the Washington DC release, you can see both the Source-to-Pay Workspace and Supplier Manager Workspace on the **Workspaces** tab. If you want to use the Supplier Manager Workspace instead of the default Source-to-Pay Workspace, run the **fixscript_migrate_workspace_to_smw.xml** fix script.

At any time, you can revert to using the Source-to-Pay Workspace by running the **fixscript_migrate_workspace_to_s2p.xml** fix script.

You can download the fix script XML files from the [ServiceNow](#)

The screenshot shows the ServiceNow App Store page for the "Supplier Lifecycle Operations" app. The page includes the following sections:

- Product Details:** Includes a green icon of two hands shaking, the app name, a brief description, and compatibility information.
- Ratings and Reviews:** Shows a 5-star rating with "No Reviews".
- Dependencies:** Shows a dependency on "Supplier Collaboration".
- Summary:** Describes the app's purpose: "Collaborate with suppliers, manage supplier relationships, and monitor risk, compliance and performance across the supplier life cycle."
- Supporting Links and Docs:** Contains links to "Supplier Lifecycle Operations product documentation", "Migrate_SLM_Tables_to_Supplier_Common.xml", and the two fix scripts: "fixscript_migrate_workspace_to_smw.xml" and "fixscript_migrate_workspace_to_s2p.xml". The latter two are highlighted with a red box.
- View Products:** A button to view other products.
- Type:** Standalone Application.
- Version:** 2.5.0.
- Licensing:** View Licensing Requirements.
- Subscription Required:** Yes. This app is associated with a for-fee subscription. More Info.
- Your Subscription Status:** We found a valid subscription.
- Terms and Conditions:** View Terms and Conditions.
- Industry:** All.
- Category:** Supplier Collaboration.

Procedure

1. Download the fix script XML file from the Supporting Links and Docs section.
2. Navigate to **All > System Definition > Fix Scripts**.
3. Right-click the Name column and choose **Import XML**.
4. Select **Choose file** and then select the fix script XML file that you downloaded.
5. Select **Upload**.
6. Search for and select the fix script record to open it.
7. Select **Run Fix Script**.

Install Supplier Collaboration Portal

You can install the Supplier Collaboration Portal application (com.snc.sn_supplier_sp) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The Supplier Collaboration Portal application (com.snc.sn_supplier_sp) installs the following dependent plugins.
 - Supplier Common Architecture (sn_slm)
 - Service Portal (com.glide.service-portal)
 - E-signature (com.snc.esign)
 - Employee Center (sn_ex_sp)

Note: You can activate additional plugins to enable other features in Supplier Collaboration Portal. For more information, see [Additional plugins for Supplier Collaboration Portal](#).

Role required: admin

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Supplier Collaboration Portal application (com.snc.sn_supplier_sp) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.
Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

i Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

What to do next

Ensure that you complete the post installation mandatory steps. For more information, see [Post installation troubleshooting](#).

Post installation mandatory step for Supplier Collaboration Portal

After you install the Supplier Collaboration Portal, ensure that you enable access to Supplier Collaboration Portal.

Enable access to Supplier Collaboration Portal

Enable users to access the Supplier Collaboration Portal either by configuring the user criteria or by running the fix script.

Before you begin

Role required: admin

Procedure

To enable users to access the Supplier Collaboration Portal, do one of the following:

| Option | Instruction |
|---|---|
| Configure the user criteria for the Service Portal. | <p>Complete these steps:</p> <ol style="list-style-type: none"> 1. Activate the user criteria for Service Portal plugin. 2. Set the user criteria for Service Portal system property. |
| Run the fix script. | Complete the steps listed in Run the fix script to enable access to Supplier Collaboration Portal . |

Run the fix script to enable access to Supplier Collaboration Portal

After you install the Supplier Collaboration Portal, you must run the fix script to enable access to the portal.

Before you begin

Role required: admin

About this task

Download the `SCP_Contact_User_Access.xml` file from the ServiceNow

Store.

After you download the script file, perform the following steps.

Procedure

1. Navigate to **System Definition > Fix Scripts**.

Ensure that the application scope is set to **Global**.

2. Right-click the Name column and select **Import XML**.

3. Select **Choose file** and select the XML file that you downloaded.

4. Select **Upload**.

5. Search for and select the `SCP_Contact_User_Access` script record to open it.

6. Select **Run Fix Script**.

You can now access the Supplier Collaboration Portal.

Configure self-registration for external users

Configure self-registration for external users.

Before you begin

Note: You need to do this task after installing the Supplier Collaboration Portal.

Role required: admin

About this task

Ensure that you have activated the `com.snc.external_user_self_registration` plugin. For more information, see [Activate External User Self-Registration](#).

Procedure

1. Navigate to **External User Self-Registration > User Registration Configurations** and select **New**.

2. On the User Registration Configuration form, fill in the fields.

For more information about the form fields and descriptions, see [Create a user registration configuration for external users](#).

3. From the form context menu, select **Save**.
4. Select the **Registration** tab, and do the following:
 - a. In the Mandatory column for the **First name** and **Last name** fields, double-click and select **true** to make these fields required.
 - b. Select the green check mark icon (✓) to save your changes.
5. Configure the **Verification** tab to verify the identity of the registered users.
When the user verification flow triggers, an activation link is sent to the user's registered email address.
6. Select the **Transformation** tab, select and open the **u_reg_xmap_[number]** transformation map that maps the registered users from the User Acti Req [number] source table to the User [sys_user] target table.
7. In the **Target table** field, search and select **Vendor Contact [vm_vdr_contact]**.
8. From the form header, right-click the header bar and select **Save**.
9. Scroll down and select the **Field Maps** tab, and then select **New**.
10. Select the **Use source script** check box.
The Source script box is displayed.
11. In the return string, enter supplier_registration in lowercase letters exactly as shown below.

```
answer = (function transformEntry(source) {
  // Add your code here
  return "supplier_registration"; // return the value to be put into the
  target field
}) (source);
```

12. From the **Target field** choice list, select **Source**.
13. Select **Submit**.
14. Select the **Onboarding** tab and in the **User onboarding flow** field, search for and select **Supplier Contact Onboarding**.
15. Select the **Advanced** tab.
16. In the **Registration form field configuration** field, leave the **Account signup** option selected as-is, and then select the preview this record icon to open the record.
17. In the Variables related list, select and open the **First name**, **Last name**, and **Email** records individually.
18. In the First name variable record, select the **Mandatory** check box and select **Save**.
Repeat this step for both the Last name and Email variable records.
19. Select **Save**.
20. For sending personalised emails to contacts who want to self-register, select the **Catalog Client Scripts** tab.
21. Select **New**.
22. In the **Name** field, enter a name.
23. From the **Type** choice list, select **onLoad**.
24. In the **Script** box, copy and paste the following code.

```
function onLoad() {
  function getParameterValue(name) {
```

```

        var url = top.location.href;
        var value = new URLSearchParams(url).get(name);
        if (value) {
            return value;
        }
        return false;
    }

    if (this && this.location && this.location.pathname) {
        if (getParameterValue("email")) {
            g_form.setValue("email", getParameterValue("email"));
            g_form.setReadOnly("email",true);
        }
    }
}

```

25. Select **Save**.

What to do next

Do the following:

- Configure the sn_supplier.external_registration_profile_id system property to ensure that registration emails are sent to external users. For more information, see [Configure system property to send registration emails to external users](#).
- Configure the Vendor Contact table to send emails to contacts during self-registration. For more information, see [Configure the Vendor Contact table to send invitation emails during self-registration](#).
- If you do this task after installing the Supplier Collaboration Portal, map the external user registration configuration that you just created to the Supplier Collaboration Portal. For more information, see [Map the self-registration configuration to Supplier Collaboration Portal](#).

Configure the flow to create approval records for all supplier contact invite requests

Typically, an approval record is created only when a supplier contact self-registers to get access to the Supplier Collaboration Portal. However, a supplier admin can configure the Supplier Contact Onboarding flow to create approval records even when a supplier manager adds or invites a new supplier contact.

Before you begin

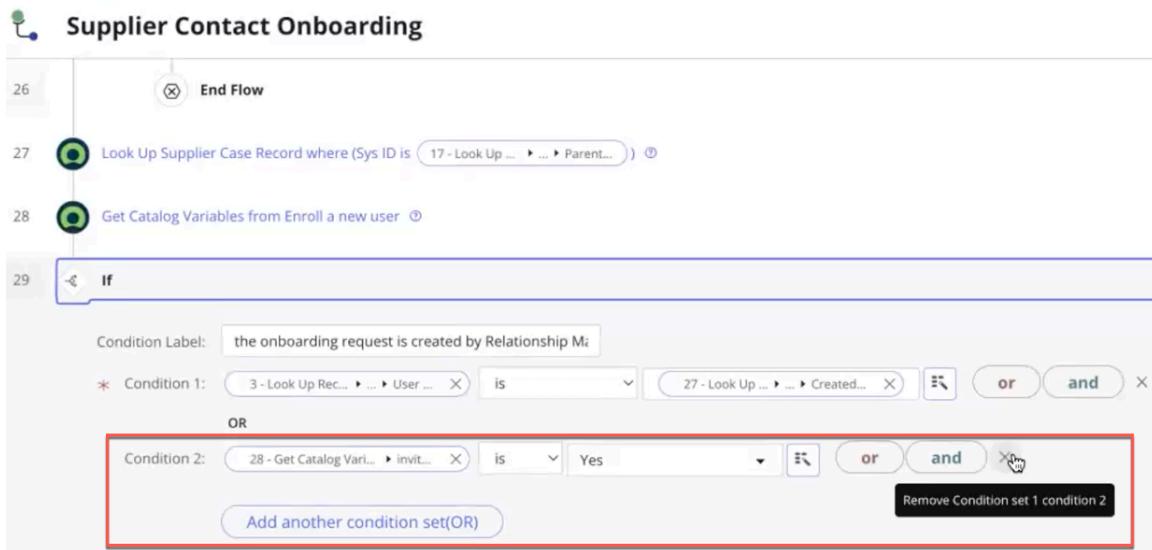
Role required: sn_slm.admin

About this task

After you perform this task, an approval record is created for the Enroll a new supplier user case type, regardless of whether a supplier contact self-registers or a supplier manager invites a new supplier contact.

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Select the **Subflows** tab, search for and select the **Supplier Contact Onboarding** flow.
3. Search for the **If the onboarding request is created by Relationship Manager or Contact is invited** condition label and select it, which expands the condition label.
4. Delete the Condition 2 by selecting the remove condition icon () next to the condition.



5. Select **Save**.

Map the self-registration configuration to Supplier Collaboration Portal

Map the external user self-registration configuration to the Supplier Collaboration Portal.

Before you begin

[Configure self-registration for external users](#).

Role required: admin

Procedure

1. Navigate to **Service Portals > Portals**.

The Service Portals module displays the list of all the available portals.

2. Select **Supplier Collaboration Portal**.

3. In the **External user registration configuration** field, search for and select the external user configuration that you created for Supplier Lifecycle Operations.

4. Select **Save**.

What to do next

Supplier contacts can self-register to the Supplier Collaboration Portal. For more information, see [Self-register to the Supplier Collaboration Portal](#).

Configure system property to send registration emails to external users

Configure the sn_supplier.external_registration_profile_id system property to ensure that registration emails are sent to external users for accessing the Supplier Collaboration Portal.

Before you begin

[Configure self-registration for external users](#).

Role required: admin

Procedure

1. Navigate to **External User Self-Registration > User Registration Configurations**.

2. Open the record for the user registration configuration.

3. Select the context menu icon (≡), and then select **Copy sys_id**.

4. In the navigation filter, enter `sys_properties.list`.

The entire list of properties in the System Properties [sys_properties] table appears.

5. In the **Name** search field, enter `sn_supplier.external_registration_profile_id`.

6. Select the **sn_supplier.external_registration_profile_id** system property.

7. In the **Value** field, paste the sys ID of the user registration configuration.

8. Select **Update**.

On the Supplier Lifecycle Operations Properties page, the **Sys Id of the External User Registration Configuration for Onboarding a contact for a supplier** field is auto-populated with the sys ID of the user registration configuration you specified in the **Value** field of the **sn_supplier.external_registration_profile_id** system property.

Configure the Vendor Contact table to send invitation emails during self-registration

Configure the Vendor Contact [vm_vdr_contact] table to send invitation emails to supplier contacts during the self-registration process.

Before you begin

Role required: admin

Procedure

1. Navigate to **All**.

2. In the left navigation pane, enter `vm_vdr_contact_list.do`.

3. On the Vendor Contacts page, right-click any column header and select **Configure > Notifications**.

4. In the Name column, select **Vendor Contact Invited**.

5. On the **When to send** tab, add the condition: "Source is not supplier_registration".

6. From the form header, right-click and select **Save**.

Enable supplier admins to get notified about self-registration errors

Add the `sn_slm.admin` role to the groups to enable supplier admins to receive an email if a supplier contact encounters an error during self-registration.

Before you begin

Role required: `sn_slm.admin`

Procedure

1. Navigate to **All > System Security > Users and Groups > Groups**.

2. Search for and select the **Supplier Administrators** group.

3. On the **Roles** tab, select **Edit**.

4. In the Collection list, search for and double-click the **sn_slm.admin** role to move it to the Role list.

5. Select **Save**.

Restricted caller access approvals for Supplier Collaboration Portal

After you install the Supplier Collaboration Portal application from ServiceNow Store, you might encounter Restricted Caller Access (RCA) approval messages requesting for an update in the access request. You can approve the RCA privileges either manually or by running the fix script.

Approve restricted caller access privileges manually

Approve restricted caller access (RCA) privileges to allow cross-scope access to the Supplier Collaboration Portal.

Before you begin

Log in to the Supplier Collaboration Portal as an admin.

Role required: admin

About this task

RCA privileges define cross-scope access to an application, an event, or an application resource.

Procedure

1. Navigate to **All > System Applications > Application Restricted Caller Access**.
2. In the search field of the Source Scope column, enter **Supplier Collaboration Portal**.

i Note: The source scope records for the Supplier Collaboration Portal are displayed on the Application Restricted Caller Access form in the Platform UI only after you log in to the Supplier Collaboration Portal as an admin.

3. Right-click the Source Scope column header and select **Group By Source Scope**.
4. Expand the **Supplier Collaboration Portal** source scope.
5. Select and open each source scope record and set the **Status** field to **Allowed**.
6. Select **Update**.

Run the fix script for RCA approvals

After you install the Supplier Collaboration Portal application from ServiceNow Store, you might encounter Restricted Caller Access (RCA) approval messages requesting for an update in the access request.

Before you begin

Role required: admin

About this task

The RCAs that are generated after the installation are in the **Requested** state and you must manually mark the RCAs as **Allowed**, which can be time-consuming.

To automate the RCA approvals for any record, you can run the **SCP_BULK_RCAs_Approval.xml** script where the source scope is Supplier Collaboration Portal.

Download the **SCP_BULK_RCAs_Approval.xml** file from the ServiceNow

The screenshot shows the ServiceNow App Store page for the "Supplier Collaboration Portal". The app has a green header with the title and a brief description: "Simplify the supplier experience to maximize productivity and unlock value". Below the header, it says "ServiceNow Compatibility: San Diego" and "Automatically entitled on all sub-prod instances and all ServiceNow developer portal instances". There are no reviews yet. The "Product Details" section includes a screenshot of the portal showing two users interacting. To the right, there are sections for "Type" (Standalone Application), "Version" (1.3.0), "Dependencies and Licensing" (View Dependencies and Licensing Requirements), "Subscription Required" (Yes, with a link to More Info), "Your Subscription Status" (We found a valid subscription), "Compatibility" (San Diego), "Supporting Links and Docs" (ServiceNow Store Terms Of Use), and a "Store" section with links for "Store version history", "release notes", "SCP_Contact_User_Access.xml", and "SCP_BULK_RCAs_Approval.xml", where the latter is highlighted with a red box.

Store.

Note: This file is a standalone script to reduce the manual effort involved.

After you download the script file, perform the following steps.

Procedure

1. Navigate to **All > System Definition > Fix Scripts**.
2. Right-click the Name column and choose **Import XML**.
3. Select **Choose file** and select the **SCP_BULK_RCAs_Approval.xml** file that you downloaded.
4. Select **Upload**.
5. Search for and select the **SCP_BULK_RCAs_Approval** script record to open it.
6. Select **Run Fix Script** to approve all the requested RCAs.

RCA fix script can approve the RCAs which exist at the time of execution. After running the RCA script, if you install any new plugins, rerun the RCA script to approve the new RCAs.

Set the property to configure activity configurations

Set the `sn_supplier_sp.allow_all_apps_configuration` property to make activity configurations and filters accessible from all application scopes.

Before you begin

Role required: admin

About this task

If you set this system property to **true**, you can create or modify an activity configuration to display relevant activities in My active items widget of the Supplier Collaboration Portal. For more information , see [Configure properties for Supplier Lifecycle Operations](#).

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Administration > Properties**.
2. Select the check box for the **Allow "Activity Configurations" and "Filters" to be picked from all application scopes (sn_supplier_sp.allow_all_apps_configuration)** property.
By default, the check box for this property is deselected (set to No).
3. Select **Save**.

Set a user as the primary contact

Set a user as the primary contact to enable that user to perform additional tasks, such as adding or removing contacts, updating emails of contacts, and reassigning tasks to contacts in the Supplier Collaboration Portal.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Vendor Risk > Vendors > Vendor Contacts**.
2. In the Name column, search for the user that you want to set as the primary contact.
3. In the Primary contact column for that user, double-click and select **true**.
4. Select the green check mark icon (✓) to save your changes.

Additional plugins for Supplier Collaboration Portal

After installing the Supplier Collaboration Portal application, you can activate additional plugins to enable additional features.

You must have the admin role to activate these additional plugins. For details, see [Activate a plugin](#).

| Plugin | Description |
|--|--|
| GRC: Vendor Risk Management [sn_vdr_risk_asmt] | The ServiceNow® Vendor Risk Management (VRM) application enables you to assess vendors to understand the risk that they pose to your organization, and reduce the manual burden and cost of assessment through automation. |
| GRC: Vendor Portal [sn_grc_vendor_portal] | Enables Supplier Contacts to view a list of open and closed risk assessments on the Vendor Risk page in the Vendor Assessment Portal (Governance, Risk, and Compliance (GRC): Vendor Portal). |

i Note: The GRC: Vendor Portal is installed as a dependent plugin with GRC: Vendor Risk Management.

Domain separation and Supplier Lifecycle Operations

Domain separation is unsupported for Supplier Lifecycle Operations . Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see [Application support for domain separation](#).

Related topics

[Domain separation for service providers](#)

Craft.io Integration for Supplier Lifecycle Operations

The Craft.io Integration for Supplier Lifecycle Operations plugin (com.snc.sn_supplier_craft) provides an integration between Craft and Supplier Lifecycle Operations application.

Craft is a third-party supplier intelligence platform that offers most up-to-date, validated, and comprehensive information about any supplier you are working with.

Ensure that you have configured the `sn_supplier_craft.craft.api.key` system property, which enables you to import supplier information automatically from Craft. For more information, see [Configure properties for Supplier Lifecycle Operations](#).

The integration with Craft provides the following advantages:

- Import suppliers automatically without manually entering supplier details.
- Synchronize supplier information stored in your system with that in Craft, thus ensuring that you always view the most up-to-date supplier data.

Related topics

[Synchronize supplier data using external third-party application](#)

News Integration for Supplier Lifecycle Operations

The News Integration for Supplier Lifecycle Operations plugin (com.snc.sn_supplier_news) retrieves supplier news and activities using the Microsoft Bing News Search API and displays this information in the Supplier News and Activity section on the **About** tab of the Source-to-Pay Workspace.

The News Integration for Supplier Lifecycle Operations plugin is installed along with the Supplier Lifecycle Operations application.

The Microsoft Bing News Search API uses the default Supplier News REST message to fetch supplier news, so ensure that you have configured the Supplier News REST message. For more information, see [Configure the Supplier News REST message](#).

Configure the Supplier News REST message

Configure the Supplier News REST message using the Microsoft Bing News Search API subscription key.

Before you begin

Role required: admin

Get the Bing News Search API subscription key.

Procedure

1. Navigate to **All > System Web Services > Outbound > REST Message**.
2. From the REST Messages list, select **Supplier News**.
3. In the HTTP Request related list, select **Get Supplier News**.
4. In the HTTP Request related list, under HTTP Headers, double-click the **Value** column and enter the Bing News Search API subscription key.
5. Select the green check mark icon (✓) to save your changes.
6. Select **Update**.

Configuring a custom API to dynamically fetch supplier news

By default, News Integration for Supplier Lifecycle Operations retrieves the supplier news and activities using the Microsoft Bing News Search API.

However, you have the flexibility to use any API of your choice to dynamically retrieve the supplier news and activities.

The process for configuring a custom news API includes the following tasks:

Create a REST message for a custom API

Create a REST message request and send it to a custom API endpoint to fetch the latest supplier news.

Before you begin

- Install the News Integration for Supplier Lifecycle Operations plugin (com.snc.sn_supplier_news).
- Set the application scope to News Integration for Supplier Lifecycle Operations using the application picker.

Role required: admin

Procedure

1. Navigate to **All > System Web Services > Outbound > REST Message**.
2. Select **New**.
3. On the form, fill in the fields.

REST Message form

| Field | Description |
|---------------------|---|
| Name | Name for this message. |
| Endpoint | Endpoint that this REST message is sent to. |
| Authentication type | Authentication to use, if any, and the profile record that contains the user credentials. |

4. Right-click the form header and select **Save**.
After creating the REST message, a GET HTTP method is created automatically using the values from the REST message record.
5. In the HTTP Methods related list, select **Default GET**.
6. In the **Name** field, specify a name for the GET HTTP method.
7. Select the **HTTP Request** tab.
8. In the HTTP Headers embedded list, select **Insert a new row**.
9. In the **Name** field, enter the name of the header.
Supported headers depend on the REST web service provider that you want to connect to.
10. Double-click the **Value** field for the new row and enter the value that you want to assign to this header.
You can use a variable in the format \${variable} instead of a static value. You can assign a value to the variable when sending a REST request.
11. In the HTTP Query Parameters embedded list, select **Insert a new row**.

12. In the **Name** field, enter the name of the query parameter.
13. Double-click the **Value** field for the new row and enter the value that you want to assign to this query parameter.
You can use a variable in the format \${variable} instead of a static value. You can assign a value to the variable when sending a REST request.
14. Select **Update**.

What to do next

[Add and configure the Get News data resource in UI Builder](#).

Add and configure the Get News data resource in UI Builder

Add and configure the Get News - Composite data resource in UI Builder to dynamically retrieve supplier news in the News and Activity section of the Source-to-Pay Workspace.

Before you begin

Create a REST message for a custom API. For more information, see [Create a REST message for a custom API](#).

Role required: admin

About this task

A data resource is the data that a page fetches to display the content in the components. For more information, see [Data resources in UI Builder](#).

Procedure

1. Navigate to **All > Now Experience Framework > UI Builder**.
2. In the My experiences list, select **Source-to-Pay Workspace**.
3. In the Page menu, select **SLM About tab**.

The Page menu is located in the upper-left corner of the UI Builder interface.

4. From the lower-left pane, select the data icon ().

In the Data resource instances section, you can add and configure data resource instances for your page. If you have any inherited data resources, you see them listed in the inherited data resource pane but they are read-only. You do not configure inherited data in UI Builder.

5. To add a data resource to your page, select **+ Add**.
6. In the search field, enter **Get News – Composite**.
7. Under Server data, select **Get News – Composite**, and then select **Add** to add it to your page.
8. Select the **Configurations** tab to configure the data resource and then do the following actions:
 - a. In the **When to evaluate this data resource** list, select when you want to evoke the data resource.
 - b. In the **News Api** list, select the name of the REST message record.
 - c. In the **News Api Method** list, select the name of the GET HTTP request method.
 - d. In the **Query Params** field, select **Edit**.

The Query Params dialog box is displayed.

- e. On the **Edit JSON** tab, enter the query parameters, and then select **Apply**.
- f. In the **Response Base Path** field, enter the top-level object to retrieve information from.

You can also specify nested objects.

- g. In the **Response Field List** field, select **Edit**.

The Response Field List dialog box is displayed.

- h. On the **Edit JSON** tab, enter the fields that you want to display in the response, and then select **Apply**.

Note: Specifying specific fields enables you to retrieve filtered responses for REST endpoints. The response includes only the requested fields and objects.

9. Select **Save**.

Update the field names in the UX client script

Update the field names in the UX client script to match the custom field names in the custom API response.

Before you begin

Role required: admin

Procedure

1. In the navigation filter, enter `sys_ux_client_script.list`.
2. In the UX Client Scripts form, in the **Name** search field, search for the Set 'news' activity state.
3. Select the **Set 'news activity' section state** client script.
4. Edit the **Script** field to update the field names so that they match the field names in the custom API response.

For example, in your custom API response, if the **name** field entry is **title**, and the **description** field entry is **summary**, then you must update the field names accordingly in the script.

```

* Name Set 'news activity' section state
*: Macropotent About
Client Script Include Dependencies A
SupplierCommonUtil

Application Supplier Lifecycle Management
Type Default

Script
const formattedArticles = items.map((article) => {
  let mainText = article.name + "";
  // NOTE: HTML/decimal codes are not supported on text-links
  const [
    removeDecimalCodes
  ] = imports['sn_supplier.SupplierCommonUtil'];
  mainText = removeDecimalCodes(mainText);

  const description = article.description + "";
  const source = article.provider[0].name + "";

  const pubDate = article.datePublished + "";

  const linkUrl = article.url ? article.url : "";
  const formattedArticle = {
    "title": {
      "label": mainText,
      "variant": "primary",
      "href": linkUrl,
      "opensWindow": "true"
    },
    "text": description,
    "icon": "news-outline",
  };
  return formattedArticle;
});

```

Update Delete

5. Select **Update**.

Supplier Document Management

Supplier Lifecycle Operations uses the ServiceNow® Document Management functionality to enable supplier managers, supplier owners, supplier administrators, and supplier contacts to manage supplier documents.

Supplier Lifecycle Operations extends the Document Management plugin (com.snc.platform_document_management), which is installed along with the Supplier Lifecycle Operations application. For more information, see [Document Management](#).

You can create a supplier document configuration to configure various aspects of the document upload process. The document configuration determines when this configuration is run, who can view, update, and upload a document, and whether to send notifications when a document is uploaded or has expired. You can set run conditions to determine when the configuration should be run or you can run the configuration manually.

Create a supplier document configuration

Create a supplier document configuration to define when to run the configuration, who can view the upload request and upload the documents, and whether to send notifications when documents are uploaded or have expired.

Before you begin

Role required: sn_slm.manager or sn_slm.admin

Procedure

1. Do one of the following.

| To | Do This |
|--|--|
| Create a document configuration from the Platform UI | Navigate to All > Supplier Lifecycle Operations > Administration > Document Configuration |
| Create a document configuration from the Source-to-Pay Workspace | <ol style="list-style-type: none"> a. Navigate to All > Supplier Lifecycle Operations > Source-to-Pay Workspace. b. Select the list icon () and navigate to Lists > Administration > Document Configuration. |

2. Select **New**.

3. On the form, fill in the fields.

Supplier Document Configuration form

| Field | Description |
|-------------|--|
| Name | The name you assign to the configuration. |
| Application | The application containing this record. In this case, it displays the default application, which is Supplier Collaboration Portal. |
| Order | The order that you want the configuration to be displayed. Assign a numeric value in multiples of 100. |
| Active | Option to decide if this configuration is in use. |
| Description | A brief description of the configuration. |

4. Select the **Run condition** tab and fill in the fields.

Run condition form

| Field | Description |
|--------------------|--|
| When to run | <p>When you want the configuration to run. The choices are:</p> <ul style="list-style-type: none"> ◦ On demand: The configuration runs when you select Execute Now on the Supplier Document Configuration form. You can use this option to run the configuration immediately without waiting for the other run conditions to be met. For more information, see Manually run a supplier document configuration. <ul style="list-style-type: none"> ◦ When supplier record inserted: The configuration runs when a new supplier record is created. ◦ When supplier record updated: The configuration runs when an existing supplier record is updated. ◦ When supplier record inserted/updated: The configuration runs when a new record is created or an existing supplier record is updated. |
| Supplier condition | Specify when the configuration must run when specific conditions are met. |
| Advanced | Option to use a script to specify when the configuration is run. |

5. Select the **Upload preferences** tab and fill in the fields.

Upload preferences form

| Field | Description |
|---------------|--|
| Required from | <p>Specify who must upload the document. The choices are:</p> <ul style="list-style-type: none"> ◦ Anyone: Requires any one of the supplier contacts to upload the required document. With this option, the supplier contact can upload a document from the Document widget on the My Company page of the Supplier Collaboration Portal. For more information, see Manage documents from the Supplier Collaboration Portal. ◦ Everyone: Requires each supplier contact to upload the required document. <p>The Generate task for field becomes available if you select Everyone in the Required from field. Select Yes in the Generate task for field to generate the Upload Document task for each supplier contact.</p> <p>With this option, the supplier contact can upload the document from either of these locations in the Supplier Collaboration Portal:</p> <ul style="list-style-type: none"> ▪ Documents widget on the My Company page ▪ Upload Document task on the My To-dos page <p>For more information, see Manage documents from the Supplier Collaboration Portal.</p> |

6. Select the **Manage access** tab and fill in the fields.

Manage access form

| Field | Description |
|----------------------|---|
| View access | Users with this access can only read the document. |
| Upload/Update access | Users with this access can update and upload the document. |
| Admin access | Users with this access can read, update, and upload the document. |

Note: On the **Manage access** tab, assign access to users or user groups based on the user criteria permissions.

- Select the **Notification** tab and fill in the fields.

Notification form

| Field | Description |
|------------------------------|---|
| Notify on upload | Controls whether a notification is sent when a document is uploaded. The options are: <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No |
| Whom to notify on upload | The user that you want to notify when the document is uploaded. This field becomes available only if you select Yes in the Notify on upload field. |
| Notify on expiry | Controls whether a notification is sent when a document expires. The options are: <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No |
| Whom to notify on expiration | The user that you want to notify when the document expires. This field becomes available only if you select Yes in the Notify on expiry field. |

- Select **Save** to remain on the Supplier Document Configuration form.

Note: The Suppliers related list displays all the suppliers for whom the supplier document configuration is applicable.

- In the Supplier Document Types related list, select **New**.

Note: If you want to create a supplier document type from the Source-to-Pay Workspace, do the following:

- a. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
- b. Select the list icon () and navigate to **Lists > Administration > Document Configuration**.
- c. Open a supplier document configuration, select the **Supplier Document Types** tab, and then select **New**.

10. On the form, fill in the fields.

Supplier Document Type form

| Field | Description |
|------------------------|---|
| Name | The name for the document type. |
| Type | <p>The type of the document. The choices are:</p> <ul style="list-style-type: none"> ◦ Policy ◦ Guideline ◦ Procedure ◦ Contract |
| Document Configuration | The document configuration that you want to associate the document type with. |
| Order | The order that you want the configuration to be displayed. Assign a numeric value in multiples of 100. |
| Days to expiry | <p>Number of days before the document expires.</p> <p>Note: After a document expires, a notification is sent to the users stating that the document has expired and a new version of the document must be uploaded.</p> <p>The notification is sent only if the Notify on expiry field is set to Yes. The notification is sent to the users you specify in the Whom to notify on expiration field.</p> <p>After a document expires, it is marked as Expired in the Documents widget in the Supplier Collaboration Portal. The Expired marking is removed when you upload an updated version of that document.</p> |
| Template | <p>Option that enables you to attach a template that specifies the expected format of the document to upload.</p> <p>Select the Manage Attachments icon () to attach a template.</p> |
| Description | A brief description of the document type. |

11. On the **Upload preferences**, **Manage access**, and **Notification** tabs, specify the values that you want the document type to use.

Note: The field values that you set in these tabs override the field values that you set in the corresponding tabs for the document configuration you associate this document type with.

12. Select **Submit**.

Manually run a supplier document configuration

Run a supplier document configuration to enable supplier managers, supplier owners, and supplier contacts to immediately upload the required documents.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, sn_slm.contact or sn_slm.admin

About this task

The supplier document configuration is configured to run based on the run conditions that you set. However, you can run them manually when needed. Running the document configuration creates either or both of the following in the Supplier Collaboration Portal, based on the run conditions:

- A tile in the Documents widget on the My Company page. The supplier contact can upload a document using this tile in the Documents widget.
- Note:** The Documents widget is created if you select **Anyone** from the **Required from** field in the Upload preferences form. The tile in the Documents widget is named after the supplier document type name that you provided when creating the supplier document configuration.
- The Upload Document task on the My To-dos page. The supplier contact can upload a document using this task. The Upload Document task is created if you select **Everyone** from the **Required from** field and also set the **Generate task for** field to **Yes** in the Upload preferences form.

Procedure

1. Do one of the following.

| To | Do This |
|---|--|
| Run a document configuration from the Platform UI | Navigate to All > Supplier Lifecycle Operations > Administration > Document Configuration |
| Run a document configuration from the Source-to-Pay Workspace | <p>a. Navigate to All > Supplier Lifecycle Operations > Source-to-Pay Workspace.</p> <p>b. Select the list icon () and navigate to Lists > Administration > Document Configuration.</p> |

2. Select the document configuration that you want to run.

3. Select **Execute Now**.

Uploading supplier documents

After you create and run a supplier document configuration, you can upload the required prerequisite documents.

The supplier document configuration enables the following:

- Supplier managers and supplier owners can upload the required documents from the Source-to-Pay Workspace. For more information, see [Manage documents from the Source-to-Pay Workspace](#).
- Supplier contacts can upload the required documents from the Supplier Collaboration Portal. For more information see [Manage documents from the Supplier Collaboration Portal](#).

Advanced Work Assignment for Supplier Lifecycle Operations

Use the Advanced Work Assignment for Supplier Lifecycle Operations feature to automatically assign work items to agents based on availability and capacity.

Advanced Work Assignment for Supplier Lifecycle Operations pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. For more information, see [Exploring Advanced Work Assignment](#).

Prerequisites for installing Advanced Work Assignment for Supplier Lifecycle Operations

Before you install Advanced Work Assignment for Supplier Lifecycle Operations, ensure that you activate the Agent Chat application and load the demo data during installation. For more information see, [Activate Agent Chat and load demo data](#).

Required plugins

Install the Advanced Work Assignment for Supplier Lifecycle Operations (com.snc.sn_slm_awa) plugin if you have the admin role. Installing this plugin also installs the following dependent plugins:

- Advanced Work Assignment (com.glide.awa)
- Agent Chat (com.glide.interaction.awa)
- Glide Virtual Agent (com.glide.cs.chatbot)
- Supplier Lifecycle Operations (com.snc.sn_supplier_mgmt)

Source-to-Pay Workspace agent inbox

Use the agent inbox to manage your incoming work items, such as chats, cases, incidents, and more.

To open the agent inbox, select the Inbox icon () in the Source-to-Pay Workspace.

The agent inbox displays the queues that are assigned to you, the number of active chats in each queue, and the average wait time for chats in the queue. For more information, see [Inbox layout](#).

When you accept a chat, an interaction record is automatically created and captures the work done in that session.

Activate Agent Chat and load demo data

Activate Agent Chat and load demo data.

Before you begin

Role required: admin

Procedure

1. Navigate to **System Applications > All Available Applications > All**.
2. Find the Agent Chat plugin using the filter criteria and search bar.
3. Select **Install**.
4. In the Activate Plugin dialog box, select the **Load demo data** check box, and then select **Activate**.

Setting up Advanced Work Assignment for Supplier Lifecycle Operations

Plan and configure your implementation of Advanced Work Assignment for Supplier Lifecycle Operations.

Setting up Advanced Work Assignment for Supplier Lifecycle Operations involves configuring the following components:

- Service channels: A means of providing customer service. Advanced Work Assignment offers base system channels for chats, cases, incidents, and walk-up centers. For each channel, you can set attributes such as agent capacity and utilization conditions to control the work handled in the channel.
- Work item: A single piece of work handled by an agent from start to completion.
- Work item queue: A queue that stores a specific type of work item for a service channel.
- Assignment groups: Agents belong to specific groups organized by the type of work assigned to them.
- Assignment rules: Criteria that determine how work items are pushed to the appropriate agent within a qualified assignment group.
- Agent capacity: The maximum number of work items on a particular service channel that an agent may actively work on at one time. If you want to set a maximum capacity for an agent across all service channels, define the maximum universal capacity for that agent.
- Agent availability: States that indicate agent presence and whether the agent is available for work or is busy or offline. Advanced Work Assignment uses the agent availability state to determine if an agent is able to receive work.
- Inbox layout: A configuration tied to a service channel that defines which fields of a record representing a work item are shown in agent inboxes. A layout defines what the agent sees in the Source-to-Pay Workspace.

For more information, see [Exploring Advanced Work Assignment](#) .

Configure Advanced Work Assignment for Supplier Lifecycle Operations

Configure various components, such as service channels, work item queues, and assignment rules that determine how a chat interaction should be routed to an agent.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Advanced Work Assignment**.
2. Create a service channel to automatically route incoming work to agents.

For more information, see [Create or configure a service channel](#) .

The following service channels are specific to Advanced Work Assignment for Supplier Lifecycle Operations.

- Supplier Cases
- Chat

After you have created a service channel, do the following:

- a. Configure the agent capacity to determine the number of work items that can be automatically assigned to agents supporting a service channel. For more information, see [Override agent capacity for selected agents](#).
 - b. Create or change an inbox layout to determine the information shown on work item cards displayed in an agent's inbox. For more information, see [Create or change an inbox layout](#).
 - c. Create a work item size override if you want to calculate an agent's workload using a work item size other than the default. For more information, see [Create or change a work item size override](#).
3. Define or change a queue so that you can determine which work items are routed automatically to agents through a given service channel.
For more information, see [Create a work item queue](#).
4. Set the Advanced Work Assignment criteria for assigning work items to agents.
For more information, see [Configure agent assignment rules](#).
5. Optional: Configure the following parameters to improve your Advanced Work Assignment functionality:
- a. Create or modify the availability states that agents use to indicate whether they can receive work or are offline or away. Agents set these states in their Workspace Inbox. For more information, see [Configure agent presence states](#).
 - b. Define the reasons that agents can use to decline work assignments that they receive in their Agent Workspace inbox. For more information, see [Configure reasons for rejecting work items](#).
 - c. Prevent an agent from being assigned too many work items by configuring the agent's maximum universal capacity. For more information, see [Configure an agent's maximum universal capacity](#).
 - d. Create or manage groups that have associated Advanced Work Assignment queues.
For more information, see [Create or change groups for Advanced Work Assignment queues](#).

For detailed instructions on how to configure Advanced Work Assignment, see [Configuring Advanced Work Assignment](#).

Configure the Supplier Collaboration Queue

Configure the Supplier Collaboration Queue chat queue to ensure that the chat requests are routed and assigned to specific agents that belong to a defined group.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Advanced Work Assignment > Queues**.
2. Select **Supplier Collaboration Queue**.

For more information about the fields on the Supplier Collaboration Queue form, see [Create a work item queue](#).

3. In the **Initial agent response** field, enter the message that you want the users to see when an agent accepts a chat.
For example: Thank you for contacting support. I am looking into your question now and will be with you shortly.
4. In the **Max wait time message** field, enter the message that you want the users to see when a chat ends after the Max Wait Time has elapsed.
This field is required if the **Max Wait Time** is greater than 0.
5. In the **Target wait time** field, enter the estimated time (Days or Hours, minutes, seconds) you want allotted for an agent to accept an item in the queue.
6. In the Max Wait Time field, enter the maximum amount of time within which all available agents have to accept or reject a chat request.
After time runs out, the requester receives the value in either the **Max wait time message** field or the **No Agents Available Message** field defined in [Agent Chat settings](#).

Note: The **Max Wait Time** field is available after you associate the queue to the chat service channel.

7. In the Assignment Eligibility related list, select **New**.
 - a. In the **Agent assignment rule** field, select **Chat - Most Capacity**.
 - b. Click the lock icon () next to the **Groups** field.
 - c. Click the look-up icon () to view the list of groups.
 - d. Select **New**.
 - e. In the **Name** field, enter a name for the group.
 - f. Fill in the remaining fields, as appropriate.
 - g. Select **Submit**.
 - h. Click the lock icon () to lock the **Groups** field.
 - i. Right-click and select **Save**.
8. Next to the **Groups** field, select the link to the group, which opens the group record.
 - a. In the Group Members related list, select **Edit** to add members to the group.
 - b. Select one or more users in the Collection list and move them to the Group Members List.
 - c. Select **Save**.

Note: The users that you add to this assignment group are automatically granted the awa_agent role.

Configure Agent Chat for Source-to-Pay Workspace

Use Agent Chat Settings to configure Agent Chat for Source-to-Pay Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Conversational Interfaces > Settings > Agent Chat**.
2. In the User Experience - Chat settings section, do the following:
 - a. Swipe the **Agent names and avatars** toggle switch to the right to enable this option.
 - b. Swipe the **Transcripts** toggle switch to the right to enable the requesters to download a transcript of the conversation they had with an agent. For more information, see [Chat transcript downloads for requesters](#).
3. In the User Experience - Statuses section, from the Live chat wait status drop-down list, select **Wait Time**.
4. In the Configurable Toolbar Controls section, select **View All**.
The Quick Action Toolbar Controls is displayed.

Add or update the quick action shortcuts for live agents in the Agent Chat. For more information about configuring the toolbar controls, see [Set up quick action toolbar controls](#).
5. Select **Save**.

Using Advanced Work Assignment for Supplier Lifecycle Operations

Enables supplier contacts to interact with supplier owners and resolve their issues and get answers to questions.

The Advanced Work Assignment for Supplier Lifecycle Operations application enables the following:

- Supplier fulfillers can accept a chat request from the Supplier Lifecycle Operations to interact with supplier contacts. For more information, see [Accept an incoming chat request from the Source-to-Pay Workspace](#).
- Supplier contacts can start a chat session from the Supplier Collaboration Portal to interact with supplier fulfillers. For more information see [Start a chat session from the Supplier Collaboration Portal](#).

Using Supplier Lifecycle Operations

Supplier managers and supplier contacts can use Supplier Lifecycle Operations to accelerate supplier onboarding, minimize supplier risk, and maximize productivity.

Using Source-to-Pay Workspace

As a supplier manager, use the Source-to-Pay Workspace to import or create suppliers, add key contacts, add supplier locations, and manage the supplier cases assigned to you.

Important: Starting with the Washington D.C. release, Supplier Manager Workspace is being prepared for future deprecation. It will be hidden from the navigation and no longer be activated on new instances but will continue to be supported. Source-to-Pay Workspace provides the latest experience for this functionality.

Create a supplier from the Source-to-Pay Workspace

Create a supplier to quickly onboard the supplier using playbooks and start purchasing goods and services.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under Quick actions, select **Create new supplier**.
3. On the form, fill in the fields.

Request new supplier form

| Field | Description |
|--------------------|---|
| Supplier Name | Name of the supplier. |
| Supplier DUNS | Unique numeric identifier for every supplier. |
| Contact first name | First name of the supplier contact. |
| Contact last name | Last name of the supplier contact. |
| Contact email | Email of the supplier contact. |
| Contact title | Title of the supplier contact. |
| Priority | Priority of the supplier. The available options are: <ul style="list-style-type: none"> ◦ Critical ◦ High ◦ Moderate ◦ Low ◦ Planning |

4. Select **Create**.
5. On the Request new supplier window, select **View onboarding request**.
The application creates a case of type Onboard a Supplier.

The supplier manager can continue to onboard the supplier using the **Playbook** tab on the Case Details page. For more information, see [Using the supplier onboarding playbook to onboard suppliers](#).

Using the supplier onboarding playbook to onboard suppliers

Supplier owners and supplier managers can use the supplier onboarding playbook to complete the tasks and activities that are needed to onboard new suppliers.

Playbooks overview

Playbooks provide step-by-step guidance for onboarding suppliers. A playbook visualizes a workflow in a simple, task-oriented view. The workflow for a playbook is typically created using [Process Automation Designer](#).

A playbook takes a workflow and breaks it into multiple stages. Each stage in a playbook includes one or more activities or steps for a supplier owner or supplier manager to complete. Stages can also include automated activities, such as sending an email to a supplier contact when a stage or activity is complete. For more information, see [Interact with Playbook](#).

When using a playbook, a supplier owner or supplier manager can:

- View the playbook stages and activities.
- View status indicators that display the current state of each activity or step.
- View check boxes that indicate the stage you are currently at in the workflow.
- Select an activity and perform the work necessary to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities necessary to complete the case.

Supplier onboarding playbook

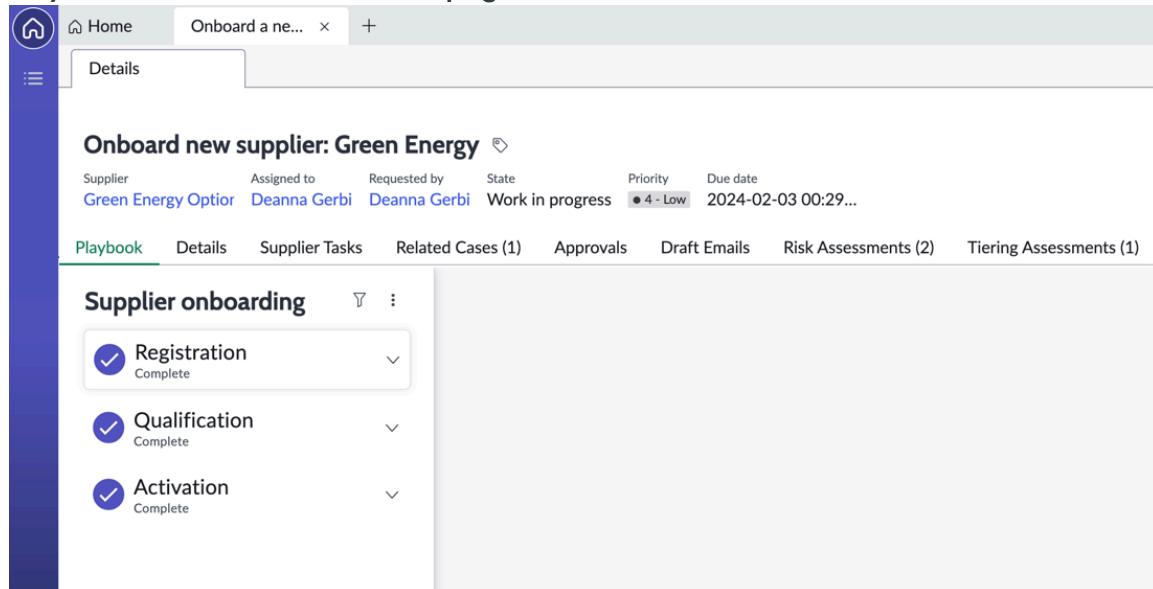
You can use the Supplier onboarding playbook to onboard a new supplier. The Supplier onboarding playbook provides the activities and tasks that a supplier owner or supplier manager can perform during the onboarding process.

You can use the Supplier onboarding playbook with cases that are created using the Onboard a Supplier case type.

The Supplier onboarding playbook appears in the **Playbook** tab on the Case Details page in the Source-to-Pay Workspace.

After you submit a supplier onboarding request, the application creates a new case of type Onboard a Supplier and opens the Case Details page. You can select the **Playbook** tab and start the supplier onboarding process using playbook. For more information on creating a supplier, see [Add a supplier](#).

Playbook tab on the Case Details page



The Supplier onboarding playbook includes the following stages:

Stages in the Supplier onboarding playbook

| Stage | Description |
|--------------|---|
| Registration | <p>Includes activities to register the supplier.</p> <p>As part of one of the activities in the registration process, the Supplier onboarding</p> |

Stages in the Supplier onboarding playbook (continued)

| Stage | Description |
|---------------|--|
| | <p>playbook creates the Provide banking information task and the Verify/update supplier profile task. Both of these tasks are displayed on the Supplier Tasks tab of the Onboard a Supplier case. The supplier contact needs to manually complete these tasks in the Supplier Collaboration Portal. After these tasks are completed, the supplier owner or supplier manager can continue with the supplier onboarding process.</p> |
| Qualification | <p>In the Qualification stage, you are presented with options to either perform risk assessment or to continue without assessment. In the Risk assessment decision activity, if you select Perform risk assessment. Depending on the plugins that you have installed, the playbook either creates risk assessment records or supplier case of type Due diligence. The Due diligence case is the child case of the parent Onboard new supplier case.</p> <p>To view the risk assessments or the Due diligence case record, in the Waiting for risk assessment to be completed activity, select View record to open the Perform risk assessment playbook. Complete the Perform risk assessment playbook.</p> <p>Note: In the Risk assessment decision activity, if you select Continue without assessment, the playbook skips all the other activities and displays the Confirm supplier is not restricted activity.</p> |
| Activation | <p>Includes activities to activate the supplier being onboarded.</p> <p>After you complete all the activities in the Perform risk assessments playbook, you can continue to work on the activities in the Activation stage of the Supplier onboarding playbook.</p> <p>If the Onboard a Supplier case is created from a sourcing request, then the Supplier onboarding playbook creates an onboarding approval task. The supplier owner or supplier manager needs to complete this approval task to continue with the supplier onboarding process.</p> |

Stages in the Supplier onboarding playbook (continued)

| Stage | Description |
|-----------|---|
| | <p>After you successfully complete all the activities in this stage, a welcome email is sent to the supplier to inform them that they have been successfully onboarded.</p> |
| Rejection | <p>Includes activities to reject the supplier.</p> <p>After you select Reject during the supplier onboarding process, the Rejection stage is displayed. You need to complete the activities to reject the process of onboarding the supplier.</p> <p>When rejecting a supplier, you must provide a valid reason for the rejection. After you reject a supplier, an email is sent to the primary supplier contact informing them about the rejection, and the status of the Onboard a Supplier case is updated to Closed Rejected.</p> |

Perform risk assessment playbook

The Perform risk assessment playbook includes activities that enable you to conduct risk assessments for the supplier that you are onboarding.

The type of flow that is triggered in the Perform risk assessment playbook depends on the plugins that you have installed.

Perform risk assessment playbook

The screenshot shows the ServiceNow interface for the 'Perform risk assessment' playbook. The left sidebar has a dark blue gradient background and lists several categories: Home, Playbooks, Suppliers, Requests, Assessments, Tasks, Cases, Approvals, Draft Emails, and Documents. The 'Playbooks' category is currently selected. The main content area has a light gray header with tabs: List, Onboard new su..., and Onboard new su... (active). Below the header, there's a 'Details' tab and a 'Conduct due dilig...' button. The main body shows a table with columns: Supplier (Green Energy Option), Assigned to (Deanna Gerbi), Requested by (Deanna Gerbi), State (Closed completed), Priority (4 - Low), and Due date (2024-01-24 00:32...). Below the table, there are tabs for Playbook, Details, Supplier Information, Supplier Tasks, Related Cases, Approvals, Draft Emails, and Documents. The 'Playbook' tab is active. On the left, a list of tasks is shown under the heading 'Perform risk assessment': 'Review case' (Complete), 'Create request' (Complete), 'Assess risk' (Complete), 'Review risk rating' (Complete), and 'Close case' (Complete). To the right, a modal window titled 'Assign case' is open, showing a dropdown for 'Assigned to Me' (Deanna Gerbi) and a text input for 'Short description' (Conduct due diligence for Green Energy Options).

| Plugins Installed | Playbook flow |
|---|---|
| Risk Assessments Integration for Supplier Lifecycle Operations [sn_supplier_tprm] | <p>If you have installed only the <code>sn_supplier_tprm</code> plugin, the Perform risk assessment playbook triggers the flow that includes activities to verify the eligibility of the supplier by creating risk assessments.</p> <p>In this flow, the following occurs:</p> <ol style="list-style-type: none"> The playbook creates the risk assessment records. The risk assessment records are listed in the Risk Assessments tab. The supplier owner or supplier manager assigns these records to the Third-party risk (TPR) assessor. The TPR assessor assigns the assessments to the supplier contact. The supplier contact logs in to the Supplier Collaboration Portal and complete the risk and tiering assessments. For more information, see Complete a risk assessment from the Supplier Collaboration Portal. The supplier manager uses the risk assessment result data in combination with any other data to determine whether to continue or cancel the onboarding process. <p>After the assessments are completed, you can continue with completing the activities in the Activation stage.</p> |
| <ul style="list-style-type: none"> Risk Assessments Integration for Supplier Lifecycle Operations [sn_supplier_tprm] <ul style="list-style-type: none"> GRC: Third-party Risk Due Diligence [sn_tprm_dd] | <p>If you have installed both the <code>sn_supplier_tprm</code> and <code>sn_tprm_dd</code> plugins, the Perform risk assessment playbook triggers the flow that includes activities to create a due diligence request, complete Inherent Risk Questionnaire (IRQ) assessments, and conduct risk assessments for a third-party or engagement.</p> <p>In this flow, the following occurs:</p> <ol style="list-style-type: none"> The playbook creates a due diligence request. For more information about the fields in this activity, see Request due diligence for a third-party engagement. <p>The supplier manager must fill in the details, assign the due diligence request to the TPR manager and submit the request.</p> <p>Note: For each due diligence request, the system auto-assigns a unique ID number that starts with the prefix DDR.</p> <ol style="list-style-type: none"> The supplier manager fills and submits a due diligence request, which is assigned to the TPR manager. If the due diligence request is approved by the TPR manager, the inherent risk questionnaire (IRQ) is sent to the TPR assessor (internal stakeholder). After the TPR assessor submits the completed IRQ, the due diligence process begins. The due diligence process creates two risk assessments, each containing an external due diligence questionnaire, one for the third-party and another for engagement. After the supplier contacts complete and submit the external questionnaires from the Supplier Collaboration Portal, the TPR |

| Plugins Installed | Playbook flow |
|-------------------|---|
| | <p>manager goes through the questionnaires and approves the due diligence request.</p> <p>7. A contract record is created with an approval. After the contract record is approved, the risk record is updated with the final rating.</p> <p>8. After the supplier manager accepts the risk rating, an email is sent to the requester informing that the due diligence request has been successfully processed and approved.</p> <p>9. The supplier manager closes the due diligence request (case).</p> <p>After the case is closed, you can continue with completing the activities in the Activation stage.</p> <p>For more information about the due diligence workflow, see Processes in the due diligence workflow.</p> |

Playbook actions

During the supplier onboarding process, different activities require different user input. For example, you can select the following options during the supplier onboarding process:

Supplier onboarding playbook actions

| Action | Description |
|---------------------|--|
| Continue onboarding | Continues the onboarding process. |
| Create new request | Creates a new due diligence request. |
| Update | Applies updates to an activity. |
| Mark complete | Marks an activity as complete. |
| Submit | Submits an activity. |
| Skip | Skips the current activity and moves to the next activity. |
| View record | Opens the record. |
| Import Data | Imports the supplier data from any third-party application. |
| Restart | Restarts an activity from the beginning. |
| Accept | Accept the current activity to move on to the next activity. |
| Reject | Stops the supplier onboarding process and opens the Rejection stage. |

Add a subsidiary for a supplier from the Source-to-Pay Workspace

If a supplier has subsidiaries, you can add them to that supplier from the Source-to-Pay Workspace.

Before you begin

Role required: sn_slm.owner or sn_slm.admin

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under Quick actions, select **Manage my suppliers**.
3. Under My suppliers, select the legal name of the supplier that you want to add a supplier location for.
4. Select the **Subsidiaries** tab and then select **Add**.
5. In the **Select subsidiary** field of the Add subsidiary dialog box, search for and select a subsidiary.
6. Select **Add**.

The subsidiary is added and displayed on the **Subsidiaries** tab.

When you add a subsidiary, the supplier you added it under becomes the parent entity of that subsidiary.

Managing supplier cases from the Source-to-Pay Workspace

You can create and manage supplier cases for suppliers in the Source-to-Pay Workspace

Configure due dates for supplier cases

Configure due dates for different case types so that the **Due date** field is auto-populated when you create supplier cases.

Before you begin

Role required: sn_slm.admin

About this task

Although the **Due date** field is auto-populated for a supplier case type, you can always update this field as required.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Administration > Default Due Dates for Cases**.
- The Decision Builder opens and displays the Decision table for configuring the default due dates.

| Case type | Default due date |
|-------------------------------------|------------------|
| Onboard new supplier | 30 |
| Supplier support request | 3 |
| General inquiry | 3 |
| Banking information change request | 3 |
| Supplier information change request | 3 |
| Supplier location change request | 3 |
| Enroll new supplier user | 3 |
| Account access request | 3 |
| Supplier issue | 3 |
| Document change request | 3 |

| Case type | Default due date |
|-----------------------------------|------------------|
| Conduct a risk assessment | 3 |
| Conduct a tiering risk assessment | 3 |
| Request supplier contact | 3 |
| Offboard supplier contact | 3 |
| Primary contact elevation | 3 |

2. Under the Default due date column, select a row next to the case type row and enter a positive number.
The number that you enter for a case type is auto-populated in the **Due date** field the next time you create a supplier case of that case type.

For example, let's say that you enter 3 as the due date for the case type General enquiry. If you create a General enquiry case on September 12, the due date will be in three days from this date; that is, September 15.

3. Select **Save**.

Case playbook for specific supplier case types

Source-to-Pay Workspace includes a generic case playbook to complete supplier cases of specific case types.

Case playbook for supplier cases

The case playbook provides step-by-step guidance for completing specific types of supplier cases. The case playbook includes a generic supplier case flow containing various stages and activities that you must complete to close the supplier case. For more information, see [Interact with Playbook](#).

When a supplier contact submits a request using the supplier catalog item from the Supplier Collaboration Portal or when a supplier manager or fulfiller creates a case from the Source-to-Pay Workspace, the application opens the case on the **Playbook** tab on the Details page.

The case playbook is displayed only for these case types:

- Supplier issue
- Supplier support request
- General inquiry

Case playbook on the Playbook tab

The screenshot shows the ServiceNow interface for a 'General case' record. At the top, there are tabs for 'Supplier', 'Assigned to', 'Requested by', 'State', 'Priority', and 'Due date'. Below these are tabs for 'Playbook', 'Details', 'Supplier Information', 'Supplier Tasks', 'Related Cases', 'Approvals', 'Draft Emails', and 'Documents'. The 'Playbook' tab is selected.

The main area displays the 'Case playbook' for this case. It consists of several stages and activities:

- Review case**: Sub-tasks include 'Complete' (marked as completed), 'Assign case', and 'Close the case record' (progress bar at 1/2).
- Assign case**
- Close the case record**
- Notify the supplier**
- Complete case**

To the right of the playbook, there is a form titled 'Complete case' with fields for 'State' (set to 'Closed completed'), 'Work notes' (empty), and 'Close notes' (containing 'done'). A 'Priority' button is also present.

At the bottom right of the main area is a blue button labeled 'Complete case'.

Case playbook stages and activities

The case playbook contains the following stages and activities.

| Stage | Activity | Activity Details |
|-----------------------|---------------------|---|
| Review case | Assign case | <p>As a supplier manager or fulfiller, you can use this activity to assign the case to a different person or keep the case assigned to you.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> In the Assigned to search field, search for and select the person that you want to assign the case to. In the Short description field, update the description for the case. Select one of the following actions: <ul style="list-style-type: none"> Select Save to save your changes. Select Start work to start working on the case. |
| Close the case record | Notify the supplier | <p>A draft email appears with pre-populated data in the To and Subject fields. The email body is pre-populated with the relevant text.</p> <p>Select one of the following actions:</p> <ul style="list-style-type: none"> Send Email: Send an email to the supplier informing that the request has been completed. Skip: Skips this activity and moves to the next activity. |
| | Complete case | <p>As a supplier manager or fulfiller, you can update the state of the case and close the case.</p> |

| Stage | Activity | Activity Details |
|-------|----------|---|
| | | <p>You can do the following:</p> <ul style="list-style-type: none"> From the State drop-down list, select Closed completed. In the Work notes field, provide any additional information about the case. In the Close notes field, enter the details when closing the case. Select Complete case. <p>Updates the case to Closed Completed.</p> |

Playbook for updating the supplier primary data

Source-to-Pay Workspace includes a playbook that you use for updating the supplier primary data.

Review supplier primary data request playbook

This playbook provides step-by-step guidance for cases related to updating supplier primary data. The playbook includes a supplier case flow containing various stages and activities that you must complete to close the supplier case. For more information, see [Interact with Playbook](#).

This playbook is used for updating the supplier primary data when:

- A supplier contact submits a request for updating the supplier primary data using the supplier catalog item from the Supplier Collaboration Portal
- A supplier manager or fulfiller creates a case for updating the supplier primary data from the Source-to-Pay Workspace

The application opens the case on the **Playbook** tab on the Details page.

This playbook is displayed only for these case types:

- Banking information change request
- Supplier information change request
- Supplier location change request

Review supplier primary data request playbook on the Playback tab

The screenshot shows the ServiceNow interface for a 'Banking information change request' from 'Adobe Systems Software Ireland'. The 'Playback' tab is active. The current stage is 'Review supplier primary ...' with the following activities:

- Review case** (Complete)
- Assign case**
- Approve changes**
- Process Change Request** (Complete)
 - Verify changes are made in other systems**
 - Notify the supplier**
 - Close case**

The 'Close case' activity is currently being performed, as indicated by the progress bar at the bottom of the list.

Playbook stages and activities

The playbook contains the following stages and activities.

| Stage | Activity | Activity Details |
|------------------------|--|---|
| Review case | Assign case | <p>As a supplier manager or fulfiller, you can use this activity to assign the case to a different person or keep the case assigned to you.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> In the Assigned to search field, search for and select the person that you want to assign the case to. In the Short description field, update the description for the case. Select one of the following actions: <ul style="list-style-type: none"> Select Save to save your changes. Select Start work to start working on the case. |
| | Approve changes | <p>As a supplier manager or fulfiller, you can use this activity to decide whether to approve or reject the case.</p> <p>This activity has the options:</p> <ul style="list-style-type: none"> Approve changes: Approves your changes. Reject changes: Rejects your changes and opens the Reject changes stage. <p>For more information, see Non-Interactive activities.</p> |
| Process change request | Verify changes are made in other systems | This activity informs you that changes to this request have been processed in ServiceNow. If applicable, please verify that the details of this case have also been processed in all other systems. |

| Stage | Activity | Activity Details |
|----------------|---------------------|--|
| | | <p>You can do the following:</p> <ul style="list-style-type: none"> • Skip: Skips this activity and moves to the next activity. • Continue: Marks this activity as complete and moves to the next activity. |
| | Notify the supplier | <p>A draft email appears with pre-populated data in the To and Subject fields. The email body is pre-populated with the relevant text.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> • Send Email: Send an email to the supplier informing that the request has been completed. • Skip: Skips this activity and moves to the next activity. |
| | Complete case | <p>As a supplier manager or fulfiller, you can update the state of the case and complete the case.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> • From the State drop-down list, select Closed completed. • In the Work notes field, provide any additional information about the case. • In the Close notes field, enter the details when closing the case. • Select Complete case. <p>Updates the case to Closed Completed.</p> |
| Reject Changes | Notify the supplier | <p>A draft email appears with pre-populated data in the To and Subject fields. The email body is pre-populated with the relevant text.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> • Send Email: Send an email to the supplier informing that the request has been rejected. • Skip: Skips this activity and moves to the next activity. |
| | Complete case | <p>As a supplier manager or fulfiller, you can update the state of the case and reject the case.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> • From the State drop-down list, select Closed rejected. • In the Work notes field, provide any additional information about the case. |

| Stage | Activity | Activity Details |
|-------|----------|---|
| | | <ul style="list-style-type: none"> In the Close notes field, enter the details when closing the case. Select Complete case. <p>Updates the case to Closed Rejected.</p> |

Create a case on behalf of a supplier from the Source-to-Pay Workspace

Create a supplier case to track the progress of supplier tasks, resolve issues related to supplier products or services, and request additional information from a supplier.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

Note: The sn_slm.owner role can create cases only for the suppliers they own.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Do one of the following.

| To | Do this |
|-------------------------------------|---|
| To create a case from Quick actions | <p>On the home page, do one of the following:</p> <ul style="list-style-type: none"> Under Quick actions, select Create case. Under Quick actions, select Manage my suppliers and do the following: <ol style="list-style-type: none"> Select the link to the supplier name under the Legal name column. From the Create drop-down list, select Supplier case. |
| To create a case from the List page | <ul style="list-style-type: none"> Select the list icon () and do one of the following: <ul style="list-style-type: none"> Navigate to Lists > My work > Open cases Navigate to Lists > All work > Cases Select New. On the Create new case dialog box, select a case type from the Case type field, and then select Submit. |

3. On the Create New Supplier Case form, fill in the fields.
For more information about the form fields and descriptions, see [Create New Supplier Case form](#).
4. Select **Save**.
The case is created in Draft state.
5. Do the following steps only if you selected these case types:

- a. Select **Add more details**.

- b. On the Add more details form, fill in the fields.

In the **Case type** field, if you selected **Banking information change request**, see [Update banking details form](#) for more information about the form fields and descriptions.

In the **Case type** field, if you selected **Supplier information change request**, see [Update profile details form](#) for more information about the form fields and descriptions.

In the **Case type** field, if you selected **Supplier location change request**, see [Add New Location form](#) for more information about the form fields and descriptions.

- c. Select **Submit**.

What to do next

[Submit a supplier case from the Source-to-Pay Workspace](#)

Create a task for a supplier case from the Source-to-Pay Workspace

You can create a task for a supplier case and assign it to a supplier contact.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, sn_slm.fulfiller, or sn_slm.admin

Note: The sn_slm.owner role can create tasks only for the suppliers they own.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Do one of the following.

| To | Do this |
|---|---|
| Create a supplier task from Quick actions | <p>On the home page, do one of the following:</p> <ul style="list-style-type: none"> ◦ Under Quick actions, select Create task. ◦ Under Quick actions, select Manage my suppliers and do the following: <ol style="list-style-type: none"> a. Select the link to the supplier name under the Legal name column. b. From the Create drop-down list, select Supplier task. |
| Create a supplier task from the List page | <ul style="list-style-type: none"> a. Select the list icon (). b. Navigate to Lists > Cases. c. Select one of the following: <ul style="list-style-type: none"> ▪ Open tasks ▪ All tasks d. Select New. |
| Create a supplier task from the Case details page | <ul style="list-style-type: none"> a. Select the list icon (). b. Navigate to Lists > Cases. |

| To | Do this |
|----|---|
| | <p>c. Select one of the following:</p> <ul style="list-style-type: none"> ▪ Open Cases ▪ All Cases <p>d. In the Number column, select the link to the case that you want to create a task for, and do one of the following:</p> <ul style="list-style-type: none"> ▪ Select Create task on the top right. ▪ Select the Supplier Tasks tab and then select New. |

3. On the Create a new task form, fill in the fields.

For more information about the form fields and descriptions, see [Create a new task form](#).

4. Select **Submit**.



To delete this task, select the more actions icon () and then select **Delete**.

What to do next

The supplier contact to whom this task is assigned can view it on the My To-dos page. For more information, see [Viewing supplier contact tasks from the Supplier Collaboration Portal](#).

Assign a supplier case to yourself from the Source-to-Pay Workspace

As a supplier manager, assign a case to yourself and start working on it.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, sn_slm.fulfiller, or sn_slm.admin

About this task

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - View all the open cases by navigating to **Lists > Cases > Open Cases**.
 - View all the cases by navigating to **Lists > Cases > All Cases**.
4. To view the details of the case, select the link for the case in the Number column.
5. Select **Assign to me**.
The case is assigned to you.

 **Note:** The **Assign to me** option is not available if a case is already assigned.

6. Select **Save**.

Submit a supplier case from the Source-to-Pay Workspace

Submit a supplier case in Draft state to indicate that it is ready to be worked on.

Before you begin

Role required: sn_slm.fulfiller, sn_slm.owner, or sn_slm.admin

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - View all the open cases by navigating to **Lists > Cases > Open cases**.
 - View all the cases by navigating to **Lists > Cases > All cases**.
4. Open a case that is in Draft state by selecting the link to the case in the Number column.
5. Select **Submit case**.
The state of the case updates to Open, indicating that the case is ready to be worked on.

What to do next

After you submit the case, depending on the case type, the specific playbook for the supplier case opens.

For more information, see [Case playbook for specific supplier case types](#) and [Playbook for updating the supplier primary data](#).

Complete a supplier case from the Source-to-Pay Workspace

You can mark a supplier case as complete when you finish all the tasks related to that case.

Before you begin

Role required: sn_slm.fulfiller, sn_slm.owner, or sn_slm.admin

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - View all the open cases by navigating to **Lists > Cases > Open cases**.
 - View all the cases by navigating to **Lists > Cases > All cases**.
4. Open a case that is in Open, Work in progress, or Awaiting task completion state by selecting the link to the case in the Number column.
5. Select **Complete**.
The state of the case updates to Closed completed.

Reopen a supplier case from the Source-to-Pay Workspace

Reopen a closed supplier case if you are not satisfied with the case resolution.

Before you begin

Role required: sn_slm.owner and sn_slm.agent

About this task

The **Re-open** option is available for a supplier case that is in any of the following states:

- Closed completed
- Closed canceled
- Closed rejected

The **Re-open** option is not available for the auto-closing supplier cases of the following case types:

- Onboard new supplier
- Enroll new supplier user
- Account access request
- Offboard supplier contact
- Primary contact elevation
- Request supplier contact

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.

2. Select the list icon ().

3. Navigate to **Lists > Cases**.

4. Select one of the following:

◦ **Open Cases**

◦ **All Cases**

5. In the Number column, select the link to the case that you want to reopen.

6. Select **Re-open**.

The following occurs:

◦ The case is reopened and its state moves to **Open**.

◦ The **Close notes** field is cleared in the Resolution Information section.

◦ The previous comments that were made on the case are retained and displayed in the Activity section.

◦ The **Actual end** field becomes empty.

Add a related case to a supplier case from the Source-to-Pay Workspace

If a supplier case has related cases, you can add them to that supplier case from the Source-to-Pay Workspace.

Before you begin

Role required: sn_slm.owner or sn_slm.admin

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.

2. Select the list icon ().

3. On the List page, navigate to and select a case.

4. Select the **Related Cases** tab and then select **Add**.

5. In the **Select case** field of the Add related cases dialog box, search for and select a case.

6. Select **Add**.

The case is added and displayed on the **Related Cases** tab.

When you add a related case, the supplier case you added it under becomes the parent case of that related case.

View a supplier case from the Source-to-Pay Workspace

As a supplier manager, view a supplier case that requires your input or approval.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, sn_slm.fulfiller, or sn_slm.admin

About this task

Note: You can view only those cases that are opened for a supplier that you manage.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.

2. Select the list icon ().

3. Do one of the following:

- View all the open cases by navigating to **Lists > Cases > Open cases**.
- View all the cases by navigating to **Lists > Cases > All cases**.

4. To view the details of the case, select the link to the case in the Number column.

Result

The case details are displayed on the **Details** tab. For more information, see [Source-to-Pay Workspace Case Details page](#). You can modify the fields as needed. Select the **Supplier Task** tab to view details about the tasks for the case or to create a new task. For more information, see [Create a task for a supplier case from the Source-to-Pay Workspace](#).

Add a supplier location from the Source-to-Pay Workspace

Add a supplier location to visualize the geographical location that suppliers run their operations from.

Before you begin

Ensure that you have configured the FAM map properties. For more information, see [Configure properties for Supplier Lifecycle Operations](#).

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

Note: The sn_slm.owner role can add locations only for the suppliers they own.

About this task

- If a supplier has multiple locations, at least one location should be set as headquarters.
- If a new supplier location is set as headquarters (HQ) or if any updates are made to the existing HQ supplier location, the location details of the HQ supplier location is updated in the supplier record.
- When you update the supplier location details in a supplier record, the location details are updated in the supplier location record as well.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.

2. Under Quick actions, select **Manage my suppliers**.

3. Under My suppliers, select the legal name of the supplier that you want to add a supplier location for.

4. On the **About** tab, under Supplier Locations, select the add supplier location icon (+).
5. On the Add New Location form, fill in the fields.
For more information about the form fields and descriptions, see [Add New Location form](#).
6. Select **Save**.

Edit supplier details from the Source-to-Pay Workspace

Add or modify the details of an existing supplier.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

Note: The sn_slm.owner role can edit details only for the suppliers they own.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under My suppliers, select the legal name of the supplier to be edited.
The supplier Details panel opens.
3. Select the **Details** tab and update the fields in the Supplier and General sections as needed.
For descriptions of the fields on the **Details** tab, see [Source-to-Pay Workspace Supplier page](#).
4. Select **Save**.

Managing supplier contacts from the Source-to-Pay Workspace

Add or remove contacts, elevate access or remove elevated access to contacts from the Source-to-Pay Workspace.

Add a supplier contact from the Source-to-Pay Workspace

Add the supplier contacts so that they can access the Supplier Collaboration Portal and start working on the most important tasks.

Before you begin

Before performing this task, ensure that you do the following:

- Configure self-registration for external users. For more information, see [Configure self-registration for external users](#).
- Configure the sn_supplier.external_registration_profile_id system property to ensure that registration emails are sent to external users. For more information, see [Configure system property to send registration emails to external users](#).

Role required: sn_slm.owner

Note: The sn_slm.owner role can add contacts only for the suppliers that they own.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under My suppliers, select the legal name of the supplier that you want to add a supplier contact for.
The supplier details page is displayed.

3. On the **About** tab, under Supplier Contacts, select the add supplier contact icon (+) or select **Add a Supplier Contact**.

Note: The **Add a Supplier Contact** option is displayed only when you add your first contact for a supplier. This option is not displayed when you add subsequent contacts for a supplier.

4. In the Invite contacts dialog box, in the **Contact emails** field, enter the email address of the contact that you want to invite.
You can invite more than one contact by entering multiple email addresses separated by a comma.
5. Select **Add**.
6. From the Role list next to each email address, select one of the following options:
 - **Contact**: The contact is assigned the secondary contact role.
 - **Admin**: The contact is assigned the primary contact role.
7. Select **Send invites**.
An email containing the registration link is sent to the email address.

What to do next

[Register to the Supplier Collaboration Portal as an invited member.](#)

Remove a supplier contact from the Source-to-Pay Workspace

Remove a supplier contact that you no longer require.

Before you begin

Role required: sn_slm.owner

Note: The sn_slm.owner role can remove contacts only for the suppliers they own.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under Quick actions, select Manage my suppliers.
The My suppliers page is displayed.
3. Select the legal name of the supplier that you want to remove a supplier contact for.
4. Under Supplier Contacts, do one of the following:
 - Select a contact to open the contact's profile page, and then select **Remove Contact**.
 - Select the cross icon (✘) next to the name of the contact you want to remove.
The Request to remove a supplier contact dialog box is displayed.
5. In the **Delegate tasks to** field, search for and select a contact to whom you want to reassign the tasks that are currently assigned to the contact being removed.
6. In the **Reason for offboarding** field, enter the reason for removing the contact.
7. Select **Submit**.
The application creates a case, which is automatically approved. The contact is removed and all the tasks that were assigned to that contact are reassigned to the alternate contact.

Elevate a contact to the primary contact role from the Source-to-Pay Workspace

Elevate a contact to the primary contact role to enable them to access and manage all the contacts and tasks in the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.owner

Note: The sn_slm.owner role can elevate access only for the contacts of the suppliers they own.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under Quick actions, select Manage my suppliers.
The My suppliers page is displayed.
3. Select the legal name of the supplier.
4. Under Supplier Contacts, select the supplier contact that does not have the Primary label next to their name, and then select **Elevate access**.
The Primary contact column is set to **true** for this contact on the Vendor Contacts page, and the contact is elevated to the primary contact role.

Restrict the primary contact role for a contact from the Source-to-Pay Workspace

Remove the primary contact role for a contact to prevent them from accessing all the contacts and tasks in the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.owner

Note: The sn_slm.owner role can restrict access only for the contacts of the suppliers they own.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under My suppliers, select the legal name of the supplier.
The supplier details page is displayed.
3. On the **About** tab, under Supplier Contacts, select the supplier contact that has the Admin label next to their name.

Note: Each supplier must have at least one primary contact. You cannot restrict access for a primary contact if that contact is the only primary contact for the supplier.

4. Select **Restrict access**.

The Primary contact column is set to **false** for this contact on the Vendor Contacts page, and the contact no longer has the primary contact role.

Approve a request associated with a supplier case from the Source-to-Pay Workspace

As a supplier manager, you can approve or reject the assigned approve requests.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, sn_slm.fulfiller, or sn_slm.admin

Note: The sn_slm.owner role can approve requests only for the suppliers they own.

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. To open the List page, select the list icon (≡).
3. Navigate to **Approvals > My approvals**.
4. In the State column, select the link to the state of the request for the supplier case. Typically, the request requiring an approval is in the **Requested** state.
5. From the State drop-down list, select **Approved**.

The following states are available:

- **Not Yet Requested**
- **Requested**
- **Approved**
- **Rejected**
- **Cancelled**
- **No Longer Required**

6. Select **Save**.

Synchronize supplier data using external third-party application

Synchronize supplier data with any external third-party application to ensure that you are working with the latest data in the Source-to-Pay Workspace.

Before you begin

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

Note: The sn_slm.owner role can synchronize data only for the suppliers they own.

About this task

Because the supplier data may have changed from the time that you last imported it, ensure that you are working with the latest supplier data by synchronizing with an external third-party application.

Note: Supplier Lifecycle Operations provides you with the flexibility to integrate with Craft to import and view the most up-to-date supplier data. For more information, see [Craft.io Integration for Supplier Lifecycle Operations](#).

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under My suppliers, select the legal name of the supplier you want to synchronize with external data.
The supplier Details page opens.
3. Do one of the following.

| To | Do this |
|--|-------------------|
| Synchronize with external third-party application for the first time | Do the following: |

| To | Do this |
|--|---|
| | <p>a. Select Connect to external data.</p> <p>b. In the Connect to external data dialog box, select Import.</p> <p>The latest supplier data is imported and any changes that you made to the existing supplier data and the supplier locations are overwritten.</p> |
| Synchronize with external third-party application subsequently after initial synchronization | <p>Do the following:</p> <p>a. Select Sync with external data.</p> <p>b. In the Sync with external data? dialog box, select Sync.</p> <p>The latest supplier data is imported and any changes that you made to the existing supplier data and the supplier locations are overwritten.</p> |

Manage documents from the Source-to-Pay Workspace

Manage documents by uploading, updating and downloading the required documents from the Source-to-Pay Workspace.

Before you begin

Ensure that you have created a supplier document configuration. For more information, see [Supplier Document Management](#).

Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

About this task

The **Documents** tab contains the **Link Documents** option, which enables you to quickly add an already uploaded document without creating a new one. Access to the **Link Documents** option is controlled by the user criteria you set on the **Manage access** tab when creating the supplier document configuration. For more information, see [Create a supplier document configuration](#).

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Under My suppliers, select the legal name of the supplier.
The supplier details page is displayed.
3. Select the **Documents** tab and do one of the following.

| To | Do this |
|-------------------|---|
| Upload a document | <p>a. Select New.</p> <p>b. On the Create New Documents form, fill in the fields. For a description of the field values, see Create New Documents form.</p> <p>c. Select Submit.</p> |

| To | Do this |
|------------------------------------|--|
| Download a document | <p>a. In the Name column, select the link to a document to open it.</p> <p>b. Select Download Document.</p> |
| Remove a document | <p>a. Select the check box next to the document name.</p> <p>b. Select Remove.</p> |
| Upload a new version of a document | <p>a. In the Name column, select the link to a document to open it.</p> <p>b. Do one of the following:</p> <ul style="list-style-type: none"> ▪ Select Upload Version. ▪ Select the Versions tab and then select New. <p>c. On the Create New Versions form, under Attachments, select Browse to upload the new version of the document.</p> <p>d. Select Save.</p> <p>A new version of the document is created and displayed in the Versions tab.</p> |

Accept an incoming chat request from the Source-to-Pay Workspace

As a supplier fulfiller, accept an incoming chat request from the Supplier Manager Workspace Inbox to start a chat session with a supplier contact.

Before you begin

Role required: sn_slm.owner

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Select the Inbox icon ().
3. Select **Available** from **Status** to indicate that you are available to accept the incoming chat request.
4. When a chat comes through the chat queue, select **Accept**.

You are automatically connected to the supplier contact in the chat queue. The Active Chat panel displays a pre-chat message acknowledging the chat request. You can review the information before you enter a response in the Active Chat panel.

A new interaction record is created and chat details are displayed on the **Details** tab of the interaction. For more information, see [Virtual Agent interaction records](#) .

Interaction tabs

| Tab | Description |
|---------|---|
| Details | Displays details about the interaction. |

| Tab | Description |
|----------------------|---|
| Supplier Information | Displays information about the supplier. For more information, see Supplier Information tab . |
| User's Tasks | When a supplier contact communicates with an agent through chat, phone call, or SMS, the User's Task related list shows the agent all of the other tasks that have been created for the supplier contact. |
| Supplier cases | Shows all the supplier cases associated with the interaction record. |

5. From the Active Chat panel, interact with the contact who initiated the chat through the **Public Chat** tab or chat with another user for any information related to the current chat queries through the **Private Chat** tab.

From the Agent Chat panel, do the following:

- To chat, enter a message and select the send icon (▶).
- To send an attachment, select the send attachment to chat icon (📎), select the file to attach, and select Open.
- To transfer the chat to another available agent, select the transfer to agent icon (👤) and select the agent name.

6. Perform additional tasks by selecting the following UI actions:

| UI action | Description |
|--|--|
| Create Supplier Case | Creates a new supplier case. For more information, see Create New Supplier Case form . |
| End Chat | Ends the current chat session. |
| Save | Saves any updates you made to the chat information. |
| More actions icon  | Select Associate Record to associate an interaction to a supplier case. |

Interaction Management in Source-to-Pay Workspace

Interactions are a centralized location for all communication channels available in Source-to-Pay Workspace. Interaction Management involves managing supplier-related queries from different sources, such as an email, chat, message, or SMS.

For more information, see [Interaction Management in Source-to-Pay Workspace](#).

Composing emails with predefined content from the Source-to-Pay Workspace

Insert predefined content into the message body of emails that you send from the email client in the Source-to-Pay Workspace.

You can use this feature to compose and send emails directly from a supplier case or a supplier task. To open the email client, select **Compose Email** from the more actions icon



(ⓘ) from a supplier case or a supplier task. A draft email appears with pre-populated data in the **Cc** and **Subject** fields. The **Cc** field is auto-populated with the email address of the

contact who opened the case. The **Subject** field is auto-populated with the case number and issue description.

Using quick messages

In the email client, you can select a quick message to fill the email body with the content that is specified in the quick message. After you define one or more quick messages, the Quick Messages contextual pane appears in the email client so that you can draft an email with a quick message of your choice.

By default, the following quick messages are provided for the following supplier records:

- Supplier case: Standard closure response, case progress, primary contact information, Knowledge Base article information, and additional information.
- Supplier task: Standard closure response, case progress, primary contact information, Knowledge Base article information, and additional information.

i Note: The quick message templates contain placeholder text that you must replace with the appropriate text.

For more information on how to create a quick message, see [Define a quick message](#).

Using response templates

Resolve cases faster and more efficiently with response templates. Response templates are reusable messages that can be copied to draft emails to provide quick and consistent messages to users.

Open the response template that you want to use for your email and select **Copy to clipboard**. You can now paste the contents of this template at the location of the cursor. It doesn't replace the content that you created before selecting the response template. To replace existing content with a response template content, highlight the text to replace and then select a response template.

For more information on how to work with response templates, see [Create or modify a response template](#).

Viewing draft emails

After you save the emails as draft, you can view the draft emails by selecting the **Draft Emails** tab on the supplier case or supplier task. Alternatively, you can view the draft emails by selecting the list icon () and selecting the **Case Draft Emails** or **Task Draft Emails** sub-modules under the **Draft Emails** module.

Emailed message in activity log

After your email is composed, sent, and received by the intended recipient, you can see the email message in the **Activity** section of the supplier case or task. You can continue to work with this email from the activity log.

Email composer configuration

To view the **Compose Email** option in the More Actions menu, and to view your emailed message in the activity log of a supplier case or supplier task in Source-to-Pay Workspace, ensure that you add the role required to access this feature in the User Interface Properties page. For more information, see [Configure access to the compose email feature](#).

Configure access to the compose email feature

Configure the role required to access the compose email feature that enables you to send emails directly from a supplier case or supplier task in the Source-to-Pay Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Properties > UI Properties**.
2. In the **Roles that can view email in the Activity formatter when including "Sent/Received Emails"** property field, enter `itil, sn_slm.fulfiller`.
This property contains the `itil` role by default. Add the `sn_slm.fulfiller` role name after the `itil` role, separated by a comma.
3. Select **Save**.

Communicate using emails from the Source-to-Pay Workspace

Compose and send emails directly from a supplier case or a supplier task in the Source-to-Pay Workspace.

Before you begin

Ensure that you have configured access to the compose email feature. For more information, see [Configure access to the compose email feature](#).

Role required: admin

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Select the list icon ().
3. On the **Lists** tab, under the Cases or Tasks module, open a supplier case or a supplier task, respectively.
4. Click the more actions icon () and select **Compose Email**.
5. Do one of the following:
 - To insert templated content into the email body using quick messages:
 - a. Click the quick messages icon () and select an appropriate quick message that you want to use.
 - b. Select **Insert**.
 - To insert templated content into the email body using response templates:
 - a. Click the response templates icon () and select an appropriate response template that you want to use.
 - b. Select **Copy to clipboard**.
 - c. Paste the content in the email body.
6. Do one of the following:

- To send the email instantly, select **Send Email**.
- To save the email as draft to send later, select **Save as draft**.

- Note:** You can view the draft emails by doing one of the following:
- Selecting the **Draft Emails** tab on the supplier case or supplier task.
 - Clicking the list icon () , selecting the Case Draft Emails list or Task Draft Emails sub-modules under the Draft Emails module, and opening a draft email.

Using Supplier Collaboration Portal

As a supplier contact, you can self-register to the Supplier Collaboration Portal, complete your assigned tasks, and raise requests using the supplier catalog.

Invite a member to access the Supplier Collaboration Portal

Invite supplier contacts to access the Supplier Collaboration Portal so that they can raise requests and start working on their assigned tasks.

Before you begin

Before performing this task, ensure that you do the following:

- Configure self-registration for external users. For more information, see [Configure self-registration for external users](#).
- Map the external user registration configuration to the Supplier Collaboration Portal. For more information, see [Map the self-registration configuration to Supplier Collaboration Portal](#).
- Configure the **sn_supplier.external_registration_profile_id** system property to ensure that registration emails are sent to external users. For more information, see [Configure system property to send registration emails to external users](#).

Role required: sn_slm.contact

About this task

The **Invite** option in the Contacts widget is available only to the primary supplier contact and the supplier administrator. Only the primary supplier contact and the supplier administrator can invite new members to access the Supplier Collaboration Portal. For more information about setting a user as the primary contact, see [Set a user as the primary contact](#).

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the My contacts widget, select **Invite**.
The Invite contacts dialog box is displayed.
3. In the **Contact emails** field, enter the email address of the contact that you want to invite.
You can invite more than one contact by entering multiple email addresses separated by a comma.
4. Select **Add**.
5. From the **Role** list next to each email address, select one of the following options:
 - **Contact**: Manages assigned files
 - **Primary**: Manages all contacts and files

6. Select **Send invites.**

A registration email is sent to the email addresses.

What to do next

The invited member receives an email with the registration link to the Supplier Collaboration Portal. For more information, see [Register to the Supplier Collaboration Portal as an invited member](#).

Register to the Supplier Collaboration Portal as an invited member

As an invited member, you can register and get access to the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.contact

About this task

After a supplier contact invites you as a member, you receive an email with the registration link to the Supplier Collaboration Portal.

Procedure

1. Select the registration link in the email.
2. On the Supplier Self Registration form, fill in the fields.

i Note: First name, Last name, and Email are required fields.

3. Select the option to agree to the privacy policy and terms and conditions.

4. Select **Sign Up**.

A verification email is sent to the email address that you provided.

5. Select the link in the email to verify your email address.

After you verify your email address, you see this message: Our team is verifying your details. You should receive a confirmation within a few days.

After your details have been verified, the supplier manager approves the self-registration request and you receive a welcome email.

i Note: If the supplier manager invites a contact, then no approval is required for the new user registration case.

6. In the welcome email, select **Re-set Password** to reset your password.

Result

Your registration is complete. You can now log in to the Supplier Collaboration Portal.

Supplier contact self-registration

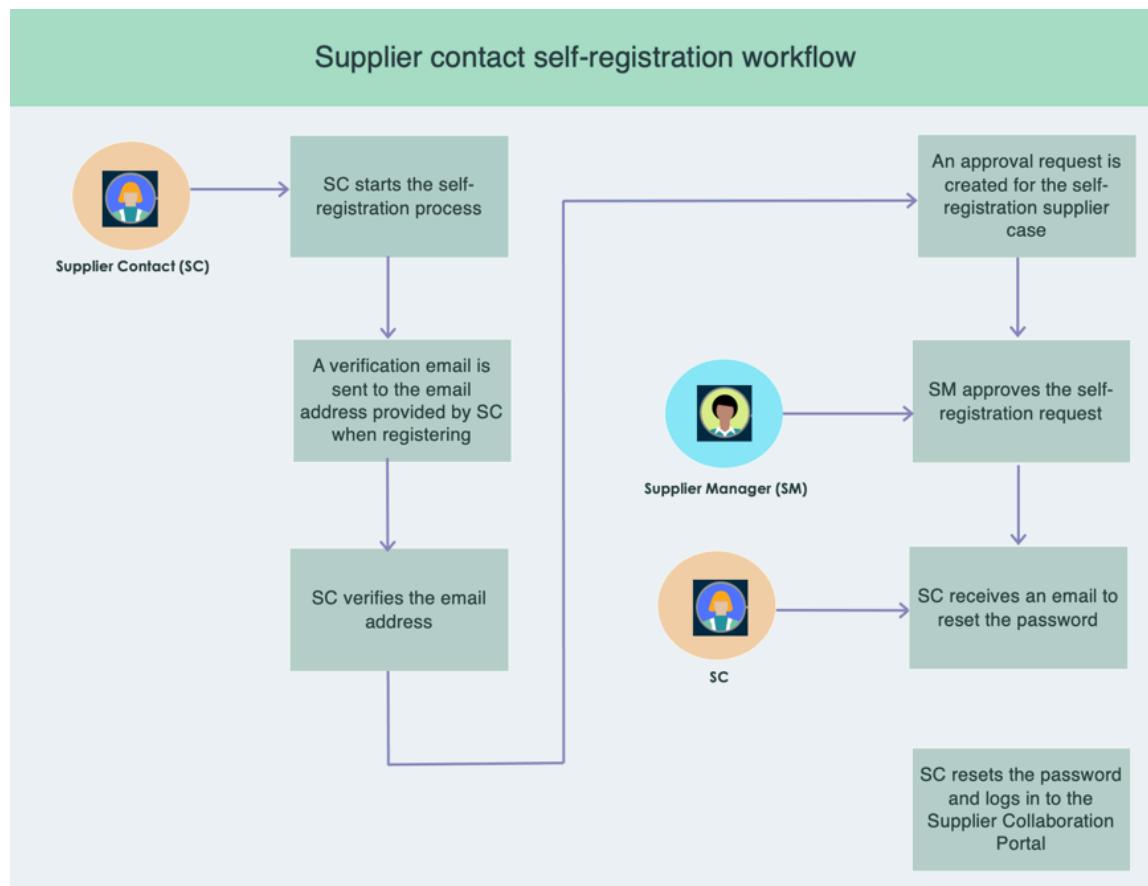
Supplier contacts can self-register to the Supplier Collaboration Portal and start working on the assigned tasks.

How supplier contact self-registration works

The process of self-registering to the Supplier Collaboration Portal involves a series of tasks that the supplier contact must complete.

Workflow of the self-registration process

The following figure shows the workflow of the supplier contact self-registration process.



In this workflow:

1. The supplier contact starts the self-registration process by selecting **Register** on the Supplier Collaboration Portal home page. For more information, see [Self-register to the Supplier Collaboration Portal](#).
2. A verification email is sent to the email address provided when registering.
3. The supplier contact verifies the email address.
4. An approval request is created for the self-registration supplier case.
5. The supplier manager approves the self-registration request. For more information, see [Approve a request associated with a supplier case from the Source-to-Pay Workspace](#).
6. The supplier contact receives an email to reset the password.
7. The supplier contact resets the password and logs in to the Supplier Collaboration Portal.

[Self-register to the Supplier Collaboration Portal](#)

Supplier contacts can self-register themselves to the Supplier Collaboration Portal without the help of an administrator.

Before you begin

Role required: sn_slm.contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.

For example, <https://example.com/supplier>.

2. Select **Register**.

3. On the Account sign up form, fill in the fields.

i Note: First name, Last name, and Email are required fields.

4. Select the option to agree to the privacy policy and terms and conditions.

5. Select **Sign Up**.

A verification email is sent to the email address that you provided.

6. To verify your email address, select the **Verify Account** link in the email.

After you verify your email address, you see this message: Our team is verifying your details. You should receive a confirmation within a few days.

After your details have been verified, the supplier manager must approve the self-registration request.

After the supplier manager approves the self-registration request, you receive a welcome email.

i Note: If the supplier manager invites a contact, then no approval is required for the new user registration case.

7. In the welcome email, select **Set a new password** to set a new password for your account.

Result

Your self-registration is complete. You can now log in to the Supplier Collaboration Portal.

Managing supplier contacts from the Supplier Collaboration Portal

Manage and remove contacts, update the contact's email address, elevate access or remove elevated access to contacts from the portal.

Elevate a contact to the primary contact role from the Supplier Collaboration Portal

Elevate a contact to the primary contact role to enable them to access and manage all the contacts and tasks in the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.contact or sn_slm.admin

About this task

The **Elevate access** option is available only to the primary supplier contact and the supplier administrator.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.

For example, <https://example.com/supplier>.

2. In the Contacts widget, select a contact to open the contact's profile page.

3. Select **Elevate access.**

The Elevate access dialog box is displayed.

4. In the **Comments field, enter the reason why you want to make this contact the primary contact.****5. Select **Submit**.**

The Primary contact column is set to **true** for this contact on the Vendor Contacts page, and the contact is elevated to the primary contact role.

Restrict the primary contact role for a contact from the Supplier Collaboration Portal

Restrict the primary contact role for a contact to prevent them from accessing all the contacts and tasks in the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.contact or sn_slm.admin

About this task

The **Restrict access** option is available only to the primary supplier contact and the supplier administrator.

Procedure**1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.**

For example, <https://example.com/supplier>.

2. In the Contacts widget, select a contact to open the contact's profile page.**3. Select **Restrict access**.**

The Restrict access dialog box is displayed.

4. In the **Comments field, enter the reason why you want to restrict the primary contact role for this contact.****5. Select **Submit**.**

The Primary contact column is set to **false** for this contact on the Vendor Contacts page, and the contact no longer has the primary contact role.

Reassign tasks to a different contact from the Supplier Collaboration Portal

Reassign a task to a different contact in the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.contact or sn_slm.admin

About this task

The **Reassign** option is available only to the primary supplier contact and the supplier administrator.

The **Reassign** option is displayed only for the following task types:

- Mark Complete
- View Link
- Play Video
- Catalog Item
- Checklist

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. Do one of the following.

| To | Do this |
|---|--|
| Open a task from the portal header | <p>a. Select one of the following:</p> <ul style="list-style-type: none"> ▪ My Tasks The My To-dos page is displayed. ▪ All Tasks The Supplier Task List is displayed. <p>b. Select the task that you want to reassign to a different contact.</p> |
| Open a task from the My active items widget | Select the Tasks tile, which opens the The My To-dos page. |
| Open a task from the My tasks widget | Select the task that you want to reassign to a different contact. |

3. Select **Reassign**.
4. In the **Assign to** field, search for and select the contact that you want to reassign this task to.
5. Select **Submit**.
The task is reassigned to the selected contact.

Update the supplier contact email from the Supplier Collaboration Portal

Update the email address of the contacts to ensure that they don't miss any email notifications.

Before you begin

Role required: sn_slm.contact

About this task

The **Update email** option is available only to the primary supplier contact and the supplier administrator.

- Note:** Ensure that the email domain of the supplier already exists in the sn_supplier_email_domain table.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the Contacts widget, select a contact to open the contact's profile page.
3. Select **Update email**.

4. In the **Email** field, enter or update the email address of the contact.

5. Select **Submit**.

Remove a supplier contact from the Supplier Collaboration Portal

Remove a supplier contact that you no longer require from the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.contact or sn_slm.admin

Procedure

To remove a supplier contact from the Supplier Collaboration Portal, do one of the following:

| To | Do this |
|---|--|
| Remove a supplier from the My contacts widget. | Perform the steps described in Remove a supplier contact from the My contacts widget . |
| Remove a supplier contact using the supplier catalog. | Perform the steps described in Remove a supplier contact using the supplier catalog . |

Remove a supplier contact from the My contacts widget

Remove a supplier contact that you no longer require.

Before you begin

Role required: sn_slm.contact or sn_slm.admin

About this task

The **Remove Contact** option is available only to the primary supplier contact and the supplier administrator.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.

For example, <https://example.com/supplier>.

2. In the My contacts widget, do one of the following:

- Select a contact to open the contact's profile page, and then select **Remove Contact**.

- Select the cross icon () next to the name of the contact you want to remove. The Remove Contact dialog box is displayed.

3. In the **Delegate tasks to** field, search for and select a contact to whom you want to reassign the tasks that are currently assigned to the contact being removed.

4. In the **Comments** field, enter the reason for removing the contact.

5. Select **Remove**.

The contact is removed and all the tasks that were assigned to that contact are reassigned to the alternate contact.

Raising requests from the Supplier Collaboration Portal

You can raise requests using the supplier catalog by selecting **Raise a request** in the Supplier Collaboration Portal header.

The following catalog items are available in the supplier catalog:

- Add or remove location
- Ask a question
- Submit an idea
- Submit an issue
- Update banking details
- Update profile details
- Something else

Add or remove a supplier location using the supplier catalog

Submit a request to add a new supplier location or remove an existing one to keep the supplier information up to date.

Before you begin

Role required: sn_slm.contact

About this task

- If a supplier has multiple locations, at least one location should be set as headquarters.
- If a new supplier location is set as headquarters (HQ) or if any updates are made to the existing HQ supplier location, the location details of the HQ supplier location is updated in the supplier record.
- When you update the supplier location details in a supplier record, the location details are updated in the supplier location record as well.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.

For example, <https://example.com/supplier>.

2. In the portal header, select **Raise a request**.

3. Under the General category, select the **Update location details** catalog item.

4. In the Add new or remove drop-down list, select one of the following:

- **Add location**
- **Remove location**

5. In the **Select a location** search field, search for and select a supplier location.

Note: You cannot remove a location whose category is set to **Headquarters**.

6. From the **Category** drop-down list, select a category for the supplier location.

- **Contracting address**
- **Delivery address**
- **Facility (default)**
- **Headquarters**
- **Invoice address**
- **Service center**

You can select multiple values from the choice list.

7. If you do not find the required supplier location in the **Search a location** search field, select the **Add new** check box.
8. On the Supplier Location form, fill in the fields.
For a description of the field values, see [Add New Location form](#).
9. Select **Submit**.
The application creates a case and assigns it to the supplier manager for review and approval.

After the supplier manager approves the case, the supplier record is updated accordingly.

Add a supplier contact using the supplier catalog

Add the supplier contacts so that they can access the Supplier Collaboration Portal and start working on the assigned tasks.

Before you begin

Role required: sn_slm.contact or sn_slm.admin

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select **Raise a request**.
3. Under the General category, select the **Enroll a new user** catalog item.
4. Select **Add**.
The Add Row dialog box is displayed.
5. In the **Email** field, enter the email address of the contact.
6. From the Primary contact choice list, select one of the following:
 - **Yes**: Select this option to specify that the contact you are adding is a primary contact.
 - **No**: Select this option to specify that the contact you are adding is not a primary contact.
7. Select **Add**.
8. Repeat steps 4 through 7 to add additional contacts in multiple rows.
9. Optional: To remove all the added rows for contacts, select **Remove All**.
A confirmation message is displayed.
10. Optional: Select **Remove**.
All the supplier contact rows are removed.
11. Select **Submit**.
The application creates a case of type Enroll new supplier user and assigns it to the supplier manager to take the appropriate action.

Remove a supplier contact using the supplier catalog

Remove a supplier contact that you no longer require.

Before you begin

Role required: sn_slm.contact or sn_slm.admin

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.

2. In the portal header, select **Raise a request**.

3. Under the General category, select the **Deactivate user account** catalog item.

4. In the **Contact** field, search for and select the contact you want to remove.

5. In the **Delegate tasks to** field, search for and select a contact to whom you want to reassign the tasks that are currently assigned to the contact being removed.

6. In the **Reason for offboarding** field, enter the reason for removing the contact.

7. Select **Submit**.

The application creates a case of type Offboard supplier contact and assigns it to the supplier manager to take the appropriate action.

Ask a question using the supplier catalog

Submit a question that you need an answer for.

Before you begin

Role required: sn_slm.contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.

2. In the portal header, select **Raise a request**.

3. Under the General category, select the **Ask a question** catalog item.

4. In the **Question** field, enter the question that you need an answer for.

5. To add attachments, such as documents and image files, to the request, select the add attachments icon ().

6. Select **Submit**.

The application creates a case of type General inquiry and assigns it to the supplier manager to take the appropriate action.

Submit an idea using the supplier catalog

Submit an idea you would like to share.

Before you begin

Role required: sn_slm.contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.

2. In the portal header, select **Raise a request**.

3. Select the **Submit an idea** catalog item under the General category.

4. In the **Description** field, describe the idea you want to share.

5. Select the Add attachments icon () to add attachments, such as documents and image files, to the request.
6. Select **Submit**.
The application creates a case and assigns it to the supplier manager to take appropriate action.

Submit an issue using the supplier catalog

Submit an issue that you need help with.

Before you begin

Role required: sn_slm.contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select **Raise a request**.
3. Under the General category, select the **Submit or report an issue** catalog item.
4. In the Urgency drop-down list, select one of the following:
 - **High**
 - **Medium**
 - **Low**
5. In the **Description** field, describe the issue that you need help with.
6. To add attachments, such as documents and image files, to the request, select the add attachments icon ().
7. Select **Submit**.
The application creates a case and assigns it to the supplier manager to take the appropriate action.

Update banking details using the supplier catalog

Keep the banking information up to date to ensure timely payments without any delays.

Before you begin

Role required: sn_slm.contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select **Raise a request**.
3. Select the **Update banking details** catalog item under the General category.
4. On the Update banking details form, fill in the fields.
For more information about the form fields and descriptions, see [Update banking details form](#).
5. Select **Submit**.

The application creates a case and assigns it to the supplier manager for review and approval.

After the supplier manager approves the case, the banking details are updated in the supplier record.

Update company profile using the supplier catalog

Update the company profile when the details about your company change.

Before you begin

Role required: sn_slm.contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. Do one of the following:

- In the portal header, select **Raise a request**, and then select the **Update profile details** catalog item under the General category.
 - In the portal header, select **My Company**, and then select **Request Change** on the Company Profile page.
3. On the Update profile details form, fill in the fields.
For more information about the form fields and descriptions, see [Update profile details form](#).
 4. Select **Submit**.
The application creates a case and assigns it to the supplier manager for review and approval.
- After the Supplier Manager approves the case, the company profile details are updated in the supplier record.

Request elevated access

Submit a request to gain access to the privileges of the primary contact role.

Before you begin

Role required: sn_slm.contact

About this task

The Request elevated access catalog item is available only to the secondary contact role. A secondary contact is a user that has the Primary contact column set to **false** on the Vendor Contacts page.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select **Raise a request**.
3. Select the **Request an access change request** catalog item under the General category.
4. In the **Supplier** field, search for and select the supplier.

The **Supplier** field is auto-populated with the supplier name, but you can change its value, if required.

5. From the Urgency drop-down list, specify how soon you want the request to completed.
 - **High**
 - **Medium**
 - **Low**
6. In the **Reason for requesting elevation** field, enter the reason for making this request.
7. Select the add attachments icon () to add attachments, such as documents and image files, to the request.
8. Select **Submit**.

If more than one primary contact exists for a supplier, then approval tasks are created and assigned to all the primary contacts. When any one of the primary contacts approves or rejects the approval task from the My To-dos page, the approval tasks assigned to the other primary contacts are automatically canceled.

The secondary contact receives an email notification, regardless of whether the request is approved or rejected.

After the primary contact approves the request, the secondary contact role is elevated to that of the primary contact.

Request something else using the supplier catalog

Request something else if the available catalog items in the supplier catalog do not meet your needs.

Before you begin

Role required: sn_slm.contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select **Raise a request**.
3. Under the General category, select the **General inquiry** catalog item.
4. From the Urgency drop-down list, select one of the following:
 - **High**
 - **Medium**
 - **Low**
5. In the **Requested for** field, enter the name of the person or organization that this request is for.
6. In the **What can we help you with?** field, enter the details explaining what you need help with.
7. Select **Add Attachments** to upload any relevant images or documents.
8. Select **Submit**.

The application creates a case and assigns it to the supplier manager for review and approval.

After the supplier manager approves the case, the supplier record is updated accordingly.

Viewing supplier contact tasks from the Supplier Collaboration Portal

View the tasks that are assigned to you and other supplier contacts.

Tasks are of the following types:

- Mark Complete: Mark the task as complete.
- View Link: Open a link to complete the task.
- Play Video: Play a video to complete the task.
- E-Signature: Sign documents electronically to complete to task.
- Catalog Item: Submit a catalog item to complete the task.
- Survey: Take a survey to complete this task.
- Checklist: Complete a checklist to complete the task.
- Upload Document: Upload a document to complete the task.

Viewing your tasks

The My To-dos page lists all the tasks that are assigned to the logged-in user.

To open the My To-dos page, do one of the following on the Supplier Collaboration Portal home page:

- In the Supplier Collaboration Portal header, select **My Tasks**.
- (If you are a primary contact) In the Supplier Collaboration Portal header, select **Tasks** and then select **My Tasks**.
- In the My active items widget, select **Tasks**.

My To-dos page

Home > To-dos

My To-dos

| Open | Completed |
|--|-----------|
| test data for checklist STASK0001017 - Open <small>Overdue 64 days</small> | |
| test data for upload document STASK0001018 - Open <small>Overdue 64 days</small> | |
| Task to complete this consignment STASK0001005 - Open <small>Due in 1 day</small> | |

Task to complete this consignment
STASK0001005 - Open
Due in 1 day

Supplier Case: SCASE0001003

Details **Activity**

Complete

The My To-dos page has the following tabs:

- **Open:** Lists all the to-dos that are open.
- **Completed:** Lists all the to-dos that have been completed.

Selecting a to-do displays the following tabs in the To-dos summary section:

- **Details:** Displays details of the selected task.

Note: The information displayed on this tab varies depending on the task type.

- **Activity:** Displays a chronological record of the updates made to the to-do since it was created. To add your comments to the activity stream, select **Post**. Click the Add attachments icon (📎) to add attachments, such as documents and image files, to the to-do.

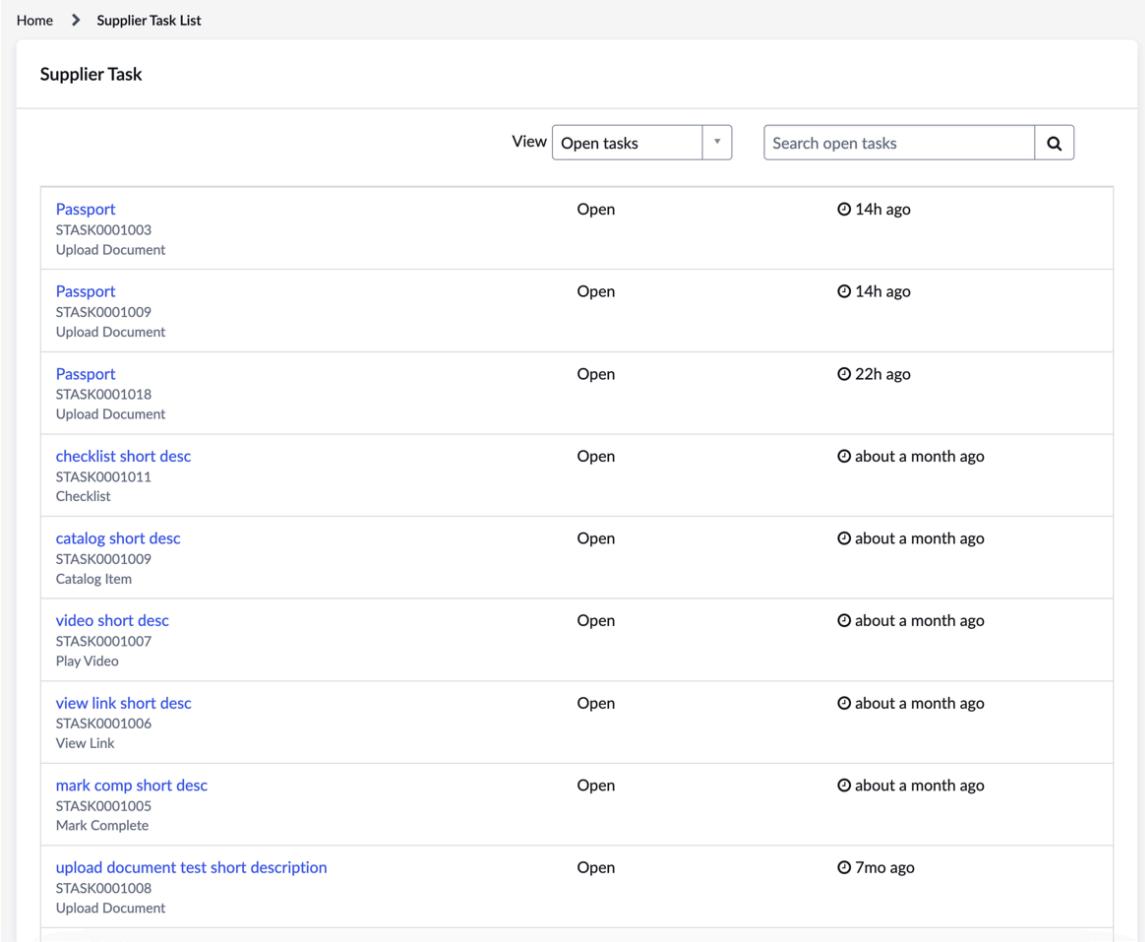
Viewing all the tasks

The Supplier Task List page displays both the tasks assigned to you and the tasks assigned to other contacts.

To open the Supplier Task List page, in the Supplier Collaboration Portal header, select **Tasks** and then select **All Tasks**.

Note: The **All Tasks** option is available only to the primary supplier contact and the supplier administrator.

Supplier Task List page



The screenshot shows a list of tasks on a "Supplier Task" page. At the top, there is a navigation bar with "Home" and "Supplier Task List". Below the navigation, there is a search bar labeled "Search open tasks" with a magnifying glass icon. The main area contains a table with the following data:

| | | View | Open tasks | Search open tasks |
|--|---|------|---------------------|-------------------|
| | Passport STASK0001003 Upload Document | Open | ⌚ 14h ago | |
| | Passport STASK0001009 Upload Document | Open | ⌚ 14h ago | |
| | Passport STASK0001018 Upload Document | Open | ⌚ 22h ago | |
| | checklist short desc STASK0001011 Checklist | Open | ⌚ about a month ago | |
| | catalog short desc STASK0001009 Catalog Item | Open | ⌚ about a month ago | |
| | video short desc STASK0001007 Play Video | Open | ⌚ about a month ago | |
| | view link short desc STASK0001006 View Link | Open | ⌚ about a month ago | |
| | mark comp short desc STASK0001005 Mark Complete | Open | ⌚ about a month ago | |
| | upload document test short description STASK0001008 Upload Document | Open | ⌚ 7mo ago | |

On the Supplier Task List page, you can do one of the following:

- In the **View** drop-down list, select one of the following:
 - **Open tasks:** Displays the tasks that are open.
 - **Closed tasks:** Displays the tasks that have been closed.
- Search for a task in the search field.

On the Supplier Task List page, select the link to a task to view details about that task.

Approve or reject a task

Review the tasks that are assigned to you and approve or reject them.

Before you begin

Role required: sn_supplier_contact or admin

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select **My Tasks**.
The My To-dos page is displayed.
3. On the **Open** tab, select a task.
4. In the **Do you want to approve the following:** field, enter your comments and select **Approve** or **Reject**.

View or update your user profile from the Supplier Collaboration Portal

Update your personal profile in the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.contact

About this task

Keep your personal information accurate and up to date so that a supplier manager can communicate with you via phone or email.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select your user name, and then select **Profile**.
3. To add a picture to your profile, select **Upload Picture** and select an image.
4. To update the personal information in your profile, including company, location, email address, and contact information:
 - a. Select the field that you want to update.
 - b. Enter the information in the pop-up window.
 - c. Select **Save**.
5. Turn on the **Accessibility enabled** toggle switch to enable accessibility.

6. From the Time zone drop-down list, select a time zone.

7. Select **Refresh to see changes**.

View all your requests from the Supplier Collaboration Portal

View all the requests that you've raised, to whom they are assigned, and their status.

Before you begin

Role required: sn_supplier_contact

About this task

The My Requests page displays all the requests that you've raised. For more information about raising requests, see [Raising requests from the Supplier Collaboration Portal](#).

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.

2. Do one of the following:

- In the portal header, select **My Requests**.
- In the My active items widget, select **Requests**.

The My Requests page is displayed.

| Request | State | Updated |
|--|-----------|-----------|
| Request changes to the supplier master record for your company. SCASE0001012 4 - Low | In review | ⌚ 2mo ago |
| Request Something SCASE0001017 4 - Low | In review | ⌚ 2mo ago |
| Request Something SCASE0001015 4 - Low | In review | ⌚ 2mo ago |
| Request Something SCASE0001014 4 - Low | In review | ⌚ 2mo ago |
| Request Something SCASE0001016 4 - Low | In review | ⌚ 2mo ago |
| Request to update banking details SCASE0001011 4 - Low | In review | ⌚ 2mo ago |

3. Do one of the following:

- In the View drop-down list, select one of the following:

- **Open requests:** Displays the requests that are open.
- **Closed requests:** Displays the requests that have been closed.

- Search for a request in the search field.

4. To view details about that request, select the link to a request under the Request column.

Home > Request

Number: SCASE0001035

Created: 5h ago Updated: 3h ago State: Work in progress

Get an answer

Assigned to: Deanna Gerbi (DG)

Opened by: Ryan Giggs (RG)

Case progress:

- Open
- Work in Progress
- Resolved

Activity Attachments Task

Type your message here... Post

Ryan Giggs
SCASE0001035 Created 5h ago

Start

Home > Request

Number: SCASE0001018

State: Open Assigned to: Deanna Gerbi Updated: 5h ago Created: 5h ago

Location change request from Adobe Systems

Assigned to: Deanna Gerbi (DG)

Opened by: Ryan Cook (RC)

Case progress:

- Open
- Work in Progress
- Resolved

Case details Activity Attachments Task

Add new or remove
Add location

Select a location
100 South Charles Street, Baltimore,MD

Add new
false

Category
Facility

The Supplier Ticker page shows details about the request, such as request title, name of the person who opened the request, name of the person to whom the request is assigned, and a case progress bar.

Note: Any request that you raise automatically creates a case.

The Case progress bar shows any of the following stages depending on the status of the case.

- Open: The case is open.
- Work in Progress: The case is in progress.
- Resolved: The case has been resolved.

5. To work on the request, select any of the following tabs:

- **Case details:** View the details about the case.
- **Activity:** Enter your comment in the text field and select **Post**.

You can add comments to communicate with the supplier manager to request clarifications or ask questions related to the request.

- **Attachments:** Select the add attachments icon (📎) to attach documents or images to the case.
- **Task:** Do one of the following:
 - In the Assigned to drop-down list, select one of the following:
 - **All:** Displays all the requests.
 - **Assigned to me:** Displays only the requests that are assigned to you.
 - In the State drop-down list, select one of the following:
 - **Open:** Displays the requests that are open.
 - **Closed:** Displays the requests that have been closed.

View supplier locations from the Supplier Collaboration Portal

As a supplier contact, view the locations of a supplier in the Supplier Collaboration Portal.

Before you begin

Role required: sn_supplier_contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select **My Company**.
3. On the Company Profile page, the Locations section displays the details about your locations.
Do one of the following:
 - Select the link to a supplier to view the location details of that supplier.
 - To view a list of all of your payment information on the Supplier Locations page, select **View all**.

View supplier payment information from the Supplier Collaboration Portal

As a supplier contact, view the payment information of a supplier in the Supplier Collaboration Portal.

Before you begin

Role required: sn_supplier_contact

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the portal header, select **My Company**.
3. On the Company Profile page, the Payment Informations section displays the details about your payment information.
Do one of the following:
 - Select the link to a bank name to view its details.
 - To view a list of all of your payment information on the Payment Informations page, select **View all**.

Start a chat session from the Supplier Collaboration Portal

As a supplier contact, you can start a chat session from the Supplier Collaboration Portal and interact with supplier fulfillers.

Before you begin

Role required: sn_slm.contact

About this task

By starting a chat session, supplier contacts can interact directly with supplier fulfillers and get immediate responses to their queries or issues.

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. Select the Open chat window icon () to start a chat session.
3. Select **Show me everything**, and then select **Live Agent Support**.
The "Routing you to a live agent..." message is displayed.

The maximum wait time to connect with a live agent is 2 minutes.

After a live agent accepts your chat request, the "Agent has joined" message is displayed in the chat window.
4. To chat with the live agent, enter a message and select the send icon ().
5. To end the chat session, select the end chat icon ().

Manage documents from the Supplier Collaboration Portal

Manage documents by uploading, updating and downloading the required documents from the Supplier Collaboration Portal.

Before you begin

Ensure that you have created a supplier document configuration. For more information, see [Supplier Document Management](#).

Role required: sn_slm.contact or sn_slm.admin

Procedure

1. Navigate to the Supplier Collaboration Portal home page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. Do one of the following:

| To | Do this |
|--|--|
| Upload or download a document from the My Company page | <p>To upload a document:</p> <ol style="list-style-type: none"> In the portal header, select My Company. In the Documents widget, on the tile having the document name, select Upload. Browse for and select the document that you want to upload. <p>To download the document template:</p> <ol style="list-style-type: none"> In the portal header, select My Company. In the Documents widget, on the tile having the document name, select Get template. <p>Note: The document template specifies the expected format of the document that you must upload.</p> <p>To update an already uploaded document:</p> <ol style="list-style-type: none"> In the portal header, select My Company. In the Documents widget, select the three vertical dots icon (⋮) on the tile having the document name, and then select Update. Browse for and select the document that you want to upload. <p>To download a document:</p> <ol style="list-style-type: none"> In the portal header, select My Company. In the Documents widget, select the three vertical dots icon (⋮) on the tile having the document name, and then select Download. <p>Note: Access to the Documents widget on the My Company page is controlled by the user criteria you set on the Manage access tab when creating the supplier document configuration. For more information, see Create a supplier document configuration.</p> |
| Upload a document from | To upload a document: |

| To | Do this |
|--------------------|---|
| the My To-dos page | <p>a. Do one of the following:</p> <ul style="list-style-type: none"> ▪ In the portal header, select My Tasks. ▪ (If you're a primary contact) In the portal header, select Tasks and then select My Tasks. <p>The My To-dos page is displayed.</p> <p>b. Select the Open tab, select the to-do that you want to upload a document for.</p> <p>c. Select the Details tab and select the add attachments icon (📎) to add a document to the to-do.</p> <p>d. Select Complete.</p> |

Complete a risk assessment from the Supplier Collaboration Portal

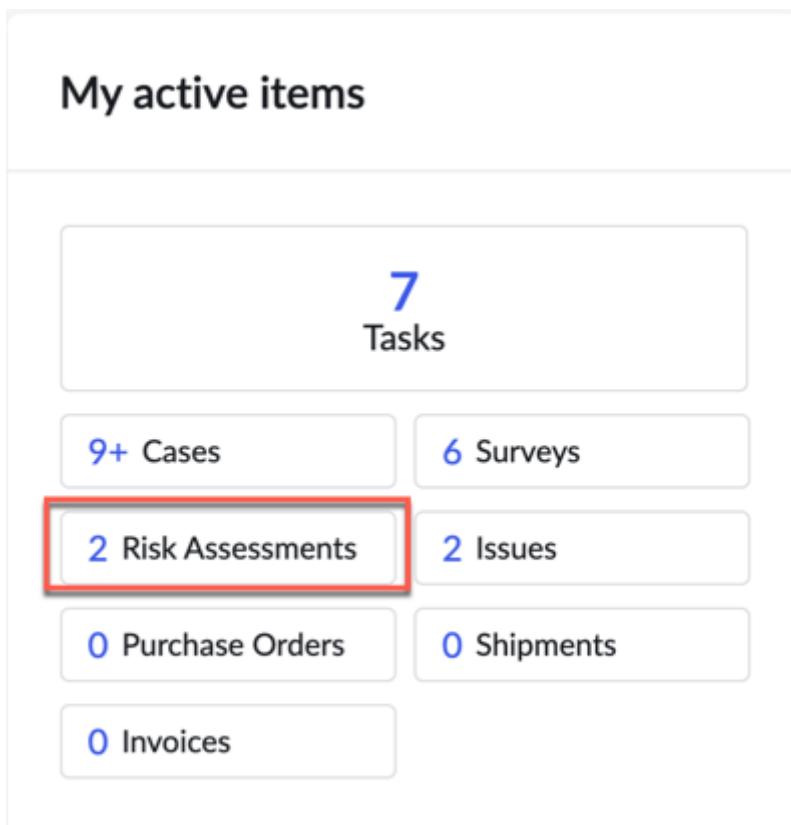
As a supplier contact, you can view and complete your assigned risk assessments to help the supplier manager in evaluating a supplier before onboarding them.

Before you begin

Role required: sn_slm.contact

Procedure

1. Go to the Supplier Collaboration Portal portal page by accessing your instance URL and adding a /supplier suffix.
For example, <https://example.com/supplier>.
2. In the My active items widget, select **Risk Assessments**.



3. The All Assessments page opens displaying a list of all the risk assessments.

Note: Supplier Lifecycle Operations integrates with Vendor Risk Management to enable you to quickly view and work on all the assigned risk assessments.

The screenshot shows the 'All Assessments' page in the ServiceNow interface. At the top, there are tabs for 'Open' (2) and 'Closed' (0). Below is a table with the following columns: Assessment, Entity, Status, Questionnaires, Document requests, Issues, and Due by. Two rows are listed:

| Assessment | Entity | Status | Questionnaires | Document requests | Issues | Due by |
|-------------------------------|----------------|--------|----------------|-------------------|------------|------------|
| Environmental Risk Assessment | Omnicon Vendor | New | 0/1 completed | 0/0 completed | 0/1 closed | 2021-11-20 |
| Cybersecurity Risk Assessment | Omnicon Vendor | New | 0/2 completed | 0/0 completed | 0/1 closed | 2021-11-20 |

The All Assessments page contains the **Open** and **Closed** tabs. Select each tab to view the open and closed assessments.

The All Assessments page has these columns.

- **Assessment:** List of risk assessments.
- **Entity:** The assessed supplier.
- **Status:** Status of the assessment.
- **Questionnaires:** Number of questionnaires completed.
- **Document requests:** Number of document requests completed.
- **Issues:** Number of issues closed.
- **Due by:** The date by which the assessment should be completed.

4. Under the Assessment column, select the link to an assessment to view more details.

For example, select the Cybersecurity Risk assessment.

The screenshot shows the 'Assessment Details' page for the 'Cybersecurity Risk Assessment'. At the top, there are tabs for 'Requests' (2), 'Issues' (0), and 'Tasks' (0). To the right, it says 'Due by: Saturday'. Below is a table with the following columns: Request, Type, Assigned to, Status, Progress, and Signature. Two rows are listed:

| Request | Type | Assigned to | Status | Progress | Signature |
|--|---------------|-------------------|-------------|----------------|-----------|
| Cloud Security General cloud security questionnaire. | Questionnaire | u | In Progress | 0/1 answered | Required |
| SIG Core 2021 Shared Assessments Standardized Information Gathering (SIG) questionnaire.Core 2021 | Questionnaire | u | In Progress | 0/152 answered | - |

The assessment details page contains the **Requests**, **Issues**, and **Tasks** tabs. Select each tab to view more details about requests, issues, and tasks related to the assessment.

5. Under the Request column, select the link to a request to view more details.

For example, select SIG Core 2021.

The screenshot shows the ServiceNow Supplier Central interface. At the top, there's a navigation bar with links for Procurement, Accounts Payable, Supply Chain, ESG, Support, and My Company. Below the navigation is a breadcrumb trail: Home > Omnicom > Cybersecurity Risk Assessment > SIG Core 2021. The main content area is titled "SIG Core 2021" and describes it as a "Shared Assessments Standardized Information Gathering (SIG) questionnaire.Core 2021". On the left, there's a sidebar with an "Import" section containing a cloud icon and a link to "Already have a completed SIG questionnaire (.xlsm)? Import". Below that is a "Sections" list with items A through L. The "A. Risk Management" section is currently selected. The main panel has tabs for "Questionnaire" and "Notes and Comments". Under "Questionnaire", there are two checkboxes: "Show follow-ups" and "Show unanswered questions". Below these are sections for "A. Risk Management" and "A.1 Is there a formalized risk governance plan that defines the Enterprise Risk Management program requirements?". This section includes "Yes" and "No" radio buttons. There are also "Additional Information" and "Maturity" fields. At the bottom of the main panel, there's a note: "A.2 Are there Subject Matter Experts and/or groups assigned to assess risk for different categories e.g., operational," followed by a large empty text area.

You can do the following:

- Navigate through the various sections on the left and enter the required information.
- Under Import, you can import an already completed questionnaire in XML format by selecting **Import**.
- The questionnaire is displayed on the **Questionnaire** tab. Select the **Notes and Comments** tab to enter any notes and comments.

6. To exit the questionnaire, select **Exit** or to save your responses, select **Save as Draft**.

After you exit or save the questionnaire, you return to the details page of the assessment that the request is associated with. In this example, you return to the Cybersecurity Risk Assessment page.

7. Select **Submit Assessment.**

Supplier Lifecycle Operations reference

Reference topics provide additional information about Supplier Lifecycle Operations, including lists and forms.

Create New Supplier Case form

Use the Create New Supplier Case form to enter supplier case details and provide resolution information.

Create New Supplier Case form

| Field | Description |
|------------------|--|
| Supplier Case | |
| Number | An auto-generated number that uniquely identifies the supplier case. |
| State | <p>The current state of the case. The choices are:</p> <ul style="list-style-type: none"> • Processing Case • Draft • In review • On Hold • Work in progress • Closed Canceled • Closed Rejected • Closed Completed |
| Case type | <p>The type of case. The choices are:</p> <ul style="list-style-type: none"> • Supplier support request • General inquiry • Banking information change request • Supplier information change request • Supplier location change request • Supplier issue • Conduct a risk assessment • Conduct a tiering risk assessment • Due diligence |
| Priority | Indicates how quickly you must complete the task based on its severity. |
| Supplier | The name of the supplier the case is for. |
| Assigned to | The name of the agent that the case is assigned to. |
| Requested by | The person who requested the case. |
| Due date | The date that the case must be completed. |
| Created | The date that the case is created. |
| Assignment group | Group to which the case is assigned to. |
| Channel source | Channel that was used to request this case; for example, email. |
| Watch list | Users who are notified when updates are made to the case. |

Create New Supplier Case form (continued)

| Field | Description |
|-------------------|---|
| Short description | Short description of the case. |
| Description | Detailed description of the case. |
| Summary Details | |
| Parent case | Parent case, if any, from which this case has been created, typically for reference purposes. |
| Related location | |
| Expected start | Expected start date of the invoice task. |
| Actual start | Actual start date of the invoice task. |
| Actual end | Actual end date of the invoice task. |
| Duration | Duration to complete this invoice task. |

Create a new task form

Use the Create a new task form to add a task to a supplier case.

Create a new task form

| Field | Description |
|-----------------------------|--|
| Select action type for task | Action type that defines the supplier task. The options are: <ul style="list-style-type: none"> • Mark Complete • View Link • Play Video • E-Signature • Catalog Item • Survey • Checklist • Upload Document |
| Supplier Case | Supplier case to associate this task with. |
| Assigned to | Person that you want to assign this task to. |
| Due date | Date that this task must be completed by. |
| Short description | Brief description about the task. |
| Action description | Description of the action type for the task. |

Add New Location form

Use the Add New Location form to provide details about the location of a supplier.

Add New Location form

| Field | Description |
|-----------------|--|
| Name | Name of the supplier location. |
| Street | The street address of the supplier location. |
| City | The city of the supplier location. |
| State/Province | The state of the supplier location. |
| Zip/Postal Code | The zip code of the supplier location. |
| Country | The country of the supplier location. |
| Latitude | The latitude coordinates of the supplier location. |
| Longitude | The longitude coordinates of the supplier location. |
| Category | <p>The category that the supplier location belongs to. The choices are:</p> <ul style="list-style-type: none"> • Contracting address • Delivery address • Facility (default) • Headquarters • Invoice address • Service center <p>You can select multiple values from the choice list.</p> |

Update banking details form

Use the Update banking details form to update the banking details of the supplier.

Update banking details form

| Field | Description |
|--------------------------|--|
| Bank Name | Name of the bank. |
| Primary account | <p>Option that indicates whether this account is the primary account.</p> <p>i Note: A supplier can have only one primary payment record at a given time.</p> |
| Beneficiary name | Name of the beneficiary. |
| Account number | Account number of the beneficiary. |
| Country | Country the bank is located in. |
| BSB code (For Australia) | Bank State Branch is a six-digit number that is used to identify a bank code and its associated branch in Australia. |

Update banking details form (continued)

| Field | Description |
|---|--|
| | This field becomes available only if you select Australia in the Country field. |
| IFSC code (For India) | Indian Financial System Code (IFSC) is a unique 11-digit alphanumeric code that is used for online fund transfer transactions in India. This field becomes available only if you select India in the Country field. |
| Currency | Currency of the country. |
| Routing information - Wire/ACH (For US) | Unique, nine-digit number used to identify banks and financial institutions. |
| IBAN | International Bank Account Number used for international payments. |
| SWIFT code (BIC) | Bank Identifier Code (also known as SWIFT code) of the bank. |
| Bank account proof | Option to upload the bank account proof document. Select Required - Upload to upload the document. |

Update profile details form

Use the Update profile details form to update the details of the company profile.

Update profile details form

| Field | Description |
|-------------------------|---|
| Basic Profile | |
| Legal name | Legal name of the supplier. |
| Company description | Detailed description of the supplier. |
| Website | URL of the company website. |
| Country of registration | Name of the country where the supplier is registered. |
| Tax ID | Tax identification number of the supplier. |
| DUNS number | Unique numeric identifier for every supplier. |
| Year founded | Year that the company was founded. |
| Number of employees | Number of employees that the supplier has. |
| Industry | Industry type of the supplier. |
| Publicly traded | Indicates whether the company is publicly traded. The choices are: <ul style="list-style-type: none">• Yes• No |
| Stock symbol | Stock symbol of the supplier. |

Update profile details form (continued)

| Field | Description |
|--|---|
| Primary phone number | Primary phone number of the supplier. |
| Any other attribute(s) or detail(s) you wish to let us know? | Additional information about the company. |

Onboard a Supplier form

Use the Onboard a Supplier form to provide details about the supplier that you want to onboard.

Onboard a Supplier form

| Field | Description |
|----------------------------|---|
| Supplier Name | Name of the supplier. |
| Supplier DUNS | Unique numeric identifier for every supplier. |
| Primary contact first name | First name of the supplier primary contact. |
| Primary contact last name | Last name of the supplier primary contact. |
| Primary contact email | Email of the supplier primary contact. |
| Primary contact title | Title of the supplier primary contact. |

Create New Documents form

Use the Create New Documents form to provide details about the new document you want to create.

The Create New Documents form contains the Documents and Access Settings sections. For more information about document access settings, see [Document security and access](#).

Create New Documents form

| Field | Description |
|------------------|--|
| Documents | |
| Name | Name of the document. |
| Owner | Name of the document owner. |
| Reviewers | Name of the document reviewers, if any. |
| Template | Option to determine whether the document is a template. |
| Department | Name of the department that created the document. |
| Type | The type of document based on the content. The choices are: <ul style="list-style-type: none"> • Policy • Guideline • Procedure • Contract |

Create New Documents form (continued)

| Field | Description |
|-----------------|---|
| Classification | Classification of the document. The choices are: <ul style="list-style-type: none"> • Public • Restricted • Confidential |
| State | The state of the document. The choices are: <ul style="list-style-type: none"> • Draft • Submit • Review • Complete |
| Description | A brief description about the document. |
| Default Version | The document version that is used for document download. By default, the latest version is the default version. |

Primary data tables for Supplier Lifecycle Operations

The primary data tables for Supplier Lifecycle Operations store important information about suppliers, supplier contacts, supplier email domains, product codes, supplier locations, and supplier payment information.

Supplier table

The Supplier [sn_fin_supplier] table stores important information about a supplier.

Supplier [sn_fin_supplier] table

The Supplier [sn_fin_supplier] table contains the following fields.

Supplier table

| Field | Data type | Description |
|-------------------|-----------|--|
| Legal Name | String | Legal name of the supplier that corresponds to its operating location. |
| DUNS number | Integer | Unique, 9-digit identifier for a supplier. |
| ERP supplier code | Integer | Company code of the supplier in the ERP system. |
| Parent entity | Reference | Parent organization of the supplier. |
| Global company | Reference | Global company that the supplier is linked to. |

Supplier table (continued)

| Field | Data type | Description |
|----------------------|-----------|---|
| Industry | String | Industry to which the supplier belongs. |
| Website | URL | Website of the supplier. |
| Image | Image | Image of the supplier's logo. |
| Description | String | Detailed description of the supplier. |
| Relationship manager | String | Person responsible for managing the relationship with this supplier. |
| Relationship status | List | Business relationship that is designated to the supplier. The options are Strategic, Valued, Tactical, or Excluded. |
| Onboarded | Boolean | Status of whether the supplier is onboarded into the ERP system. The options are Yes or No. |
| Preferred | Boolean | Whether the supplier is preferred. The options are Yes or No. |

Supplier Contact table

The Supplier Contact [vm_vdr_contact] table stores important information about a supplier contact.

Supplier Contact [vm_vdr_contact] table

The Supplier Contact [vm_vdr_contact] table contains the following fields.

Supplier Contact table

| Field | Data type | Description |
|-----------------|-----------|--|
| First name | String | First name of the supplier contact. |
| Last name | String | Last name of the supplier contact. |
| Vendor | Reference | The name of the vendor the supplier contact belongs to. |
| Email | Email | Email address of the supplier contact. |
| Primary contact | Boolean | Indicates whether the supplier contact is a primary contact. |

Supplier Email Domain table

The Supplier Email Domain [sn_slm_email_domain] table stores important information about the email domain of a supplier.

Supplier Email Domain [sn_slm_email_domain] table

The Supplier Email Domain [sn_slm_email_domain] table contains the following fields.

Supplier Email Domain table

| Field | Data type | Description |
|--------------|-----------|--|
| Email Domain | String | Email domain of the supplier. |
| Supplier | Reference | Vendor that provides goods and services. |

Product Code table

The Product Code [sn_slm_product_code] table stores important information about a product's Universal Product Code (UPC).

Product Code [sn_slm_product_code] table

The Product Code [sn_slm_product_code] table contains the following fields.

Product Code table

| Field | Data type | Description |
|-------|-----------|--|
| Name | String | Unique name for the product code. |
| Level | List | The level of the product. The choices are: <ul style="list-style-type: none"> Segment Family Class Commodity (default) |
| Code | String | The code of the product. |

Supplier Location table

The Supplier Location [sn_slm_m2m_location] table stores important information about the geographical location of a supplier.

Supplier Location [sn_slm_m2m_location] table

The Supplier Location [sn_slm_m2m_location] table contains the following fields.

Supplier Location table

| Field | Data type | Description |
|-----------------|-----------|--|
| Supplier | Reference | Name of the supplier. |
| Name | String | Name of the supplier location. |
| Street | String | The street address of the supplier location. |
| City | String | The city of the supplier location. |
| State/Province | String | The state of the supplier location. |
| Zip/Postal Code | String | The zip code of the supplier location. |
| Country | String | The country of the supplier location. |
| Latitude | Integer | The latitude coordinates of the supplier location. |
| Longitude | Integer | The longitude coordinates of the supplier location. |
| Category | List | The category that the supplier location belongs to. The choices are: <ul style="list-style-type: none"> Contracting address Delivery address |

Supplier Location table (continued)

| Field | Data type | Description |
|-------|-----------|---|
| | | <ul style="list-style-type: none"> • Facility (default) • Headquarters • Invoice address • Service center |

Supplier Payment Information table

The Supplier Payment Information [sn_fin_supplier_payment] table stores important information about the payment information of a supplier.

Supplier Payment Information [sn_fin_supplier_payment] table

The Supplier Payment Information [sn_fin_supplier_payment] table contains the following fields.

Supplier Payment Information table

| Field | Data type | Description |
|-----------------------------|-----------|---|
| Supplier | Reference | The supplier that the payment information is for. |
| Active | Boolean | Indicates whether the supplier payment record is active. |
| Currency | Reference | The three-digit ISO currency code used for a given country. |
| Primary | Boolean | Option that indicates whether this account is the primary account. i Note: A supplier can have only one primary payment record at a given time. |
| Bank name | String | Name of the bank. |
| ABA routing number | String | Unique, nine-digit number used to identify banks and financial institutions. |
| BSB code | String | Bank State Branch is a six-digit number that is used to identify a bank code and its associated branch in Australia. |
| IFSC code | String | Indian Financial System Code (IFSC) is a unique 11-digit alphanumeric code that is used for online fund transfer transactions in India. |
| Country | Reference | Country the bank is located in. |
| SWIFT Code | String | Bank Identifier Code (also known as SWIFT code) of the bank. |
| IBAN | String | International Bank Account Number used for international payments. |
| Beneficiary name on account | String | Name of the beneficiary. |

Supplier Payment Information table (continued)

| Field | Data type | Description |
|----------------|-----------|------------------------------------|
| Account number | Password2 | Account number of the beneficiary. |

Accounts Payable Operations

The ServiceNow® Accounts Payable Operations application enables you to efficiently manage invoices, invoice exceptions, invoice approvals, and supplier inquiries.

Accounts Payable Operations value proposition

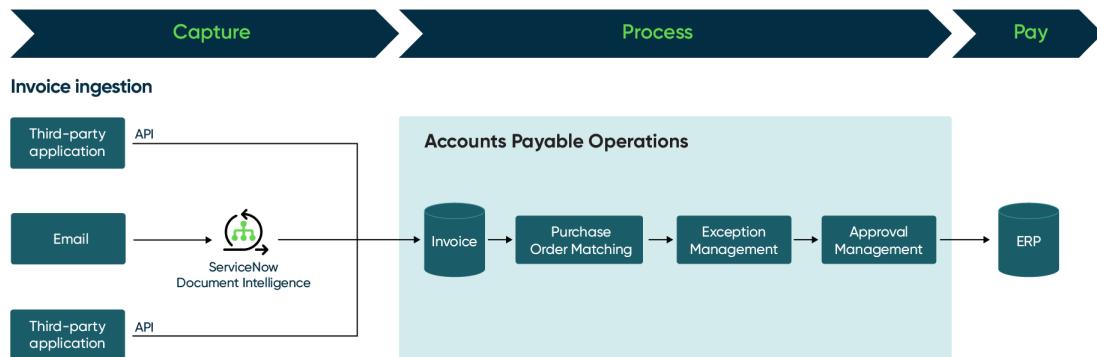
Accounts Payable Operations

Simplifies the accounts payable specialist experience and maximizes productivity



The following figure illustrates the end-to-end invoice automation process.

End-to-end invoice automation process



| | |
|---|---|
| <p>Explore</p>  <p>Learn about how accounts payable specialists, employees, and suppliers use Accounts Payable Operations.</p> | <p>Configure</p>  <p>Plan and configure your implementation.</p> |
| <p>Use</p>  <p>Work on invoices, view invoice statuses, identify and resolve invoice exceptions.</p> | <p>Reference</p>  <p>Get details about components, such as fields, tables, and properties.</p> |

Exploring Accounts Payable Operations

Learn about the key features and capabilities of Accounts Payable Operations.

Key features

Accounts Payable Operations includes the following features:

- Automatically create cases for inquiries received via email from your employees or the suppliers
- Ingest invoices and perform end-to-end invoice processing using workflows from invoice ingestion to approval

Benefits

Accounts Payable Operations offers the following benefits:

- Resolve inquiries from employees and suppliers using self-service
- Automate invoice processing and therefore allocate your work resources to more important tasks
- Detect duplicate invoices to prevent the same invoice from being paid twice
- Verify, process, and reconcile invoices to expedite payment to suppliers
- Identify invoice exceptions to prevent fraudulent invoices from getting processed

Accounts Payable Operations applications

Accounts Payable Operations includes the following applications:

Accounts Payable Invoice Processing

The ServiceNow® Accounts Payable Invoice Processing application identifies invoice duplicates, matches invoices to purchase orders and goods receipts, enables invoice approval management, and provides invoice exception management.

Invoice Case Management

The ServiceNow® Invoice Case Management application enables you to resolve inquiries from suppliers or employees via invoice inquiry cases.

Accounts Payable Workspace

The ServiceNow® Accounts Payable Workspace application provides a single interface and an optimized layout that helps agents and Account Payable Specialists to efficiently manage invoice cases and invoice tasks.

i Note: Accounts Payable Workspace uses and customizes the existing capabilities of the Source-to-Pay Workspace for its own specific requirements.

Accounts Payable Operations integration with Document Intelligence

The ServiceNow® Accounts Payable Operations integration with Document Intelligence application captures data from invoices received via email or through APIs and automatically creates invoices and invoice lines in Accounts Payable Operations.

Accounts Payable Invoice Processing

Accounts Payable Invoice Processing (com.sn_ap_apm) enables Accounts Payable Specialists to ingest invoice documents and extract invoice data using ServiceNow® Document Intelligence.

Accounts Payable Invoice Processing also enables purchase order matching, invoice exception management, and invoice approval management. Thus, enabling Account Payable Specialists to manage the entire life cycle of an invoice, from its ingestion to approval.

For more information about installing Accounts Payable Invoice Processing, see [Install Accounts Payable Invoice Processing](#).

Invoice Case Management

With Invoice Case Management, agents can manage and work on their assigned invoice cases, request more information from suppliers or employees, and create and assign tasks to users using the Accounts Payable workspace.

Invoice Case Management (com.sn_ap_cm) is a dependent application and is automatically installed along with the Accounts Payable Operations (com.sn_ap_apm) application. However, you can also install Invoice Case Management independently. For more information, see [Install Invoice Case Management](#).

The agent [sn_ap_cm.agent] and Invoice Case Management administrator [sn_ap_cm.admin] roles can access the Invoice Case Management application.

Open the Invoice Case Management application by navigating to **All > Accounts Payable Operations > Accounts Payable Workspace**.

Accounts Payable Workspace

The Accounts Payable Workspace enables you to manage and work on cases and tasks related to invoices and invoice exceptions.

The Accounts Payable Workspace provides a dashboard and tools that enable you to do the following:

- Manage all the invoice cases and complete your actionable tasks
- View and respond to inquiries and requests
- View and work with all the invoices, including the invoices that have exceptions

The Accounts Payable Workspace supports global search, which enables you to search for information using keywords. The search results include all the items that the keyword appears in, for example, cases, tasks, short description, content, or attached files. For more information, see [Global search in Workspace](#).

Note: The global search is available only for users with the Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist] role.

The Accounts Payable Workspace is automatically installed if any of the following applications are installed:

- Accounts Payable Invoice Processing (com.sn_ap_apm)
- Invoice Case Management (com.sn_ap_cm)

End user and roles

| End user and goal | Required role |
|--|---------------------------------------|
| Accounts Payable Specialist: View and manage invoice processing cases and tasks. | sn_ap_apm.accounts_payable_specialist |
| Agent: View and manage invoice inquiry cases and tasks. | sn_ap_cm.agent |

Accounts Payable Workspace landing page

Use the Accounts Payable Workspace landing page to find all the information that you need and view the tasks specific to your role, all in one location.

Open the Accounts Payable Workspace by navigating to **All > Accounts Payable Operations > Accounts Payable Workspace**.

When you open the Accounts Payable Workspace, the home page is displayed by default. If you navigate away from the home page, you can select the home icon () to return to the home page.

As an agent, you can view and manage to-do tasks assigned to you, open any unassigned cases, and cases by priority. As an Accounts Payable Specialist, you can view and manage tasks assigned to you, open any unassigned cases, cases by priority, invoice exceptions, and invoices at risk of being paid late.

Landing page view for an Accounts Payable Specialist

The following information is displayed on the landing page when you log in to the workspace with the Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist] or admin [sn_ap_apm.admin] role.

Note: For a detailed analysis on each component, select the respective widget or chart.

| Title | Type | Description |
|-----------------------------|-------------|---|
| Quick actions | | |
| Create New Invoice | Widget | Opens a new tab that enables you to create a new invoice case with the Invoice automation category. |
| Review your work | | |
| Supplier | Filter | Filter by supplier to view information for specific suppliers in the widgets of the Review your work section. |
| Legal entity | Filter | Filter by legal entity to view information for specific legal entities in the widgets of the Review your work section. |
| My invoices | Widget | Displays the invoices grouped by their state. |
| Top invoice exception types | Donut chart | Displays the invoice exceptions grouped by type. Select View all to view a list of all the exception types. |
| Invoices due soon | Bar chart | Displays the invoices grouped by state that are due soon. Select View all to view a list of all the invoices that are due soon. |
| My team | | |
| Backlog | Widget | View the list of cases that are yet to be assigned. |

Landing page view for an agent

The following information is displayed on the landing page when you log in to the workspace with the agent [sn_ap_cm.agent] or admin [sn_ap_cm.admin] role.

Note: For a detailed analysis on each component, select the respective widget or chart.

| Title | Type | Description |
|--------------------------|--------|--|
| Quick actions | | |
| Create New Inquiry | Widget | Opens a new tab that enables you to create a new invoice case with the Inquiry category. |
| Review your work | | |
| Supplier | Filter | Filter by supplier to view information for specific suppliers in the widgets of the Review your work section. |
| Open inquiries by status | Widget | Displays the inquiries grouped by their status. Select View all to view a list of all the inquiries. |
| Inquiries by category | Widget | Displays the inquiries grouped by their category. Select View all to view a list of all the inquiries. |
| My team | | |
| Backlog | Widget | View the list of cases that are yet to be assigned. |

Accounts Payable Workspace list page

As an agent, view and work with the primary data, all the invoice inquiry cases, including the cases that are assigned to you. As an Account Payable Specialist, you can view and work with the primary data, all the invoice processing cases, your assigned cases and tasks, invoices, and invoice exceptions.

Select the list icon () to open the List page in the Accounts Payable Workspace.

You can select each module and sub-module to view the details in a list. Under **Lists**, you can do the following:

- Refresh the list to display the most updated information.
- Edit columns to adjust the list to display required columns in the order of your choice.
- Reset column widths to default.
- Copy the URL for this list.
- Apply filters to view specific information that you're interested in.
- Export the list to a file in Excel, CSV, JSON, or PDF format.
- Create a copy of the list and save it under **My Lists**.
- Edit a selected supplier case or create a new supplier case.

Note: For more information on setting up the list view, see [Setting up list view in a legacy workspace](#) .

As an Accounts Payable Specialist, you have access to the following modules and sub-modules:

- My Work
 - My open invoice processing cases
 - My open invoice exceptions
 - My open tasks
 - Unassigned cases
 - Unassigned tasks
- All Work
 - All open invoice processing cases
 - All open invoice exceptions
 - All open tasks
 - All closed cases
 - All closed tasks
- Primary Data
 - Suppliers
 - Purchase orders
 - Goods receipts
 - Invoices
 - Payment terms
 - Ledger accounts

As an agent, you have access to the following modules and sub-modules:

- My work in progress: Cases
- All team work: Cases
- My Work
 - My open invoice inquiry cases
 - My open tasks
 - Unassigned cases
 - Unassigned tasks
- All Work
 - All open invoice inquiry cases
 - All open tasks
 - All closed cases
 - All closed tasks
- Primary Data
 - Suppliers
 - Purchase orders
 - Invoices
 - Payment terms

Accounts Payable Operations integration with Document Intelligence

Accounts Payable Operations integration with Document Intelligence (com.sn_ap_ic) enables you to automatically capture data from incoming invoices, thus significantly reducing manual effort.

Accounts Payable Operations integration with Document Intelligence uses the capabilities of the ServiceNow® Document Intelligence application to quickly and accurately extract information from invoice documents that are received as attachment via email, and creates invoice records in the Accounts Payable Operations application.

i Note: Accounts Payable Operations integration with Document Intelligence supports invoice documents that are in PDF, PNG, and JPEG format.

For more information, see [Exploring Document Intelligence](#).

Configuring Accounts Payable Operations

Plan and configure your implementation for Accounts Payable Operations.

Install Accounts Payable Invoice Processing

You can install the Accounts Payable Invoice Processing (com.sn_ap_apm) application if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Review the Accounts Payable Invoice Processing application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The Accounts Payable Invoice Processing (com.sn_ap_apm) application installs the following dependent plugins:
 - Invoice Case Management (com.sn_ap_cm)
 - Accounts Payable Operations integration with Document Intelligence (com.sn_ap_ic)

Role required: admin

About this task

The following items are installed with Accounts Payable Operations :

- Plugins
- Roles
- Flows
- Tables

For more information, see [Components installed with Accounts Payable Invoice Processing](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Accounts Payable Operations application (com.sn_ap_apm) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.

Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.



Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Components installed with Accounts Payable Invoice Processing

Several types of components are installed with activation of the Accounts Payable Invoice Processing plugin, including user roles, flows, and tables.

Roles installed

Note: The following roles are installed with Finance Common Architecture (com.sn_fin), which is installed as a dependent plugin:

- sn_fin.supplier_payment_info_read: Provides read access to supplier details and supplier payment information tables
- sn_fin.supplier_payment_info_write: Provides write access to supplier details and supplier payment information tables

The sn_shop.invoice_owner role is installed with Source-to-Pay Common Architecture (com.snc.sn_shop), which is installed as a dependent plugin.

For information about the components installed with Invoice Case Management, see [Components installed with Invoice Case Management](#).

| Role title [name] | Description | Contains roles |
|--|--|--|
| Accounts Payable Invoice Processing Administrator [sn_ap_apm.admin] | Can access all the features and capabilities of the Accounts Payable Operations application. | <ul style="list-style-type: none"> • sn_ap_cm.admin • sla_admin • sn_ap_apm.accounts_payable_specialist |
| Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist] | <ul style="list-style-type: none"> • Can view and update all invoices and invoice exceptions. • Can view purchase orders, supplier details, and supplier payments. | <ul style="list-style-type: none"> • sn_fin.supplier_payment_info_read • sla_manager • workspace_user • canvas_user • sn_ap_apm.reader • sn_ap_cm.task.owner • email_composer |
| Accounts Payable Invoice Processing Reader [sn_ap_apm.reader] | Can view all the tables available in the Accounts Payable | <ul style="list-style-type: none"> • vendor_reader • sn_shop.procurement_common_reader |

| Role title [name] | Description | Contains roles |
|-------------------|-------------------------|----------------|
| | Operations application. | |

Flows installed

| Flow | Description |
|--|---|
| Create Invoice Processing Case for Invoice | <p>Creates an invoice processing case for an invoice that is received via email.</p> <p>i Note: If you receive an email with N attachments, the application creates N invoice processing cases — a new invoice processing case for each attached invoice, where N is a positive number. If you receive an email with no attachment, then the application does not create an invoice processing case.</p> |
| Start Invoice Processing for Orphan Invoices | <p>Picks up all the invoice records in Draft state that do not have an invoice case associated to them and starts their processing.</p> <p>You must activate the flow to use it. For information on how to activate the flow, see Activate the Start Invoice Processing for Orphan Invoices flow.</p> |

Scheduled job

| Job | Description |
|--------------------------------|---|
| Exception Monitoring scheduler | Runs on a regular schedule every five minutes to identify exceptions for the PO and Non-PO invoices that are in PO matching completed/Accepted or Exceptions found state. |

Tables installed

| Table | Description |
|--|--|
| Invoice exception [sn_ap_apm_exception] | Stores the exceptions found in the invoices. |
| Invoice exception line [sn_ap_apm_line_exception] | Stores the line exceptions found in the invoices. |
| Invoice exception definition [sn_ap_apm_exception_definition] | Extends the Application File table. Stores the exception definitions for an exception. |
| Invoice processing detail sn_ap_apm_invoice_attribute | Stores invoice processing information |

Run the fix script for Accounts Payable Operations

Run the fix script for successful installation of Accounts Payable Operations.

Before you begin

- Install *Accounts Payable Invoice Processing* plugin.
- Run fix script for Insufficient funds (header amount variance) exception to work.
- Set the **Application scope to Source-to-Pay Common Architecture**.
- All the invoices associated with purchase order must be available in the system for Insufficient funds (header amount variance) exception to work.
- Ensure that invoices have same currency as that of associated with purchase order currency for exception to run successfully.
- You can run the fix script in batches by adding the command `gr.setLimit(100000)` after the command line `gr.addEncodedQuery("in_process_invoiced_amountISEMPTY")`. Run the script in batches of 100k or 200k.
- Ensure POs are updated with **In process invoice amount** and **Invoice amount** fields.

Note: If fix script is not executed for POs, then Insufficient funds (header amount variance) exception associated with a invoice will not work.

Role required: admin

Procedure

1. Navigate to **All > System Definition > Fix scripts**.
2. Click **New**.
A new Fix script record opens.
3. In the **Name** field, enter name as `Update PO Invoiced Amounts for APO`.
4. In the **Script** field, copy paste the below mentioned script.

```
updatePOInvoicedAmounts();

function updatePOInvoicedAmounts() {
    var sessionCurrency = new
sn_currency.GlideCurrencyConfig().getSessionCurrency();
    var gr = new GlideRecord("sn_shop_purchase_order");
    gr.addEncodedQuery('in_process_invoiced_amountISEMPTY');
    gr.query();
    while (gr.next()) {
        var poSysID = gr.getValue('sys_id');
        var inProcessInvoiceAmt = getInProcessInvoicedAmount(poSysID);
        var invoicedAmount = getInvoicedAmount(poSysID);
        var poCurrency = !gs.nil(gr.total_amount) ?
gr.total_amount.currency : sessionCurrency;
        var amtUpdated = false;
        if (!gs.nil(inProcessInvoiceAmt)) {
            inProcessInvoiceAmt = poCurrency + ';' + inProcessInvoiceAmt;

            gr.getElement('in_process_invoiced_amount').setDisplayValue(inProcessInv
iceAmt);
            amtUpdated = true;
        }
        if (!gs.nil(invoicedAmount)) {
```

```

        invoicedAmount = poCurrency + ';' + invoicedAmount;

        gr.getElement('invoiced_amount').setDisplayValue(invoicedAmount);
        amtUpdated = true;
    }
    if (amtUpdated)
        gr.update();
}
}

function getInProcessInvoicedAmount(poSysId) {
    var query =
'invoice_amountISNOTEMPTY,^invoice_amount.amount!=0^stateINpo_matching_c
ompleted,exceptions_found,no_exceptions_found,pending_approval,approval_r
ecalled,approved';
    var gr = new GlideAggregate('sn_shop_invoice');
    gr.addNotNullQuery('purchase_order');
    gr.addQuery('purchase_order', poSysId);
    gr.addEncodedQuery(query);
    gr.addAggregate('SUM', 'invoice_amount.amount');
    gr.groupBy('purchase_order');
    gr.query();
    if (gr.next()) {
        var inProcessInvoicedAmt = gr.getAggregate('SUM',
'invoice_amount.amount');
        return inProcessInvoicedAmt;
    }
    return 0;
}

function getInvoicedAmount(poSysId) {
    var query =
'invoice_amountISNOTEMPTY,^invoice_amount.amount!=0^stateINpending_payme
nt,paid';
    var gr = new GlideAggregate('sn_shop_invoice');
    gr.addNotNullQuery('purchase_order');
    gr.addQuery('purchase_order', poSysId);
    gr.addEncodedQuery(query);
    gr.addAggregate('SUM', 'invoice_amount.amount');
    gr.groupBy('purchase_order');
    gr.query();
    if (gr.next()) {
        var invoicedAmt = gr.getAggregate('SUM',
'invoice_amount.amount');
        return invoicedAmt;
    }
    return 0;
}
}

```

5. Click **Submit.**

- 6. In the fix script list view, search and select Update PO Invoiced Amounts for APO fix script.**

The Update PO Invoiced Amounts for APO fix script opens.

7. Select **Run Fix Script.**

A pop-up window appears with options to **Cancel**, **Proceed**, and **Proceed in Background**.

8. Click **Proceed in Background.**

Set system properties for invoice exception

Set the system property `sn_ap_apm.exception.engine.max_parallel_thread_count` which defines the number of parallel threads used by the exception engine scheduler to process invoice exceptions.

Before you begin

Role required: admin

Procedure

- 1. Navigate to **All**.**
- 2. In the left navigation pane, enter `sys_properties_list.do`.**
- 3. Search for `sn_ap_apm.exception.engine.max_parallel_thread_count` and open the system property.**
The system property `sn_ap_apm.exception.engine.max_parallel_thread_count` opens as a record. The **Value** field displays default value as 4. You can edit the record in editing mode.
- 4. In the **Value** field, you can enter the value as 6, or 8 (if the invoice count is huge based on the number of nodes in the instance).**
- 5. Select **Update**.**

Set system properties for scheduler

Set the system property `sn_ap_apm.exception.engine.scheduler_cool_off_period` which defines the time interval in minutes after which the invoice is picked for processing.

Before you begin

Role required: admin

Procedure

- 1. Navigate to **All**.**
- 2. In the left navigation pane, enter `sys_properties_list.do`.**
- 3. Search for `sn_ap_apm.exception.engine.scheduler_cool_off_period` and open the system property.**
The system property `sn_ap_apm.exception.engine.scheduler_cool_off_period` opens as a record. The **Value** field displays default value as 240. You can edit the record in editing mode.
- 4. In the **Value** field, you can enter the value as per your choice.**
- 5. Select **Update**.**

Application plugin installation sequence in Accounts Payable Operations

View the consolidated list of plugins, high-level description of each plugin, and the dependencies that are required before installing each plugin in Accounts Payable Operations.

Application plugin list

| Plugin name | Description | Dependencies |
|---|---|---|
| Source-to-Pay Common Architecture [com.snc.sn_shop] | Maintains primary data such as Enterprise Resource Planning (ERP) sources, legal entities, accounting periods, and so on. | <ul style="list-style-type: none"> Finance Common Architecture [com.sn_fin] Service Delivery Common [com.sn_spend_sdc] |
| Supplier Collaboration Portal [com.snc.sn_supplier_sp] | Includes demo data and related ServiceNow Store applications and plugins. | Supplier Common Architecture [com.snc.sn_slm] |
| Glide Virtual Agent | | |
| Advanced Work Assignment for Source-to-Pay Operations [com.snc.sn_spend_awa] | Provides configurations to support automatic routing, queuing, and assignment of procurement cases, emails, and live agent chat conversations. | <ul style="list-style-type: none"> Advanced Work Assignment [com.glide.awa] Agent chat [com.glide.interaction.awa] |
| Invoice Case Management [com.sn_ap_cm] | Includes demo data and related ServiceNow Store applications and plugins. | <ul style="list-style-type: none"> Source-to-Pay Common Architecture [com.snc.sn_shop] Source-to-Pay Workspace [com.sn_spend_workspace] |
| Accounts Payable Invoice Processing [com.sn_ap_apm] | Enables Accounts Payable specialists to ingest invoice documents and extract invoice data using Document Intelligence | <ul style="list-style-type: none"> Invoice Case Management [com.sn_ap_cm] Accounts Payable Operations integration with Document Intelligence [com.sn_ap_ic] |
| Document Intelligence [com.snc.docintel] | Provide solutions that enables any organization to automate and accelerate the process of extracting data from documents. | sn-docintel-iframe [com.sn_docintel_iframe] |
| Document Intelligent Admin [com.snc.docintel_admin] | Provides full access to the Document Intelligence application, apart from modifying a subset of system properties, and the billing and internal tables. | sn-docintel-iframe [com.sn_docintel_iframe] |

Application plugin list (continued)

| Plugin name | Description | Dependencies |
|--|--|--|
| Accounts Payable Operations integration with Document Intelligence com.sn_ap_ic | Enables you to automatically capture data from incoming invoices, thus significantly reducing manual effort. | Document Intelligence [com.snc.docintel] |
| Source-to-Pay Workspace [com.sn_spend_workspace] | Provides a single environment for Procurement Specialists to work on purchase requisitions, sourcing requests, negotiations, procurement requests, and more. | |

Install Invoice Case Management

You can install the Invoice Case Management (com.sn_ap_cm) application if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Review the Invoice Case Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The Invoice Case Management (com.sn_ap_apm) application installs the following dependent plugins:
 - Source-to-Pay Common Architecture (com.snc.sn_shop)
 - Supplier Collaboration Portal
 - [Source-to-Pay Operations](#)

Role required: admin

About this task

The following items are installed with Invoice Case Management:

- Plugins
- Roles
- Scheduled jobs
- Tables

For more information, see [Components installed with Invoice Case Management](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Invoice Case Management application (com.sn_ap_cm) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.

Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Components installed with Invoice Case Management

Several types of components are installed with activation of the Invoice Case Management plugin, including user roles, scheduled jobs, and tables.

Roles installed

| Role title [name] | Description | Contains roles |
|---|--|--|
| Invoice Case Management Administrator [sn_ap_cm.admin] | Can configure and make changes to record producers, invoice case assignment rules, invoice case SLA definitions, and email properties. | <ul style="list-style-type: none"> • sla_admin • sn_ap_cm.agent |
| Invoice Case Management Agent [sn_ap_cm.agent] | Can view, create, and update invoice cases and tasks and manage the workflows for fulfilling requests. | <ul style="list-style-type: none"> • sn_ap_cm.requester • sla_manager • workspace_user • vendor_reader • canvas_user • sn_ap_cm.task_owner • email_composer |

| Role title [name] | Description | Contains roles |
|---|--|-----------------------|
| Invoice Case Management Requester [sn_ap_cm.requester] | Can create invoice inquiry cases. | sn_shop.invoice_owner |
| Invoice Case Management Task Owner [sn_ap_cm.task_owner] | Can view and update the tasks that are assigned to them. | None |

Scheduled jobs installed

| Scheduled job | Description |
|--------------------------------------|--|
| Create Inquiry Case on Invoice email | Creates an invoice inquiry case from the information in an inbound email. You must activate the flow to use it. For information on how to activate the flow, see Activate the Create Inquiry Case on Invoice email flow . |

Tables installed

| Table | Description |
|------------------------------------|--|
| Invoice case [sn_ap_cm_ap_case] | Extends the Service Case table. Stores the invoice case records. |
| Invoice task [sn_ap_cm_ap_task] | Extends the Service Task table. Stores the invoice task records. |

Activate the Create Inquiry Case on Invoice email flow

Activate the **Create Inquiry Case on Invoice email** flow to automatically create an invoice inquiry case based on the information in an inbound email.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and select the **Create Inquiry Case on Invoice email** flow to open it.
3. Select the more actions icon () in the top right and select **Copy flow**.
The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations**.

6. Select **Copy.**

A copy of the flow opens.

7. Under TRIGGER, specify the conditions that trigger this flow.**8. Select **Save**.****9. Select **Activate**.**

Install Accounts Payable Operations integration with Document Intelligence

Accounts Payable Operations integration with Document Intelligence (com.sn_ap_ic) is installed automatically along with Accounts Payable Invoice Processing (com.sn_ap_apm).

Required plugins

To use the flows for extracting data from the invoice document received as an email attachment, you must install ServiceNow® Document Intelligence.

i Note: Accounts Payable Operations integration with Document Intelligence supports Document Intelligence version 2.4.

For more information, see [Install Document Intelligence](#).

Components installed with Accounts Payable Operations integration with Document Intelligence

Several types of components are installed with activation of the Accounts Payable Operations integration with Document Intelligence (com.sn_ap_ic) application plugin, including user roles, flows, and tables.

Roles required

You must have the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role to review an invoice in Document Intelligence and enter values in the invoice fields.

For more information about the roles that are installed with Document Intelligence, see [Components installed with Document Intelligence](#).

Flows installed

| Flow | Description |
|---|--|
| Invoice processing case for Invoice email | <p>Creates an invoice processing case after receiving an inbound email that contains at least one attachment, and then copies the email attachment to the invoice processing case.</p> <p>i Note: This flow is installed when you install the Accounts Payable Operations integration with Document Intelligence application.</p> |
| Flows installed only when you install the Document Intelligence application | |
| Invoice attachment DI processing | Creates the DocIntel task for processing the invoice attachment and creates the invoice stage record for storing the extracted data from the invoice attachment. |

| Flow | Description |
|---|---|
| DocIntel Extract Values Flow - Invoice Processing v1.2 - Invoice Processing v1.2 v1.2 - Invoice Processing v1.2 | Populates the extracted data from the DocIntel task to the invoice stage and invoice line stage records and updates Invoice stage status to Processing completed. |
| Invoice Stage to Invoice Transformation | <p>This flow does the following:</p> <ul style="list-style-type: none"> Runs the transformation logic for the invoice stage and the invoice line stage records Updates the invoice to Received state and associates the invoice with the invoice processing case if all the prerequisite conditions for the transformation are met Updates the invoice processing case's DocIntel Status to Processed (STP completed) if the DocIntel status is still in Processing |
| DI STP Failed | Processes the DocIntel task that does not fail or that does not undergo straight through processing. This flow updates its associated invoice stage to Processing error and updates the invoice processing case's DocIntel status to Processed (STP failed) or Failed, respectively. |

Tables installed

| Table | Description |
|---|--|
| Invoice Stage [sn_ap_ic_invoice_stage] | Stores the invoice data extracted from the invoice. |
| Invoice Line Stage [sn_ap_ic_invoice_line_stage] | Stores the invoice line data extracted from the invoice. |

Invoice Processing use case

Accounts Payable Operations integration with Document Intelligence provides the **DO NOT USE - Invoice Processing** use case.

The **DO NOT USE - Invoice Processing** use case identifies the information to extract invoice documents received as email attachments and determines how a user with the Accounts Payable Specialist role interacts with the extracted values in the Document Intelligence workspace.

Note: The **DO NOT USE - Invoice Processing** use case is read-only and cannot be edited.

The **DO NOT USE - Invoice Processing** use case contains the list of invoice fields to extract data from invoice attachments and stores this data in the invoice stage record. It also contains an extraction flow that populates the extracted invoice data into the invoice stage and invoice line stage records and updates the Invoice stage status to Processing completed.

You can access this use case by navigating to **All > Document Intelligence > Use Cases > DO NOT USE - Invoice processing**.

The **DO NOT USE - Invoice Processing** use case includes the following information.

| Use case information | Description |
|----------------------|--|
| Fields | <p>Contains the list of invoice and invoice line fields to extract information from an invoice document. A field is a single piece of information to extract from an invoice document. For example, the invoice date on a document.</p> <p>For the list of invoice and invoice line fields included in the DO NOT USE - Invoice Processing use case, see List of invoice and invoice line fields included in the use case for Accounts Payable Operations integration with Document Intelligence.</p> |
| Field Groups | <p>Includes the Invoice Lines field group that maps to the Invoice Line Stage [sn_ap_ic_invoice_line_stage] target table where the extracted invoice line information from the invoice document is stored.</p> |
| Document tasks | <p>Includes a document task to train the Document Intelligence model to identify the correct information to extract from an invoice document.</p> |
| Integration | <p>Maps to the DO NOT USE - Invoice processing use case that contains the DocIntel Extract Values Flow - Invoice processing v1.2 - Invoice Processing v1.2 extraction flow, which populates the extracted invoice data into the invoice stage and invoice line stage records. It also updates the Invoice stage status to Processing completed.</p> |

List of invoice and invoice line fields included in the use case for Accounts Payable Operations integration with Document Intelligence

The **DO NOT USE - Invoice Processing** use case includes the following set of invoice and invoice line fields from which to extract information from your invoice documents.

List of invoice and invoice line fields included in the use case

| Field | Description |
|-------------------------|---|
| Invoice Fields | |
| Supplier invoice number | The invoice number of the supplier invoice. |
| Supplier | Supplier who delivers the product or service. |
| Supplier tax id | The tax ID of the supplier. |
| Invoice date | Date on which this invoice is created. |
| Purchase order | Purchase order associated with this invoice. |
| Supplier bank name | Bank name of the supplier. |
| Account number | Bank account number of the supplier. |
| ACH routing number | Unique, nine-digit number used to identify banks and financial institutions. |
| Swift code | Standard format for the Bank Identifier Code (BIC) that is used to identify banks and financial institutions. |

List of invoice and invoice line fields included in the use case (continued)

| Field | Description |
|---------------------------------|--|
| Wire routing number | Unique, nine-digit number used to identify banks and financial institutions. |
| Tax rate | Tax rate applied on the invoice amount. |
| Amount invoiced | Total amount to be paid to the supplier including tax and shipping charges. |
| Subtotal | The total amount from all the invoice lines without tax and shipping charges. |
| Shipping amount | Shipping charges incurred for the invoice. |
| Other charges | Other charges applied on the invoice amount. |
| Tax amount | Tax applied on the invoice amount. |
| Invoice currency | The currency mentioned in the invoice. |
| Bill to company name | The name of the company to which the invoice is billed. |
| Bill to city | The city to which the invoice is sent. |
| Bill to country | The country to which the invoice is sent. |
| Bill to state/province | The state to which the invoice is sent. |
| Bill to street | The street address to which the invoice is sent. |
| Bill to zip/postal code | The zip code to which the invoice is sent. |
| Remit to city | The city to which the payment is made. |
| Remit to country | The country to which the payment is made. |
| Remit to state/province | The state to which the payment is made. |
| Remit to street | The street address to which the payment is made. |
| Remit to zip/postal code | The zip code to which this payment is made. |
| Invoice ship to city | The city to which the items on the purchase order should be shipped. |
| Invoice ship to country | The country to which the items on the purchase order should be shipped. |
| Invoice ship to state/province | The state to which the items on the purchase order should be shipped. |
| Invoice ship to street | The street address to which the items on the purchase order should be shipped. |
| Invoice ship to zip/postal code | The zip code to which the items on the purchase order should be shipped. |
| Invoice Line Fields | |
| Line amount | Total amount for the invoice line item. |

List of invoice and invoice line fields included in the use case (continued)

| Field | Description |
|------------------|--|
| Line tax amount | Tax amount for the invoice line item. |
| Line unit price | Unit price of the line item in the invoice. |
| Line quantity | The number of items that have been invoiced. |
| Line description | Description for the invoice line. |

Configuring the invoice ingestion flows using Accounts Payable Operations integration with Document Intelligence

Configure Accounts Payable Operations integration with Document Intelligence to automatically create an invoice processing case and extract the required data from an invoice attachment received via email.

The process for configuring Accounts Payable Operations integration with Document Intelligence includes the following scenarios:

Configuration scenarios for invoice ingestion flows using Accounts Payable Operations integration with Document Intelligence

| Scenario | Do this |
|---|---|
| When Document Intelligence is installed and you want to use the invoice ingestion flows | <ol style="list-style-type: none"> 1. Create a copy of the default Invoice Processing use case. 2. Do the following to configure the invoice ingestion flows: <ol style="list-style-type: none"> a. Configure the newly created DocIntel Extract Values Flow. b. Copy and configure the Invoice processing case for Invoice email flow. c. Copy and configure the Invoice attachment DI processing flow. d. Copy and configure the DI STP Failed flow. 3. Perform the steps described in KB article KB1286265 to run the business rule to delete the duplicate ml_solution record from the ML Solution [ml_solution] table. |
| When Document Intelligence is not installed | <p>Copy and configure the Invoice processing case for Invoice email flow when Document Intelligence is not installed.</p> |
| When Document Intelligence is installed but you want to disable the invoice ingestion flows | <ol style="list-style-type: none"> 1. Configure the Invoice processing case for Invoice email flow for disabling the Document Intelligence capability. 2. Deactivate the Invoice attachment DI processing flow. |

Create a copy of the default Invoice Processing use case

Create a copy of the default invoice processing use case to customize the invoice flow in your environment.

Before you begin

Ensure that the application scope is set to Accounts Payable Operations integration with Document Intelligence.

Role required: admin

About this task

Do this task to copy the default **DO NOT USE- Invoice Processing V3** use case along with its fields, field groups, integrations, flows, and all the related machine learning (ML) models.

Procedure

1. Navigate to **Workspaces > All > Document Intelligence > Document Data Extraction Administration > Use cases**.
2. Open the **DO NOT USE- Invoice Processing V3** use case.
3. Select **Duplicate use case** icon ().
You will be prompted with a message "*Choose the name for this use case*".
4. Click **Duplicate** button
 - The copy is saved automatically into your environment.
 - A copy of the DO NOT USE - Invoice Processing V3 use case is created with the name entered. You can see the copied use case by navigating to **All > Document Intelligence > Use Cases**. For more information on configuring use case, see [Configuring Document Intelligence](#) .
 - A flow named DocIntel Extract Values Flow is created. This flow is suffixed with the name of the copied use case that was created after you clicked the copy () icon. For example, DocIntel Extract Values Flow - name of the entered use case - Invoice Processing v2. You can see this flow by navigating to **All > Process Automation > Flow Designer** and searching for the flow name.

You must add the missing information in the newly created flow by copying the existing information from the default DocIntel Extract Values Flow - Invoice Processing v2.0. For more information, see [Configure the newly created DocIntel Extract Values Flow](#).

Configure the newly created DocIntel Extract Values Flow

Configure the newly created **DocIntel Extract Values Flow - copied use case - Invoice Processing v2** flow to add the missing information by referring to the default **DocIntel Extract Values Flow - Invoice Processing v2** flow.

Before you begin

Role required: admin

About this task

In the **DocIntel Extract Values Flow - copied use case - Invoice Processing v2** flow, perform the following steps.

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and open the **DocIntel Extract Values Flow - Invoice Processing v2** flow.
3. In the **DocIntel Extract Values Flow - copied use case - Invoice Processing v2** flow, under **Actions**, configure two new actions similar to **Look up Invoice Stage Record** (action 3) and **Update Invoice Stage Record** (action 4) from flow mentioned in step 2.
4. In the **DocIntel Extract Values Flow - copied use case - Invoice Processing v2** flow, under **TRIGGER**, do the following:
Configure the condition by appending **AND** condition with existing condition where the new condition is **Use case** which is equal to copied use case. Example: Use case=<<copied use case>>.
5. Select **Save**.
6. Select **Activate**.

Copy and configure the Invoice processing case for Invoice email flow

Copy and configure the Invoice processing case for Invoice email flow and add a trigger condition to specify when to create an invoice processing case.

Before you begin

Role required: admin

About this task

When activated, this flow automatically creates an invoice processing case for an inbound email.

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and open the **Invoice processing case for Invoice email** flow.
3. Select the more actions icon () in the top right and select **Copy flow**.
The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations integration with Document Intelligence**.
6. Select **Copy**.
A copy of the flow opens.
7. Under **TRIGGER**, select **Inbound Email**.
8. In the **Trigger** field, leave the trigger as **Inbound Email**.
9. Update the email conditions according to your business requirements.

Note: Don't activate this flow without configuring email conditions to specify when to create an invoice processing case. Otherwise, an invoice processing case is created for any email that you receive.

10. Select **Save**.
11. Select **Activate**.

Copy and configure the Invoice attachment DI processing flow

Copy and configure the Invoice attachment DI processing flow and activate this flow to use it.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and open the **Invoice attachment DI processing** flow.A blue square icon with three white dots in the center, representing a more actions or copy icon.
3. Select the more actions icon () in the top right and select **Copy flow**.
The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations integration with Document Intelligence**.
6. Select **Copy**.
A copy of the flow opens.
7. Under **TRIGGER**, set the trigger conditions for this flow.
8. Under **ACTIONS**, do the following:
 - Select **Process Attachment using DI** to expand it.
 - In the **SYS DI Task Definition [Use Case]** field, select the copy of the use case that was created using the **Duplicate use case** icon () in Global scope. For more information on copying use case, refer [Create a copy of the default Invoice Processing use case](#).
9. Select **Save**.
10. Select **Activate**.

Copy and configure the DI STP Failed flow

Copy and configure the DI STP Failed flow and activate this flow to use it.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and open the **DI STP Failed** flow.A blue square icon with three white dots in the center, representing a more actions or copy icon.
3. Select the more actions icon () in the top right and select **Copy flow**.
The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations integration with Document Intelligence**.
6. Select **Copy**.
A copy of the flow opens.

7. Under **TRIGGER**, in the **Condition** field, ensure that you select the copy of the use case that was created in Global scope.
For more information on copying use case, refer [Create a copy of the default Invoice Processing use case](#).
8. Select **Save**.
9. Select **Activate**.

Copy and configure the Invoice processing case for Invoice email flow when Document Intelligence is not installed

Copy and configure the Invoice processing case for Invoice email flow and add a trigger condition to specify when to create an invoice processing case when Document Intelligence is not installed.

Before you begin

Role required: admin

About this task

The Invoice processing case for Invoice email is the only flow that is available if you don't install the Document Intelligence application. When activated, this flow automatically creates an invoice processing case for an inbound email.

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and open the **Invoice processing case for Invoice email** flow.
3. Select the more actions icon () in the top right and select **Copy flow**.
The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations integration with Document Intelligence**.
6. Select **Copy**.
A copy of the flow opens.
7. Under TRIGGER, select **Inbound Email**.
8. In the **Trigger** field, leave the trigger as **Inbound Email**.
9. Update the email conditions according to your business requirements.

Note: Don't activate this flow without configuring email conditions to specify when to create an invoice processing case. Otherwise, an invoice processing case is created for any email that you receive.

10. Under ACTIONS, do the following:
 - a. Select **Accounts payable case Record** to expand it.
 - b. Under Fields, in the **DocIntel status** field, select **Not applicable**.
11. Select **Save**.
12. Select **Activate**.

Configure the Invoice processing case for Invoice email flow for disabling the Document Intelligence capability

Configure the copied version of the **Invoice processing case for Invoice email** flow for disabling the Document Intelligence capability.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and open the copied version of the **Invoice processing case for Invoice email** flow.
3. Under ACTIONS, do the following:
 - a. Select **Accounts payable case Record** to expand it.
 - b. Under Fields, in the **DocIntel status** field, select **Not applicable**.
4. Select **Save**.
5. Select **Activate**.

Deactivate the Invoice attachment DI processing flow

Deactivate the Invoice attachment DI processing flow when you don't want to use the Document Intelligence capability.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and open the copied version of the **Invoice attachment DI processing** flow.
3. Select **Deactivate**.

Upgrade Accounts Payable Operations

Upgrade Accounts Payable Operations with Document Intelligence from lower to higher versions.

Before you begin

- Upgrade Accounts Payable Operations version 2.0 and above to Accounts Payable Operations 4.0 by installing Document Intelligence version 4.0.
- As part of APO 2.0 or APO 3.0, in Use cases `sys_di_task_definition` table, verify OOB Use case – “DO NOT USE- Invoice Processing v2”.

Role required: Admin

Procedure

1. Verify if the OOB pre-trained model Use case is available in the `sys_di_task_definition` table.
Verify if the OOB pre-trained model is used for copying and creating Use cases. The upgrade applies only if the users use OOB Use case – “DO NOT USE- Invoice Processing v2” to create a new use case.

2. Verify the newly added pre-trained model Use case "DO NOT USE - Invoice Processing v3" exists.
3. Execute the following script from the background script in `sn_ap_ic` Accounts Payable Operations integration with Document Intelligence scope.
4. To execute the below script, perform the following steps.

```

function alignParentUseCaseSysIds (oldReadOnlyUseCaseSysId, newReadOnlyUseCaseSysId) {
    var oldCopyUseCaseGr = new GlideRecord("sys_di_task_definition");
    oldCopyUseCaseGr.addQuery("parent_task_definition", "CONTAINS", "base_trained_model");
    if (oldReadOnlyUseCaseSysId) {
        oldCopyUseCaseGr.addQuery("parent_task_definition", "CONTAINS", oldReadOnlyUseCaseSysId);
        oldCopyUseCaseGr.addOrCondition("parent_task_definition", "CONTAINS", "di_source");
    } else {
        oldCopyUseCaseGr.addQuery("parent_task_definition", "CONTAINS", "di_source");
    }
    oldCopyUseCaseGr.query();
    while (oldCopyUseCaseGr.next()) {
        replaceCopyUseCaseSysId(oldCopyUseCaseGr, oldReadOnlyUseCaseSysId, newReadOnlyUseCaseSysId);
    }
}

function replaceCopyUseCaseSysId (copyUseCaseGr, oldReadOnlyUseCaseSysId, newReadOnlyUseCaseSysId) {
    var oldParentUseCase = copyUseCaseGr.getValue("parent_task_definition");
    var oldParentUseCaseObj = {};
    var newParentUseCaseObj = {};
    if (!oldParentUseCase || !oldParentUseCase.includes("base_trained_model")) {
        return;
    }
    oldParentUseCaseObj = JSON.parse(oldParentUseCase);
    newParentUseCaseObj = oldParentUseCaseObj;
    if (oldParentUseCaseObj["sys_di_parent"] && oldReadOnlyUseCaseSysId && oldParentUseCaseObj["sys_di_parent"] === oldReadOnlyUseCaseSysId) {
        newParentUseCaseObj["sys_di_parent"] = newReadOnlyUseCaseSysId;
        newParentUseCaseObj["base_trained_model"] = getNewReadOnlyUseCaseTrainingSolutionName(newReadOnlyUseCaseSysId);
    } else if (oldParentUseCaseObj["di_parent"] && !oldParentUseCaseObj["sys_di_parent"]) {
        newParentUseCaseObj["sys_di_parent"] = newReadOnlyUseCaseSysId;
        newParentUseCaseObj["base_trained_model"] = getNewReadOnlyUseCaseTrainingSolutionName(newReadOnlyUseCaseSysId);
    } else {
        newParentUseCaseObj["base_trained_model"] = getNewReadOnlyUseCaseTrainingSolutionName(newReadOnlyUseCaseSysId);
    }
    var newParentUseCase = JSON.stringify(newParentUseCaseObj);
    copyUseCaseGr.setValue("parent_task_definition", newParentUseCase);
    copyUseCaseGr.update();
}

function getNewReadOnlyUseCaseTrainingSolutionName (newReadOnlyUseCaseSysId) {
    var gr = new GlideRecord("sys_di_task_def_solution_def");
    gr.addQuery("task_definition", newReadOnlyUseCaseSysId);
    gr.addQuery("solution_type", "be5131acb70a2110cbc68b91ee11a981");
    gr.query();
    if (gr.next()) {
        return gr.getDisplayValue("ml_capability_definition_base.solution_name");
    }
    return "";
}

alignParentUseCaseSysIds ("54214afa87c32110822cb887cebb35ff", "d679b5744736f110d10671dc416d4390");

```

5. Navigate to **All > System Definition > Scripts - Background**.
6. Set the **In scope** as `sn_ap_ic`.
7. Copy and paste the script in the **Scripts** area.
8. Click **Run Script**.
 - Use cases configured for Invoice processing flow in Accounts Payable Operations integration with Document Intelligence scope [`sn_ap_ic`] only will get upgraded.
 - Use cases will be upgraded if there is at least one trained task that are manually trained by the user from Document Intelligence Workspace.

Use cases are upgraded with latest model.

How Accounts Payable Operations integration with Document Intelligence works

Accounts Payable Operations integration with Document Intelligence uses automated workflows to extract the required information from the invoice document received as an email attachment, creates a new invoice record in Accounts Payable Operations, and adds the extracted information into the newly created invoice record.

Invoice ingestion process flow when extraction confidence is high

When you receive an invoice as an attachment via email from a supplier or an employee, the following occurs:

1. An invoice case is created with category **Invoice automation** and sub-category **Invoice processing** in Accounts Payable Operations.
2. If Document Intelligence determines that the extraction confidence is higher than the threshold value, it extracts the invoice data and stores the data in temporary staging tables.
3. The Document Intelligence transformation process imports the invoice data from the staging tables, creates a new invoice in the Draft state, and associates the invoice with the invoice processing case.
4. The application verifies the following:
 - The required fields are populated on the invoice.
 - If the required fields are not populated on the invoice, the Accounts Payable Specialist is required to open the invoice, manually enter the required values in the required fields, and submit the invoice.
 - If the required fields are populated on the invoice, the invoice is auto-submitted.
 - At least one invoice line record exists for the invoice. If not, the Accounts Payable Specialist must add an invoice line record and submit the invoice.
 - If a unique currency code is not identified during currency transformation, the process uses the currency mentioned in the purchase order. If the currency is missing in the purchase order, the transformation process uses the session currency based on the user's locale. In this case, the Accounts Payable Specialist is required to open the invoice processing case, and enter the correct currency code in the invoice fields and submit the invoice. For more information, see [Invoice data transformation logic](#).

For more information about the required fields for invoice and invoice lines, see [Required fields for creating an invoice](#).

After the invoice is submitted, its state changes to Received. The invoice processing begins from this point. For more information, see [Work on an invoice processing case](#).

Invoice ingestion process flow when extraction confidence is low

When you receive an invoice as an attachment via email from a supplier or an employee, the following occurs:

1. An invoice case is created with category **Invoice automation** and sub-category **Invoice processing** in Accounts Payable Operations.
2. If Document Intelligence determines that the extraction confidence is lower than the threshold value, it does not extract the invoice data and as a consequence an invoice is not created.
3. In this scenario, the Accounts Payable Specialist must do the following:

- a. Open the invoice processing case created in [Step 1](#).

The case displays the following error message.

Invoice has a data extraction error. Review invoice with automation to continue processing.

- b. Select **Review invoice**, which opens Document Intelligence and displays the invoice fields.
 - c. Enter the required values into the invoice fields, and select **Submit**.
4. The Document Intelligence transformation process imports the invoice data from the staging tables, creates a new invoice in the Draft state, and associates the invoice with the invoice processing case.
5. The application verifies the following:
- The required fields are populated on the invoice.
 - If the required fields are not populated on the invoice, the Accounts Payable Specialist is required to open the invoice, manually enter the required values in the required fields, and submit the invoice.
 - If the required fields are populated on the invoice, the invoice is auto-submitted.
 - At least one invoice line record exists for the invoice. If not, the Accounts Payable Specialist must add an invoice line record and submit the invoice.
 - A unique currency code exists on the invoice. If a unique currency code is not identified during currency transformation, the process uses the currency mentioned in the purchase order. If the currency is missing in the purchase order, then the transformation process uses the session currency based on the user's locale. In this case, the Accounts Payable Specialist is required to open the invoice processing case and enter the correct currency code in the invoice fields and submit the invoice. For more information, see [Invoice data transformation logic](#).

For more information about the required fields for invoice and invoice lines, see [Required fields for creating an invoice](#).

After the invoice is submitted, its state changes to Received. The invoice processing begins from this point. For more information, see [Work on an invoice processing case](#).

Invoice ingestion process flow when the entire transformation process fails

When the Document Intelligence transformation process fails entirely, the following error message is displayed on the invoice processing case:

Invoice automation is experiencing issues. Please contact System Administrator.

You must collaborate with the system administrator to resolve this issue.

Required fields for creating an invoice

The Accounts Payable Operations integration with Document Intelligence application checks whether the required fields are populated on the invoice and invoice lines for creating the invoice.

Required fields for invoice and invoice lines

| Required field for invoice | Required field for invoice line |
|----------------------------|---------------------------------|
| Supplier invoice number | Line description |
| Invoice date | Line amount |
| Invoice amount | Line unit price |
| Supplier | Invoiced quantity |

Invoice data transformation logic

Accounts Payable Operations integration with Document Intelligence converts the invoice and invoice line field values from the invoice document to a format supported by the system that processes the invoice.

Type deriving logic

The application includes the following logic for deriving the type field on the invoice.

- Considers the purchase order value in the invoice stage record
- If the purchase order value isn't empty, then the invoice type is set to PO type.
- If the purchase order value is empty, then the invoice type is set to Non- PO type.

Date conversion logic

The application includes the following logic for converting date formats mentioned in the invoice document:

- Considers YYY-MM-DD as the ISO format and the system format for date conversion.
- Considers dates only in MM-DD-YYYY format for conversion.
- Doesn't consider dates in DD-MM-YYYY format if DD is less than 12.

| Date format in the incoming invoice | Converted date format |
|-------------------------------------|-----------------------|
| 2nd Sep, 2022 | 2022-09-02 |
| 3rd September, 2022 | 2022-09-02 |
| 02-Sep-2022 | 2022-09-02 |
| 02-Sept-2022 | 2022-09-02 |
| Sept-02-2022 | 2022-09-02 |
| Sep-02-2022 | 2022-09-02 |
| 09-02-2022 | 2022-09-02 |
| 02-09-2022 | 2022-02-09 |
| 09/02/2022 | 2022-09-02 |
| 02/09/2022 | 2022-02-09 |

Currency conversion logic

The application supports different locale such as US, European and Indian number systems. For example, "X,XXX.XXX", "X.XXX,XX", "XX,XX.XXX" where X is a single-digit positive number.

| Scenario | Currency format in the incoming invoice | Converted currency format |
|---|---|--|
| Amount followed by a space and the currency code | 76 EUR | 76 EUR |
| Amount followed by a space and the currency symbol | 76 € | 76 EUR |
| Currency code followed by multiple spaces and the amount | EUR 76 | 76 EUR |
| Currency symbol followed by multiple spaces and the amount | € 76 | 76 EUR |
| Amount without a currency code or symbol | 76 | 76 (followed by the purchase order currency or the session currency) |
| Amount separated by comma, dot or any other grouping or decimal separator followed by a space and the currency code | 7.123.456,99 EUR | 7123456.99 EUR |
| Amount followed by the currency code without any space | 76EUR | 76 EUR |
| Amount followed by the currency symbol without any space | 76€ | 76 EUR |
| Currency code followed by the amount without any space | EUR76 | 76 EUR |
| Currency symbol followed by the amount without any space | €76 | 76 EUR |

The application first looks for the active unique currency code in the Currency [fx_currency] table when an incoming invoice amount has a currency symbol or code. If multiple currency matches are found or the incoming invoice amount has no currency code or symbol, then the application runs the defaulting currency logic depending on the invoice type as follows.

- PO invoice - Searches for purchase order and related currency, and sets the invoice currency to purchase order currency. In case of missing purchase order or related currency, the invoice currency is set to system currency.
- Non- PO invoice - Searches for legal entity and local currency, and sets the invoice currency to the legal entity's local currency. In the case of missing legal entity and local currency, the invoice currency is set to system currency.

Unit Price conversion logic

The application supports different locale such as US, European and Indian number format locale. For example, "X,XXX.XXX", "X.XXX,XX", "XX,XX.XXX" where X is a single-digit positive number.

If the incoming invoice unit price consists of currency symbol or code present in Currency [fx_currency] table, then the unit price is converted. For example, \$ XX,XXX,XXX.XX or USD XX,XX,XXX.X, where X is a single-digit positive number.

| Unit price mentioned in the incoming invoice | Converted unit price |
|--|----------------------|
| 1,000,25.10 | 100025.10 |
| 1,00,025.10 | 100025.10 |
| \$1,000,25.10 | 100025.10 |
| 1,000,25.10 \$ | 100025.10 |
| USD1,00,025.10 | 100025.10 |
| 1,00,025.10 USD | 100025.10 |

Decimal conversion logic

The application supports different locale such as US, European and Indian decimal format locale. For example, "X,XXX.XXX", "X.XXX,XX", "XX,XX.XXX" where X is a single-digit positive number.

Currency groupings on invoice and invoice lines are determined based on the user system locale settings. European currencies consider comma as a decimal separator and dot as a thousand separators. In some cases, various characters can also be used as grouping separator. The incoming invoice and invoice lines present in [sn_ap_ic_invoice_stage] and [sn_ap_ic_invoice_line_stage] tables are converted based on the positioning of decimal and thousand separators.

Note: During conversion, for numbers such as 100,251 and 100.251, the system checks for other decimal separators mentioned in the invoice, and converts it to the appropriate decimal format. If the invoice contains fields with single decimal separator, then conversion does not apply for the invoice, and the value is set to empty as shown in the table below.

For more information on currency conversion, see [Currency administration](#).

| Decimal format mentioned in the incoming invoice | Converted decimal format |
|--|--------------------------|
| 1,000,25.10 | 100025.10 |
| 1,00,025.10 | 100025.10 |
| 100,251 | 100,251 |
| 10.102,510 | 10102.51 |
| 10.10.102,510 | 1010102.51 |
| 100,251 | |
| 100.251 | |

Logic to fetch reference field values

| Reference Field | Logic to fetch the field value |
|-----------------|--|
| Legal Entity | <p>The system fetches the value by checking the following values in the order listed:</p> <ol style="list-style-type: none"> 1. Bill to company 2. Street, City, State, Country, Zip 3. City, State, Country, Zip 4. State, Country, Zip 5. Country, Zip 6. Country 7. Zip |
| Purchase Order | <p>The system does the following:</p> <ul style="list-style-type: none"> • The system considers the purchase order value mentioned in the invoice stage • If the purchase order value is prefixed with special characters, alphabets or zeroes, then the application ignores the prefixes and matches the remaining purchase order value with the ERP number from the purchase order table • If a unique purchase order is found then the application populates the purchase order in the invoice |
| Supplier | <p>The system does one of the following:</p> <ul style="list-style-type: none"> • The system considers the value mentioned in the invoice and does a complete match with supplier in Supplier table. • If the invoice contains a purchase order associated with the supplier, the application matches with the supplier name mentioned in the invoice with the supplier name of purchase order and populates the supplier. • If the invoice document contains supplier name with more than two words, the application performs partial name match against the supplier details in the supplier table along with street address or city. Example. If the invoice document contains supplier name as XX Corp, and the supplier name in the supplier table is XX Ltd, the application matches XX in supplier table along with the address and populates the invoice document with the corresponding supplier. <p>If a unique supplier record is found in any of the above, then the application populates the supplier in the invoice.</p> |
| Country | <p>The system does one of the following:</p> <ul style="list-style-type: none"> • Considers the value mentioned in the invoice • If this value isn't mentioned in the invoice, it populates the International Organization for Standardization (ISO) short country name or the ISO long country name |
| Subtotal, Tax | The system does the following: |

| Reference Field | Logic to fetch the field value |
|-----------------------|---|
| amount, Other charges | <ul style="list-style-type: none"> If the invoice contains XX.XXX,XXX the application groups the numeric to four digits after decimal separator. If the invoice contains three numeric digits after the separator, the application sets the invoice fields to empty. If the invoice contains a combination of decimal and thousand separators in a form, the application defaults to the numeric value to the decimal separator. |

Domain separation and Accounts Payable Operations

Domain separation is unsupported for Accounts Payable Operations. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see [Application support for domain separation](#).

Invoice integration

Invoice integration facilitates inbound and outbound integration with third party applications or any external systems into the ServiceNow® application.

The integration framework consists of inbound invoice and outbound invoice interface tables. Invoice integration involves the transfer of invoice and invoice line data by running transform maps through various sources or external systems. For more information on integration, see [Integration Hub](#).

The integration framework enables the following use cases:

- Ingest invoices from external sources - The invoice data is extracted from ERP sources into ServiceNow® inbound staging tables and is referred as inbound integration.
- Post invoices into ERP- The invoice and invoice line data with **Approved** status is synchronized with ServiceNow® outbound invoice and invoice line tables. The integration status is set to **New** and is referred as outbound integration.
- Ingest invoice payment details from ERP- The ERP number received from the third party application is updated in the invoice table with payment status as **Pending Payment**. The supplier selects the payment method, proceeds with the payment and sets the payment status as **Paid**.

For example, You're receiving invoice data from various sources. The invoice data is transferred to inbound invoice and invoice lines if the required fields are set on the invoice. For more information on the required fields, see [Inbound Invoice Fields](#) and [Inbound invoice line fields](#). The invoice status changes to **Approved** and the invoice data is transferred to outbound invoice tables. The outbound invoice displays the integration status as **New**. The ERP integrator fetches the outbound invoices with status as **New**, creates a record in the third party application and sets the integration status to **In progress**. After the outbound data

is successfully processed by the third party application, the system auto updates the ERP number in the outbound invoice tables and sets the integration status to **Processed**. The ERP number is updated in the invoice table with payment status set to **Pending Payment**. The supplier verifies the invoice payment details, proceeds with the payment and the payment status is set to **Paid**. For more information on payment fields, see [Inbound invoice payment fields](#).

The advantages of integration framework are:

- Expedites the integration of the Accounts Payable Operations application with external systems and reduces the time to verify invoices. Integration framework enables bulk import of invoice and invoice line data through scheduled jobs. A scheduled job runs every 30 minutes, verifies, and auto process the invoices. Scheduled jobs result in increased efficiency of creating invoices.
- Expedite the payment processing process and enhance the user experience by seamlessly exchanging data with external systems.

Import data into invoice

You can import bulk data through transform map using excel file.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Accounts Payable Workspace**.
2. View the inbound table `sn_spend_intg_imp_invoice_list.do`.
3. Right-click the column heading.
4. Select **Import**.
The **Import external data into Invoice Import** page appears. For more information on importing data through transform map, see [Run transform to update invoice data](#).

Note: Follow the same steps for invoice lines and invoice payment.

5. Select if you want to **Insert** or **Update** data.
By default, **Insert** is selected.
6. Check the **Do you want to create an Excel template to enter data?** check box.
 - a. In **Create an Excel template file to enter data** > Check the **Include all fields in the template** check box.
 - b. Click **Create Excel template**.
 - c. In **Upload the template file**, browse for the excel file in XLS format.
 - d. Click **Upload**.

Result

Excel template is created and uploaded with mandatory invoice data.

Load invoice data

Load the invoice data from the excel template into the `sn_spend_intg_imp_invoice` staging table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Load Data**.
The **Load Data page** appears.
2. In **Import set table**, choose **Existing table** option.
3. Choose the invoice table from the drop-down list.
4. In **Source of the Import**, choose **File**.
5. Browse the excel template that was created from [Import data into invoice](#).
6. Enter the **Sheet number** of the excel template that needs to be loaded into the staging table.
7. Enter the **Header row** of the excel template that needs to be loaded into the staging table.
8. Click **Submit**.

Result

The invoice data from the excel template is processed successfully.

Run transform to update invoice data

Use transform map and run transform to map the invoice fields from the import set into target tables in Accounts Payable Operations.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Load Data > Run Transform**.
The **Specify Import set and Transform map** screen appears. In the **Import set**, the staging table you selected from [Load invoice data](#) is auto populated. In **Selected maps, run in order** area, the target invoice table to be mapped in Accounts Payable Operations is auto-populated and selected by default.
2. Click **Transform**.

Result

The invoice fields from the import set is mapped to `sn_shop_invoice` table.

Working with inbound invoice

Create invoice and invoice lines originating from different ERP sources using an integration framework.

Before you begin

- [Import data into invoice](#)
- [Load invoice data](#)
- [Run transform to update invoice data](#)

Role required: `sn_spend_intg_admin` or `sn_spend_intg_procurement_integrator`

Procedure

1. Open `sn_spend_intg_imp_invoice_list`.do staging table.
The **Invoice Imports** lists the inbound invoice columns. For more information on the inbound fields, refer [Inbound Invoice Fields](#).

Note: If the required inbound fields are validated and entered, then the **Status** is set to inserted.

2. Open any inbound record with **Status** as **Inserted**.
3. Navigate to **Import Set > Target record**.



4. Select > **Open Record**.

Invoice record is created in the **Draft** state and the scheduled job is run every thirty minutes. If the required fields on the invoice are filled, and no exceptions are found, then the invoice is auto set to **Approved** status.

Working with outbound invoice

ERP integrator validates the invoice with ERP number, processes the integration, and the moves the invoice for payment extraction.

Before you begin

Role required: sn_spend_intg_admin or sn_spend_intg_procurement_integrator

Procedure

1. Open *sn_spend_intg_outbound_invoice_list.do* staging table.
The **Invoice record** is verified with ERP number.
2. Set the **Integration status** to **Processed**.
The invoice **Status** is automatically set to **Pending payment**. The invoice is extracted for payment, and the invoice status is set to **Paid**.

Using Accounts Payable Operations

Accounts Payable Specialists and agents can use Accounts Payable Operations to create cases, route cases to agents, manage invoices, and resolve invoice exceptions.

Invoice case categories and subcategories

An agent and Accounts Payable Specialist can access and work on the invoice cases in the Accounts Payable workspace.

The following table provides information about the invoice case categories and subcategories, when the cases are created, and which roles can access and work on these cases.

Account Payables cases

| Category | Subcategory | Role | Description |
|----------|--|--|--|
| Inquiry | <ul style="list-style-type: none"> • Payment inquiry • Invoice inquiry • Expedite payment request | Agent <code>[sn_ap_cm.agent]</code> | You can view the invoice inquiry cases in the Accounts Payable Workspace. For more information, see |

Account Payables cases (continued)

| Category | Subcategory | Role | Description |
|--------------------|---|--|--|
| | <ul style="list-style-type: none"> • Payment terms issue • Invoice entry assistance | | Invoice inquiry cases. |
| Invoice automation | Invoice processing | Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist] | <p>You can view the manual invoice ingestion cases in the Accounts Payable Workspace.</p> <p>For more information, see Invoice processing cases.</p> |

To view the invoice cases, do the following:

1. Navigate to **Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - As an Accounts Payable Specialist:
 - Navigate to **Lists > My Work > My open invoice processing cases**
 - Navigate to **Lists > All Work > All open invoice processing cases**
 - As an agent:
 - Navigate to **Lists > My Work > My open invoice inquiry cases**
 - Navigate to **Lists > All Work > All open invoice inquiry cases**

Using Invoice Case Management

Agents can use Invoice Case Management to manage and work on invoice inquiry cases raised by employees and suppliers to resolve issues related to invoices.

Invoice inquiry cases

Invoice inquiry cases help you resolve invoice-related issues raised by the suppliers or employees.

When you receive an email for an inquiry, the application automatically creates an invoice case with a category of **Inquiry** and one of the following sub-categories:

- **Payment inquiry**
- **Invoice inquiry**
- **Expedite payment request**

- Payment terms issue
- Invoice entry assistance
- Other

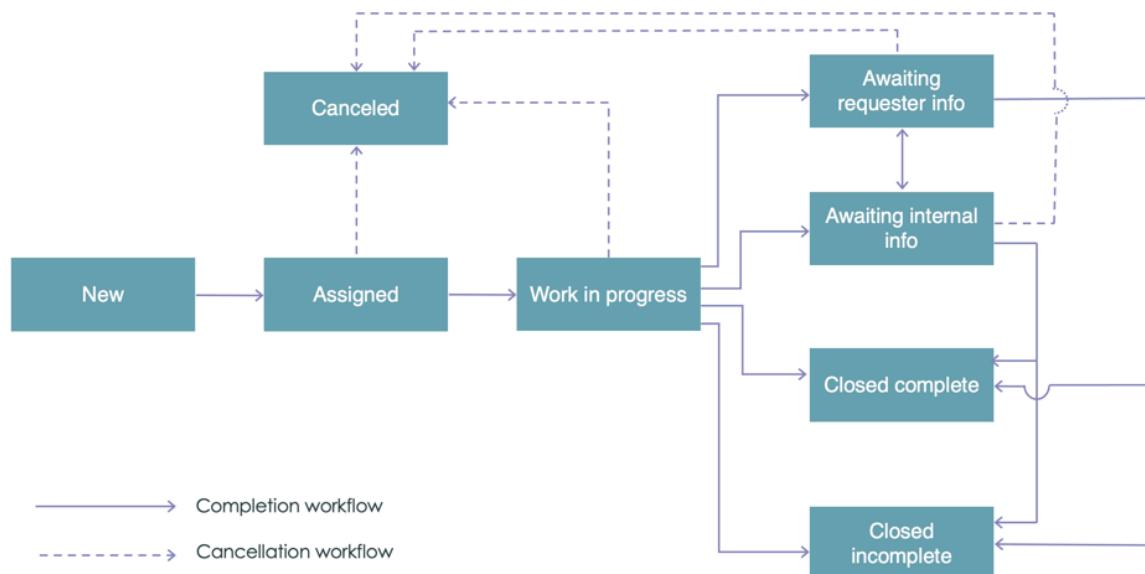
Note: An invoice case with a category of **Inquiry** is referred to as an invoice inquiry case.

However, an agent [sn_ap_cm.agent] can manually create invoice inquiry cases and work on them or create Accounts Payable tasks for those cases and assign them to a user or group. For more information, see [Create an invoice inquiry case manually](#).

Invoice inquiry case life cycle

The following figure illustrates the various states that the invoice inquiry case goes through during its life cycle, from its creation to closure.

Invoice inquiry case life cycle



Invoice inquiry case states

| State | Description |
|-------------------------|--|
| New | The case is created. |
| Assigned | The case is assigned. |
| Work in progress | The case is being worked on. |
| Awaiting requester info | The agent needs more information from the requester to continue working on the case. |
| Awaiting internal info | The agent is waiting for the internal review on the case to complete. |
| Closed complete | The case is closed by entering the closure code. |

Invoice inquiry case states (continued)

| State | Description |
|-------------------|--|
| Closed incomplete | The case is marked as incomplete by entering the closure code. Providing the closure details is required when you mark a case as Close incomplete . |
| Canceled | The case is a duplicate, created in error, or no longer required. |

Work on an invoice inquiry case

Work on an invoice inquiry case to resolve an issue raised by the suppliers or employees.

Before you begin

Role required: sn_ap_cm.agent or sn_ap_cm.admin

About this task

An invoice case with a category of Inquiry is referred to as an invoice inquiry case.

Typically, an invoice inquiry case is automatically created when you receive an inquiry email. However, the agent can also manually create an invoice inquiry case from the Accounts Payable Workspace. For more information, see [Create an invoice inquiry case manually](#).

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - Navigate to **Lists > My Work > My open invoice inquiry cases**.
 - Navigate to **Lists > All Work > All open invoice inquiry cases**.
4. Open an invoice inquiry case to work on.
5. Do one of the following:
 - To assign the case to yourself, select **Assign to me**.
 - If the case is assigned to you by the Accounts Payable Specialist, you can start working on the case by selecting **Accept**.

The case moves to the **Work in progress** state.

6. Do one of the following:
 - Request more information about the invoice inquiry case from the requester. For more information, see [Request additional information from the requester for an invoice inquiry case](#).

The state of the case updates to Awaiting requester info.

 - Submit the invoice inquiry case for an internal review. For more information, see [Submit an invoice inquiry case for an internal review](#).

The state of the case updates to Awaiting internal info.

 - Create an invoice task and assign it to a user or group to resolve the invoice inquiry case. For more information, see [Create an invoice task](#).

7. Close an invoice inquiry case when all the activities and tasks for resolving the case are completed.
For more information, see [Close an invoice inquiry case](#).

Create an invoice inquiry case manually

Create invoice inquiry cases to address and respond to questions related to invoices and payment.

Before you begin

Role required: sn_ap_cm.agent or sn_ap_cm.admin

About this task

Invoice inquiry cases are created automatically when you receive emails from suppliers or employees. However, you can also create invoice inquiry cases manually.

Note: An invoice case with a category of Inquiry is referred to as an invoice inquiry case.

Procedure

1. Navigate to **All > All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Under Quick actions, select **Create New Inquiry**.
3. On the Create New Invoice case form, fill in the fields.
For a description of the field values, see [Create New Invoice case form](#).
4. Select **Save**.

Create an invoice task

Create an invoice task and assign it to a user or group to resolve an invoice inquiry case.

Before you begin

Role required: sn_ap_cm.agent or sn_ap_cm.admin

Procedure

1. Navigate to **All > All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - **Lists > My Work > My open invoice inquiry cases**
 - **Lists > All Work > All open invoice inquiry cases**
4. In the Number column, select the link for an invoice inquiry case to open it.
5. Select the **Tasks** tab and then select **New**.
6. On the Create New Invoice task form, fill in the fields.
For a description of the field values, see [Create New Invoice task form](#).
7. Select **Save**.

Request additional information from the requester for an invoice inquiry case

Request additional information from the requester to continue working on the case.

Before you begin

Role required: sn_ap_cm.agent or sn_ap_cm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - Navigate to **Lists > My Work > My open invoice inquiry cases**.
 - Navigate to **Lists > All Work > All open invoice inquiry cases**.
4. In the Number column, select the link to the case to open it.
5. Select the down arrow icon () and then select **Wait for requester**.
The Wait for requester dialog box is displayed.
6. In the **Reason** field, enter the information that you need from the requester.
7. Select **Wait for requester**.
The state of the case updates to Awaiting requester info.

Submit an invoice inquiry case for an internal review

Submit an invoice inquiry case for an internal review by creating a review task and assigning it to the reviewers.

Before you begin

Role required: sn_ap_cm.agent or sn_ap_cm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - Navigate to **Lists > My Work > My open invoice inquiry cases**.
 - Navigate to **Lists > All Work > All open invoice inquiry cases**.
4. In the Number column, select the link to the case to open it.
5. Select the down arrow icon () and then select **Request internal review**.
The application automatically creates a task in the New state and opens it.
6. In the **Assigned to** field, assign the task to the users who must complete the review.
Alternatively, in the **Assignment group** field, assign the task to a group who must complete the review.
7. Select **Save**.
8. The state of the case updates to **Awaiting internal info**.

Close an invoice inquiry case

Close an invoice inquiry case when all the activities and tasks for resolving the case are completed.

Before you begin

Role required: sn_ap_cm.agent or sn_ap_cm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
 2. Select the list icon ().
 3. Do one of the following:
 - Navigate to **Lists > My Work > My open invoice inquiry cases**.
 - Navigate to **Lists > All Work > All open invoice inquiry cases**.
 4. In the Number column, select the link to the case to open it.
 5. Do one of the following:
 - Select **Close inquiry**.
The Close inquiry dialog box is displayed.

◦ Select the down arrow icon () and then select **Close incomplete**.
The Closure details dialog box is displayed.
 6. From the Closure code list, select one of the following options:
 - **Duplicate request**
 - **Canceled/False inquiry**
 - **Canceled by requester**
 - **Information provided**
 - **Exceptions resolved**
 7. In the **Closure details** field, enter the reason why you're closing the case.
- i Note:** This field is required when you close an invoice inquiry case as **Close incomplete**.
8. Select **OK**.
Depending on the option that you selected in step 5, the state of the case updates to Close complete or Closed incomplete.

Using Accounts Payable Invoice Processing

Accounts Payable Specialists can use the Accounts Payable Invoice Processing application to manage and work on invoice processing cases to perform end-to-end invoice processing, from invoice ingestion to approval.

Invoices

Invoices are generated for a payment against a purchase order. The Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist] can access all the invoices and take required actions to process the invoices in Accounts Payable Workspace.

Accounts Payable Operations integration with Document Intelligence automatically extracts data from the invoices that are received as an attachment via email, and creates the invoice records and the invoice line records. When the invoice is in certain states during automated invoice processing, manual intervention is required by the Accounts Payable Specialist to move the invoice to the next stage of processing.

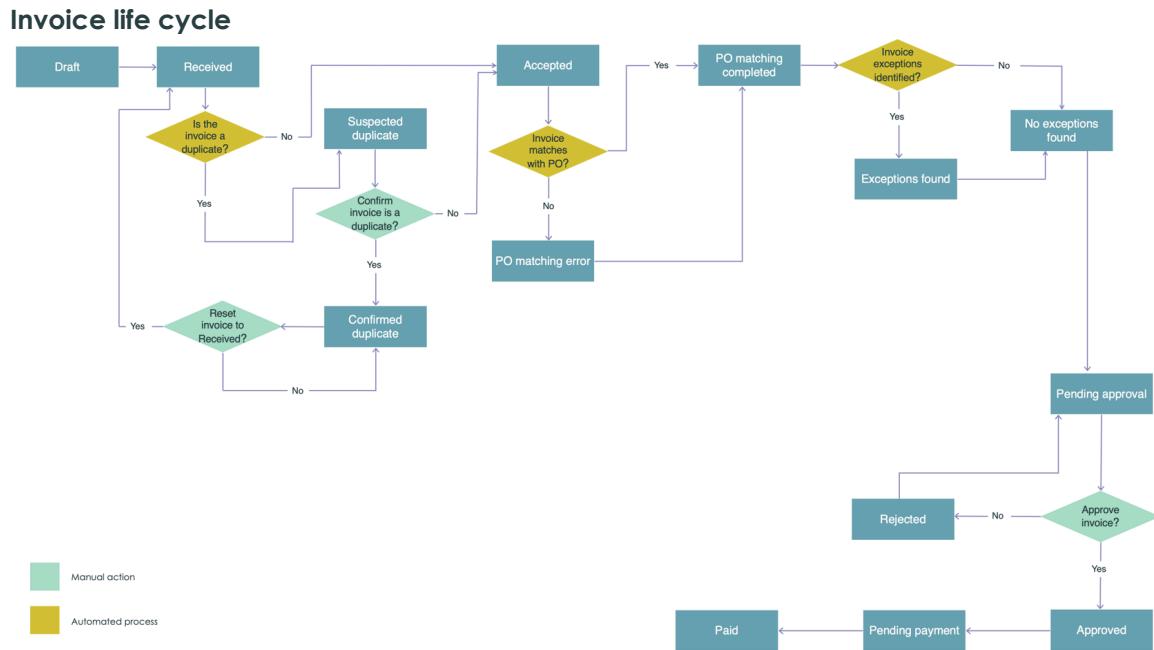
i Note: Accounts Payable Operations supports invoices of type **PO Invoice** and **Non-PO Invoice**.

The Accounts Payable Specialist can view the invoices by doing the following:

1. Navigate to **Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon (≡).
3. Navigate to **Lists > Invoices**.

Invoice life cycle

The following figure illustrates the various statuses and sub-statuses that the invoice goes through during its life cycle, from its creation to approval.



Create an invoice manually

As an Accounts Payable Specialist, you can create an invoice manually from the Accounts Payable Workspace when the automated invoice creation process is encountering issues or not available.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

Invoices are created automatically by integration with Document Intelligence. However, you can also create invoices manually.

Procedure

1. Navigate to **All > All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Under Quick actions, select **Create New Invoice**.
3. On the Create New Invoice form, fill in the fields.
For a description of the field values, see [Create New Invoice form](#).
4. Select **Save**.

A new invoice is created in the Draft state, a new invoice case is created with a category of Invoice automation and sub-category of Invoice processing, and the new invoice is associated with the invoice case.

For more information about working with an invoice processing case, see [Work on an invoice processing case](#).

What to do next

Create invoice lines for the invoice. For more information, see [Create an invoice line manually](#).

Create an invoice line manually

Create invoice lines manually for an invoice when the invoice automation process doesn't capture this information from an incoming invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All > All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Navigate to **Lists > Invoices > All Open Invoices**.
3. In the Number column, select the link to the invoice that you want to create an invoice line for.
4. Select the **Invoice lines** tab and select **New**.
5. On the Create New Invoice Line form, fill in the fields.
For a description of the field values, see [Create New Invoice Line form](#).
6. Select **Save**.

Update the purchase order on an invoice

If you find that the purchase order that is currently associated with an invoice is incorrect, you can associate the correct purchase order to the invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists > Invoices > All open invoices**.
4. Open a PO Invoice.
5. Under Summary Details, in the **Purchase order** field, search for and select a purchase order.
The following confirmation message is displayed: Updating the Purchase order may require PO matching again. Do you want to continue?
6. Select **OK**.

The confirmation message is not displayed if you update the purchase order on a PO invoice that is in the Draft, Received, or Accepted status.

The confirmation message is displayed if you update the purchase order on a PO invoice either before or after PO matching is completed. If you select **OK** after you change the

purchase order in the **Purchase order** field, the invoice lines are mapped with the purchase order lines of the newly associated purchase order. Subsequently, the automated PO matching process is run and the invoice status moves to PO matching error or PO matching completed.

View your invoices on Employee Center

As a business owner, you can view all the invoices that you own on Employee Center.

Before you begin

Role required: sn_shop.invoice_owner

Procedure

1. Navigate to **All > Employee Center**.
2. In the My active items widget, select **Invoices**.

The Invoice List page is displayed, which lists all the invoices that you own.

In the Number column, select the link to an invoice to view its details.

Invoice processing cases

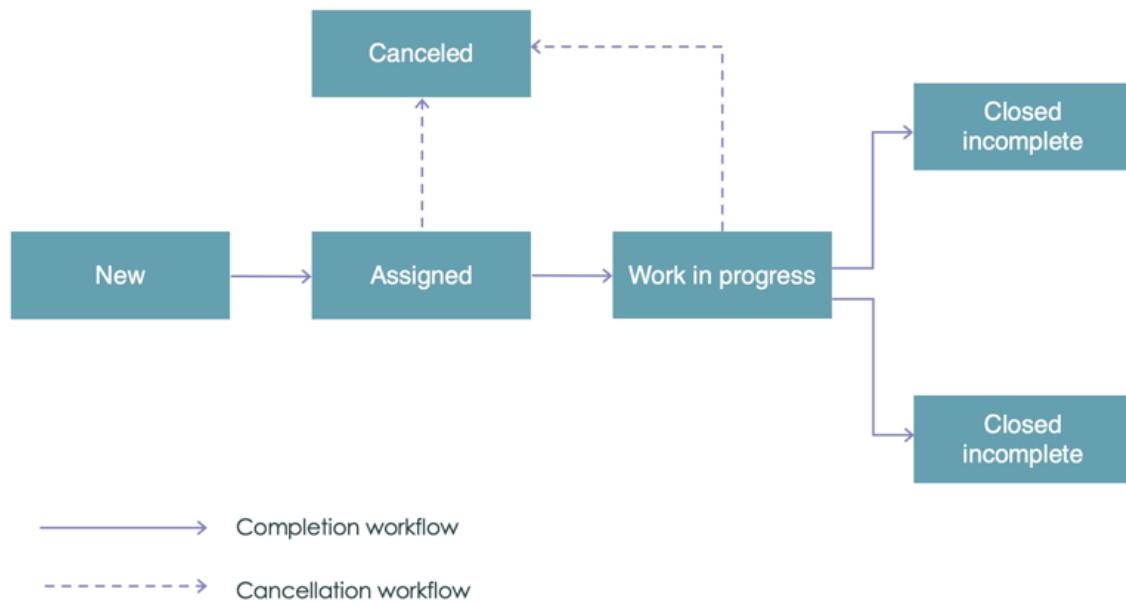
Typically, Accounts Payable Operations integration with Document Intelligence automatically creates the invoice processing case by extracting data from the invoice that you receive as an attachment via email. However, the Accounts Payable Specialist may need to manually create a new invoice or update details of a partially created invoice in situations where the automated invoice creation process encounters issues or is not available.

By default, when an inbound email is received in Accounts Payable Operations integration with Document Intelligence, the invoice processing flow is triggered and an invoice case with a category of **Invoice automation** and sub-category of **Invoice processing** is created. For more information, see [Install Accounts Payable Operations integration with Document Intelligence](#).

Invoice processing case life cycle

The following figure illustrates the various states that the Invoice processing case goes through during its life cycle, from its creation to closure.

Manual invoice ingestion case life cycle



Invoice processing case states

| State | Description |
|-------------------|--|
| New | The case is created. |
| Assigned | The case is assigned. |
| Work in progress | The case is being worked on. |
| Closed complete | The case moves to this state after the invoice approval request is approved by the approver or after the invoice is auto-approved by the approval engine. |
| Closed incomplete | The case moves to this state when the invoice is in the Suspected duplicate state and the Accounts Payable Specialist selects the Confirm duplicate option. |
| Canceled | The case is canceled because it was created in error or is no longer required. |

Work on an invoice processing case

Perform different manual actions to process an invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

An invoice case with a category of Invoice automation and sub-category of Invoice processing is referred to as an invoice processing case.

By default, an invoice processing case is automatically created when you receive an invoice via email. Document Intelligence captures the invoice data and subsequently creates the invoice and invoice line records in Accounts Payable Operations. However, the Accounts Payable Specialist can also manually create an invoice from the Accounts Payable Workspace. For more information, see [Create an invoice manually](#).

For a description of the field values and information about the available tabs on the invoice processing case form, see [Invoice processing case form](#).

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
 2. Select the list icon ().
 3. Do one of the following:
 - Navigate to **Lists > My Work > My open invoice processing cases**.
 - Navigate to **Lists > All Work > All open invoice processing cases**.
 4. Open an invoice processing case.
Typically, the state of the newly created invoice processing case is New and the status of the invoice associated with this case is either Draft or Received, depending on how it was processed by the Accounts Payable Operations integration with Document Intelligence application.
- For more information about invoice statuses, see [Invoices](#).
5. In the **Assigned to** field, specify a user that you want to assign the invoice processing case to.
The invoice processing case moves to the Assigned state.
 6. Do one of the following:
 - If you have the Accounts Payable Specialist role, assign the invoice processing case to yourself by selecting **Assign to me**.
 - If the invoice processing case is assigned to you by the Accounts Payable Specialist, start working on the case by selecting **Accept**.

The invoice processing case moves to the Work in progress state.

7. Do one of the following:

| To | Do this |
|---|---|
| Review the invoice in Document Intelligence to create the invoice | <p>If a processing error occurs in Document Intelligence, the invoice processing case displays the following error:</p> <p>Invoice has a data extraction error. Review invoice with automation to continue processing.</p> <p>For more information, see Review an invoice in Document Intelligence.</p> |
| Enter the missing required information in the invoice | <p>If a transformation error occurs in Document Intelligence, the invoice processing case displays the following error:</p> <p>Required information for invoice has one or more errors. Review required fields and currency in "Details" tab to continue processing.</p> <p>For more information, see Enter the missing required invoice information and submit an invoice.</p> |

8. Submit the invoice.

After you submit the invoice, the status of the invoice updates to Received and the invoice processing case remains in the Work in progress state.

The automated duplicate check process is run and if the process suspects that the invoice is a duplicate, the invoice moves to the Suspected duplicate status, and the invoice processing case displays the following error.

Invoice is a potential duplicate. Review invoices in "Potential duplicate invoices" tab to confirm or reject duplicate.

The Accounts Payable Specialist must manually confirm whether the invoice is a duplicate.

9. Confirm whether the invoice is a duplicate.

For more information, see [Confirm whether an invoice is a duplicate](#).

If you confirm that the invoice is a duplicate, the invoice moves to the Confirmed duplicate status and the invoice processing case moves to the Closed incomplete state.

i Note: When the invoice is in the Confirmed duplicate status, the **Reset to Received** option becomes available. If you've confirmed an invoice as duplicate by mistake, you can reset the status back to the Received status. For more information, see [Reset an invoice to the Received status](#).

If you confirm that the invoice is not a duplicate, the invoice moves to the Accepted status, and the invoice processing case remains in the Work in progress state.

After the invoice moves to the Accepted status, the automated PO matching process is run and one of the following occurs:

- If the invoice matches with the PO, then the invoice moves to the PO matching completed status.
- If the invoice doesn't match with the PO, then the invoice moves to the PO matching error status and the invoice processing case displays the following error:

Invoice needs to match Purchase order. Match "invoice lines" to "Purchase order lines" to continue processing.

The Accounts Payable Specialist must manually match the invoice and invoice lines with the PO and the PO lines, respectively. The invoice moves to the PO matching completed status only after all the invoice lines move to the PO matching completed status.

The invoice processing case remains in the Work in progress state.

i Note: After the invoice moves to the PO matching completed status, the exception engine is run via a scheduled job at a specific time on a recurring basis. The exception engine runs on all the invoices that are in the PO matching completed status.

At this stage, however, you can also manually run the exception engine to identify invoice exceptions on the invoice.

i Note: The **Check for exceptions** option enables you to instantly run the exception engine on a single, selected invoice that is in the PO matching completed status, whereas the scheduled job periodically runs the exception engine on all the invoices that are in the PO matching completed status.

10. Check for exceptions on the invoice.

For more information, see [Check for invoice exceptions on a single invoice](#).

If no exceptions are found, the invoice moves to the No exceptions found status.

If exceptions are found on the invoice, the invoice moves to the Exceptions found status, and the invoice processing case displays the following error:

Invoice has one or more exceptions. Resolve all issues in "Invoice exceptions" to continue processing.

The Accounts Payable Specialist can work on the exceptions or create exception tasks and assign them to other users to resolve the exceptions. For more information, see [Invoice exceptions](#).

After all the exception tasks are completed and the exceptions are resolved, the invoice moves to the No exceptions found status. The invoice processing case remains in the Work in progress state.

At this stage, the automated invoice approval process runs and submits the invoice for approval.

The invoice moves to the Pending approval status and the invoice processing case remains in the Work in progress state.

Typically, an invoice that is in the No exceptions found status is automatically picked by the approval engine and submitted for approval. However, in a few scenarios, you may have to manually submit an invoice for approval. For more information, see [Send an invoice for approval](#).

After you submit the invoice, the invoice moves to the Pending approval status, and the invoice processing case remains in the Work in progress state.

At this stage, one of the following occurs:

- If the invoice is rejected, the invoice moves to the Rejected status and the rejection comments are copied over to the invoice processing case.

To resubmit the invoice, you must cancel the rejected invoice using the **Cancel invoice** option and submit a new invoice.

- If the invoice is approved, the invoice moves to the Approved status and the invoice processing case moves to the Closed complete state.

Accounts Payable Specialist manual tasks

Accounts Payable Operations performs invoice processing using automated workflows, with minimal manual intervention. In some situations, however, the Accounts Payable Specialist is required to perform a few manual tasks to move the invoice to the next stage of processing.

View the invoice processing case associated with an invoice

View the invoice processing case that is automatically created for an invoice and take any actions to process the invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists > Primary Data > Invoices**.
4. Open an invoice.
5. Select **View invoice processing case**.
The invoice processing case opens.

Review an invoice in Document Intelligence

Review the invoice details, enter the required invoice field values, and submit the invoice if Document Intelligence encounters an extraction error.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

If Document Intelligence encounters an extraction error, the invoice processing case is created in Accounts Payable Operations integration with Document Intelligence. The invoice is not created or associated with that case. You must review the invoice details in Document Intelligence, enter the required values in the invoice fields, and submit the invoice to create the invoice.

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists > Primary Data > Invoices**.
4. Open an invoice that is in the Draft status.
5. Select **View invoice processing case**.
The invoice processing case opens and displays the following notification at the top:

Invoice has a data extraction error. Review invoice with automation to continue processing.
6. Select **Review invoice**.
7. Refer to the invoice document and fill in the fields for the invoice.
8. Select **Submit**.
The invoice and invoice line records are created and the invoice is associated with this invoice processing case.
9. Open the invoice processing case and select **Submit invoice**.
A message appears asking you for a confirmation.
10. Select **Yes**.
The invoice is submitted for further processing and the status of the invoice changes to Received.

Enter the missing required invoice information and submit an invoice

If Document Intelligence encounters a transformation error, the invoice is created and associated with an invoice processing case. However, not all required information is populated on the invoice. You must manually enter the required information and submit the invoice for further processing.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.

2. Select the list icon ().

3. Navigate to **Lists > Primary Data > Invoices**.

4. Open an invoice in the Draft status.

5. Select **View invoice processing case**.

The invoice processing case opens and displays the following notification at the top:

Required information for invoice has one or more errors. Review required fields and currency in "Details" tab to continue processing.

6. On the **Details** tab, under Summary details, enter the missing details in the fields.

7. Select the **Invoice lines** tab, and ensure that you add at least one invoice line.

8. Select **Submit invoice**.

A message appears asking you for a confirmation.

9. Select **Yes**.

The invoice is submitted for further processing and the status of the invoice changes to Received.

Confirm whether an invoice is a duplicate

Confirm whether an invoice that is in the Suspected duplicate status is indeed a duplicate to determine if the invoice should be considered for processing.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.

2. Select the list icon ().

3. Navigate to **Lists > Primary Data > Invoices**.

4. Open an invoice in the Suspected duplicate status.

5. Select **View invoice processing case**.

The invoice processing case opens and displays the following notification at the top:

Invoice is a potential duplicate. Review invoices in "Potential duplicate invoices" tab to confirm or reject duplicate.

6. Do one of the following:

| Option | Action |
|---------------------------------------|--|
| To mark an invoice as not a duplicate | <p>a. Select Not a duplicate.</p> <p>A message appears asking you for a confirmation.</p> |

| Option | Action |
|-----------------------------------|--|
| | <p>b. Select Yes.</p> <p>The status of the invoice changes to Accepted.</p> |
| To mark an invoice as a duplicate | <p>a. Select Confirm duplicate.</p> <p>A message appears asking you for a confirmation.</p> <p>b. Select Yes.</p> <p>The status of the invoice changes to Confirmed duplicate and the state of the invoice processing case changes to Closed incomplete.</p> |

Convert invoice type

You can convert invoice type from PO to Non-PO invoice and vice versa based on interaction between buyers and suppliers of business services.

Before you begin

Role required: Account Payable Specialist

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists > My work > My open invoice processing cases** and open an invoice processing case.
An alternate way is by navigating to **Lists > Primary Data > Invoices > Open invoice**.

i Note: Type conversion is supported only for invoices from **Draft** state to **No exceptions found** state. You cannot convert invoice type once it is submitted for approval.

4. Choose the **Type** drop-down to convert an invoice.
 - When you choose to convert an invoice from PO to Non-PO invoice, the **Purchase order** field is hidden.
 - When you choose to convert an invoice from Non-PO to PO invoice, the **Purchase order** field is displayed and you must populate the purchase order field.

A message appears asking for your confirmation.

5. Select **Continue**.

6. Select **Save**.

The changes are saved and all open exceptions are closed. If the type selected is Non-PO, then the application removes all the purchase order and purchase order line mapping from invoice and invoice lines respectively. The **State** field is set to **Received** for an intermittent time period, and then changes to the respective state depending on the invoice processing.

The application displays the following notification:

Invoice is currently being processed.

For more information on checking exceptions, refer [Check for invoice exceptions on a single invoice](#).

Reset an invoice to the Received status

If you confirm an invoice as a duplicate by mistake, you can reset that invoice from the Confirmed duplicate status back to the Received status.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists > Primary Data > Invoices**.
4. Open an invoice in the **Confirmed duplicate** state.
5. Select **View invoice processing case**.
6. On the invoice processing case form, select **Reset to Received**.
A message appears asking you for a confirmation.
7. Select **Yes**.
The status of the invoice changes to Received.

Check for invoice exceptions on a single invoice

Manually check for invoice exceptions on a single invoice so that you can resolve them.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

The **Check exceptions** option is available for all invoices that are in **Exceptions found** state.

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists > Primary Data > Invoices**.
4. Open an invoice that is in the **Exceptions found** state.
5. Select **View invoice processing case**.

Note: If you open an invoice processing case for an invoice that is in Exceptions found status, the invoice processing case form displays the following notification at the top:

Invoice has one or more exceptions. Resolve all issues in "Invoice exceptions" to continue processing.

6. On the invoice processing case form, select **Check exceptions**.
7. Select **Yes**.

While exceptions are being identified on the invoice, the status of the invoice changes to **Checking exceptions** for a short period of time and the following occurs:

- If no exceptions are found on the invoice, the status of the invoice changes to No exceptions found.
- If exceptions are found on the invoice, the status of the invoice remains as Exceptions found.

Send an invoice for approval

Send an invoice that is in the No exceptions found status for approval.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

For information, see [Invoice approvals](#).

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists > Primary Data > Invoices**.
4. Open an invoice in the **No exceptions found** state.
5. Select **View invoice processing case**.
The invoice processing case opens.
6. On the Invoice processing case form, select **Request approval**.
A message appears asking you for a confirmation.
7. Select **Yes**.
The invoice is sent for approval and the status of the invoice changes to Pending approval.

Start the processing for an invoice imported via integration with third-party applications

Start the processing for an invoice that doesn't have an associated invoice processing case.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

In a few scenarios, the invoice can be imported via integration with third-party applications. If an invoice is ingested into Accounts Payable Operations via integration, the invoice processing is not initiated. No invoice processing case is created for the invoice.

In such situations, the Accounts Payable Specialist must open the invoice and select the **Start invoice processing** option, which creates an invoice processing case for the invoice and starts processing the invoice.

The **Start invoice processing** option is displayed for invoices of type PO and Non-PO only.

The **Start invoice processing** option is not displayed for invoices that are in the Canceled, Closed duplicate, Approved, Pending payment, or Paid status.

- Note:** Accounts Payable Operations includes the Start Invoice Processing for Orphan Invoices flow, which automatically picks up all the PO and Non-PO invoice type records that are in the Draft status that don't have an invoice processing case associated to them and starts their processing.

You don't need to perform this manual task if you've activated the Start Invoice Processing for Orphan Invoices flow. For more information, see [Activate the Start Invoice Processing for Orphan Invoices flow](#).

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to **Lists > Primary Data > Invoices**.
4. Open the invoice that is imported into Accounts Payable Operations via integration.
5. Select **Start invoice processing**.

An invoice processing detailed record and an invoice processing case is created for the invoice and the invoice processing begins.

After an invoice processing case is created for the invoice, the **Start invoice processing** option is replaced by the **View invoice processing case** option on the Invoice form.

The invoice is processed based on its current status. For example, if the invoice is in the Received status, the duplicate check process is run, if the invoice is in the PO matching completed status, the exception engine is run, if the invoice is in the No exceptions found status, the approval engine is run, and so on.

The invoices for which an invoice processing case is not created automatically, a scheduled job runs at regular intervals to pick up such invoices, creates an invoice case for each invoice, and starts the processing for the invoices. The scheduled job enables you to start the processing for all such invoices in bulk, without requiring you to start the processing for each invoice individually.

Activate the Start Invoice Processing for Orphan Invoices flow

Activate the **Start Invoice Processing for Orphan Invoices** flow to start the processing of an invoice that doesn't have an associated invoice case.

Before you begin

Role required: admin

About this task

This flow creates an invoice processing case, associates the invoice with that case, and then starts the invoice processing.

Procedure

1. Navigate to **All > Process Automation > Flow Designer**.
2. Search for and select the **Start Invoice Processing for Orphan Invoices** flow to open it.
3. Select the more actions icon () in the top right and select **Copy flow**.
The Create a copy of this flow dialog box is displayed.
4. In the **New flow name** field, enter a name for the copied flow.
5. In the **Application** field, select **Accounts Payable Operations**.

6. Select **Copy.**

A copy of the flow opens.

7. Under TRIGGER, specify the conditions that trigger this flow.**8. Select **Save**.****9. Select **Activate**.****Invoice ingestion process when Document Intelligence is unavailable**

When Document Intelligence goes down or when Document Intelligence itself is not installed, and if you receive an invoice document via email, an invoice processing case is created but an invoice record is not created.

In this scenario, the invoice processing case displays the **Create invoice** and **Close case** options. The Accounts Payable Specialist must open the invoice processing case and either create the invoice or close the invoice processing case.

Create an invoice manually when Document Intelligence is unavailable

As an Account Payable Specialist, manually create an invoice if an invoice processing case automatically is created when the Document Intelligence application is unavailable.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist

Procedure**1. Navigate to All > Accounts Payable Operations > Accounts Payable Workspace.****2. Select the list icon (****).****3. Do one of the following:**

- Navigate to **Lists > My Work > My open invoice processing cases**.
- Navigate to **Lists > All Work > All open invoice processing cases**.

4. Open the invoice processing case.**5. Select **Create invoice**.**

The invoice is created and the invoice processing case displays the following message:

Invoice has been successfully created. Verify all the required fields are correct and add invoice lines before submitting.

Verify that the values in the invoice fields are correct and ensure that you add at least one invoice line for the invoice. For more information, see [Create an invoice line manually](#).

6. Select **Submit invoice.****Close the additional invoice processing case for an invoice**

Close the auto-created invoice processing case if one already exists for an invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist

About this task

If you create an invoice manually, a new invoice processing case is created for that invoice. As a result, the auto-generated invoice processing case becomes redundant and therefore you can close it.

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - Navigate to **Lists > My Work > My open invoice processing cases**.
 - Navigate to **Lists > All Work > All open invoice processing cases**.
4. Open the invoice processing case.
5. Select **Close case**.
The Close case dialog box is displayed.
6. From the Closure code list, select one of the following options:
 - **Duplicate invoice**
 - **Invoice canceled**
 - **Invoice approved**
7. In the **Reason** field, enter the reason why you're closing the case.
8. Select **Close case**.
The invoice processing case is closed and its state updates to Closed complete.

Invoice exceptions

Invoice exceptions are issues that are identified in an invoice during invoice processing.

The Accounts Payable Operations exception engine automatically identifies discrepancies in invoices and lists them as invoice exceptions in the Accounts Payable Workspace workspace. The Accounts Payable Specialist can analyze the identified invoice exceptions and take appropriate action to resolve them.

The Accounts Payable Operations exception engine is run for the PO invoices that are in either the PO matching completed or Exceptions found state.

The Accounts Payable Operations exception engine is run for Non-PO invoices that are in Accepted or Exceptions found state.

The Accounts Payable Operations exception engine identifies invoice exceptions of the following types.

Invoice exception type

| Invoice exception | Description | Do these steps to resolve the invoice exception | Applicable to |
|-----------------------------|---|--|-------------------------------|
| Invalid or blocked supplier | <p>This exception occurs in one of the following scenarios:</p> <ul style="list-style-type: none"> • The supplier information is missing on the invoice. • The supplier information | <p>To resolve this invoice exception, do the following:</p> <ul style="list-style-type: none"> • If the supplier information is missing on the invoice, do the following: | PO invoice and Non-PO invoice |

Invoice exception type (continued)

| Invoice exception | Description | Do these steps to resolve the invoice exception | Applicable to |
|-------------------|--|--|---------------|
| | <p>on the invoice doesn't match the information on the purchase order if invoice is of type PO.</p> <ul style="list-style-type: none"> • The Supplier Legal Entity Mapping (<code>sn_fin_supplier_detail</code>) table doesn't have a record with a combination of <code>Invoice.supplier</code> and <code>Invoice.legal_entity</code> fields • In the Supplier Legal Entity Mapping (<code>sn_fin_supplier_detail</code>) table, the supplier has one of the following attributes set to true: <ul style="list-style-type: none"> ◦ Hold Payment: Indicates that the invoice payment is put on hold for the supplier ◦ Hold Posting: Indicates that the invoice posting is put on hold for the supplier <p>This exception is a header-level exception.</p> | <ol style="list-style-type: none"> 1. Log in to the application with the Accounts Payable Specialist (<code>sn_ap_apm.accounts_payable_specialist</code>) role. 2. Populate valid supplier and legal entity. <ul style="list-style-type: none"> • If the supplier information on the invoice doesn't match with that on the purchase order, do the following: <ol style="list-style-type: none"> 1. Log in to the application with the Accounts Payable Specialist (<code>sn_ap_apm.accounts_payable_specialist</code>) role. 2. Update the supplier information on the invoice to match with that on the purchase order. • If the Supplier Legal Entity Mapping (<code>sn_fin_supplier_detail</code>) table, doesn't have a record with a combination of <code>Invoice.supplier</code> and <code>Invoice.legal_entity</code>, do the following: <ol style="list-style-type: none"> 1. Log in with the Supplier Enablement Manager (<code>sn_fin.supplier_payment_info_write</code>) role. | |

Invoice exception type (continued)

| Invoice exception | Description | Do these steps to resolve the invoice exception | Applicable to |
|--|--|--|---------------|
| | | <p>2. Add a record with the combination of Invoice.Supplier – Invoice.LegalEntity fields in the Supplier Legal Entity Mapping (sn_fin_supplier_detail) table.</p> <ul style="list-style-type: none"> If the supplier's Hold Payment and Hold Posting attributes are set to true in the Supplier Legal Entity Mapping table, do the following: <p>1. Log in with the Supplier Enablement Manager (sn_fin.supplier_payment_info_write) role.</p> <p>2. Take the necessary actions to remove holds from invoices to enable payment and posting of the invoices.</p> | |
| Insufficient Funds (Quantity variance) | <p>This exception occurs when the total quantity of previously billed invoices and the current invoice which is in-process becomes more than the respective purchase order line quantity.</p> <p>This exception is a line-level exception.</p> | <p>To resolve this invoice exception, you must edit the purchase order. For more information, see Edit a purchase for an Insufficient Funds invoice exception.</p> | PO invoice |

Invoice exception type (continued)

| Invoice exception | Description | Do these steps to resolve the invoice exception | Applicable to |
|---|--|---|---------------|
| | <p>To resolve this invoice exception, you must edit the purchase order. For more information, see Edit a purchase for an Insufficient Funds invoice exception.</p> | | |
| Insufficient Funds (Line amount variance) | <p>This exception occurs when purchase order lines doesn't have sufficient funds left to process the current invoice which is in-process.</p> <p>This exception is a line-level exception.</p> | <p>To resolve this invoice exception, you must edit the purchase order. For more information, see Edit a purchase for an Insufficient Funds invoice exception.</p> | PO invoice |
| Insufficient Goods Receipt | <p>This exception occurs when one or more lines of an invoice do not have sufficient receipts to process the invoice.</p> <p>This exception is a line-level exception.</p> | <p>Resolving the Insufficient Goods Receipt exception when PSM is installed</p> <p>If Sourcing and Procurement Operations (PSM) is installed, and if no receipt task exists for the purchase order line, Accounts Payable Invoice Processing creates a receipt task and displays the task in the Related</p> | PO invoice |

Invoice exception type (continued)

| Invoice exception | Description | Do these steps to resolve the invoice exception | Applicable to |
|-------------------|-------------|---|---------------|
| | | <p>tasks tab of the exception form. For more information, see Invoice exception form.</p> <p>The receipt task is assigned to the user specified in the Recipient field on the PO line. The recipient must have the sn_shop.acknowledgement_task_owner role to complete the receipt task from Employee Center.</p> <p>For more information, see Confirm receipt of your order from Employee Center.</p> <p>Resolving the Insufficient Goods Receipt exception when PSM isn't installed</p> | |

Invoice exception type (continued)

| Invoice exception | Description | Do these steps to resolve the invoice exception | Applicable to |
|-----------------------|---|--|-------------------------------|
| | | <p>If Sourcing and Procurement Operations isn't installed, then the Accounts Payable Specialist must manually create an exception task, which is assigned to the business owner. The business owner needs to mark this task as complete in Employee Center. For more information, see Mark an exception task as complete from Employee Center.</p> | |
| Valid coding required | This exception occurs when one or more lines of an invoice are missing the following information: | To resolve this invoice line exception, do the following: | PO Invoice and Non-PO invoice |

Invoice exception type (continued)

| Invoice exception | Description | Do these steps to resolve the invoice exception | Applicable to |
|-----------------------------------|--|--|-------------------------------|
| | <ul style="list-style-type: none"> • Ledger account • Tax code • Cost center <p>This exception is a line-level exception.</p> | <ol style="list-style-type: none"> 1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. 2. Populate the ledger account, tax code and cost center information on all the invoice lines. | |
| Missing required information | <p>This exception occurs when one or more fields of the following are missing on the invoice:</p> <ul style="list-style-type: none"> • Payment terms • Invoice type • Supplier • Invoice amount • Invoice date • Legal entity <p>This exception is a header-level exception.</p> | <p>To resolve this invoice exception, do the following:</p> <ol style="list-style-type: none"> 1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. 2. Populate the following fields on the invoice: <ul style="list-style-type: none"> ◦ Payment terms ◦ Invoice type ◦ Supplier ◦ Invoice amount ◦ Invoice date ◦ Legal entity | PO Invoice and Non-PO invoice |
| Missing or Invalid Business Owner | <p>This exception occurs when the business owner of the invoice is missing or inactive or is different from the business owner mentioned in the purchase order (if invoice is of type PO).</p> | <p>To resolve this invoice exception, do the following:</p> <ol style="list-style-type: none"> 1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. | PO Invoice and Non-PO invoice |

Invoice exception type (continued)

| Invoice exception | Description | Do these steps to resolve the invoice exception | Applicable to |
|-------------------|---|--|---------------|
| | This exception is a header-level exception. | 2. Update valid business owner field in the invoice line. | |

By default, the exception engine is configured to run once every 5minutes through the **Exception Monitoring Job**. This is a scheduled job which is inactive in state by default. For information on how to activate the scheduled job, see [Activate the Exceptions Monitoring Scheduler](#).

However, you can also run the exception engine manually. For more information, see [Check for invoice exceptions on a single invoice](#).

When you run the exception engine manually on a single invoice, it checks for exceptions only on that invoice, whereas the automated exception engine checks for exceptions on all the invoices that are valid for exception check.

You can bypass an exception in situations where that exception is not applicable to an invoice. For more information, see [Bypass an invoice exception](#).

The Accounts Payable Operations exception engine finds exceptions and lists them in the list page of the Accounts Payable Workspace. View the list of exceptions by navigating to **All > Accounts Payable Operations > Accounts Payable Workspace**.

In the workspace, select the list icon () and do one of the following:

- Navigate to **Lists > My Work > My open invoice exceptions**.
- Navigate to **Lists > All Work > All open invoice exceptions**.

The Accounts Payable Specialist can analyze the invoice exceptions, create exception tasks, and assign these tasks to the relevant individuals to fix the exceptions and resolve the case. For more information, see [Work on an invoice exception](#).

Activate the Exceptions Monitoring Scheduler

Activate the **Exception Monitoring Scheduler** to run the exception engine on a regular schedule to identify invoice exceptions.

Before you begin

Role required: admin

About this task

The default automatically runs every 5 minutes after you activate it.

Procedure

1. Navigate to **All > System Definition > Scheduled Jobs**.
2. Search for and select the **Exception Monitoring Scheduler** to open it.
3. Select **Active** check box.

You will notice the **Repeat interval** set to five minutes.

4. Select **Update**.

Work on an invoice exception

As an Accounts Payable Specialist, analyze the invoice exceptions, create exception tasks, and assign them to the relevant individuals to resolve the invoice exceptions.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

For a description of the field values and information about the available tabs on the invoice exception form, see [Invoice exception form](#). For details about the available tabs for an exception task, see [Invoice task form tabs](#).

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.

2. Select the list icon ().

3. Do one of the following:

| To | Do this |
|---|--|
| View exceptions from the List page | <p>a. Do one of the following:</p> <ul style="list-style-type: none"> ▪ Navigate to Lists > My Work > My open invoice exceptions. ▪ Navigate to Lists > All Work > All open invoice exceptions. <p>b. Select the link to the invoice exception under the Number column to open the exception and view its details.</p> |
| View exceptions from an invoice processing case | <p>a. Do one of the following:</p> <ul style="list-style-type: none"> ▪ Navigate to Lists > My Work > My open invoice processing cases. ▪ Navigate to Lists > All Work > All open invoice processing cases. <p>b. Open an invoice processing case that contains exceptions.</p> <p>i Note: If an invoice processing case contains exceptions, the following message is shown at the top of the case:</p> <p style="padding-left: 20px;">Invoice has one or more exceptions. Resolve all issues in "Invoice exceptions" to continue processing.</p> <p>c. Select the Invoice Exceptions tab.</p> <p>d. Select the link to the invoice exception under the Number column to open the exception and view its details.</p> |

4. Either work on the invoice exception yourself or create an exception task to assign it to a user or an assignment group to resolve the invoice exception.

For more information, see [Create an exception task for an invoice exception](#).

After all the invoice exception tasks are completed, the status of the invoice updates to No exceptions found. The invoice processing case remains in the Work in progress state.

5. To view all the invoice exceptions tasks and the exception tasks that are assigned to you, do the following:
 - a. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
 - b. Select the list icon ().
 - c. Do one of the following:
 - Navigate to **Lists > My Work > My open tasks**.
 - Navigate to **Lists > All Work > All open tasks**.

Create an exception task for an invoice exception

Create an exception task to assign it to a user or an assignment group to resolve the invoice exception.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:

| To | Do this |
|---|---|
| Create an exception task from the List page | <p>a. Do one of the following:</p> <ul style="list-style-type: none"> ▪ Navigate to Lists > My Work > My open tasks. ▪ Navigate to Lists > All Work > All open tasks. <p>b. Select New.</p> <p>The Create New Invoice task page is displayed. For a description of the field values, see Create New Invoice task form.</p> <p>The Type field is set to Case task by default.</p> <p>c. In the Parent case field, select the parent case for the invoice.</p> <p>d. In the Invoice exception field, select the exception for which you want to create an exception task.</p> <p>e. After you select an exception, the Type field changes from Case task to Exception task.</p> <p>Note: The Type field is read-only.</p> <p>f. Enter the required information in the Assignment group, Assigned to, Short description, and Description fields.</p> <p>g. Select Save.</p> |

| To | Do this |
|--|--|
| Create an exception task from an invoice exception | <p>a. Do one of the following:</p> <ul style="list-style-type: none"> ▪ Navigate to Lists > My Work > My open invoice exceptions. ▪ Navigate to Lists > All Work > All open invoice exceptions. <p>b. In the Number column, select the link to an invoice exception to open it.</p> <p>c. Select the Exception tasks tab and then select New.</p> <p>The Create New Invoice task page is displayed. For a description of the field values, see Create New Invoice task form.</p> <p>The Parent case, Invoice exception, and Type fields are auto-populated.</p> <p>d. Enter the required information in the Assignment group, Assigned to, Short description, and Description fields.</p> <p>e. Select Save.</p> |
| Create an exception task from an invoice processing case | <p>a. Navigate to Lists > All Work > All open invoice processing cases.</p> <p>b. In the Number column, select the link to an invoice processing case to open it.</p> <p>c. Select the Tasks tab and then select New.</p> <p>The Create New Invoice task page is displayed. For a description of the field values, see Create New Invoice task form.</p> <p>The Parent case field is auto-populated. The Type field is set to Case task by default.</p> <p>d. In the Invoice exception field, select the exception for which you want to create an exception task.</p> <p>e. After you select an exception, the Type field changes from Case task to Exception task.</p> <p>Note: The Type field is read-only.</p> <p>f. Enter the required information in the Assignment group, Assigned to, Short description, and Description fields.</p> <p>g. Select Save.</p> |

The exception task gets assigned to the business owner specified on the invoice.

What to do next

[Mark an exception task as complete from Employee Center.](#)

Mark an exception task as complete from Employee Center

As a task owner, when you finish working on an assigned exception task, you can mark the task as complete from Employee Center.

Before you begin

Role required: sn_shop.invoice_owner or sn_ap_cm.task_owner

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. On the **Open** tab, select an exception task.
3. Select **Mark Complete**.
The Marking the task complete dialog box is displayed.
4. Enter your comments and select **Mark Complete**.
The status of the exception task changes to Closed complete.

Edit a purchase for an Insufficient Funds invoice exception

Edit a purchase to resolve invoice exceptions of type Insufficient Funds (Amount variance) and Insufficient Funds (Quantity variance).

Before you begin

Role required: sn_shop.shopper

About this task

For more information about editing a purchase order line, see [Edit a purchase order line](#).

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. On the **Open** tab, select an Insufficient Funds exception task.
3. Select **Edit Purchase**.
4. On the Edit a purchase page, select **Entire purchase**.
5. In the **Purchase** field, select the purchase order and do one of the following:
 - To resolve the Insufficient Funds (Quantity variance) invoice exception, edit the purchase order and ensure that the purchase order quantity is greater than the invoiced quantity of all the invoices received for this purchase order.
 - Insufficient Funds (Line amount variance) invoice exception, edit the purchase order and ensure that the purchase order amount is greater than the invoiced amount of all the invoices received for this purchase order.
6. Select **Submit**.

What to do next

Mark the Insufficient Funds exception task as complete. For more information, see [Mark an exception task as complete from Employee Center](#).

Confirm receipt of your order from Employee Center

Confirm the receipt of the items that you've ordered so that the payment is made to the supplier.

Before you begin

Role required: sn_shop.acknowledgement_task_owner

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. On the **Open** tab, select the receipt task.
3. Select **Complete in ShoppingHub**.
Shopping Hub is opened in a new browser tab.
4. Follow the steps starting from step 2 in [Confirm receipt of your order from ShoppingHub Home](#).

Bypass an invoice exception

Bypass an invoice exception if you find that it is not applicable to the invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

The **Bypass exception** option is available for an exception only if the **Allow bypass** option is selected for that exception on the Invoice exception definition form. For more information, see [Invoice exception definition form](#).

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:

| To | Do this |
|---|---|
| View exceptions from the List page | <p>a. Do one of the following:</p> <ul style="list-style-type: none"> ▪ Navigate to Lists > My Work > My open invoice exceptions. ▪ Navigate to Lists > All Work > All open invoice exceptions. <p>b. Select the link to the invoice exception under the Number column to open the exception and view its details.</p> |
| View exceptions from an invoice processing case | <p>a. Do one of the following:</p> <ul style="list-style-type: none"> ▪ Navigate to Lists > My Work > My open invoice processing cases. ▪ Navigate to Lists > All Work > All open invoice processing cases. <p>b. Open an invoice processing case that contains exceptions.</p> <p>i Note: If an invoice processing case contains exceptions, the following message is shown at the top of the case:</p> <p style="padding-left: 20px;"><i>One or more exceptions have been identified on this invoice. Review the identified invoice exceptions and take appropriate action to resolve them.</i></p> <p>c. Select the Exceptions tab.</p> <p>d. Select the link to the invoice exception under the Number column to open the exception and view its details.</p> |

4. Select **Bypass exception**.
5. In the Bypass reason dialog box, enter a reason for bypassing the invoice exception and select **OK**.
The invoice exception is bypassed and its status changes to Closed-bypassed.
After you bypass an exception, the exception engine re-runs automatically.

View invoice line details for a line-level invoice exception

View details about invoice lines to understand why a line-level invoice exception has been created.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

The **Invoice lines affected** tab is displayed only for exception tasks that are created for line-level exceptions, such as Insufficient Goods Receipt, Insufficient Funds (Quantity variance), and Insufficient Funds (Amount variance).

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - Navigate to **Lists > My Work > My open invoice exceptions**.
 - Navigate to **Lists > All Work > All open invoice exceptions**.
4. In the Number column, select the link to a line-level invoice exception to open it.
5. Select the **Exception tasks** tab and open an exception task that you created for the invoice exception.
6. Select the **Invoice lines affected** tab to view details about each invoice line exception.

View related tasks for an Insufficient Goods Receipt invoice exception

As an Accounts Payable specialist, view tasks related to Sourcing and Procurement Operations to understand why an Insufficient Goods Receipt invoice exception has been raised for an invoice.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Do one of the following:
 - Navigate to **Lists > My Work > My open invoice exceptions**.
 - Navigate to **Lists > All Work > All open invoice exceptions**.
4. In the Number column, select the link to an Insufficient Goods Receipt invoice exception to open it.
5. Select the **Related tasks** tab.

If Sourcing and Procurement Operations is installed, then this tab shows the following tasks:

- Receipt. For more information, see [Receipt tasks](#).
- Milestone. For more information, see [Milestones](#).
- Invoice acknowledgment. For more information, see [Invoice tasks](#).

If Sourcing and Procurement Operations is not installed, then this tab shows only the Milestone task.

Define a new invoice exception definition

Define a new invoice exception definition and configure it according to your business requirements.

Before you begin

Role required: sn_ap_apm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Administration > Invoice exception definition**.
2. On the Invoice exception definitions form, select **New**.
3. On the Invoice exception definition form, fill in the fields.
For a description of the field values, see [Invoice exception definition form](#).
4. Select **Submit**.

Invoice approvals

Invoices with the No exceptions found status are eligible for approval.

The approval engine picks all the invoices with the No exception found status and based on the configured approval rules, creates the approval requests and assigns them to the approvers. At this stage, the status of the invoices changes to Pending approval. After the approver approves the approval request, the status of the invoice changes to Approved.

Create an approval rule

Create approval rules to ensure that the approval requests are reasonable and fit your organization's budget.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Administration > Approval rules**.
2. Select **New**.
3. On the Approval Rule form, fill in the fields.
For a description of the field values, see [Approval Rule form](#).
4. Select **Submit**.

What to do next

You can also associate approval rules with approval groups and define the sequence to determine when these rules should be triggered. For more information, see [Approval rule grouping and sequencing](#).

Approval rule types

Approval rule types determine how approvals are created and routed during the invoice approval process.

The approval rule types determine the conditions under which approval plans are created and routed.

Approval rule types

| Approval rule type | Description |
|-------------------------------|--|
| Dynamic Users or Groups | Approvals are dynamically created and sent to the specified user or group. Approvals are triggered based on the purchasing user's attributes. The approval routing method is restricted to just sending approvals in parallel. |
| Managerial Job Code Hierarchy | Approvals are triggered based on the purchasing user's job code and manager's job code. The approval routing method can be parallel or sequential, and the approval decision method can be all approvers or any approver. |
| Managerial Hierarchy | Approvals are triggered based on the purchasing user's manager's hierarchy. The approval routing method can be parallel or sequential, and the approval decision method can be all approvers or any approver. |
| Specified Users or Groups | Approvals are triggered based on the specified users or groups. The approval routing method is restricted to just sending approvals in parallel. |

Monitor an approval plan

Monitor approval plans to understand how the overall approval process is progressing.

Before you begin

To monitor an approval plan, you must have already defined an approval rule. For more information on how to create approval rules, see [Create an approval rule](#). You can review and update the plans if required. Approval plans are not created manually.

Role required: admin

About this task

The approval engine converts each approval rule into one or multiple approval plans. You can monitor approval plans to understand how the overall approval process is progressing, the routing and decision methods used, the list of approvers involved, the status of the approvals, the list of invoice lines the approval is planned for, and so on.

Procedure

1. Navigate to **All > Accounts Payable Operations > Administration > Approval plan**.
2. Select a record.
3. On the Approval Plan form, review the fields.
For a description of the field values, see [Approval Plan form](#).

What to do next

Use the related lists of the Approval Plan form to view the approval plan details and approvers associated with this approval plan.

Approve an invoice approval task from Employee Center

Review the invoice approval tasks that are assigned to you and approve or reject them.

Before you begin

Role required: sn_shop.invoice_owner

Procedure

1. Navigate to **All > Employee Center > My Tasks**.
2. On the **Open** tab, select an invoice approval task.
3. Do one of the following:

| Action | Description |
|---------|-----------------------|
| Approve | Approves the request. |
| Reject | Rejects the request. |

You can now view the approved and rejected approval tasks on the **Completed** tab.

i Note: When rejecting a request, you must provide your justification for rejection on the Reject request window.

View invoice documents in the Accounts Payable Workspace

View the invoice documents directly in the Accounts Payable Workspace using Document Viewer without having to download them.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_apm.admin

About this task

The invoice document is displayed for invoice, invoice lines, invoice processing case, invoice exceptions, and exception task records.

Procedure

1. Navigate to **All > All > Accounts Payable Operations > Accounts Payable Workspace**.
2. Select the list icon ().
3. Navigate to the list of invoice cases.
4. In the Number column, select the link to a case record that contains an invoice document.

The invoice document is displayed on the right contextual side panel. You can zoom in, zoom out, rotate left and right, adjust the document width both horizontally and vertically, and also download the document.

 You can toggle the invoice document icon () to show or hide the invoice document.

Composing emails with predefined content from the Accounts Payable Workspace

Insert predefined content into the message body of emails that you send from the email client in the Accounts Payable Workspace.

You can use this feature to compose and send emails directly from an invoice case. To open



the email client, select **Compose Email** from the more actions icon () from an invoice case. A draft email appears with pre-populated data in the **To** and **Subject** fields.

The **To** field is auto-populated with the following information:

- The email address of the user in the **Requested by** field on the invoice case form.
- The email address of the user in the **Assigned to** field on the invoice case form.

The **Subject** field is auto-populated with the case number and the invoice case short description.

Using quick messages

In the email client, you can select a quick message to fill the email body with the content that is specified in the quick message. After you define one or more quick messages, the Quick Messages contextual pane appears in the email client so that you can draft an email with a quick message of your choice.

For more information on how to create a quick message, see [Define a quick message](#)

Using response templates

Resolve cases faster and more efficiently with response templates. Response templates are reusable messages that can be copied to draft emails to provide quick and consistent messages to users.

Open the response template that you want to use for your email and select **Copy to clipboard**. You can now paste the contents of this template at the location of the cursor. It doesn't replace the content that you created before selecting the response template. To replace existing content with a response template content, highlight the text to replace and then select a response template.

For more information on how to work with response templates, see [Create or modify a response template](#)

Communicate using emails from the Accounts Payable Workspace

Compose and send emails directly from an invoice inquiry case or an invoice processing case in the Accounts Payable Workspace.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist, sn_ap_apm.admin, sn_ap_cm.agent, or sn_ap_cm.admin

Procedure

1. Navigate to **All > Accounts Payable Operations > Accounts Payable Workspace**.

2. Select the list icon ().

3. Do one of the following:

◦ As an Accounts Payable Specialist:

- Navigate to **Lists > My Work > My open invoice processing cases**
- Navigate to **Lists > All Work > All open invoice processing cases**

◦ As an agent:

- Navigate to **Lists > My Work > My open invoice inquiry cases**
- Navigate to **Lists > All Work > All open invoice inquiry cases**

4. In the Number column, select the link to the case to open it.



5. Select the more actions icon () and select **Compose Email**.

6. Do one of the following:

- To insert templated content into the email body using quick messages:

a. Select the quick messages icon () and select an appropriate quick message that you want to use.

b. Select Insert.

- To insert templated content into the email body using response templates:

a. Select the response templates icon () and select an appropriate response template that you want to use.

b. Select Copy to clipboard.

c. Paste the content in the email body.

7. Do one of the following:

- To send the email instantly, select **Send Email**.
- To save the email as draft to send later, select **Save as draft**.

Using Supplier Collaboration Portal

The Supplier Collaboration portal application integrated with Accounts Payable Operations provides seamless interaction between Account Payable Specialist and supplier in creating invoice inquiry case, submit new invoice, resolving case tasks and exception tasks.

Supplier Portal Collaboration header

The portal header is located at the top-right corner of the home page contains the following options.

| Option | Description |
|------------------|--|
| My Tasks | Lists all the tasks that are assigned to the logged-in user. For more information on tasks, see Working with tasks in Supplier Collaboration Portal header . |
| My Requests | Opens the My Requests page, which lists all the requests assigned to you. |
| Submit a request | Supplier raises invoice requests. |

For more information regarding the Supplier Portal Collaboration header options, see [Working with tasks in Supplier Collaboration Portal header](#).

Supplier Collaboration Portal widgets

The Supplier Collaboration Portal integrated with Accounts Payable Operations consists of the following widgets. For more information on Supplier Collaboration Portal widgets, see [Supplier Collaboration Portal](#).

My active items widget

As a supplier contact, you can view specific items from the following tiles in the **My active items** widget:

| Item | Description |
|----------|--|
| Tasks | Opens the My Tasks list page, which lists all the tasks that are assigned to the supplier. For more information on tasks, see Working with tasks in Supplier Collaboration Portal header . |
| Requests | Lists all the invoice inquiry cases for the supplier. For more information on inquiry requests, see Working with My Requests . |
| Invoices | <p>Lists the invoices for supplier to view the invoice details and raise invoice related inquiry case. For more information on invoice inquiry see Submit Invoice Inquiry.</p> <p>i Note: From the invoice form, you can submit an inquiry case. For more details on inquiry case, see Submit Invoice Inquiry</p> |

My Requests widget

Displays a list of invoice inquiry cases that you have submitted. Selecting a case directly opens the **My Requests** page so that you can work on that inquiry case. Select **View All** to view the list of all inquiry cases that you have submitted. For more information on **My Requests** widget, see [Working with My Requests](#).

Working with tasks in Supplier Collaboration Portal header

Use the portal header located at the top-right corner of the Supplier Collaboration Portal home page to open exception tasks, invoice inquiry requests assigned to the logged-in supplier.

Before you begin

Role required: Supplier

Procedure

1. Navigate to the header on the Supplier Collaboration Portal home page >**Tasks** > **My Tasks**.
Lists the **Open** and **Completed** exception tasks and invoice case tasks assigned for the logged in supplier. For more information on creating an exception task, see [Work on an invoice exception](#).

Note: You can also view **My Tasks** by navigating to **My active items** widget>**Tasks** tile.

- On the **Exception task** form, you can view the following details.

| Option | Description |
|--|--|
| Number | An auto-generated number that uniquely identifies the task. |
| Due Date | The assigned date by which the task must be completed. |
| State | The current state of the task. The states are: <ul style="list-style-type: none"> ◦ New ◦ Assigned ◦ Work in progress ◦ Closed complete ◦ Closed incomplete |
| Supplier | Name of the supplier |
| Supplier invoice number | The invoice number of the supplier invoice. |
| Purchase order | Purchase order number related to the invoice. |
| Amount invoiced (Transaction currency) | Charges applied on the invoice. |
| Description | Detailed description about the task. |
| Activity | Lists the activity postings between Accounts Payable Specialist and supplier. |
| Attachments | Supplier uses attachments in the form of PDF, JPEG, PNG formats. |

- On the **Invoice case** task form, you can view the following.

| Option | Description |
|----------|--|
| Number | Auto-generated number that uniquely identifies the invoice case. |
| Due Date | The assigned date by which the task must be completed. |
| State | The current state of the task. The states are: <ul style="list-style-type: none"> ◦ New ◦ Assigned ◦ Work in progress ◦ Closed complete ◦ Closed incomplete |

| Option | Description |
|-------------------------|---|
| Supplier invoice number | The invoice number of the supplier invoice. |
| Purchase order | Purchase order number related to the invoice. |
| Parent case | Name of the parent case assigned to. |
| Description | Detailed description about the task. |
| Activity | Lists the activity postings between Accounts Payable Specialist and supplier. |
| Attachments | Supplier uses attachments in the form of PDF, JPEG, PNG formats. |

Supplier selects **Mark complete**. The status of the task changes to **Closed complete**. For more information on invoice case, see [Using Invoice Case Management](#).

Working with My Requests

View and respond to invoice inquiries.

Before you begin

Role required: Supplier

Procedure

1. Navigate to the header on the home page > **My Requests**.
Lists all the invoice inquiry cases assigned to supplier. For more information on invoice inquiry cases, see [Invoice inquiry cases](#).
2. You can apply filter on **View** option which will display the open and closed requests.
3. Use the **Search open requests** option to search for a specific request using the inquiry number.
4. Open a **Invoice inquiry** case.
The **Invoice inquiry** form appears.
5. On the **Invoice inquiry** form, perform the following.

| Option | Description |
|-------------------------|--|
| Number | Auto-populates the invoice number associated with the inquiry. |
| State | Displays the current state of the Invoice inquiry . |
| Updated | Number of days the record was last updated. |
| Created | Number of days the record was created on. |
| Requested by | Auto-populated name of the requester. |
| Supplier invoice number | Supplier invoice number to which the inquiry is related to. |

| Option | Description |
|-------------|---|
| Due date | Last date to approve the request by the supplier. |
| Description | Detailed description about the invoice inquiry. |
| Activity | Supplier posts comments related to the invoice inquiry. |
| Attachments | Invoice attachments in the form of jpeg, png. |

The Accounts Payable agent interacts with the supplier and updates the inquiry case using the **Activity** option.

Working with Supplier Catalog

Supplier uses the Supplier Catalog to submit new invoice inquiry and invoice to the Accounts Payable Operations team to evaluate and resolve the cases.

Supplier can perform the following actions in the **Supplier Catalog >Invoices**. By default, the **Invoices** tab is selected and displayed in **Card View**. You can toggle between **Card view** and **Table view**.

Note: You can also select **Raise a request** option in the Supplier Collaboration Portal header to perform the following actions.

- Submit Invoice Inquiry
- Submit new Invoice

Submit Invoice Inquiry

Supplier uses the Supplier Collaboration Portal to create an inquiry related to an invoice and submits it to the Accounts Payable Operations team to evaluate and resolve the inquiry.

Before you begin

Role required: Supplier

Procedure

1. Navigate to **Supplier Catalog > Invoices > Submit an invoice inquiry**.
2. On the **Submit an invoice inquiry** form, enter the following details.

| Question | Description |
|--|--|
| What invoice would you like to inquire about? | Invoice number- Choose the invoice number on which you need to inquire from the drop-down list. |
| What kind of invoice inquiry would you like to make? | Inquiry type- Choose the type of inquiry that you would like to ask an Account Payable Specialist. The options are: <ul style="list-style-type: none"> ◦ Payment inquiry ◦ Invoice inquiry ◦ Expedite payment request |

| Question | Description |
|---|--|
| Please describe your inquiry below in detail: | <ul style="list-style-type: none"> ◦ Payment term issue ◦ Invoice entry assistance <p>For more information on invoice inquiry, see- Invoice inquiry cases.</p> |

3. Select **Submit**.

A pop-up alert message appears as " Your inquiry is submitted and we will respond soon. You can review details here: <<Invoice case number>>.

Note:

From the invoice form page, you can select **Actions > Create new inquiry** and submit an invoice inquiry.

Invoice inquiry case is created.

Submit new Invoice

Supplier creates and submits an invoice requesting for payment from Accounts Payable Operations team. The invoices are of type PO-invoice or Non-PO invoice.

Before you begin

Role required: Supplier

Procedure

1. Navigate to **Supplier Catalog > Invoices > Submit new invoice**.
2. On the **Submit new invoice** form, enter the following details.

| Question | Description |
|--|--|
| What type of invoice are you submitting? | <p>Invoice type- Choose the invoice type for processing from the drop-down list. The options are:</p> <ul style="list-style-type: none"> ◦ PO invoice- The Purchase order drop-down appears. Choose the purchase order from the drop-down that you would like to associate with the invoice. ◦ Non-PO invoice- Browse and attach the invoice for the Accounts Payable Operations team to create an invoice processing case. |

| Question | Description |
|----------|--|
| | <p>i Note:</p> <ul style="list-style-type: none"> ◦ If you select Invoice type as Non-PO, and upload an invoice copy with purchase order, DocIntel processes the invoice as a valid PO invoice. ◦ If you select Invoice type as PO invoice and enter purchase order number but Doc Intel is unable to extract the purchase order details, then the purchase order that you selected from the Purchase order drop-down list will be considered and processed. <p>For more information on invoice case, see Create New Invoice form.</p> |

3. Click **Submit**.

A pop-up alert message appears as " Your invoice is submitted and we will send updates about any issues. You can review details here: <>Invoice case number>>. Invoice is created.

Accounts Payable Operations reference

Reference topics provide additional information about the lists and forms that you use in Accounts Payable Operations.

Create New Invoice Line form

Use the Create New Invoice Line form to provide details about an invoice line.

Create New Invoice Line form

| Field | Description |
|-----------------------|---|
| Invoice Line | |
| Number | An auto-generated number that uniquely identifies the invoice line. |
| Invoice | Invoice for which you are creating the invoice line. |
| Status | Status of the invoice line. |
| ERP line number | Unique number generated within the ERP system for the invoice line. |
| Line description | Description for the invoice line. |
| Summary Details | |
| Purchase order line | Purchase order line item in the purchase order. |
| Invoice line quantity | The number of items that have been invoiced. |
| Line unit price | Unit price of the line item in the invoice. |
| Subtotal | The total amount for the invoice line without tax and shipping charges. |

Create New Invoice Line form (continued)

| Field | Description |
|-------------------------|--|
| Tax amount | Tax amount for the invoice line item. |
| Line amount invoiced | Total amount for the invoice line item. |
| Accounting Details | |
| Ledger account | The account used to generate the invoice. |
| Cost center | The cost center for which the invoice is generated. |
| Tax code | Tax code of the invoice. |
| Ship to street | The street address to which the items on the purchase order should be shipped. |
| Ship to country | The country to which the items on the purchase order should be shipped. |
| Ship to city | The city to which the items on the purchase order should be shipped. |
| Ship to zip/postal code | The zip code to which the items on the purchase order should be shipped. |
| Ship to state/province | The state to which the items on the purchase order should be shipped. |

Create New Invoice form

Use the Create New Invoice form to enter the details of the new invoice.

Create New Invoice form

| Field | Description |
|-------------------------|--|
| Invoice | |
| Number | An auto-generated number that uniquely identifies the invoice. |
| Supplier invoice number | The invoice number of the supplier invoice. |
| Type | The type of invoice. • Note: Accounts Payable Operations supports invoices of type PO invoice and Non-PO invoice . |
| Business owner | An individual or group who owns the invoice. |
| Status | The status of the invoice. |
| Channel | The channel used to send the invoice. The choices are: <ul style="list-style-type: none">• Web• Email• Integration• Virtual agent |

Create New Invoice form (continued)

| Field | Description |
|---|--|
| Supplier tax id | The tax ID of the supplier. |
| ERP number | Unique number generated within the ERP system for the invoice. This field is applicable when there is an ERP integration. The value is populated after the invoice is posted in the ERP system through the integration. |
| Short description | Brief description about the invoice. |
| Summary Details | |
| Supplier | Supplier who delivers the product or service. |
| Purchase order | Purchase order associated with this invoice. Note: For Non-PO invoice the purchase order is not made available. |
| Payment terms | How and when to make a payment for the products and services. |
| Subtotal | The total amount from all the invoice lines without tax and shipping charges. |
| Tax amount | Tax applied on the invoice amount. |
| Shipping | Shipping charges incurred for the invoice. |
| Other charges | Other charges applied on the invoice amount. |
| Discounts | The discount applied on the invoice amount. |
| Early payment discount amount | The discount applied on the total invoice amount on early payment. |
| Amount invoiced without tax (Transactional currency) | Total amount to be paid to the supplier excluding tax and shipping charges. This amount is displayed in transactional currency. |
| Amount invoiced (Transactional currency) | Total amount to be paid to the supplier including tax and shipping charges. This amount is displayed in transactional currency. |
| Dates | |
| Invoice date | Date on which this invoice is created. |
| Due date | Date by when you must make the payment. |
| ERP posting date | Date on which the invoice is posted in the ERP system. |
| Payment date | The date by when you must make the payment. |
| Accounting Details | |
| Legal entity | The internal legal entity which incurs the cost of this invoice. |
| Default tax code | The tax code levied on the total invoice amount. |

Create New Invoice form (continued)

| Field | Description |
|-------------------------------|--|
| Default tax jurisdiction code | The tax code jurisdiction to which you must pay the tax. |
| Addresses | |
| Remit to street | The street address to which the payment is made. |
| Remit to country | The country to which the payment is made. |
| Remit to city | The city to which the payment is made. |
| Remit to zip/postal code | The zip code to which this payment is made. |
| Remit to state/province | The state to which the payment is made. |
| Bill to street | The street address to which the invoice is sent. |
| Bill to country | The country to which the invoice is sent. |
| Bill to city | The city to which the invoice is sent. |
| Bill to zip/postal code | The zip code to which the invoice is sent. |
| Bill to state/province | The state to which the invoice is sent. |
| Ship to street | The street address to which the items on the purchase order should be shipped. |
| Ship to country | The country to which the items on the purchase order should be shipped. |
| Ship to city | The city to which the items on the purchase order should be shipped. |
| Ship to zip/postal code | The zip code to which the items on the purchase order should be shipped. |
| Ship to state/province | The state to which the items on the purchase order should be shipped. |

Invoice form tabs

The Invoice form includes tabs that store invoice information that an Accounts Payable Specialist can use to perform related tasks.

Invoice case form tabs

| Tab | Description |
|---------------|--|
| Details | Details about the invoice. |
| Invoice Lines | Invoice lines of the invoice. |
| Exceptions | Exceptions found on the invoice. |
| Payments | Payments made to the supplier. |
| Cases | A list of cases associated with the invoice. |

Invoice case form tabs (continued)

| Tab | Description |
|---------------------------|---|
| Other invoices of same PO | Other invoices associated with the same purchase order as that of the invoice that you are currently viewing. |
| Goods receipts | Displays the corresponding goods receipt information for the invoice. |

Inbound Invoice Fields

The Inbound invoice table is the source table from where you import the invoice required fields to successfully create an invoice through the integration framework.

Invoice Imports

| Column | Description | Data type |
|--------------------------|--|--|
| Invoice Type (Mandatory) | Details about the invoice. | Choice Examples: invoice/non_po_invoice, debit_memo, credit_memo |
| Supplier invoice number | The invoice number of the supplier and ERP source and ERP invoice number | String |
| Business owner | email of business the owner who owns the application from the business side | String |
| Supplier (Mandatory) | Name of the ERP supplier code | String |
| Purchase order | Binding contract between a buyer and a supplier that authorizes a purchasing transaction. Derived from ERP source and supplier | String |
| Invoice date (Mandatory) | The date on which the invoice is created. | String (yyyy-mm-dd) |
| Payment terms | Conditions applied on the payment term. | String |
| Legal entity | Stores Legal entity's ERP company code | String |
| Tax amount | Tax rate applied on the invoice amount | Decimal number |
| Shipping amount | Shipping charges incurred for the invoice | Decimal number |
| Subtotal (Mandatory) | Total amount of money to be paid to the supplier excluding tax and shipping charges. | Decimal number. Example 12345.65 |
| Other charges | Additional charges incurred on the invoice | Decimal number |
| Discounts | Reduction on the total amount incurred on the invoice | Decimal number |

Invoice Imports (continued)

| Column | Description | Data type |
|-------------------------------------|---|-----------|
| Currency | Currency code standard of amount exchanged. ISO 4217 currency code (USD, GBP, INR, etc) | String |
| External invoice number (Mandatory) | Invoice number originated from a third party application. | String |
| ERP source (Mandatory) | The available ERP | String |
| Status | Current state of the invoice is Draft | String |
| External invoice source (Mandatory) | Name of the third party application associated with the invoice. | String |

Inbound invoice line fields

The Inbound invoice line table is the source table from where you import the invoice line required fields to successfully create an invoice through the integration framework.

Invoice Imports

| Column | Description | Data type |
|------------------------------------|---|--------------------------------------|
| External invoice source (required) | Name of the third party application associated with the invoice. Derive logic from external invoice number. | String |
| Line description (required) | Description of the invoice line. | String |
| Purchase order line | Information of the individual lines under a purchase order and ERP PO line number. | String |
| Line quantity (required) | The number of items that have been invoiced | Decimal number |
| Line unit price (required) | Unit price of the line item in the invoice. | Decimal number |
| Payment terms | Conditions applied on the payment term. | String Example (Net 30) |
| Legal entity | Stores legal entity's ERP company code. | String |
| Tax amount | Tax rate applied on the invoice amount. | Decimal number |
| Subtotal (required) | Total amount of money to be paid to the supplier excluding tax and shipping charges. | Decimal number Example (12345.65) |
| Cost center | Combination of cost center's account number and ERP source. | String |

Invoice Imports (continued)

| Column | Description | Data type |
|------------------------------------|--|-----------|
| GL accounts | Records the total number of transactions derived from GL account and ERP source. | String |
| Tax code | Sales tax related to locations where business transactions occur. | String |
| Currency | Standard Currency Code ISO 4217 (USD, GBP, INR, etc) | String |
| External invoice source | Invoice source number originated from a third party application. | String |
| ERP source (required) | The available ERP source. | String |
| Status | The current state of the invoice is draft. | String |
| External invoice source (required) | Name of the third party application associated with the invoice. | String |

Outbound invoice fields

The outbound invoice table transfers the invoice details from ServiceNow® to third party applications through integration framework.

Invoice Imports

| Column | Description | Data type |
|---|--|-----------|
| Supplier invoice number | The combination of supplier invoice number or supplier and ERP source and ERP invoice number | String |
| Business owner.Email | Name of the owner who owns the application from the business side | String |
| Amount invoiced (Transaction currency).amount | Charges added to the invoice | String |
| Amount invoiced (Transaction currency).currency | Charges added to the invoice | String |
| Discounts.amount | Reduction on the total amount incurred on the invoice | String |
| Legal Entity.ERP Source.Source | Stores organizational entities defined in the application | String |
| Type | Details about the invoice | Choice |
| Supplier | Name of the supplier | Reference |
| Supplier invoice number | Invoice number mentioned by the supplier | String |
| Purchase order | Binding contract between a buyer and a supplier that authorizes a purchasing transaction | Reference |

Invoice Imports (continued)

| Column | Description | Data type |
|----------------------|--|------------------------|
| Invoice date | The date on which the invoice is created. | String (yyy-mm-dd) |
| Payment terms | Conditions applied on the payment | Reference |
| Tax amount.amount | Tax rate applied on the invoice amount | String |
| Shipping. amount | Shipping charges incurred for the invoice | String |
| Subtotal.amount | Total amount of money to be paid to the supplier excluding tax and shipping charges. | String |
| Other charges.amount | Additional charges incurred on the invoice | String |
| Number | Unique business identifier associated with the business partner | String |
| Status | Current state of the invoice | Choice |
| Invoice date | Date on which the invoice was created | String (yyyy-mm-dd) |

Outbound invoice line fields

The Outbound invoice line table is the transfers the invoice line details table from ServiceNow® to third party application through integration framework.

Invoice Imports

| Column | Description | Data type |
|----------------------------------|---|-----------|
| Line description | Description of the invoice line | String |
| Purchase order line | Information of the individual lines under a purchase order line or a sourcing request for the referenced supplier | Reference |
| Invoice line quantity | The number of items that have been invoiced | String |
| Line unit price | Unit price of the line item in the invoice | String |
| Ledger account | Displays General Ledger Account | Reference |
| Tax amount.amount | Tax rate applied on the invoice amount | String |
| Subtotal.amount | Total amount of money to be paid to the supplier excluding tax and shipping charges. | String |
| Cost center | Represent business entity to which costs can be allocated | Reference |
| Status | Current state of the invoice | String |
| Invoice.Legal entity. ERP source | Stores organizational entities defined in the application | String |
| ERP line number | Displays the ERP number at the line item level | String |

Invoice Imports (continued)

| Column | Description | Data type |
|-----------------------------|--|-----------|
| Invoice | Transaction record used to track purchase between shopper and supplier | Reference |
| Number | The number in the invoice | String |
| Status | Status of an invoice | Choice |
| Line amount.invoiced amount | The total amount for the invoice line | String |

Inbound invoice payment fields

The Inbound invoice payment details needed for a supplier to complete the transaction.

Invoice Imports

| Column | Description | Data type |
|--------------------------|--|--|
| Payment amount | Payment details about the invoice | Decimal number |
| ERP invoice number | The ERP invoice number of the supplier invoice | String |
| Payment date | The date on which the invoice payment was completed | String (yyy-mm-dd) |
| Payment method | Mode of payment | Choice Example: bank_transfer/cash_payment/cheque/credit_card/debit_card/wire_transfer |
| Payment reference ID | A unique ID to track the payment details | Alpha numeric |
| Remit to city | The city to which the payment is made | String |
| Remit to country | The country to which the payment is made in ISO 3166 format. Example:US | String |
| Remit to state/province | The state or province to which the payment is made | String |
| Remit to street | The street address to which the payment is made | String |
| Remit to zip/postal code | The zip or postal code address to which the payment is made | String |
| Scheduled payment date | The date at which the payment will be made | String (yyyy-mm-dd) |

Invoice Imports (continued)

| Column | Description | Data type |
|-------------------|--|---|
| ERP supplier code | Integer ERP code of the supplier in the ERP system | Combination of ERP supplier code and ERP source |
| ERP Source | The available ERP | String |
| Currency | Standard of amount exchanged in Currency Code ISO 4217 format (USD, GBP, INR, etc) | String |

Invoice Line form tabs

The Invoice line form includes tabs that store invoice line information that an Accounts Payable Specialist can use to perform related tasks.

Invoice Line form tabs

| Tab | Description |
|------------|--|
| Details | Details about the invoice line. |
| Exceptions | A list of exceptions on the invoice line. |
| Receipts | Goods receipts for the purchase order line corresponding to the invoice line. This tab is shown only for the invoice of type PO Invoice . |

Create New Invoice case form

Use the Create New Invoice case form to provide details about the Invoice case.

Create New Invoice case form

| Field | Description |
|-----------------|---|
| Invoice case | |
| Requested by | User who submitted the inquiry. |
| Requester email | Email ID of the user who submitted the inquiry. |
| Sub-category | Sub-category of the invoice inquiry case. The choices are: <ul style="list-style-type: none"> • Payment inquiry • Invoice inquiry • Expedite payment request • Payment terms issue • Invoice entry assistance |
| Duplicate case | The case that is similar to the currently opened case. |
| Channel | The channel used to send the inquiry. |
| State | The state of the case. |

Create New Invoice case form (continued)

| Field | Description |
|------------------------|---|
| Priority | Indicates how quickly you must complete the task based on its priority. |
| Assignment group | The assignment group that the case is assigned to. |
| Assigned to | Person that the case is assigned to. |
| Watch list | Users who are notified when updates are made to the case. |
| Short description | Brief description about the invoice. |
| Description | Description about the invoice. |
| Summary | |
| Supplier | Supplier who has made the inquiry. |
| Invoice | Invoice associated with the case. |
| Closure Details | |
| Closure code | <p>The closure code for the case. The options are:</p> <ul style="list-style-type: none"> • Duplicate request • Canceled/False inquiry • Canceled by requester • Information provided • Exceptions resolved |
| Closure details | Details about the case closure. |
| Closed by | Person who closed the case. |
| Closed | Whether the case is closed or not. |

Invoice case form tabs

The Invoice case form includes tabs that store invoice case information that an agent can use to perform related tasks.

Invoice case form tabs

| Tab | Description |
|-------------------------|--|
| Details | Details about the case. |
| Tasks | Tasks that have been created for this case by the agent. |
| Task SLAs | The service level agreements that are associated with this case. |
| Emails | Emails that are sent or received as part of resolving this case. |
| Cases by same requester | Cases that are opened by the same requester. |

Create New Invoice task form

Use the Create New Invoice task form to provide details about the Invoice task.

Create New Invoice task form

| Field | Description |
|-------------------|--|
| Number | An auto-generated number that uniquely identifies the task. |
| Parent Case | Parent case to associate the inquiry task or the exception task with. |
| Invoice exception | <p>Invoice exception for an invoice.</p> <p>i Note: This field is displayed only when you create an exception task from within an invoice exception.</p> |
| Type | <p>This field is set to Exception task by default. This field is read-only.</p> <p>i Note: This field is displayed only when you create an exception task from within an invoice exception.</p> |
| State | <p>The current state of the task. At task creation, the State defaults to New.</p> <p>The available task states are:</p> <ul style="list-style-type: none"> • New • Assigned • Work In progress • Closed complete • Closed incomplete |
| Assignment group | Group that you want to assign this task to. |
| Assigned to | Person that you want to assign this task to. |
| Short description | Brief description about the task. |
| Description | Detailed description about the task. |

Invoice task form tabs

The Invoice task form includes tabs that store invoice task information that an Accounts Payable Specialist can use to perform related tasks.

Invoice task form tabs

| Tab | Description |
|-------------------------|---|
| Details | Details about the task. |
| Invoice exception lines | <p>Details about exceptions on invoice lines for line-level invoice exceptions.</p> <p>This tab is displayed only for exception tasks that are created for line-level exceptions, such as Insufficient Goods Receipt, Insufficient Funds (Quantity variance), and Insufficient Funds (Amount variance).</p> |

Invoice processing case form

Use the Invoice processing case form to view the case details that store invoice information that an Accounts Payable Specialist can use to perform related tasks.

Invoice processing case form

| Field | Description |
|--|---|
| Invoice Case | |
| Type | The type of invoice. |
| Channel | The channel used to send the invoice. |
| Supplier invoice number | The invoice number of the supplier invoice. |
| Supplier tax id | The tax ID of the supplier. |
| Assignment group | Group that you want to assign this case to. |
| Assigned to | Person that you want to assign this case to. |
| Business owner | An individual or group who owns the invoice. |
| Summary details | |
| Supplier | Supplier who delivers the product or service. |
| Purchase order | Purchase order associated with this invoice. This field is shown only for invoices of type PO Invoice . |
| Payment terms | How and when to make payment for the products and services. |
| Subtotal | The total amount from all the invoice lines without tax and shipping charges. |
| Tax amount | Tax applied on the invoice amount. |
| Shipping | Shipping charges incurred for the invoice. |
| Other charges | Other charges applied on the invoice amount. |
| Discounts | The discount applied on the invoice amount. |
| Amount invoiced (Transactional currency) | Total amount to be paid to the supplier including tax and shipping charges. This amount is displayed in transactional currency. |
| Dates | |
| Invoice date | Date on which this invoice is created. |
| Due date | Date by when you must make the payment. |
| Accounting | |
| Legal entity | The internal legal entity which incurs the cost of this invoice. |
| Default tax code | The tax code levied on the total invoice amount. |
| Default tax jurisdiction code | The tax code jurisdiction to which you must pay the tax. |
| Addresses | |
| Remit to street | The street address to which the payment is made. |

Invoice processing case form (continued)

| Field | Description |
|--------------------------|--|
| Remit to country | The country to which the payment is made. |
| Remit to city | The city to which the payment is made. |
| Remit to zip/postal code | The zip code to which this payment is made. |
| Remit to state/province | The state to which the payment is made. |
| Bill to street | The street address to which the invoice is sent. |
| Bill to country | The country to which the invoice is sent. |
| Bill to city | The city to which the invoice is sent. |
| Bill to zip/postal code | The zip code to which the invoice is sent. |
| Bill to state/province | The state to which the invoice is sent. |
| Ship to street | The street address to which the items on the purchase order should be shipped. |
| Ship to country | The country to which the items on the purchase order should be shipped. |
| Ship to city | The city to which the items on the purchase order should be shipped. |
| Ship to zip/postal code | The zip code to which the items on the purchase order should be shipped. |
| Ship to state/province | The state to which the items on the purchase order should be shipped. |

Invoice processing case form tabs

The Invoice form includes tabs that store invoice information that an Accounts Payable Specialist can use to perform related tasks.

Invoice processing case form tabs

| Tab | Description |
|------------------------------|--|
| Details | Details about the case. |
| Invoice lines | Invoice lines of the invoice. |
| Exceptions | Exceptions that are identified on the invoice. |
| Purchase order lines | Purchase order lines of the purchase order for which the invoice has been raised. This tab is shown only for invoices of type PO Invoice . |
| Tasks | Tasks that have been created for this case by the Accounts Payable Specialist. |
| Potential duplicate invoices | Invoices that may be a duplicate of the invoice currently associated with this case. |

Invoice processing case form tabs (continued)

| Tab | Description |
|------------------|--|
| Approvals | Approval requests for the invoice. |
| Related invoices | Related invoices from the same supplier. |
| Emails | Emails that are sent or received as part of resolving this case. |
| Task SLAs | The service level agreements that are associated with this case. |

Invoice exception form

Use the invoice exception form to view the case details that store invoice exception information that an Accounts Payable Specialist can use to perform related tasks.

Invoice exception form

| Field | Description |
|--------------------------|--|
| Invoice Exception | |
| Number | An auto-generated number that uniquely identifies the invoice exception. |
| Status | Status of the invoice exception. |
| Exception definition | Type of invoice exception. |
| Invoice | Invoice for which the exception is raised. |
| Bypass reason | Reason for bypassing the invoice exception. |
| Short description | Brief description of the invoice exception. |
| Description | Detailed description of the invoice exception. |
| Summary | |
| Invoice | Invoice that contains this exception. |
| Purchase order | Purchase order corresponding to this invoice. |
| Supplier | Supplier who delivers the product or service. |
| Total amount | Total amount to be paid to the supplier. |

Invoice exception form tabs

The Invoice exception form includes tabs that store invoice exception information that an Accounts Payable Specialist can use to perform related tasks.

Invoice exception form tabs

| Tab | Description |
|------------------------|---|
| Details | Details about the invoice exception. |
| Invoice lines affected | Invoice lines that have exceptions. Note: This tab is shown only for line-level exceptions. |

Invoice exception form tabs (continued)

| Tab | Description |
|----------------------|--|
| Purchase Order Lines | <p>Purchase order lines corresponding to the invoice lines for which the invoice exception has been raised.</p> <p>This tab is shown only for invoice exceptions of type Insufficient Funds (Quantity variance) and Insufficient Funds (Amount variance).</p> |
| Receipts | <p>Goods receipts for all the purchase order lines of a purchase order. For more information, see Receipts.</p> |
| Related invoices | <p>Related invoices from the same supplier.</p> <p>This tab is shown only for invoice exceptions of type Insufficient Funds (Quantity variance) and Insufficient Funds (Amount variance).</p> |
| Exception tasks | <p>Exception tasks for the invoice exception.</p> |
| Related tasks | <p>If Sourcing and Procurement Operations is installed, the following tasks are shown:</p> <ul style="list-style-type: none"> • Receipt. For more information, see Receipt tasks. • Milestone. For more information, see Milestones. • Invoice acknowledgment. For more information, see Invoice tasks. <p>If Sourcing and Procurement Operations is not installed, only the Milestone task is shown.</p> <p>i Note: This tab is shown only for an Insufficient Goods Receipt (IGR) exception.</p> |

Master data table for Accounts Payable Operations

Enter the mandatory fields in the primary table for successful processing of an invoice in Accounts Payable Operations.

Master Table

Data in the following key tables should be populated for processing an invoice within Accounts Payable Operations.

- [Purchase order](#)
- [Purchase order lines](#)
- [Supplier](#)
- [Supplier Legal Entity Mapping](#)
- [Supplier contact](#)
- [Legal entity](#)
- [Cost center](#)
- [Ledger account](#)
- [Payment terms](#)

Purchase order

A purchase order is a binding contract between a buyer and a supplier that authorizes a purchasing transaction. It contains the descriptions, quantities, prices, applicable discounts, payment terms, delivery dates, and other associated terms and conditions with the supplier.

sn_shop_purchase_order table

An Account Payable Specialist fills the key fields in the purchase order for invoice processing.

Purchase order fields

| Field | Data type | Description |
|----------------|-----------|---|
| ERP number | String | The purchase order number which is synced from ERP systems. |
| Business owner | Reference | The user who placed the order. |

Summary details

| Field | Data type | Description |
|--------------|-----------|--|
| Supplier | Reference | Supplier who provides the product of this order. |
| Order type | String | Indicates if the purchase order is of the type Standard or Blanket. |
| Order placed | date_time | Date and time of the order placed in YYYY-MM-DD HH:MM:SS format. |
| Total amount | currency | The total cost of purchase order calculated as the sum from all related lines. Example:USD 100. |

Accounting details

| Field | Data type | Description |
|--------------|-----------|--|
| Cost center | Reference | The cost center incurring the expense of this order. |
| Legal entity | Reference | Internal legal entity making this purchase |
| Payment term | Reference | The agreed time and conditions of payment to the supplier. |

Purchase order lines

Purchase order lines provide information of the individual lines under a purchase requisition or a sourcing request for the referenced supplier.

sn_shop_purchase_order_line table

You can add or associate a purchase order with a purchase order line.

| Field | Data type | Description |
|------------------------|-------------|--|
| Purchase order | Reference | ERP PO number as unique identifier of the purchase order. |
| Supplier | Reference | Supplier for which the shopper places the order. |
| Product name | String | Name of the product or service purchased from a supplier. |
| Product type | Choice list | Defines whether product purchased is classified as goods or services. The values are: <ul style="list-style-type: none"> • Good • Service • Handling fee |
| Goods receipt required | Choice list | Applicable only if product type is "Good". The values are: <ul style="list-style-type: none"> • Yes • No |
| Acknowledgement type | Choice list | Applicable only if product type is "Service" or "Handling fee". The values are: <ul style="list-style-type: none"> • Milestones • Service acknowledgement • Two way match |
| Expected delivery date | Date | Applicable only if product type is "Good". |
| Start date | Date | The date on which service is expected to be rendered. This is applicable only if Product type is "Service". |
| End date | Date | The date on which service is expected to end. This is applicable only if Product type is "Service". |
| Purchase quantity | String | The quantity of the goods or service purchased. |

| Field | Data type | Description |
|------------------------|-------------|--|
| Unit | Choice list | The unit of rate at which product or service is sold by supplier. The values are: <ul style="list-style-type: none"> • Fixed fee • Individual unit |
| Unit price | currency | The price of each individual unit purchased. |
| Total line amount | currency | Total amount of purchased goods and services including estimated tax and shipping. |
| Recipient | Reference | The person to whom goods or services are being delivered. |
| Address | | Street address where goods will be shipped or where services will be provided. |
| City | | City where goods will be shipped or where the services are provided. |
| State or Province | | State or Province where goods will be shipped or where the services are provided. |
| Country | | Country where goods will be shipped or where the services are provided. |
| Zip or Postal code | | Zip or Postal code where goods will be shipped or where the services are provided. |
| General Ledger Account | | The account to which capital or operational expenses will be posted. |

Supplier

You can add a supplier to the primary data and add products related to that supplier. The supplier data is managed effortlessly and enhance productivity of the teams that engage with suppliers.

sn_fin_supplier table

You can add suppliers and their products to populate your primary data.

| Field | Data type | Description |
|------------|-----------|--|
| Legal name | String | Legal name of the supplier that corresponds to its operating location. |

Supplier Legal Entity Mapping

You can view all the information about a supplier and associated legal entities.

Supplier Legal Entity Mapping table

| Field | Data type | Description |
|------------------------|-----------|--|
| Supplier | Reference | Name of the supplier. |
| Legal entity | Reference | Legal entity of the customer. |
| Payment term | Reference | The name or code of the payment term. Example: Net 60. |
| General ledger account | Reference | The account to which capital or operational expenses will be posted. |

Supplier contact

You can add the supplier contacts allowing them to access the# Supplier Collaboration Portal# and start working on the most important tasks. You can view information about the supplier contacts and also indicates which user is the primary contact.

vm_vdr_contact table

You can view the supplier contact details.

| Field | Data type | Description |
|------------|-----------|---------------------------------------|
| First Name | String | Name of the supplier. |
| Vendor | Reference | Name of the assigned vendor. |
| Email | email | email address of the supplier |
| User ID | String | User ID to identify the supplier |
| Title | String | The designated title of the supplier. |

Legal entity

View the legal entity corresponding to a purchase.

sn_fin_legal_entity table

The table refers to internal legal entity that requests for purchase.

| Field | Data type | Description |
|--------------------|-------------|--|
| Legal name | String | Legal name of the entity corresponding to the location in which it operates. |
| ERP company code | String | Company code of the entity in the ERP system. |
| Region | Choice list | Area of the entity. The values are: <ul style="list-style-type: none"> AMS APAC LATAM EMEA |
| Local currency | Reference | Local currency of the entity. |
| Reporting currency | Reference | Reporting currency of the entity. |

Cost center

Cost centers are a commonly used reference between financial systems and IT. Cost center records represent business entities and have a related list of CI Cost Center Relationships that measure the cost center's consumption of business services.

cmm_cost_center table

| Field | Data type | Description |
|----------------|-----------|--|
| Name | String | A unique name for the cost center. |
| Account Number | String | An account number associated with the cost center, if one exists. |
| Code | String | A code associated with the cost center, if one exists. |
| Location | Reference | A reference to the location of the cost center. The format is YYYY-MM-DD HH:MM:SS. |
| Valid from | Date/Time | The date that the cost center is valid from. The format is YYYY-MM-DD HH:MM:SS. |
| Valid to | Date/Time | The date that the cost center is valid to. The format is YYYY-MM-DD HH:MM:SS. |

Ledger account

A reference field for the account used to generate the# invoice.

sn_fin_gl_account table

You can view records in any of the general ledger tables and make changes if necessary.

| Field | Data type | Description |
|----------------|-----------|--|
| Account Name | String | Display name of the ledger account fetched from ERP. |
| Currency | Reference | Currency that the expense is valued in. |
| Ledger account | String | Ledger account code fetched from ERP. Example: 160020. |

Payment terms

Specify the terms and conditions that apply to customers while paying for an invoice. These are usually imposed by suppliers during the purchase.

sn_shop_payment_term

You can view the payment terms referencing an invoice.

| Field | Data type | Description |
|---------------------|-------------|--|
| Name | String | The name or code of the payment term. Example: Net 060. |
| Type | Choice list | The values are: <ul style="list-style-type: none"> • Due upon receipt • Fixed • Net |
| Short description | String | A short explanation of the payment term. Example: 2%14, Net 60. |
| Net days to pay | String | Applicable only to type "Net". |
| Discount percentage | String | Applicable only to type "Net". |
| Discount days | String | Applicable only to type "Net". |

Invoice exception definition form

Use the Invoice exception definition form to provide details about the new invoice exception definition.

Invoice exception definition form

| Field | Description |
|----------------------|---|
| Name | Name of the invoice exception definition. |
| Application | Application scope to create the invoice exception definition in. For example, Accounts Payable Invoice Processing. |
| Active | Option to activate the invoice exception definition for use. |
| Order | The order in which you want the invoice exception to be identified. Specify a numeric value in multiples of 100. |
| Line level exception | Option to mark the invoice exception definition as a line-level exception. |
| View | View that is used to display the fields in an exception record. |
| Allow bypass | Option to allow bypass of the invoice exception definition. |
| Dependent | <p>The Invoice exception definition on which the new invoice exception definition depends on.</p> <p>For example, if an exception definition record A is dependent on an exception definition record B, then when an invoice has an exception of type exception definition B in open state, then the exception engine does not check the invoice for exception definition A. Instead, the exception engine identifies only the exception definition B.</p> <p>The dependent invoice exception definition record must have a lower order value than the new invoice exception definition record that you are creating.</p> |
| Applicable to | Type of invoice that the invoice exception definition is applicable to. For example, PO Invoice. |
| Subflow | Subflow that is run to determine if the exception exists for a given invoice. |

Approval Rule form

Use the Approval Rule form to provide details about the new approval rule.

Approval Rule form fields

| Field | Description |
|------------------|--|
| Number | System-generated unique identifier for the approval rule. |
| Name | The name you assign to the approval rule. |
| Active | Option to decide if this rule is used to generate invoice approvals. |
| Approving object | <p>Object you're seeking approval for. The following options are available:</p> <ul style="list-style-type: none"> • Invoice • Purchase Order <p>To create an approval rule for an invoice, select Invoice.</p> |
| Approving line | Approving object line that you're seeking approval for. For Invoice approving object, the approving line is defaulted to Invoice Line. |

Approval Rule form fields (continued)

| Field | Description |
|-----------------------------|--|
| Approval rule type | <p>The type of approval rule that determines how approval plans are generated and routed when conditions are met. The following options are available:</p> <ul style="list-style-type: none"> • Dynamic Users or Groups • Managerial Job Code Hierarchy • Managerial Hierarchy • Specified Users or Groups <p>Depending on the rule type that you select, the associated fields appear. For more information, see Approval rule types.</p> |
| Base approvals on | Invoice fields that you want to base your approvals on. Select the invoice field and move it from Available to Selected. |
| Allow automatic approval | Option to allow automatic approval of an invoice if the requester (invoice business owner) is the only approver. |
| Approval trigger conditions | Conditions based on the approving object that determine the conditions under which an approval plan is created. |

Approval Plan form

Use the Approval Plan form to view details of the overall invoice approval process.

Approval Plan form

| Field | Description |
|--------------------------|---|
| Number | System-generated unique identifier for the approval plan. |
| Approval Rule | The approval rule that you want to reference for this plan. |
| Approval group | Group containing the users responsible for approving the plan. |
| Approving record | Invoice record that requires approval. |
| Detail records | Details about the invoice and invoice line records. |
| Approval routing method | Method of routing the approvals. The options are sequentially and in parallel. |
| Approval decision method | Method of approving the rule. You can select if all approvers must approve the rule or any approver can approve it. |
| Approval | Status of the approval plan request. The options are Not Yet Requested, Requested, Approved, Rejected, and Self Approved. |

Approval Plan form (continued)

| Field | Description |
|---------------------|--|
| State | Work status on the requested approval plan. The options are Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped. |
| Approver list | User or users responsible for approving the plan. |
| Approver group list | List of groups containing the users responsible for approving the plan. |
| Short description | Short description of the approval plan in the following format: Invoice approval required for <supplier name>. |

Source-to-Pay Workspace

The Source-to-Pay Workspace provides experiences and tools that you can use to work on various activities, such as procuring goods, onboarding high-performing suppliers, and processing invoices.

The Source-to-Pay Operations (S2P) product suite includes the following products:

- Sourcing and Procurement Operations (SPO)
- Supplier Lifecycle Operations (SLO)
- Accounts Payable Operations (APO)

Regardless of whether you have installed the entire Source-to-Pay (S2P) product suite or any of the individual products that are part of the S2P suite, you use the Source-to-Pay Workspace to manage and work on all aspects and activities of Source-to-Pay Operations. Access to the landing pages and list views within the Source-to-Pay Workspace is role-based.

The Source-to-Pay Workspace application provides experiences and tools for a Procurement Specialist, Supplier Manager, and Accounts Payable Specialist to view and work on cases and tasks related to Source-to-Pay Operations.

The Source-to-Pay Workspace application is a dependent application and is automatically installed if any of the following applications are installed:

- Source-to-Pay Common Architecture
- Procurement Case Management
- Supplier Lifecycle Operations
- Invoice Case Management

However, if you wish to install just the Source-to-Pay Workspace application, the dependent application Procurement Case Management is also installed along with.

End user and roles

| End user and goal | Required role |
|--|--------------------------------|
| Procurement Specialist: View your open requests and purchasing to-dos. | sn_shop.procurement_specialist |
| PCM Agent: View your open requests and purchasing to-dos. | sn_spend_psd.agent |

| End user and goal | Required role |
|--|-------------------------------------|
| <p>Accounts Payable Specialist: View your open requests and purchasing to-dos.</p> <p>Note: This role contains the PCM Agent role, and therefore has access to the same home page and modules as the PCM Agent.</p> | sn_shop.accounts_payable_specialist |
| <p>Admin role for Canvas Core Application: View and make configuration changes to the widgets.</p> | canvas_admin |
| <p>Supplier Fulfiller:</p> <ul style="list-style-type: none"> • Create tasks • View suppliers related to assigned cases or tasks • View assigned cases and tasks, or tasks that are created by them • Update assigned cases and tasks, or tasks that are created by them | sn_slm.fulfiller |
| <p>Supplier Manager:</p> <ul style="list-style-type: none"> • Create suppliers, cases, and tasks • View all the suppliers, cases, and tasks • Update only the suppliers they manage • Update the cases and tasks that they create or that are assigned to them | sn_slm.manager |
| <p>Supplier Administrator: Create, view, update, and delete all the suppliers, cases, and tasks.</p> | sn_slm.admin |

Source-to-Pay Workspace landing page

Depending on the product that you have installed and the role you're assigned, the landing page for each product is displayed in a separate tab under the **Source-to-pay** header. The product tabs that appear are named after each installed product.

When you open the Source-to-Pay Workspace, the home page is displayed by default. If you navigate away from the home page, you can select the home icon () to return to the home page.

Example scenarios for role-based access in Source-to-Pay Workspace

Let's take a look at a few example scenarios to help you understand the conditions that determine how and when product-specific tabs containing landing pages are displayed.

Scenario 1: Only one product is installed

Let's consider a scenario where you have installed only the Supplier Lifecycle Operations product and you are assigned the Supplier Fulfiller [sn_slm.fulfiller]

role. In this scenario, the individual product-specific tabs are not shown, instead the landing page for Supplier Lifecycle Operations is directly displayed.

Scenario 2: Two or more products are installed

Let's consider a scenario where:

- You have installed Sourcing and Procurement Operations, Supplier Lifecycle Operations, and Accounts Payable Operations.
- You have been assigned the Procurement Case Management (PCM) agent [sn_spend_psd.agent], Supplier Fulfiller [sn_slm.fulfiller], and Accounts Payable Specialist [sn_ap_apm_accounts_payable_specialist] roles.

In this scenario, the following product-specific tabs are displayed under the **Source-to-pay** header on the Source-to-Pay Workspace landing page.

- **Sourcing and procurement:** Select this tab to view the landing page for Sourcing and Procurement Operations. For more information, see [List page for Sourcing and Procurement Operations in Source-to-Pay Workspace](#).
- **Supplier management:** Select this tab to view the landing page for Supplier Lifecycle Operations. For more information, see [Landing page for Supplier Lifecycle Operations in Source-to-Pay Workspace](#).
- **Accounts payable:** Select this tab to view the landing page for Accounts Payable Operations.

Landing page for Sourcing and Procurement Operations in Source-to-Pay Workspace

As a fulfiller within the procurement team, you can visually launch into your day with a one-stop-shop experience where you can view work that needs your attention, and use quick actions to navigate to internal and external websites.

As a Procurement Specialist or Procurement Case Management (PCM) Agent, you can use the Source-to-Pay Workspace landing page to view all your open requests, which include purchasing to-dos that need your attention, along with their overdue status. You can also view requests that need your review, and filter them by priority and work type, such as purchase requisitions, sourcing requests, negotiation events, and cases. You can also filter your tasks by due date for better planning. The distribution of your work by work type and priority is displayed in a stacked bar chart format. This quick glance of your work enables you to better plan and prioritize your work. You can also view the recently updated records, which enables you to keep up with the progress when collaborating with other stakeholders.

Each record widget displays details such as the record number, short description, state, date opened, priority, business owner, and last updated. You can then select the widget to view more details pertaining to that record.

Note: If you install Procurement Case Management without Source-to-Pay Common Architecture, you can see only procurement cases in the **Work to review** section, and procurement tasks in the **Tasks** section.

Reports

For a detailed analysis on each component, select the respective widget or chart.

| Title | Type | Description |
|----------------|------|-------------|
| Work to review | | |

| Title | Type | Description |
|--------------------|--------|--|
| Needs final action | Widget | <p>View the total number of records assigned to the logged-in user that needs a final action. Select a widget to view the complete list of records.</p> <p>Up to five records are displayed upfront in this section, with their record number, short description, priority, business owner, last updated date, and opened date. Use the carousel to view more records.</p> <p>Filter by priority and work type such as purchase requisitions, sourcing requests, negotiation events, and cases, for focused results.</p> |
| New this week | Widget | <p>View the total number of new records assigned to the logged-in user during the current week. Select a widget to view the complete list of records.</p> <p>Up to five records are displayed upfront in this section, with their record number, short description, priority, business owner, last updated date, and opened date. Use the carousel to view more records.</p> <p>Filter by priority and work type such as purchase requisitions, sourcing requests, negotiation events, and cases, for focused results.</p> |
| Tasks | | |
| Tasks | Widget | <p>View the total number of open purchasing tasks assigned to the logged-in user. Select a widget to view the details of that record.</p> |

| Title | Type | Description |
|---------------------------|-------------------|---|
| | | <p>Select View all to view the complete list of tasks.</p> <p>You can also view up to four records in this section, with their task number, state, short description, and opened date.</p> <p>Filter by due dates for focused results.</p> |
| Summary | | |
| Distribution of your work | Stacked bar chart | <p>View the total number of requests assigned to the logged-in user that's not in a closed state, sorted by priority, and color coded by work type. Point to a bar area to view the number of work types that fall within that priority time frame.</p> <p>Select a bar area to view the complete list of records within that time frame.</p> <p>Select View all to view the complete list of records.</p> <p>Note: The logged-in user can view only the work that is specific to their role.</p> |
| Recently updated | Widget | <p>View the list of records assigned to the logged-in user that was last updated by someone. The list displays the record number, short description, updated by, and state. Select a number to view the details of that record. Select View all to view the complete list of records.</p> |
| Quick actions | | |
| Procurement dashboard | Widget | <p>Open a new tab with the procurement dashboards, where dashboards are filtered by the Sourcing and Procurement Operations group.</p> |
| Supplier directory | Widget | <p>Open the list of suppliers in the workspace.</p> |

| Title | Type | Description |
|----------------------|--------|--|
| Knowledge articles | Widget | Open a new tab with the Purchase and Expense category knowledge base page. |
| Open Employee Center | Widget | Open a new tab with the Purchase and Expense category in Employee Center. |
| Open ShoppingHub | Widget | Open a new tab with the ShoppingHub home page. |

Configure your workspace landing page

You can configure the landing page using UI Builder, define different audiences for the landing page, and even add, remove, or modify the different content, if you want. However, it's recommended that you create a duplicate of the landing page before modifying it. For detailed information on how to configure using UI Builder, see [Creating custom landing pages for workspaces](#).

Landing page for Supplier Lifecycle Operations in Source-to-Pay Workspace

As a supplier manager, view a snapshot of your assigned supplier cases and tasks and take actions to resolve them.

As a Supplier Manager [sn_slm.manager] or Supplier Fulfiller [sn_slm.fulfiller], you can use the landing page to create a new case, task, and supplier. You can also manage suppliers, view cases and tasks that are assigned to you.

For a detailed analysis on each component, select the respective widget or chart. Select the Refresh icon () to view the latest data. Select the Edit columns icon () to add or remove columns in the list and to display the columns in the order you choose.

Components in the Source-to-Pay Workspace

| Title | Type | Description |
|---------------------|--------|--|
| Quick Actions | | |
| Create case | Option | Opens the Create New Supplier Case form that enables you to create a new supplier case. |
| Create task | Option | Opens the Create a new task form that enables you to create a new supplier task. |
| Create new supplier | Option | Opens the Request new supplier form that enables you to onboard a new supplier. |
| Manage my suppliers | Option | Opens the My Suppliers form that displays a list of the suppliers managed by the logged-in user. In the Number column of the My Suppliers form, select the link to the supplier number to view more details about the supplier. |
| My Work | | |

| Title | Type | Description |
|---------------------|--------------|---|
| High priority cases | Single score | Displays the count of cases marked as high priority. |
| Overdue cases | Single score | Displays the count of cases that are overdue. |
| Tasks to review | Single score | Displays the count of tasks that the logged-in user needs to review. |
| Tasks created by me | Single score | Displays the count of tasks that the logged-in user has created. |
| Overdue tasks | Single score | Displays the count of tasks that are overdue. |
| Cases | List | <p>Displays a list of cases assigned to the logged-in user.</p> <p>This list shows only five cases by default. Click View all to view the list of all the cases.</p> |
| Tasks | List | <p>Displays a list of tasks assigned to the logged-in user.</p> <p>This list shows only five tasks by default. Click View all to view the list of all the tasks.</p> |
| Work Summary | | |
| My cases | Donut chart | Displays a segmented breakdown of your assigned cases. Each segment represents the type, state, or priority of the cases based on the applied filter. |
| By type | Filter | Displays cases filtered by their type. |
| By state | Filter | Displays cases filtered by their state. |
| By priority | Filter | Displays cases filtered by their priority. |
| My tasks | Donut chart | Displays a segmented breakdown of your assigned tasks. Each segment represents the type, state, or priority of the tasks based on the applied filter. |
| By type | Filter | Displays tasks filtered by their type. |
| By state | Filter | Displays tasks filtered by their state. |
| By priority | Filter | Displays tasks filtered by their priority. |

Role-based access to quick actions in the Source-to-Pay Workspace

| Role | Available quick action |
|--|--|
| Supplier Administrator [sn_slm.admin] | <ul style="list-style-type: none"> • Create case • Create task • Create new supplier • Manage my suppliers |

| Role | Available quick action |
|--|--|
| Supplier Manager [sn_slm.manager] | <ul style="list-style-type: none"> • Create case • Create task • Create new supplier • Manage my suppliers |
| Supplier Owner [sn_slm.owner] | <ul style="list-style-type: none"> • Create case • Create task • Create new supplier • Manage my suppliers |
| Supplier Fulfiller [sn_slm.fulfiller] | Create task |

Source-to-Pay Workspace Supplier page

As a supplier manager, view all the information about a supplier, view supplier locations, manage cases, and view procurement information.

Open the Source-to-Pay Workspace Details page by navigating to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.

Under Quick Actions, select **Manage my suppliers**, and then in the Legal name column of the My suppliers form, select the link to the legal name of the supplier to view more details about the supplier.

The Details page contains the following tabs that display relevant information related to the supplier.

- **About**
- **Details**
- **Related work**
- **Spend**
- **Subsidiaries**
- **Documents**

About tab

The **About** tab displays information about the supplier, supplier relationship, similar suppliers, and supplier locations.

Sections on the About tab

| Title | Description |
|------------------|--|
| Sections | |
| Supplier details | Displays supplier details such as, legal name, DUNS number, country of registration, stock symbol, number of employees, and so on. You can edit the supplier details, if needed. |

Sections on the About tab (continued)

| Title | Description |
|----------------------|---|
| Relationship summary | Displays details about whether the supplier has been onboarded, who onboarded the supplier and on which date, and who is the supplier relationship manager. |
| Relationship manager | Person responsible for managing the relationship with this supplier. Click the email icon () to send an email to the relationship manager. |
| Similar suppliers | Displays suppliers that provide products and services similar to the one that you are currently viewing. |
| Supplier news | <p>Displays news and significant events related to the suppliers that you manage, so that you can take action to reduce the impact to the business. For example, news related to mergers and acquisitions, cybersecurity events, fines and sanctions, bankruptcy, negative news, and so on.</p> <p>By default, Supplier Lifecycle Operations retrieves supplier news and activities using the Bing News Search API.</p> <p>The News Integration for Supplier Lifecycle Operations plugin (com.snc.sn_supplier_news) provides you with the flexibility to dynamically fetch news and activities related to a supplier by using any API of your choice. For more information, see Configuring a custom API to dynamically fetch supplier news.</p> |
| Related Links | Displays links that enable you to view additional information pertaining to suppliers, such as banking information, product codes, email domains. |
| Supplier locations | <p>Displays the geographical location of the suppliers on a map.</p> <p>Note: The Map UI Component for threat and alert data feeds (com.sn_fam_map) plugin enables you to view and manage this section. Ensure that you have configured the FAM map properties. For more information, see Configure properties for Supplier Lifecycle Operations.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> Select the add supplier location icon () to add a supplier location. For more information, see Add a supplier location from the Source-to-Pay Workspace. Select the toggle list view icon () to open the list view, which displays a list of all the supplier locations. Select the toggle map view icon () to return to the map view. Select the toggle full screen view icon () to view the map in full screen. Select the toggle full screen view icon () to exit the full screen mode. |
| Supplier contacts | Displays information about the supplier contacts. Also indicates which user is the primary contact. You can add new supplier contacts, if needed. For more information, see Add a supplier contact from the Source-to-Pay Workspace . |

Sections on the About tab (continued)

| Title | Description |
|--|--|
| | <p>It also contains the following links:</p> <ul style="list-style-type: none"> • View registered: Select this link to view the list of the supplier contacts that have been registered. The link name shows the count of registered contacts in parenthesis. • View pending: Select this link to view the list of the cases for supplier contacts that are pending and not yet registered. The link name shows the count of pending contacts in parenthesis. <p>Note: The View pending and View registered links are displayed only when a supplier has more than 5 supplier contacts.</p> |
| Option | |
| Contextual side panel | <p>This panel appears below the UI actions.</p> <p>Select the supplier overview icon () to open the following panels:</p> <ul style="list-style-type: none"> • Supplier overview: Displays information about the supplier. • Supplier contacts: Displays information about the supplier contacts. An Admin label next to the contact's name indicates that the contact is a primary contact. If a supplier has more than 5 supplier contacts, the View all option is displayed. Select View all to view a list of all the contacts for the supplier. <p>Select the attachments icon () to open the Attachments panel, which enables you to attach documents to the case.</p> <p>Select the agent assist icon () to open the Agent Assist panel, which enables you to search for information across multiple sources such as catalog items, knowledge articles, supplier cases, problems, and open incidents.</p> |
| Options to sync supplier data with an external third-party application | <p>Select Connect to external data: Enables you to synchronize the supplier data from an external third-party application so that you can view the latest supplier details in the Source-to-Pay Workspace</p> <p>Select Sync with external data to synchronize with an external third-party application to update the supplier details in the Source-to-Pay Workspace</p> <p>Note: The Sync with external data option replaces the Connect to external data option after you import supplier details for the first time using the Connect to external data option.</p> <p>For more information, see Synchronize supplier data using external third-party application.</p> |
| Options to create supplier cases and supplier tasks | Select the Create drop-down list to view these options: |

Sections on the About tab (continued)

| Title | Description |
|---------------------------------|--|
| | <ul style="list-style-type: none"> Create supplier case: Enables you to create a supplier case. For more information, see Create a supplier case. Create supplier task: Enables you to create a task for a supplier case. For more information, see Create a task for a supplier case from the Source-to-Pay Workspace |
| Option to save supplier details | If you update the supplier details, select Save to save the data to the supplier record. |
| Option to delete a supplier | Select the see actions icon () and select Delete to delete a supplier. |

Details tab

The **Details** tab displays information about the supplier.

Note: The fields on this tab are editable. You can update the supplier details and select **Save** to save the data.

Fields on the Details tab

| Field | Description |
|----------------------|---|
| Supplier | |
| Number | An auto-generated number that uniquely identifies a supplier. |
| Legal name | Name of the supplier. |
| ERP supplier code | Company code of the supplier in the ERP system. |
| Parent entity | Name of the parent company of the supplier. |
| Global company | Name of the global company of the supplier. |
| Relationship manager | Person responsible for managing the relationship with this supplier. |
| Relationship status | Business relationship that is designated to the supplier. The options are Strategic, Valued, Tactical, or Excluded. |
| Onboarded | Whether the supplier is onboarded. The options are Yes or No. |
| Preferred | Whether the supplier is preferred. The options are Yes or No. |
| General | |
| Street address | Street where the supplier is located. |
| City | City where the supplier is located. |
| State / Province | State or province where the supplier is located. |
| Country | Country where the supplier is located. |

Fields on the Details tab (continued)

| Field | Description |
|----------|---|
| Industry | The type of industry the supplier belongs to. |
| Website | Website of the supplier. |
| Image | Option to attach an image of the supplier logo. Select Attach image and select the image you want to attach. |

Related work tab

The **Related work** tab displays information about cases, tasks, sourcing requests, risk assessments, purchase requisitions, and shipments.

The **Related work** tab contains the Lists section on the left, which contains the modules that display information about cases, tasks, sourcing requests, risk assessments, purchase requisitions, and shipments. The Lists section displays the count of records in each module. You can select a module to view a list of records in that module.

In the Number column, select the record number link to view more details pertaining to that record.

Modules on the Related work tab

| Module | Description |
|-----------------------|--|
| Cases | Displays a list of cases for the supplier. |
| Tasks | Displays a list of tasks for the supplier. |
| Sourcing requests | Displays a list of sourcing requests for the supplier. i Note: This module is displayed only if you have installed the Source-to-Pay Common Architecture (com.snc.sn_shop) plugin. |
| Risk assessments | Displays a list of risk assessments for the supplier. i Note: This module is displayed only if you have installed the Vendor Risk Management (com.sn_vdr_risk_asmt) plugin. |
| Purchase requisitions | Displays a list of purchase requisitions for the supplier. i Note: This module is displayed only if you have installed the Source-to-Pay Common Architecture (com.snc.sn_shop) plugin. |
| Shipments | i Note: This module is displayed only if you have installed the Source-to-Pay Common Architecture (com.snc.sn_shop) plugin. |

Spend tab

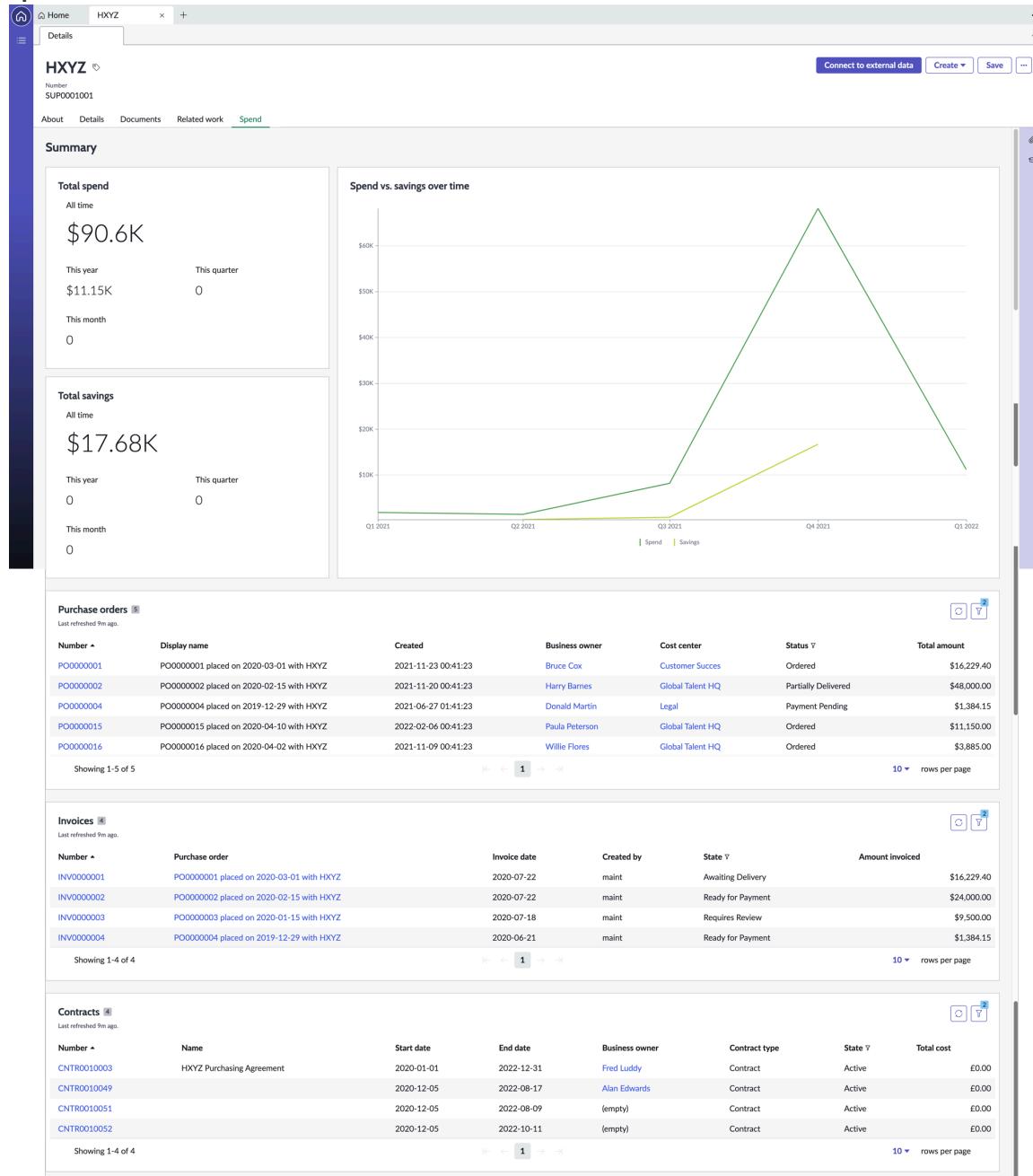
The **Spend** tab displays information about open purchase orders, open invoices, your total spend, total savings, and the trend of your spend and savings over time.

Note:

The **Spend** tab becomes available in the Source-to-Pay Workspace only if you install the Source-to-Pay Common Architecture (com.snc.sn_shop) plugin. The **Spend** tab displays information about open purchase orders, open invoices, your total spend, total savings, and a graphical representation of the trend of your spend and savings over time.

For detailed information about each component, select an individual widget or chart.

Spend tab



Sections on the Spend tab

| Title | Type | Description |
|-----------------------|--------|---------------------------------|
| Summary - Total Spend | Widget | |
| All Time | Widget | View the total spend till date. |

Sections on the Spend tab (continued)

| Title | Type | Description |
|--------------------------------|--------|---|
| This Year | Widget | View the total spend for the year. |
| This Quarter | Widget | View the total spend for the quarter. |
| This Month | Widget | View the total spend for the month. |
| Summary - Total Savings | | |
| All Time | Widget | View the total savings till date. |
| This Year | Widget | View the total savings for the year. |
| This Quarter | Widget | View the total savings for the quarter. |
| This Month | Widget | View the total savings for the month. |
| Summary | | |
| Spend vs. Savings over time | Graph | Displays a graphical presentation of spend versus savings over a given period of time. |
| Purchase orders | | |
| Number | Column | An auto-generated number that uniquely identifies the purchase order. In the Number column, select the link to the record number to view more details. |
| Display name | Column | Name of the purchase order for a supplier product. |
| Total amount | Column | The total cost of purchase requisition calculated as the sum from all related purchase lines. |
| Status | Column | State of the purchase order. |
| Created | Column | Date on which this purchase order is created. |
| Created by | Column | Person who created the purchase order. |
| Invoices | | |

Sections on the Spend tab (continued)

| Title | Type | Description |
|------------------|--------|--|
| Number | Column | An auto-generated number that uniquely identifies the invoice. In the Number column, select the link to the record number to view more details. |
| Purchase order | Column | Purchase order with which this invoice is associated. |
| State | Column | Status of the invoice. |
| Invoice date | Column | Date on which this invoice is created. |
| Created by | Column | Person who created the invoice. |
| Contracts | | |
| Number | Column | An auto-generated number that uniquely identifies the contract record. In the Number column, select the link to the record number to view more details. |
| Name | Column | Short description of the contract. |
| Total cost | Column | Final cost of the contract. |
| State | Column | Current state of the contract. |
| Substate | Column | Current substate of the contract. |
| Start date | Column | Date on which the contract takes effect. |
| End date | Column | Date on which the contract expires |

Subsidiaries tab

The **Subsidiaries** tab displays all the subsidiaries of the supplier.

The **Subsidiaries** tab contains the **Add** option, which enables you to quickly add a subsidiary of the supplier. For more information, see [Add a subsidiary for a supplier from the Source-to-Pay Workspace](#).

Documents tab

The **Documents** tab displays information about the required documents that the suppliers upload by either using this tab or from the Supplier Collaboration Portal.

The **Documents** tab contains the **Link Documents** option, which enables you to quickly add an already uploaded document without creating a new one. Access to the **Link Documents** option is controlled by the user criteria you set on the **Manage access** tab when creating the supplier document configuration. For more information, see [Create a supplier document configuration](#).

Source-to-Pay Workspace Case Details page

The Source-to-Pay Workspace Case Details page is displayed when you select the link of a supplier case to view more details about that case.

On the Source-to-Pay Workspace List page, navigate to **Lists > Cases** and select any of the sub-modules to view a list of cases. Select the link to the case in the **Number** column to open the Case Details page.

For more information about viewing cases in the Source-to-Pay Workspace, see [View a supplier case from the Source-to-Pay Workspace](#).

The Case Details page contains the following options.

Case Details page options

| Option | Description |
|---------------------|---|
| Multi-tab interface | <p>When you select a link for a case, each case opens in a separate tab in the top-left corner, which enables you to easily navigate between multiple open cases.</p> <p>Each case displays information in the following tabs:</p> <ul style="list-style-type: none"> • Playbook tab: Displays either the playbook to onboard a supplier or the generic playbook depending on the case type. For more information, see Using the supplier onboarding playbook to onboard suppliers and Case playbook for specific supplier case types. • Details tab: Contains the Supplier Case, Summary Details, and Resolution Information sections. <ul style="list-style-type: none"> ◦ Supplier Case: Displays information about the supplier case. ◦ Summary Details: Displays the parent case, related location, start and end dates for the case. ◦ Resolution Information: Displays the resolution information and close notes for the case. • Supplier Information tab: Displays information about the supplier. For more information about this tab, see Supplier Information tab. • Supplier Tasks tab: Lists the supplier tasks for the supplier case. • Related Cases tab: Lists the child supplier cases related to the parent supplier case. <p>If you've not installed Third-party Risk Management, the playbook creates supplier cases of types Risk assessment and Tiering assessment. The Supplier Risk Assessment and Supplier Tiering Assessment cases are child cases of the parent Onboard a Supplier case and are displayed on the Related Cases tab. The supplier owner or supplier manager assigns these assessment cases to the TPR assessor.</p> <ul style="list-style-type: none"> • Approvals tab: Lists the persons who need to approve this case. |

Case Details page options (continued)

| Option | Description |
|-----------------------|--|
| | <ul style="list-style-type: none"> • Risk Assessments tab: Displays the risk assessments for a supplier. If you have installed Third-party Risk Management, the playbook creates the risk assessment records and displays them in this tab. • Tiering Assessments tab: Displays the tiering assessments for a supplier. If you have installed Third-party Risk Management, the playbook creates the tiering assessment records and displays them in this tab. <p>i Note: The Risk Assessments and Tiering Assessments tabs are shown only for a supplier case of type Supplier onboarding.</p> <ul style="list-style-type: none"> • Draft Emails tab: Displays a list of emails you saved as draft. • Documents tab: Enables you to manage supplier documents by uploading, updating and downloading the required documents |
| Compose section | Contains the Comments and Work notes (Private) widgets. The text that you enter in the Comments section are visible to everyone. However, the text that you enter in the Work notes (Private section) are visible only to internal users; customers cannot view them. |
| Activity stream | Displays all the processing activities, conversations, and changes that have happened since the case was opened. You can filter activities by post types, field changes, and flagged activities. |
| Contextual side panel | <p>This panel appears below the UI actions.</p> <p>Select the supplier overview icon () to open the following panels:</p> <ul style="list-style-type: none"> • Supplier overview: Displays information about the supplier. • Supplier contacts: Displays information about the supplier contacts. An Admin label next to the contact's name indicates that the contact is a primary contact. If a supplier has more than five supplier contacts, the View all option is displayed. Select View all to view a list of all the contacts for the supplier. <p>Select the attachments icon () to open the Attachments panel, which enables you to attach documents to the case.</p> <p>Select the agent assist icon () to open the Agent Assist panel, which enables you to search for information across multiple sources such as catalog items, knowledge articles, supplier cases, problems, and open incidents.</p> |

Supplier Information tab

The **Supplier Information** tab shows details about the supplier and the supplier contact, a summary of all the open and overdue cases, and a list of all the cases by their priority.

Supplier Information tab

The screenshot shows the Supplier Information tab in ServiceNow. At the top, there are tabs for Home, Supplier Onboard..., Request to add or..., Details, and a plus sign. Below the tabs, a header bar displays Priority (4 - Low), State (Work in progress), Case type (Add or remove loc...), Requested by (Ryan Cook), and Number (SCASE0001004). The main content area is divided into several sections:

- Supplier:** Displays basic supplier information: Adobe Systems, Primary Contact (Deanna Gerbi), Phone, Website (<https://www.adobe.com/>), Street Address (100 South Charles Street...), City / State (Baltimore / MD), and Country (USA).
- Contact:** Displays contact information for Ryan Cook: Office Phone, Mobile Phone, Email (ryan.cook@adobe.com), Street Address, City / State (- / -), and Country.
- Supplier case summary:** Shows 18 Open cases and 14 Overdue cases.
- Contact case summary:** Shows 14 Open cases and 14 Overdue cases.
- Cases:** A donut chart showing 18 cases across various types: Other (4), (empty) (3), Add or remove location (3), Request or issue (3), Update banking details (2), Update supplier profile (2), and Invite Contact (1).
- Cases by priority:** A donut chart showing 18 cases across priority levels: 4 - Low (4), 3 - Medium (10), and 2 - High (4). A table lists individual cases with their numbers, short descriptions, and priority levels.

| Number | Short description | Priority |
|--------------|---|----------|
| SCASE0001002 | Update supplier profile | 4 - Low |
| SCASE0001012 | Request changes to the supplier master record for your company. | 4 - Low |
| SCASE0001003 | Update Supplier Banking Details | 4 - Low |
| SCASE0001015 | Request Something | 4 - Low |
| SCASE0001004 | Request to add or remove location details | 4 - Low |
| SCASE0001006 | Request to add or remove location details | 4 - Low |

Sections

The **Supplier Information** tab includes the following sections.

Sections on the Supplier Information tab

| Section | Description |
|----------|---|
| Supplier | Displays the following information about the supplier: <ul style="list-style-type: none"> Primary Contact Phone Website Street Address City/State Country |

Sections on the Supplier Information tab (continued)

| Section | Description |
|---------|---|
| Contact | <p>Displays the following information about the contact:</p> <ul style="list-style-type: none"> • Office Phone • Mobile Phone • Email • Street Address • City/State • Country |

Reports

The **Supplier Information** tab includes the following reports.

Reports on the Supplier Information tab

| Title | Type | Description |
|---------------------------------|--------------|---|
| Supplier case summary | | |
| Open | Single score | Total number of open cases for the supplier. Click the number to view the list of open cases. |
| Overdue | Single score | Total number of overdue cases for the supplier. Click the number to view the list of overdue cases. |
| Cases | Donut chart | Total number of supplier cases by case or type. |
| By Type | Choice list | Enables you to filter and view cases by type or state in the Cases donut chart. |
| Contact case summary | | |
| Open | Single score | Total number of open cases requested by the contact. Click the number to view the list of open cases. |
| Overdue | Single score | Total number of overdue cases requested by the contact. Click the number to view the list of overdue cases. |
| Cases | Donut chart | Total number of cases by type or state. |
| By type | Choice list | Enables you to filter and view cases by type or state in the Cases donut chart. |
| Cases by priority | | |
| Count of cases by priority | Donut chart | Total number of cases by priority. |
| List of cases and their details | List | Displays a list of cases by their priority, including case details, such as case number, short description, and priority. |

Reports on the Supplier Information tab (continued)

| Title | Type | Description |
|-------|------|---|
| | | In the Number column, select the link to the case to view more details. |

Sidebar for supplier cases in the Source-to-Pay Workspace

Sidebar enables stakeholders to collaborate with others by getting into discussions when working on supplier cases.

You can start a Sidebar discussion by selecting **Discuss** on a supplier case in the Source-to-Pay Workspace. Other stakeholders are notified when you add them to a discussion. They can join the discussion by selecting the Sidebar discussions icon ().

For more information on what Sidebar is, see [Sidebar](#).

To learn more about how to use Sidebar, see [Using Sidebar](#).

For information on activity stream in Sidebar is, see [Activity stream in Sidebar](#).

Source-to-Pay Workspace list page

The Source-to-Pay Workspace list page enables you to see high-level information for all records in a list filter.

The modules that are displayed on the list page vary depending on the Source-to-Pay Operations product that you have installed.

For example, if you have installed only Sourcing and Procurement Operations (SPO) and if you are assigned the Supplier Fulfiller [sn_slm.fulfiller] role, you can view only SPO modules on the list page.

If you have installed both Sourcing and Procurement Operations (SPO) and SLO and if you are assigned the Procurement Specialist [sn_shop.procurement_specialist] and Supplier Fulfiller [sn_slm.fulfiller] roles, the list page displays a combination of modules for both the installed products.

In the Source-to-Pay Workspace, select the list icon () to open the List page.

You can select each module and sub-module to view the details in a list. Under **Lists**, you can do the following:

- Refresh the list to display the most updated information.
- Edit columns to adjust the list to display required columns in the order of your choice.
- Reset column widths to default.
- Copy the URL for this list.
- Apply filters to view specific information that you are interested in.
- Export the list to a file in Excel, CSV, JSON, or PDF format.
- Create a copy of the list and save it under **My Lists**.

Note: For more information on setting up the list view, see [Setting up list view](#).

List page for Sourcing and Procurement Operations in Source-to-Pay Workspace

As a PCM Agent, view and work with your procurement cases, and view the knowledge base. When logged in as a Procurement Specialist however, you can also view and work with the various case types, knowledge base, orders, receipt acknowledgments, interactions, and primary data.

With an additional supplier role of sn_supplier.fulfiller, a Procurement Specialist can view, work on, and also create supplier cases from the list view of Source-to-Pay Workspace.

- i Note:** The app-supplier (com.snc.sn_supplier_mgmt) and app-supplier-common (com.snc.sn_slm) plugins must also be installed to view supplier cases.

You can select each module and submodule to view the details in a list. Here, you can adjust the column widths, copy the URL, apply filters, and export the list to a desired file type. You can also edit a selected record or create a new record as required.

You can then open the record number link to view more details pertaining to that record, including related lists displayed as tabs.

Related list grouping

As a sourcing manager working on certain procurement objects, you can view all the similar related lists grouped at one place for your easy reference, under the **Related work**, **Agreements**, and **Sourcing approach** tabs. The following information is usually grouped under these tabs:

- **Related work**

- Approval plans
- Purchasing tasks
- Purchasing SLAs
- Task SLAs
- Cases
- Interaction-related records

- i Note:** This tab is typically available for cases.

- **Agreements**

- Related contracts
- Signed contracts
- Draft contracts
- Other legal documents

- **Sourcing approach**

- Sourcing requests
- Negotiations
- Purchase lines

- i Note:** This tab is typically available for negotiation events.

Note: You can customize the related lists to be displayed in these related work item tabs by updating necessary client-side variables in the standard Record page that is shipped with Source-to-Pay Workspace. Any conflicts arising from previous customizations with the record page can be handled by identifying the difference in the macroponent file and merging the changes as required.

Contextual information

From the contextual side panel, you can view relevant information such as Agent Assist, attachments, templates, and procurement cases and tasks associated with that procurement record via dynamic related records.

For information on Agent Assist, see [Agent assist in Source-to-Pay Workspace](#). For information on procurement and supplier case creation, see [Create a procurement case](#) and [Create a supplier case](#). For information on procurement task creation, see [Create a procurement task](#).

As sourcing managers and fulfillers, you also get a contextual view of supplier profile cards for procurement objects such as purchase requisitions, sourcing requests, negotiation events, negotiations, and procurement cases. These supplier profile cards help you with key relevant information such as supplier name, industry, onboarded flag, website, supplier contact, if any, and so on. All the relevant suppliers for each procurement object are visible in the contextual side panel. For example, if a sourcing request is being worked upon with three suppliers, then all the three supplier profile cards are visible in the contextual panel. You can further drill down into the supplier 360-degree view by selecting the individual supplier cards, and gather details about them.

As administrators, you can customize the look and feel or the information to be displayed in these supplier profile cards, from the supplier manager workspace experience in UI Builder. You can also add these supplier cards to more procurement objects in Source-to-Pay Workspace by modifying the conditions of the object record pages. Any conflicts arising from previous customizations with the record page can be handled by identifying the difference in the macroponent file and merging the changes as required.

Sidebar and Microsoft Teams for Source-to-Pay Workspace

Sidebar enables stakeholders to collaborate with others by getting into discussions when working on task-based records. You can create a Sidebar discussion by selecting **Discuss** from your procurement object details page on the Source-to-Pay Workspace list page. Other stakeholders are notified when you add them to a discussion. They can join the discussion from the Sidebar discussions icon. For more information, see [Sidebar and Microsoft Teams](#) ↗.

For more information on Sidebar, see [Sidebar](#) ↗.

To learn more about how to use Sidebar, see [Using Sidebar](#) ↗.

For information on activity stream in Sidebar, see [Activity stream in Sidebar](#) ↗.

For detailed information on integrating and enabling Sidebar with Microsoft Teams, see [Integrate Sidebar and Microsoft Teams](#) ↗ and [Enable or configure the Microsoft Teams integration](#) ↗.

Configure your workspace list page

You can configure the list page, define different audiences for the page, and even add, remove, or modify the different modules, if you want. However, it's recommended that you create a duplicate of the page before modifying it. For detailed information, see [Setting up list view](#) ↗.

Work prioritization

Priority is automatically assigned to purchase requisitions, sourcing requests, and procurement cases that your procurement specialists must work on, based on decisions configured by your administrators through decision tables.

This enables your procurement specialists to view their work, sorted by priority, and get started with the highest priority records first, followed by the ones that have lower priority. Procurement specialists can view this from the Procurement Specialist list page as well as from the transaction records on Platform.

This automatic assignment of priority is governed by these three decision tables:

- Priority defaulting for Purchase Requisition: Defines the priority on purchase requisitions.
- Priority defaulting for Sourcing Request: Defines the priority on sourcing requests.
- Priority defaulting for Procurement Cases: Defines the priority on procurement cases.

Your administrators can define the logic for defaulting priority in the above decision tables based on your organization's standardized policy of classifying requisitions, sourcing requests, and procurement cases as high, medium, and low priority. Some examples are dollar value of purchases, executive or leadership purchases, type of spend, and so on. This can be achieved by using any of the attributes available in the transaction header, lines, or even related records. They can configure the decision labels and answers on these decision tables based on your organizational requirements, which will in turn decide the priority of the purchase requisitions, sourcing requests, and procurement cases. By default, the priority is set to **5 - Planning**.

The priority logic is retriggered and priority is automatically reevaluated if any subsequent updates are made to the respective records.

For information on how to work with decision tables, see [Decision Tables](#).

Process a purchase order edit in playbook

You can edit and revise the quantity of the product or delivery location of the purchase orders based on your requirements.

Before you begin

Role required: sn_spend_psd.requestor, administrator

About this task

As an agent, you can view the requests, complete tasks across multiple workflow activities, and manage complex operations from a unified playbook. The playbook provides agents an automated way to visualize the overall process in a task-oriented format.

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. Select the List icon () and select **All team work > Cases**.
3. Select the request number from the list for further processing.

Note: With the revision request raised, the state has been changed to Pending Revision for both the purchase order and purchase order line. Remember that the **Edit** option is unavailable for purchases in the Close state.

The **Playbook** tab opens with the **Edit a purchase order** section.

- View all the associated information in the **Details** and **Task SLAs** tabs, and information on the procurement case lines, tasks, and original purchase in the **Related cases and tasks** pane.

You can compose an email from the record to communicate with the requester or other stakeholders. For more information, see [Email composer with quick messages and response templates in Source-to-Pay Workspace](#). You can even search for and view relevant resources from Agent Assist. For more information, see [Agent assist in Source-to-Pay Workspace](#).

- Select **Intake and Assess** to verify and process the information about the request.
 - Select **Look up procurement case line** for information on the service request, purchase request, and purchase request line items.
 - Select **Details about changes to this purchase** to review the changes.
 - Review the request from **Buyer confirm or reject request to edit PO** and select one of the two actions.
 - Confirm:** When you confirm, you can check the revised the purchase order or purchase order line. On successful update, the request is automatically closed.
 - Reject:** When you reject, you must contact the supplier and confirm whether the order can be rejected. When the supplier allows cancellation, the request changes to Closed Rejected state.
 - Check the progress on **Process PR edit** on the following tasks:
 - Update sn_shop_purchase_order record: Updates the progress of the task automatically.
 - Create a new PR of type Revision.
- The **Close** option updates automatically.

Result

The request updates the purchase order or line item with revised quantity or location. A new card of revision type is also created for the shopper and approvers to communicate on, which can be viewed by the shopper from **My purchases**.

What to do next

Review and confirm your purchase request details from **Procurement Case Management > Procurement Cases > Purchase Requisitions > Purchase lines**, if required.

Related topics

[Purchase revision flows](#)

[Purchase revision roles and responsibilities](#)

[Playbooks](#) ↗

Process an edit request in playbook

Use the procurement playbook to approve or reject the revision requests for the quantity of the product or delivery location.

Before you begin

Role required: sn_spend_psd.admin, agents, fulfillers

About this task

As an agent, you can view the requests, complete tasks across multiple workflow activities, and manage complex operations from a unified playbook. The playbook provides agents an automated way to visualize the overall process in a task-oriented format.

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
 2. Select the List icon () and select **All team work > Cases**.
 3. Select the request number from the list for further processing.
- i Note:** With the revision request raised, the state has been changed to Pending Revision for both the purchase requisition and purchase line. Remember that the **Edit** option is unavailable for purchases in the Close state.

The **Playbook** tab opens with the **Edit a purchase request** section.

4. View all the associated information in the **Details** and **Task SLAs** tabs, and information on the procurement case lines, tasks, and original purchase in the **Related cases and tasks** pane.
You can compose an email from the record to communicate with the requester or other stakeholders. For more information, see [Email composer with quick messages and response templates in Source-to-Pay Workspace](#). You can even search for and view relevant resources from Agent Assist. For more information, see [Agent assist in Source-to-Pay Workspace](#).
5. Select **Intake and Assess** to verify and process the information about the request.
 - a. Select **Look up procurement case line** for information on the service request, purchase request, and purchase request line items.
 - b. Select **Details about changes to this purchase** to review the changes.
 - c. Review the request from **Confirm or reject procurement case** and perform one of these actions.
 - **Confirm:** When you confirm, you can check the revised the purchase request or purchase request line with updated quantity and location. On successful update, the request to edit a purchase request is automatically closed.
 - **Reject:** When you reject, you must contact the supplier and confirm whether the order can be rejected. When a supplier allows cancellation, the request changes to Closed Rejected state.

Based on the process automation designer flow, the **Process PR edit** and **Close** options update automatically.

Result

The request updates the purchase requisition or line item with revised quantity or location. A new card of revision type is also created for the shopper and approvers to communicate on, which can be viewed by the shopper from **My purchases**.

Related topics

[Purchase revision flows](#)

[Purchase revision roles and responsibilities](#)

[Playbooks !\[\]\(b68763b9a5c6f7137de0e4b1962c6f7f_img.jpg\)](#)

Process a cancel request in playbook

Use the procurement playbook to approve or reject cancellation requests.

Before you begin

Role required: sn_spend_psd.admin, agents, fulfillers

About this task

As an agent, you can view the requests, complete tasks across multiple workflow activities, and manage complex operations from a unified playbook. The playbook provides agents an automated way to visualize the overall process in a task-oriented format.

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
 2. Select the List icon () and select **All team work > Cases**.
 3. Select the request number from the list for further processing.
- Note:** With the revision request raised, the state has been changed to Pending Cancellation for both the purchase requisition and purchase line.
- The **Playbook** tab opens with the **Cancel request** section.
4. View all the associated information in the **Details** and **Task SLAs** tabs, and information on the procurement case lines, tasks, and original purchase in the **Related cases and tasks** pane.
- You can compose an email from the record to communicate with the requester or other stakeholders. For more information, see [Email composer with quick messages and response templates in Source-to-Pay Workspace](#). You can even search for and view relevant resources from Agent Assist. For more information, see [Agent assist in Source-to-Pay Workspace](#).
5. Select **Intake and Assess** to verify and process the information about the request.
 - a. Select **Look up procurement case line** for information on the request and purchase request line items.
 - b. Review the request from **Contact the supplier and confirm or reject procurement case** and select one of these actions.
 - **Confirm:** After you verify that cancellation is feasible, confirm the request. Once confirmed, the PO changes to a closed canceled state.
 - **Reject:** When you reject, you must contact the supplier and confirm whether the order can be rejected. When a cancellation option is unavailable, the request changes to Closed Rejected state.
 - c. Check the **Process cancellation** section:
 - **Update ERP with cancellation:** Updates the ERP with the cancellation.
 - **Update ShoppingHub with cancellation:** Updates the progress of the task.
 - d. Complete the tasks to **Close** the cancellation request automatically.
 - **Send business owner a confirmation email:** Notifies the business owner about the cancellation. Select **Send email** to update.

Note: You can personalize the mail subject and content.

- **Update sn_spend_sdc_service_request:** Updates the record.

Result

On confirmation, the cancellation task is complete.

Note: The shopper is notified when a cancellation request for a purchase, in part or whole, is processed. The reason for the cancellation is listed in the header as well as in the activity stream of that purchase or line.

Related topics

[Purchase revision flows](#)

[Purchase revision roles and responsibilities](#)

[Playbooks](#) 

Process a return request in playbook

Use the procurement playbook to approve or reject return requests.

Before you begin

Role required: sn_spend_psd.admin, agents, fulfillers

About this task

As an agent, you can view the requests, complete tasks across multiple workflow activities, and manage complex operations from a unified playbook. The playbook provides agents an automated way to visualize the overall process in a task-oriented format.

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. Select the List icon () and select **All team work > Cases**.
3. Select the request number from the list for further processing.
The **Playbook** tab opens with the **Return a Purchase** section.
4. View all the associated information in the **Details** and **Task SLAs** tabs, and information on the interaction records and original purchase in the **Interaction Related records**, **Original purchase** tabs.
You can compose an email from the record to communicate with the requester or other stakeholders. For more information, see [Email composer with quick messages and response templates in Source-to-Pay Workspace](#). You can even search for and view relevant resources from Agent Assist. For more information, see [Agent assist in Source-to-Pay Workspace](#).
5. Select to verify and process the information about the request.
 - a. In the **Coordinate with Supplier** section, contact the supplier, confirm the return, and collect the necessary information.
 - b. In the **Confirm return and collect information** section, review the request and perform one of these actions.
 - **Confirm:** After you verify that return is feasible, confirm the request. When confirmed, the request moves to the Work in progress state. You can now send an email to the business owner confirming that the return request has been initiated.
 - **Reject:** When you reject the return request, the request moves to the Closed Rejected state. You can now close the case by sending an email to the business owner confirming that the return request has been rejected.
 - c. In the **Reverse Goods Receipt** section, create a receipt type for the goods that are to be shipped back to the supplier. This receipt is recorded on the purchase order record. If you skip this step, the request moves to the Closed Rejected state. You can then close the case by sending an email to the business owner confirming that the return request has been rejected.
 - d. In the **Create Debit Memo** section, create a debit memo invoice for this return. This debit memo is recorded on the purchase order record. If the invoice for these returned

goods is yet to be paid, a debit memo isn't required. You may choose to skip this step, if required.

- e. In the **Close** section, send an email to the business owner confirming that the return request has been processed successfully. This closes the return request automatically and moves the case to the Closed Completed state.

Note: Any associated assets or fixed assets created during purchase order creation are revised based on the quantity of the returned products. The states of these assets and fixed assets are updated to Retired and Pending Deletion respectively.

Fulfilling request for copy of contract in playbook

Reduce manual effort by providing your procurement specialist with a playbook for attaching the contract from and sending it as an email to the employee who requested for it.

If an employee requires a copy of a contract they have access to, they can submit a request for the same from Employee Center by navigating to **Purchase and expense > Purchase Requests > Request a copy of contract**. A procurement case of type Request a copy of contract is created for the procurement specialist to work on, in Source-to-Pay Workspace. The procurement specialist can attach a copy of the contract from a playbook and send it as an email to the employee who requested for it. This reduces a lot of manual effort and provides the procurement specialist a single place to perform all the necessary actions.

Fulfill request for copy of contract in playbook

Attach a copy of the contract from a playbook and send it as an email to the employee who requested for it.

Before you begin

Role required: Procurement specialist

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. Select the List icon () and select **All team work > Cases**.
3. Select the applicable Request a copy of contract case from the list for further processing.
The **Playbook** tab opens with the **Verify and assign case** section.
4. In the **Assigned to** field, select a procurement specialist to work on this case.
5. Select **Start work**.

The procurement case moves to the Work in progress state, and the Email a copy of the contract page is displayed.

Note: If a contract is already attached to this case, it's displayed here. The procurement specialist can open and view the contract and verify the details, if necessary.

6. Select **Compose email** to draft the email for the employee.
7. Optional: Edit the auto-populated fields as required.
8. Select **Add File** to browse and attach the contract file to the email.

Note: This attachment isn't added here by default and must be attached manually by the procurement specialist. Consider these scenarios:

- If a contract number is specified in the request, and an attachment exists for that contract in the contract record, attach the requested contract number to the email.
- If a contract number is specified in the request, but an attachment doesn't exist for that contract in the contract record, find the file for the contract number and attach it to the email.
- If a contract number isn't specified in the request, and only details are mentioned, find the contract as described by the requester and attach it to the email.

9. Select **Send Email** to send the email for the employee.

10. Select **Done**.

The request is now fulfilled and the procurement case moves to the Closed Completed state.

Routing NDAs to suppliers

Reduce manual effort by providing your procurement specialist with a single place to perform all the necessary actions when creating and routing Non-Disclosure Agreements (NDAs) to suppliers and third parties.

As a procurement specialist, you can easily define your NDA content and update signer details with the help of a document template that is provided by default with the Document Template plugin [sn_doc], which is added as a dependency on Procurement Case Management [com.sn_spend_psd]. The signer details are stored in the Signers table.

Note: You must use the November 2023 version of the Document Template plugin [sn_doc] for using the November 2023 versions of the Procurement Case Management and Playbooks for Sourcing and Procurement Operations plugins.

Further, procurement specialists can easily route the NDAs to suppliers and third parties for signing via DocuSign integration, review the signed documents, and close the procurement case of type Send NDA for Signature, from a designated playbook in Source-to-Pay Workspace.

Details of the workflow are provided here.

1. Define your NDA content and update the list of participants for signature. See [Define NDA content and update the list of signers](#).

2. Set up DocuSign.

For more information, see [DocuSign Spoke](#).

3. Navigate to **All > Procurement Case Management > Procurement Workspace**.

4. Select the list icon and select **All team work > Cases**.

5. Select **New**.

6. In the Create a new case dialog box, select **Send NDA for Signature**.

7. Select **Create Case**.

Note: During a procurement request, when a valid NDA isn't available for the selected supplier, a procurement case of type Send NDA for Signature is automatically created.

8. Open the case in Source-to-Pay Workspace, prepare the NDA, and send it for signing to the suppliers and third parties from a playbook. See [Prepare an NDA and send to the signers from playbook](#).

i Note: If the **Playbook** tab isn't visible in Source-to-Pay Workspace, verify that the Document Template Integration with DocuSign application is installed correctly.

9. Sign the NDA.

- For external third-party suppliers, directly sign from the email notification  or from Supplier Collaboration Portal. For more information, see [Using Supplier Collaboration Portal](#).
- For internal supplier representatives, from Employee Center. For more information, see [Sign a document using DocuSign from Employee Center](#).

10. Review the signatures from the playbook in Source-to-Pay Workspace, notify the user, and close the case. See [Review the signed NDA from playbook](#).

Additional configurations

You can make changes to the Send NDA for signature playbook, if you must, from Playbooks.

For adding new participants, create a new column on the procurement case and update the logic to populate in Playbooks. For more information, refer to the implementation of the signer_1 column.

You can also update the subflows to incorporate any new logic. Flow details can be found in different steps in Playbooks.

Define NDA content and update the list of signers

As a procurement specialist, you can easily define your Non-Disclosure Agreement (NDA) content and update the list of participants for whose signature is required.

Before you begin

Procurement specialists can do this with the help of a document template that is provided by default with the Document Template plugin [sn_doc], which is added as a dependency on Procurement Case Management [com.sn_spend_psd]. The signer details are stored in the Signers table.

i Note: You must use the November 2023 version of the Document Template plugin [sn_doc] for using the November 2023 versions of the Procurement Case Management and Playbooks for Sourcing and Procurement Operations plugins.

Role required: Procurement specialist

Procedure

1. Navigate to **All > Document Templates > All Document Templates**.
2. Select and open the Supplier NDA draft template.
A sample NDA template that is provided by default is displayed.
3. In the **Table** field, select the required table.

i Note: Depending on the table you select, the variables that you can use in the body of your NDA content are displayed.

4. In the **Signing type** field, select **DocuSign**.

5. In the **Participants** related list, provide these details.

- **Internal Signer:** Select the user.
- **External Signer 1:** Select the signer 1 authorized signatory name and email.

6. Select **Update**.

Prepare an NDA and send to the signers from playbook

Prepare a Non-Disclosure Agreement (NDA) and send it for signing to the suppliers and third parties from a playbook in Source-to-Pay Workspace.

Before you begin

Role required: Procurement specialist

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. Select the list icon and select **All team work > Cases**.
3. Select the applicable Send NDA for Signature case from the list for further processing.
The **Playbook** tab opens with the **Verify and assign case** section.
4. In the **Assigned to** field, select a procurement specialist to work on this case.
5. Select **Start work**.
The procurement case moves to the Work in progress state.
6. In the **Document template** field, select **Supplier NDA draft**.
7. Select **Continue**.
8. In the **Internal Signer** field, select the name of the signer.
9. Select **Continue**.
10. In the **Signatory email** field, enter a valid email ID of the supplier or third-party signer.
11. In the **Signatory title** field, enter a title for the supplier or third-party signer.
12. In the **Authorized signatory name** field, enter the name of the supplier or third-party signer.
13. Select **Save**.
The details are added to the procurement case, and the signer details are displayed.
14. Review the signer details and select **Save and create NDA**.
An NDA is created with the document template that was defined in [Define NDA content and update the list of signers](#). A contract is also created in parallel and displayed here.
15. Select **Send NDA** to send the NDA for signing to the suppliers and third parties.
The NDA is sent to the signers and corresponding document tasks are automatically created for them.

Note: If document tasks are not getting created, verify that the integration with DocuSign is set up correctly.

What to do next

Review the signed and completed NDA and close the case from the playbook in Source-to-Pay Workspace. For more information, see [Review the signed NDA from playbook](#).

Review the signed NDA from playbook

Review the signed and completed Non-Disclosure Agreement (NDA) and close the case from the playbook in Source-to-Pay Workspace.

Before you begin

Ensure that the NDA that you had sent out for signing to the suppliers and third parties in [Prepare an NDA and send to the signers from playbook](#) are duly signed.

Role required: Procurement specialist

Procedure

1. In the **Review completed NDA** section, check if you have received the signed document.
2. Open and verify the signed NDA attachment for completion.
3. Select **Continue**.
4. Select **Send Email** to notify the assigned to user that the NDA has been signed.
The procurement case moves to the Closed Completed state.

Verifying delivery addresses in playbook

Procurement specialists can verify delivery addresses and notify shoppers through email for delivery address-related updates using playbook.

As a procurement specialist or an agent, you can check and approve delivery addresses provided by shoppers. With playbook, you can visualize the end-to-end address verification process in a task-oriented format. First, you manually verify the address provided by the shopper against the supplier company's addresses available in the delivery locations table. If the shopper's address is invalid or missing, you can request that the shopper provide the correct address through an email. The shopper then updates the address details in the purchase order line. For more information about editing a purchase line, see [Edit a purchase order line](#).

The activity stream, which tracks the interactions between a shopper and an agent, notifies you when the shopper updates the address in the purchase order line.

Review delivery address in playbook

Verify a delivery address presented through the playbook by evaluating the address against supplier addresses and indicating whether it's valid.

Before you begin

Role required: Fulfiller, agent

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. Select the List icon () and select **All team work > Cases**.
3. Open a procurement case with filter criteria set to **Delivery address review** and the **State** set to **In review**.
4. Note the address in the **Delivery locations** section.
5. Verify the address against the addresses in the delivery locations table of addresses provided by the supplier.
6. Indicate the status of the address.

| Address status | Action |
|---|---|
| Address provided by the shopper is invalid and can't be verified | <ul style="list-style-type: none"> a. Select Not Verified. b. Select Compose email and notify the shopper through an email to recheck the address. <p>i Note: You can add or edit the default email wording from the record to communicate with the shopper. For more information, see Email composer with quick messages and response templates in Source-to-Pay Workspace.</p> <ul style="list-style-type: none"> c. Set the State field to On hold. <p>You're notified through the activity stream of the procurement case when a shopper updates the address in the purchase order.</p> <ul style="list-style-type: none"> d. Validate the updated address. |
| Address provided by the shopper is valid but isn't approved by the supplier company | <ul style="list-style-type: none"> a. Select Not Verified not approved. b. Select Compose email and notify the shopper through an email to recheck the address. <p>c. Set the State field to On hold.</p> <p>In response to the email, the shopper updates the address in a purchase order line.</p> <p>You're notified through the activity stream of the procurement case whenever a shopper updates the address in the purchase order.</p> <ul style="list-style-type: none"> d. Validate the updated address. |
| Address provided by the shopper is valid and approved by the supplier company | <ul style="list-style-type: none"> a. Set the State field to In review. b. Select Verified and approved. |

7. After you've confirmed that an address is valid and approved, select **Mark complete**.

Result

The playbook card displays the confirmation message Procurement case can be marked as complete as the delivery address is valid and approved. The procurement case is updated with valid address and the playbook is closed.

Reviewing and updating general ledger details in playbook

As a fulfills working in the procurement team, you can review and update missing General Ledger (GL) account details using playbook.

If a shopper checks out multiple products from a single supplier, multiple purchase requisition lines are generated that can contain missing GL accounting details. The purchase requisition lines with missing GL accounting details are auto-populated in a playbook associated with the purchase requisition in the procurement case.

Review and update missing general ledger details in playbook

Review and update missing General Ledger (GL) accounting details through the procurement playbook. If a shopper checks out multiple products from a single supplier, multiple Purchase Requisition Lines (PRLs) are generated, some of which could potentially contain missing GL accounting details.

Before you begin

Role required: Fulfiller, agent

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. Select the List icon () and select **All team work > Cases**.
3. Find a procurement case by setting the filter criteria to **[Assignment group][is][General Ledger Accounting]** and **State** set to In review.
4. In the review PRLs with missing GL account information playbook card, select a PRL.
5. Review the missing GL accounting details and update them.
Some examples of possible missing information include Capex, expense and pre-payment accounts.
6. Select **Save**.
The PRL is updated with GL accounting details.
7. After you've confirmed that the GL account details are valid and approved, select **Mark complete**.

Result

The playbook card displays the confirmation message **Please verify that all PRL accounting fields are filled**. The procurement case is updated with valid GL account details and the playbook is closed.

Sourcing intake guided experience with playbooks

As sourcing managers, you can use the sourcing intake and negotiation setup playbooks to guide you through the complex request intake process so that you can focus on actual productive work such as negotiating savings from suppliers.

The sourcing intake playbook and the negotiation setup playbook embedded in the sourcing intake playbook as a flow, guide you through these actions with clear steps to view your progress.

Here's a quick breakdown of the individual playbooks and their associated tasks:

- The sourcing request playbook, also known as the sourcing intake playbook. This enables you to:
 - Review an employee or requester's requirements, which include details of the sourcing intake, purchase lines, and approvals.
 - Request clarifications or more information from the requester, if necessary.
 - Collaborate with cross-functional teams and create other work such as tasks and cases for them, if necessary.

For more information on how to perform these actions on the sourcing intake playbook, see [Review details and request clarification on a sourcing request in playbook](#).

- Decide if you should negotiate in a negotiation event or not.

Here, as the sourcing manager, you can select a sourcing approach to source with similar employee requests. You can decide whether to work on negotiations with suppliers right away or at a later stage. In case of the former, you must add the sourcing request to a new or existing negotiation event to proceed.

For more information on how to perform these actions on the sourcing intake playbook, see [Select a sourcing approach in playbook](#).

i Note: If you have skipped negotiations at this stage, you have the option to work on negotiations after the qualification is complete. You can add the sourcing request to an exiting negotiation event or create a new negotiation event as required, before working with the negotiation event.

- The negotiation event playbook, also known as the negotiation setup playbook. This enables you to:
 - Review and add sourcing requests and purchase lines, if necessary.
 - Review and add suppliers, if necessary.
 - Manage qualification work.

For more information on this, see [Set up negotiations with suppliers and manage qualifications in playbook](#).

i Note: This action is available in both the playbooks, depending on when you want to get started with managing qualification work.

Configurations

The playbook stages and activities of sourcing requests and negotiation events can be modified by the customer from Playbooks. The Declarative Actions can be edited or newly created, and their mappings modified in the Activity Definition section. The look and feel of the activities can also be configured from Activity Experience in the Activity Definition section.

For details on how administrators, agents, and fulfillers can configure playbooks, see [Using Playbooks](#). For more information on Playbooks stages and activities, see [Stages and activities](#).

Troubleshooting

If your playbook activities aren't working as expected, perform these actions.

1. Navigate to the respective process in Playbooks. For sourcing requests and negotiation events, the processes are Sourcing Intake and Negotiation Setup respectively.
2. Within the process, go to the corresponding activity that is not working as expected. For example, in the Sourcing approach section, which is the second stage of the playbook:
 - If stage 2.1 is skipped, it should go to the Qualification workflow.
 - If stage 2.1 is completed, it should go to the Add to an existing negotiation workflow.
 - If stage 2.1 is canceled, it should go to the Create new negotiation event workflow.

3. Under the **Automation** tab, navigate to the corresponding subflow in Flow Designer.
4. Open the executions of the subflow and check further.
5. To check the activity experiences, go to the sys_pd_process_definition table and check the process configurations. This table contains all the activity definition configurations and action mappings for Declarative Actions.

Review details and request clarification on a sourcing request in playbook

Get complete clarity on a sourcing request by reviewing the intake details, purchase lines, and approvals, and requesting clarification on the request, if necessary. You can perform these actions from the Request details section of the sourcing intake playbook.

Before you begin

Role required: Sourcing manager

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. Select the List icon () and select **All team work > Sourcing Requests**.
3. Open the sourcing request that you want to work with.

You can also pick the sourcing request that you want to work with from the workspace landing page.

Note: To work on the sourcing intake playbook, the sourcing request must be in the Pending Review state.

4. Review the sourcing request details and update them, if necessary.
5. Select **Continue**.
6. Review the details of the purchase lines within the sourcing request.
7. Select **Continue**.
8. Review whether the requester has all the required approvals for this sourcing request.
9. Select **Continue**.
10. Review all the cases and tasks related to this sourcing request.
11. Optional: To reach out to the appropriate teams for additional clarification on this sourcing request:
 - a. Select **Create a type of work**.
 - b. On the Create a type of work pop-up window, select the required case or task.
 - c. Select **Create**.
 - d. Select **Save** to save the case or task and add it to the sourcing request.
12. Select **Continue**.

What to do next

Decide if you want to negotiate with suppliers right away, or skip this step and start qualifying the sourcing request instead. You can perform these actions from the Sourcing approach section of the sourcing intake playbook. For details, see [Select a sourcing approach in playbook](#). For more information about the qualification process, see [Supplier qualification](#).

Select a sourcing approach in playbook

Decide if you want to negotiate with suppliers right away, or skip this step and start qualifying the sourcing request instead. You can perform these actions from the Sourcing approach section of the sourcing intake playbook.

Before you begin

Role required: Sourcing manager

Ensure that you have complete clarity on the sourcing request by reviewing the intake details, purchase lines, and approvals, and requesting clarification on the request, if necessary. For details, see [Review details and request clarification on a sourcing request in playbook](#).

Procedure

1. Perform steps 1 through 11, as documented in [Review details and request clarification on a sourcing request in playbook](#).
2. In the Sourcing approach section, choose to negotiate with suppliers right away, or skip this step and start qualifying the sourcing request instead.

In case of the former, you can add the sourcing request to an exiting or new negotiation event as required, before working with the negotiation event, as documented in [Set up negotiations with suppliers and manage qualifications in playbook](#).

In case of the latter, you have the option to work on negotiations after the qualification is complete.

3. Do one of these actions.

| Decision | Action |
|--------------------------------------|---|
| Add to an existing negotiation event | To source with an existing group of requests, select an existing negotiation event from the list. |
| Add to a new negotiation event | To source the request by itself or with a new group of similar requests, add to a new negotiation event and update the details of this negotiation event. |
| Continue | Skip negotiating and start qualifying the sourcing request. For more information about the qualification process, see Supplier qualification . |

What to do next

Work on a negotiation setup playbook to manage qualification work, and review the sourcing requests, suppliers, and purchase lines, all within the premises of a negotiation event. For details, see [Set up negotiations with suppliers and manage qualifications in playbook](#).

Set up negotiations with suppliers and manage qualifications in playbook

Work on a negotiation setup playbook to manage qualification work, and review the sourcing requests, suppliers, and purchase lines, all within the premises of a negotiation event.

Before you begin

Role required: Sourcing manager

Ensure that you've selected the appropriate sourcing approach. For details, see [Select a sourcing approach in playbook](#).

Procedure

- Under Manage qualification work, review all the cases and tasks related to this negotiation event.
- Do one of these actions.

| Decision | Action |
|------------------------|---|
| Create a type of work | On the Create a type of work pop-up window, select the required case or task, and add it to the negotiation event. |
| Complete qualification | Completes the qualification. ● Note: The procurement cases must be in the Closed Completed state for you to complete the qualification. |

- After qualification is complete, do one of these actions.

You can continue sourcing this request by adding pricing to this record. If you want pricing for additional items or suppliers, use a negotiation event instead.

| Decision | Action |
|--------------------------------------|---|
| Add to a new negotiation event | To source the request by itself or with a new group of similar requests, add to a new negotiation event and update the details of this negotiation event. |
| Add to an existing negotiation event | To source with an existing group of requests, select an existing negotiation event from the list. |
| Add pricing to this record | Continue sourcing this request by adding pricing to this record. |

- If you've added the sourcing request to a new or existing negotiation event, select **Go to negotiation event**.
- Review the details of the sourcing requests within this negotiation event.
- Optional: Select **Add sourcing requests** if you want to add more similar sourcing requests to this negotiation event.
- Select **Continue**.
- Review the details of the suppliers within this negotiation event.
- Optional: Select **Add suppliers** if you want to add more suppliers to this negotiation event.
- Select **Continue**.
Adding a sourcing request or supplier auto-creates purchase lines and creates a new negotiation record to manage negotiation activities for that specific supplier.
- Review the details of the purchase lines within this negotiation event.

12. Select **Continue**.
13. Manage qualification work, as described in steps 1 and 2.

Email composer with quick messages and response templates in Source-to-Pay Workspace

Insert predefined content into the message body of emails that you send from the email client in Source-to-Pay Workspace.

You can use this feature to send emails for all procurement objects, which include purchase requisitions, sourcing requests, negotiations, negotiation events, procurement cases, and tasks. To open the email client, select **Compose Email** from the More Actions icon on the procurement object. A draft email appears with pre-populated data in the **To**, **Subject**, and email body fields.

Using quick messages

In the email client, you can select a quick message to fill the email body with the content that is specified in the quick message. After you define one or more quick messages, the Quick Messages contextual pane appears in the email client so that you can draft an email with a quick message of your choice. For Sourcing and Procurement Operations, Disclaimer is the only default quick message provided.

On selecting **Insert**, the quick message content is inserted at the place of the cursor. It doesn't replace the content that you created before selecting the quick message. To replace existing content with a quick message, highlight the text to replace and then select a quick message.

Creating quick message content

Define quick messages by creating records in the Email Client Canned Messages [sys_email_canned_message] table.

When you define a quick message, you can add any of the following types of content into the message body:

- Icons
- Logos
- Images
- Rich-text HTML
- Hyperlinks
- Variables
- Any other HTML constructs

Assign the email_client_quick_message_author role to business managers so that they can create quick messages for users in their group.

For more information on how to create a quick message, see [Define a quick message](#).

Using response templates

Resolve cases faster and more efficiently with response templates. Response templates are reusable messages that can be copied to draft emails to provide quick and consistent messages to users. Each template is associated with a table that is an extension of the Task [task] or Interaction [interaction] table. Response templates include a short name for specifying a shortcut that can be used to identify the message.

Open the response template that you want to use for your email and select **Copy to clipboard**. You can now paste the contents of this template at the place of the cursor. It doesn't replace the content that you created before selecting the response template. To replace existing content with a response template content, highlight the text to replace and then select a response template.

By default, the following response templates are provided for these standard procurement objects:

- Procurement case: Standard closure response, procurement contacts, policy instructions, and additional information.
- Purchase requisition: Placing of purchase order is in process, procurement contacts, and policy instructions.
- Sourcing request: Placing of purchase order is in process, procurement contacts, and policy instructions.
- Negotiation: Procurement contacts, and policy instructions.
- Negotiation event: Procurement contacts, and policy instructions.
- Task: Procurement contacts, and policy instructions.

While users with the response template reader [sn_templated_snip.template_snippet_reader] role can only read response template content, those with the response template writer [sn_templated_snip.template_snippet_writer] role can read, create, update, and delete response template content.

For more information on how to work with response templates, see [Create or modify a response template](#).

Emailed message in activity log

After your email is composed, sent, and most importantly received by the intended recipient, you can see the email message in the **Activity** section of the procurement object record. You can continue to work with this email from the activity log by replying to or forwarding the email as required.

Email composer setup configurations

To view email composer and all its associated features, which include viewing your emailed message in the activity log, verify that you have the following configurations in place:

- Sent email should be in Received state, for the email log to show up in the activity stream of the procurement object.
- The formatter update of the activity stream of the procurement objects should have the **Emails - autogenerated** and **Emails - correspondence** formats applied.
- The Email client attribute should be updated to the procurement object type, for the email composer feature to be enabled for that object.
- The `email_composer` role should be added as a contained role for the base fulfiller or agent [sn_spend_sdc.agent] role, for the user to view the email composer feature.
- The response template reader [sn_templated_snip.template_snippet_reader] role should be added for the user to view the response template feature.

Agent assist in Source-to-Pay Workspace

Agent assist in Source-to-Pay Workspace automatically displays relevant search results based on the search text, which is defaulted with the short description of the procurement case

you're working on. You can edit the search text as required. These search results help you to work on the record.

Agent assist is part of the contextual side panel in Source-to-Pay Workspace. By default, it displays knowledge articles as a resource, but can also display associated suppliers for a record if you select the resource as Suppliers.

For Sourcing and Procurement Operations, Agent assist is configured for the following procurement objects:

- Purchase requisition
- Sourcing request
- Negotiation
- Negotiation event

For information on how Agent assist is set up and configured on the Now Platform, see [Set up Agent assist](#).

Add a sourcing request to a negotiation event

You can manage multi-supplier and multi-product negotiations by mapping similar sourcing requests and related negotiations to a negotiation event.

Before you begin

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. On the list page, navigate to **All team work > Sourcing Requests**.
3. Select the sourcing request that you plan to add to a negotiation event.
4. Select **Add to negotiation event**.
5. In the Add to negotiation event dialog box, select whether you would like to add the sourcing request to an existing or new negotiation event.
 - If adding to an existing negotiation event, select the negotiation event from the **Negotiation events** list.
 - If adding to a new negotiation event:
 - a. Enter a short description for the negotiation event in the **Short description** field.
 - b. Select the method used to engage with the supplier from the **Negotiation type** field. The options are Quote, RFx, Contract Renewal, and Other.
 - c. Select the anticipated outcome or end results of the negotiation event from the **Negotiation outcome** field. The options are Standard Savings, Contract Terms Negotiated, Cost Avoidance, and Negotiation Unsuccessful.
 - d. Select your expected start date from the calendar icon or enter it in the **Expected start** field, if necessary.
6. Select **Add**.

Result

A new negotiation event is created, which is attached to the selected sourcing request.

What to do next

View an overview of the negotiation event in the **Overview** tab, and other associated information in relevant tabs such as **Details**, **Negotiations**, **Sourcing Requests**, **Purchase Lines**, **Cases**, **Purchasing Tasks**, and **Contracts**.

You can add more sourcing requests to this negotiation event by selecting **Add sourcing request**. Negotiation records are automatically created for each supplier in the sourcing request. You can add more suppliers to this negotiation event as well. For more information, see [Work on a negotiation event](#).

In compliance with fair competition laws, qualify all your suppliers in that negotiation event before you start negotiating with any of them. For more information, see [Supplier qualification](#).

Supplier qualification

As a procurement specialist or Procurement Case Management (PCM) agent, you would want to engage with suppliers who are qualified to fulfill your organization's purchasing needs.

The supplier qualification process can be very involved with multiple teams wanting to engage with a supplier on different levels. Based on your process, you can define qualification cases to reflect the work that needs to be done to ready the engagement with a supplier. This is achieved through decision tables for your sourcing and negotiation work streams. For information on the relevant decision tables, see [Purchasing tasks and procurement cases](#).

Qualification cases include:

- Supplier cases:
 - Conduct a Supplier Risk Assessment: Conduct a risk assessment for a supplier.
 - Onboard a Supplier: Onboard a supplier for a purchase.
 - Conduct a Supplier Tiering Assessment: Conduct a tiering assessment for a supplier.

Note: For these supplier cases, the decision templates are available only when you have the Supplier Lifecycle Operations application installed. You must also enable the Risk Assessments Integration for Sourcing and Procurement Operations application and have the GRC Vendor Risk Management license if you want the Conduct a Supplier Tiering Assessment case to be generated. For information on how a supplier tiering assessment task influences sourcing request states, see [Sourcing and Procurement Operations integration with Vendor Risk Management](#).

- Contract cases:
 - Contract Review: Review contracts for a purchase.
 - Send NDA for Signature: Send an NDA for signature to the supplier for a purchase.
- Finance cases:
 - GL Coding Review: Review accounting details for a purchase line.
 - Budget Review: Review budget details for a purchase requisition.

For a case to be considered as a qualification case, the **Qualification dependent on case** field in that case template must be set to **Yes**.

To enable you be compliant with fair competition laws, when engaging with multiple suppliers, qualification cases that you've defined in the decision tables need to be

completed before continuing your sourcing and negotiation work streams. You can define qualification cases to be initiated on a sourcing request, negotiation, or a negotiation event.

To initiate the supplier qualification flow on a sourcing request, select the sourcing request you want to work with from the Procurement Workspace list page, **All team work > Sourcing Requests**, and select **Begin qualification**. This automatically creates the qualification cases that you've defined within the decision tables to be associated with this sourcing request, and also moves the sourcing request and its associated purchase lines to the Qualification Needed state. Alternatively, updating the negotiated unit cost on any of the purchase lines within the sourcing request automatically triggers the qualification flow on the sourcing request. Closing the cases moves them to the Qualified state, and readies the sourcing request for awarding.

Note: If a sourcing request is raised with qualified suppliers, qualification cases aren't created and the sourcing request is directly moved to the Qualified state.

When working within a negotiation or negotiation event that has an associated sourcing request, the supplier qualification flow is automatically initiated, and qualification cases are created for the negotiation or negotiation event respectively. Closing these cases moves the negotiation event and all its associated sourcing requests, negotiations, and purchase lines to the Qualified state, and readies the sourcing requests for awarding. All state changes are displayed in the activity streams of the respective records. You can use the activity stream to track your negotiations with your suppliers, from start to end.

Note: If the qualification event had been started for a sourcing request, and cases had been created on the sourcing request before it was mapped to a negotiation or negotiation event, and there's an overlap in cases, then previously created cases on the sourcing request are automatically closed and the new cases created for the negotiation or negotiation event are retained.

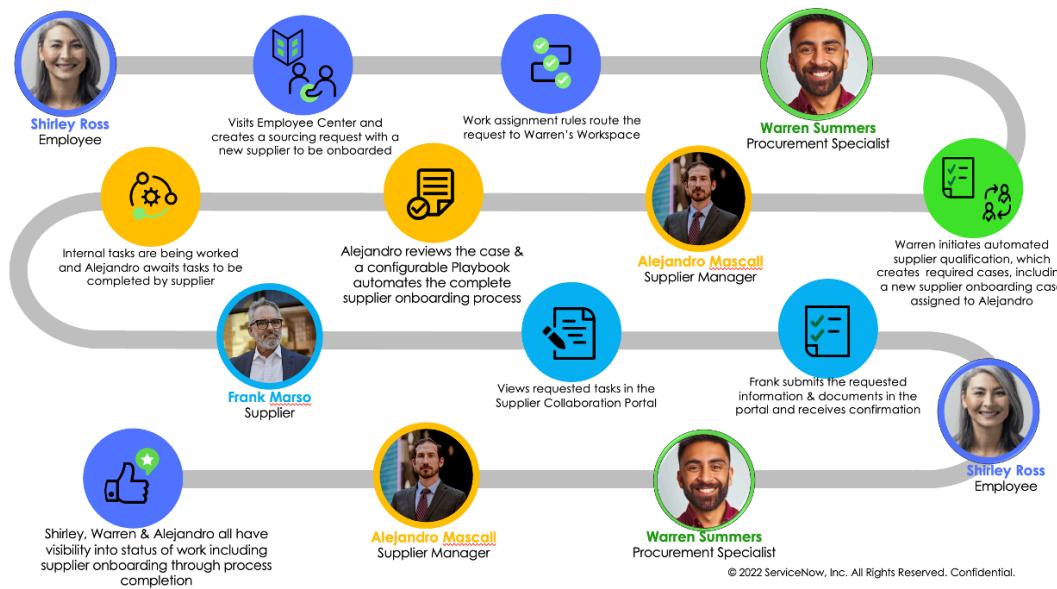
Improve sourcing experience when working with new suppliers

With Sourcing and Procurement Operations and Supplier Lifecycle Operations together, provide complete visibility to all the stakeholders involved in the sourcing process, along with improved supplier onboarding experience.

Workflow of the sourcing experience

The following figure shows how an employee, procurement specialist, supplier manager, and supplier use the SPO and SLO applications together to get complete visibility into the sourcing process and simultaneously enjoy improved supplier onboarding experience.

Workflow of the sourcing experience



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In this workflow:

1. An employee visits Shopping Hub (or Employee Center) and creates a sourcing request with a new supplier to be onboarded.
2. Work assignment rules route the request to a procurement specialist's workspace.
3. The procurement specialist initiates automated supplier qualification, which creates required cases, including a new supplier onboarding case that is assigned to a supplier manager.
4. The supplier manager reviews the supplier onboarding case and uses the onboarding playbook in the supplier workspace to onboard suppliers.
5. The playbook generates tasks and assigns them to the supplier being onboarded.
6. The supplier contact views the assigned tasks in the Supplier Collaboration Portal.
7. The supplier contact completes the assigned tasks and submits the required questionnaire in the Supplier Collaboration Portal.
8. The supplier manager reviews the collected supplier data and completes the onboarding playbook in the supplier workspace.
9. The employee, procurement specialist, and supplier manager have complete visibility into the status of work, including supplier onboarding, through process completion, from their respective portals.

Requirements for sourcing with a new supplier

Install and activate these plugins.

- Shopping Hub [com.snc.sn_spend_uib]
- Sourcing and Purchasing Automation [com.snc.sn_pr]
- Procurement Case Management [com.sn_spend_psd]
- Source-to-Pay Workspace [com.sn_spend_workspace]
- Playbooks for Sourcing and Procurement Operations [com.sn_spend_cp]
- Advanced Work Assignment for Sourcing and Procurement Operations [com.snc.sn_spend_awa]

- Supplier Common Architecture [com.snc.sn_slm]
- Supplier Lifecycle Operations [com.snc.sn_supplier_mgmt]
- Supplier Collaboration Portal [com.snc.sn_supplier_sp]
- Advanced Work Assignment for Supplier Lifecycle Operations [com.snc.sn_slm_awa]
- Source-to-Pay Common Architecture [com.snc.sn_shop]
- Finance Common Architecture [com.sn_fin]
- Common Service Delivery [com.sn_spend_sdc]
- Risk Assessments Integration for Sourcing and Procurement Operations [com.sn_spend_vrm]

For information on the installation sequence, see [Application plugin installation sequence](#).

Get started with sourcing with a new supplier

To get started with sourcing with a new supplier, follow these steps:

1. Request for a product or service that you don't see on Shopping Hub, and add a new supplier that you prefer to source it from. For more information, see [Requesting for products or services that you don't see on ShoppingHub](#).

Role: sn_shop.shopper.

2. Review the sourcing request and its associated purchase lines on the Source-to-Pay Workspace. For more information, see [List page for Sourcing and Procurement Operations in Source-to-Pay Workspace](#).

Role: sn_shop.procurement_specialist.

3. Begin the qualification process to onboard the new supplier. For more information, see [Supplier qualification](#).

Role: sn_shop.procurement_specialist.

4. Review the supplier onboarding case and start the supplier onboarding using playbooks. For more information, see [Using the supplier onboarding playbook to onboard suppliers](#).

Role: sn_slm.manager.

5. The playbook automatically creates supplier tasks to conduct risk assessment and to collect supplier information, such as banking information and location details.

6. Log in to the Supplier Collaboration Portal and complete the following:

- Assigned tasks. For more information, see [Viewing supplier contact tasks from the Supplier Collaboration Portal](#).
- Risk assessment questionnaire. For more information, see [Complete a risk assessment from the Supplier Collaboration Portal](#).

Role: sn_slm.contact.

7. Review the collected supplier information and determine whether to continue or cancel the onboarding process.

Role: sn_slm.manager.

8. Complete the different activities in each stage of the playbook to successfully onboard the new supplier.

Role: sn_slm.manager.

Work on a negotiation event

You can work on a negotiation event and complete an entire workflow, right from starting negotiations with multiple suppliers, to awarding one or multiple suppliers, or rejecting bids. Awarding suppliers create purchase requisitions for the selected suppliers and items.

Before you begin

Ensure that you've qualified all the suppliers involved in the negotiation event before you start negotiating with them. You can add additional relevant sourcing requests and qualified suppliers to the ongoing negotiation event, as and when required, when working on the event. This allows you to manage complex negotiation activities. Adding a sourcing request or supplier auto-creates purchase lines and creates a new negotiation record to manage negotiation activities for that specific supplier.

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. On the list page, navigate to **Review Needed > Negotiation Events: Ready to Negotiate**.
3. Select and open the negotiation event that you plan to work on.
4. Select **Start negotiating**.
The negotiation event moves to the Work in Progress state.
5. Optional: Select **Add sourcing requests** if you want to add more similar sourcing requests to this negotiation event.
6. Optional: Select **Add suppliers** if you want to add more suppliers to this negotiation event.
7. On the **Purchase Lines** tab, update the **Negotiated unit cost** field for each purchase line.
This moves the purchase request lines to the Pricing Obtained state.
8. On the **Negotiations** tab, select **Finish negotiating** for each negotiation.
This moves the negotiation event and all its associated negotiations, sourcing requests, and purchase lines to the Requires Decision state.
9. Do one of these actions.

| Action | Description |
|-----------------------|--|
| Save | Saves the details of the negotiation event for further action. |
| Cancel | Cancels the negotiation event and moves all its negotiations and associated sourcing requests and purchase lines to the Closed Cancelled state. This negotiation event is no longer considered for the awarding process. |
| Award single supplier | Opens the Select a supplier to award dialog box, where you can select one of the suppliers from the list and select OK to award the supplier. The awarded negotiation moves to the Closed Decided state |

| Action | Description |
|--------------------------|--|
| | while all the others move to Closed Rejected. The purchase lines for the awarded negotiation are automatically converted to purchase requisitions. |
| Award multiple suppliers | <p>Opens the Award suppliers tab, where you can select one or more suppliers from the list and select Review selection to award the suppliers. The awarded negotiations move to the Closed Decided state while the others move to Closed Rejected. The purchase lines for the awarded negotiation are automatically converted to purchase requisitions.</p> <p>For information on more options that are available to you on this tab, see Award multiple suppliers from a negotiation event.</p> |
| Reject bids | Opens the Reject all bids? dialog box, where you must enter your reason for rejection to reject all the bids. The negotiation event and all its negotiations and associated sourcing requests and purchase lines move to the Closed Rejected state. |

10. Select **View purchase requisitions** from the negotiation event or the awarded negotiation to view the details of the newly created purchase requisitions.

Award multiple suppliers from a negotiation event

When negotiations are complete for a negotiation event, you can award one or multiple suppliers from the negotiation event, or reject all bids, as required. Awarding suppliers create purchase requisitions for the selected suppliers and items.

Before you begin

Ensure that you've qualified all the relevant suppliers, and have received all the bids and responses from them, before you begin the awarding process. At this point, the negotiation event that you plan to work on, and all its associated negotiations, sourcing requests, and purchase lines must be in the Requires Decision state.

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All > Procurement Case Management > Source-to-Pay Workspace**.
2. On the list page, navigate to **All team work > Negotiation Events**.
3. Select and open the negotiation event that you plan to work on.
The **Details** page is displayed with a list of all the negotiations, suppliers, state, and negotiation outcome.
4. From the **Award single supplier** list, select **Award multiple suppliers**.
The **Award suppliers** tab is displayed with all the supplier bids and responses grouped by products, with details of the requester's intake.
5. Do one of the following.

- Select **Review selection** without making any selection for any product. A dialog box is displayed with a message alerting you that you haven't made any selection. Selecting **Continue** rejects all the bids.
- Select **Review selection** without making at least one selection for all the products. A dialog box is displayed with a message alerting you that you haven't made a selection for all the products. Selecting **Continue** awards the selected suppliers and rejects all the unselected bids.
- Select **None, reject bids** for all the products, and then select **Review selection**. The **Reject all bids?** dialog box is displayed where you must enter your reason for rejection. Selecting **Reject all bids** rejects all the bids.
- Select at least one supplier for all the products, except one whose bids you reject, and then select **Review selection**. The **Here's what you selected** dialog box is displayed with a summary of your selection. Selecting **Submit** awards the selected suppliers and rejects all the unselected bids.

i Note: The negotiation event is moved to Closed Complete, with the individual negotiations under it moved to Closed Decided or Closed Rejected based on your selection. The awarded sourcing requests are moved to Closed Complete, with purchase requisitions automatically created for the purchase lines. All the other sourcing requests are moved to the Closed Rejected state.

Create a procurement case

As a procurement specialist, create a procurement case from the list view of Source-to-Pay Workspace to address your procurement-related business needs.

Before you begin

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. On the list page, navigate to **All team work > Cases**.
3. Select **New**.
4. On the **Create a new case** dialog box, select the case type from the **What would you like to create?** list.
A procurement specialist can also create a case or task by navigating to **Related cases and tasks** in the contextual panel of a procurement object details page, and selecting the + icon.
5. Select **Create Case**.
6. On the form, fill in the fields.

Procurement Case

| Field | Description |
|-----------|--|
| Number | System-generated unique identifier for the case. |
| Created | Date and time when the case was opened. |
| Case type | Type of case based on the requirement. The case type options are different for procurement cases and supplier cases. |

| Field | Description |
|-------------------------------------|---|
| Due date | Expected date and time by when the case is expected to be resolved. |
| Requested by | Person who requested for the case. |
| Priority | Urgency of the case. |
| State | Current state the case is in. |
| Assignment group | Group to which the case is assigned to. |
| Assigned to | Person within the assignment group to whom the case is assigned to. |
| Sourcing decision dependent on case | Whether any sourcing decision is dependent on the case. |
| Order dependent on case | Whether the order is dependent on the case. |
| Short description | Brief description of the case. |
| Description | Detailed description of the case. |
| Summary Details | |
| Supplier | Supplier associated with the case. |
| Related PO | Purchase order associated with the case. |
| Related PR | Purchase requisition associated with the case. |
| Related SR | Sourcing request associated with the case. |
| Related NEG | Negotiation associated with the case. |
| Related NE | Negotiation event associated with the case. |
| Related case | Any other case associated with the case. |
| Expected start | Date and time by when work is expected to start on the case. |
| Actual start | Date and time when work actually starts on the case. |
| Actual end | Date and time when work actually completes on the case. |
| Duration | Time taken to resolve the case, in days, hours, minutes, and seconds. |
| Reason | Reason why the case was created. |

7. Select **Save**.

Create a supplier case

As a procurement specialist, with an additional supplier role of sn_supplier.fulfiller, create a supplier case from the list view of Source-to-Pay Workspace to address your supplier-related business needs.

Before you begin

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. On the list page, navigate to **All team work > Cases**.
3. Select **New**.
4. On the **Create a new case** dialog box, select the case type from the **What would you like to create?** list.
A procurement specialist can also create a case or task by navigating to **Related cases and tasks** in the contextual panel of a procurement object details page, and selecting the + icon.
5. Select **Create Case**.
6. On the form, fill in the fields.

Supplier Case

| Field | Description |
|-------------------|--|
| Number | System-generated unique identifier for the case. |
| Requested by | Person who requested for the case. |
| Case type | Type of case based on the requirement. The case type options are different for procurement cases and supplier cases. |
| Supplier | Supplier associated with the case. |
| Opened by | Person who opened the case. |
| Opened | Date and time when the case was opened. |
| State | Current state the case is in. |
| Stage | Not applicable. |
| Priority | Urgency of the case. |
| Assignment group | Group to which the case is assigned to. |
| Assigned to | Person within the assignment group to whom the case is assigned to. |
| Parent | Parent, if any, from which this case has been created, typically for reference purposes. |
| Due date | Date and time by when the case is expected to be resolved. |
| Short description | Brief description of the case. |
| Description | Detailed description of the case. |

7. Select **Save**.

Create a procurement task

As a procurement specialist, create a procurement task for the shopper or employer from the contextual panel of a procurement object details page in Source-to-Pay Workspace, to address your procurement-related business needs.

Before you begin

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. On the list page, navigate to **All team work**.
3. Select the procurement object that you want to work with.
4. On the details page, select the **Related cases and tasks** icon in the contextual panel of the procurement object.
5. Select the + icon.
6. On the **Create a new case or task** dialog box, select **Create procurement task** in the **What would you like to create?** list.
7. Select **Create**.
8. On the form, fill in the fields.

Procurement Task

| Field | Description |
|-----------------------------|---|
| Number | System-generated unique identifier for the task. |
| Task type | Type of task based on the requirement. |
| Select action type for task | <p>Type of action that the shopper must complete for this task to progress. The options are:</p> <ul style="list-style-type: none"> ◦ Mark complete ◦ View link ◦ Play video ◦ Upload documents ◦ Complete a form ◦ Sign document |

| Field | Description |
|-------------------------------------|--|
| | <p>i Note:</p> <ul style="list-style-type: none"> ◦ For View link or Play video action types, the required URL field must be populated with the desired link. ◦ For the Complete a form action type, the required Catalog item field must be populated with the desired form or catalog item that is to be completed. ◦ For the Sign document action type, the required Document template field must be populated with the desired preconfigured template that is to be sent for signing. |
| Assignment group | Group to which the task is assigned to. |
| Assigned to | <p>Person within the assignment group to whom the task is assigned to.</p> <p>i Note: You must assign the action type to the concerned shopper or employee for them to find it in their tasks list.</p> |
| State | <p>Current state the task is in.</p> <p>i Note: The assigned to shopper or employee can view this task in Employee Center or Shopping Hub only when the status of the task is updated to Work in Progress.</p> |
| Due date | Expected date and time by when the task is expected to be resolved. |
| Sourcing decision dependent on task | Whether any sourcing decision is dependent on the task. |
| Qualification dependent on task | Whether any qualification is dependent on the task. |
| Order dependent on task | Whether the order is dependent on the task. |
| Short description | Brief description of the task. |
| Description | Detailed description of the task. |
| Summary Details | |
| Related case | Case associated with the task. |
| Sourcing request | Sourcing request associated with the task. |

| Field | Description |
|----------------------|---|
| Purchase requisition | Purchase requisition associated with the task. |
| Purchase order | Purchase order associated with the task. |
| Expected start | Date and time by when work is expected to start on the task. |
| Actual start | Date and time when work actually starts on the task. |
| Actual end | Date and time when work actually completes on the task. |
| Duration | Time taken to resolve the task, in days, hours, minutes, and seconds. |

9. Select **Save**.

10. Select **Send to assignee** to send the task to the assigned shopper or employee's queue. If you have created a procurement task with action type as Sign document, a document task is automatically created and assigned to the selected shopper or employee.

List page for Supplier Lifecycle Operations in Source-to-Pay Workspace

As a supplier manager, use the list page to work on the various supplier case types, view the cases and tasks assigned to you, all the cases and tasks, all the unassigned tasks, Knowledge Base articles, and active suppliers.

Open the Source-to-Pay Workspace by navigating to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.

As a supplier manager, you have access to the following modules and sub-modules.

Note: You can create a new case, task, knowledge article, or interaction by selecting the **New** option on the top right corner within a sub-module. When you navigate to and open a sub-module, click the link under the Number column to view more details about that sub-module.

Modules and sub-modules on the List page

| Module | Sub-module |
|---------------|--|
| My work | <ul style="list-style-type: none"> • Open cases: Displays a list of all the open cases assigned to you. • Open tasks: Displays a list of all the open tasks assigned to you. • Displays the interactions that are assigned to you. <p>For more information, see Create a supplier case.</p> |
| Review needed | <ul style="list-style-type: none"> • Unassigned cases: Displays a list of all the unassigned cases. • Unassigned tasks: Displays a list of all the unassigned tasks. <p>For more information, see Create a task for a supplier case from the Source-to-Pay Workspace.</p> |

Modules and sub-modules on the List page (continued)

| Module | Sub-module |
|--------------|--|
| All work | <ul style="list-style-type: none"> Cases: Displays a list of all the cases. Closed cases: Displays a list of all the closed cases. Supplier tasks: Displays a list of all the supplier tasks. Employee tasks: Displays a list of all the employee tasks. These are internal tasks that are assigned to individuals within the same organization. Interactions: Displays a list of all the interactions. Closed interactions: Displays a list of all the closed interactions. <p>For more information, see Interaction Management in Source-to-Pay Workspace.</p> |
| Knowledge | Supplier articles: Displays a list of knowledge articles for suppliers. |
| Primary Data | Suppliers: Displays a list of active suppliers. |

Interaction Management in Source-to-Pay Workspace

Interactions are a centralized location for all communication channels available in Source-to-Pay Workspace. Interaction Management involves managing procurement related queries from different sources such as an email, chat, message, or SMS.

Interaction Management overview

Any procurement related assistance that a procurement specialist or a live agent provides to a shopper in the form of a call, chat, email, or SMS is recorded in an interaction record.

Also, any supplier-related assistance that a supplier manager or a live agent provides to a supplier contact in the form of a call, chat, email, or SMS is recorded in an interaction record.

For more information about Interaction Management, see . [↗](#)

Interaction Management activities in Source-to-Pay Workspace include:

- [View interaction details in Source-to-Pay Workspace](#)
- [Create a procurement case](#)
- [Associate a record with an interaction ↗](#)

View interaction details in Source-to-Pay Workspace

View the details of an interaction record to analyze interactions and take immediate actions. Viewing an interaction record provides a comprehensive view of the customer journey. You can link an interaction record to an existing procurement case or can assign a task, which needs a procurement specialist involvement for investigation.

Before you begin

Role required: Procurement specialist, agent

Procedure

1. Navigate to **All > Procurement Case Management**.
2. Select the List icon () and select **Interactions >All**.
3. View interactions in the desired category to associate a record with a procurement case or a task.
 - Assigned to me- Interactions assigned to a user
 - Active-Interactions ready to be investigated
 - All- All interactions
4. Select an interaction record to view its details.

Details form

| Field | Description |
|-------------|---|
| Number | System-generated unique interaction number |
| Type | Mode of interaction |
| State | Status of the record |
| Opened for | The virtual agent name |
| Assigned to | The virtual agent assigned to the interaction record |
| Transcript | Text record of the conversation between an agent and the customer |

5. Optional: View the procurement cases assigned to an interaction record by accessing the **Related tasks** tab.
6. Optional: View information about the assigned virtual agent, attachments added to the interaction, and templates for use in the contextual side panel.

Associate an interaction record with a related procurement case in Source-to-Pay Workspace

Associate an interaction record to a procurement case if your interaction is related to an existing procurement case. You can also associate a task to an interaction record to track your actions related to the interaction.

Before you begin

Role required: Live agent, Procurement specialist

Procedure

1. Navigate to **All > Procurement Case Management > Procurement Workspace**.
2. Select the List icon () and select **Interactions >All**.
3. Search for an interaction record using the interaction ID from the list of records.
4. Associate a record with an existing procurement case.

a. Select More Actions option and then select **Associate record**.

b. On the form, fill in the fields.

Associate record form

| Field | Description |
|----------------|---|
| Interaction | System-generated interaction number. |
| Record Type | Type of record created for a task or knowledge topic. By default, this task is auto-populated. |
| Document table | Unique table name of the procurement case. |
| Task | Procurement task that you want to associate to an interaction record. i Note: The ID of the related record auto-populates when the table name is provided in the Document table field. |

5. Select **Save**.

Result

The interaction record is updated with its associated procurement case.

View or create an interaction for a supplier

Typically, an interaction record is automatically created when you accept a chat through the chat queue in the Source-to-Pay Workspace. However, you can also manually create an interaction from the list page of the Source-to-Pay Workspace. You can link an interaction record to an existing supplier case or can assign a task, which needs a supplier manager involvement for investigation.

Before you begin

Role required: sn_slm.owner

Procedure

1. Navigate to **All > Supplier Lifecycle Operations > Source-to-Pay Workspace**.
2. Select the list icon () to open the List page.
3. Select **Interaction Management**, and then select any one of the following to view the list of interactions:
 - Assigned to Me
 - Active
 - All Interactions
4. Select **New**.
5. On the Create New Interaction form, fill in the fields.

| Field | Description |
|---------------------|---|
| Number | System-generated, unique interaction number. |
| Type | <p>Type of channel used for communication.</p> <ul style="list-style-type: none"> ◦ Chat ◦ Messaging ◦ Phone ◦ Video |
| State | <p>State of the interaction record.</p> <ul style="list-style-type: none"> ◦ New ◦ Work in Progress ◦ Closed Complete ◦ Closed Abandoned ◦ On Hold |
| Supplier | Name of the supplier company the supplier contact belongs to. |
| Supplier contact | Name of the supplier contact who initiated the interaction. |
| Assigned to | Agent the interaction record is assigned to. |
| Short description | Brief description of the interaction. |
| Work notes | |
| Internal Transcript | Text record of the conversation between an agent and the supplier contact. Available only to the agent. |

6. Select **Save**.

Process Automation Designer flows for playbook

The procurement workspace helps you automate the entire process, right from tracking the requests, fulfillment, and to order revision flows.

As a process owner or administrator, you can use Playbooks to enable cross-enterprise workflows and create a task-oriented view:

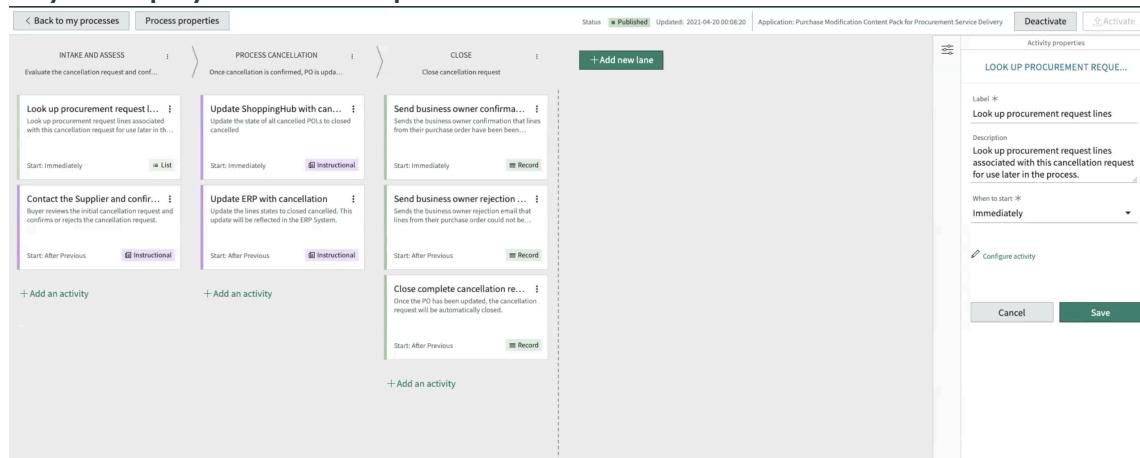
- Optimize the processes and improve the productivity with the help of the procurement workspace playbook.
- Manage easy tracking of the requests and use the guided approval and resolution flows.
- Perform complex activities and tasks from a simplified unified playbook.

Procurement workspace playbook

This playbook comes with a Global Playbook Experience record that defines a default playbook configuration. You can use the following record without any additional

configurations. By default, this record defines a set of rules for managing how individual activities appear within the playbook.

Playbooks playbook flows for procurement



You can customize this behavior by customizing the Playbook experience with your own configurations and activity overrides.

Related topics

[Playbooks](#)

Email notifications from Playbook

Several email notifications are triggered from Playbook. This may be a result of your action, an assignment for you, or to keep you updated on the status of your purchases, including purchase revisions.

Playbook sends out emails in a predefined template and uses flow designer to trigger the different email conditions. You can use the deep links that are provided in the emails to view relevant details. You're notified through email when:

- Your request to edit a purchase order or purchase requisition has been confirmed.
- Your request to edit a purchase order or purchase requisition has been rejected.
- Your request to cancel a service request, purchase order, purchase requisition, purchase order line, or purchase requisition line has been confirmed.

Note: You receive one email notification if you cancel from the header level. However, cancellation at line levels triggers respective email notifications.

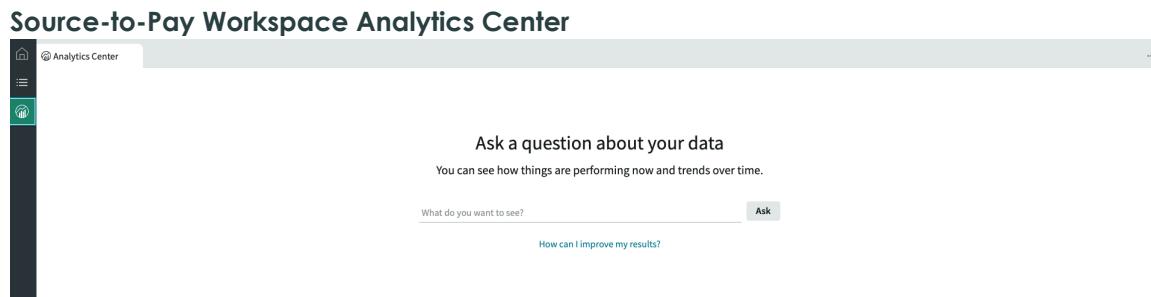
- Your request to cancel a service request, purchase order, purchase requisition, purchase order line, or purchase requisition line has been rejected.
- Your request to return a product has been confirmed.
- Your request to return a product has been rejected.

Note: You can adjust the email trigger conditions and content in flow designer or email scripts, if necessary. You can also choose to fetch and use other details that aren't displayed in the email by default, such as order type for purchase requisitions, product type or request type for sourcing requests, and so on. For detailed information on email templates and how to work with them, see [Email templates](#). You can also configure the email layout, and change the background color or font color, for example. The html field in the email layout record must be modified to achieve this. For detailed information on email layouts and how to work with them, see [Email layouts](#).

Source-to-Pay Workspace Analytics Center

With Source-to-Pay Workspace Analytics Center, you can ask a question about your data, and see how things are performing now and trends over time.

This Analytics Center is modeled using Natural Language Query (NLQ) which is helpful in converting natural language into database queries, thus fetching relevant data from the respective database tables. In this case, NLQ is developed with the help of configurable synonyms and semantic shortcuts. In synonyms, for example, to fetch data from the Supplier column in the Purchase Line table, a synonym "vendor" is added. Similarly, multiple synonyms can be configured to further improve search results. In semantics, conditions can be configured for the synonym such that search results can be further optimized. For example, to render appropriate search results for closed contracts, a condition "active=false" is configured against the synonym "closed" for the Contract Task table.



Based on these synonyms and semantic conditions, some of the predefined supported questions are listed here.

- Purchase requisition
 - Order type
 - Show me purchase requisitions of type standard
 - Show me purchase requisitions of type blanket
 - Show me standard purchase requisitions
 - Show me blanket purchase requisitions
 - Requisition type
 - Show me net new purchase requisitions
 - Show me revised purchase requisitions
 - Active
 - Show me all open purchase requisitions
 - Show me all closed purchase requisitions
- Sourcing request: Active

- Show me all open sourcing requests
- Show me all closed sourcing requests
- Negotiation: Active
 - Show me all open negotiations
 - Show me all closed negotiations
- Purchase line: Product type
 - Show me all purchase lines of type good
 - Show me all purchase lines of type goods
 - Show me all purchase lines of type service
- Purchasing tasks and all extensions of purchasing tasks: Active
 - Show me all open <task type>
 - Show me all closed <task type>
- Purchase order: Order type
 - Show me purchase orders of type standard
 - Show me purchase orders of type blanket
- Purchase order line: Product type
 - Show me all purchase order lines of type good
 - Show me all purchase order lines of type goods
 - Show me all purchase order lines of type service
- Milestones
 - Completion date
 - Show me upcoming milestones
 - Show me today's milestones
 - Show me past milestones
 - Show me historical milestones
 - Active
 - Show me all open milestones
 - Show me all closed milestones
- Receipt tasks: Active
 - Show me all open receipt tasks
 - Show me all closed receipt tasks
- Procurement cases: Active
 - Show me all open procurement cases
 - Show me all closed procurement cases

i Note: For any questions that you may want to ask about your data, ensure that you specify the table name as it appears in the database, along with other keywords as required, such as the state or type, for example. Search results are sometimes displayed graphically, based on the search criteria used.

If you do not get the desired search results, select **How can I improve my results?** to view tips and suggestions on improving your search.

Source-to-Pay Integration with SAP ECC and SAP S4 HANA

With these Source-to-Pay Integration with SAP ECC and SAP S4 HANA solutions, you can provide your employees with default integration solutions with SAP ECC (EH8) and SAP S4 HANA (1909).

Important considerations that must be understood before implementing these integration solutions are also discussed.

Scope

Integrate out of the box workflows with SAP EEC and SAP S4 HANA.

The following functionalities are offered in Source-to-Pay products:

- OOTB integration workflows for integrating
- Sourcing and Procurement Operations with SAP ECC and SAP S4 HANA
- Supplier Lifecycle Operations with SAP ECC and SAP S4 HANA
- Accounts Payable Operations with SAP ECC and SAP S4 HANA

ServiceNow offers out of the box integration workflows that customers can use to integrate with their system of records like SAP ECC and SAP S4 HANA. Before getting into the details on how such an integration is possible, it is important to understand a few prerequisite concepts.

APIs – REST, SOAP, JCO, IDOC

Use APIs to connect and communicate with any software application.

There are 2 types of API protocols that are popular.

- REST APIs: REST relies on a client/server approach that separates front and back ends of the API and provides considerable flexibility in development and implementation. REST is stateless, which means the API stores no data or status between requests.
- SOAP APIs: The simple object access protocol (SOAP) is a messaging standard defined by the World Wide Web Consortium and broadly used to create web APIs, usually with XML. SOAP supports a wide range of communication protocols found across the internet, such as HTTP, SMTP and TCP/IP.

SAP does not support the above protocols "As Is" but has a slightly different protocols to connect with the SAP system. Below are some of the ways by which the connection to an SAP system can be established:

- SAP Java Connector is a middleware product offered by SAP {SAP JCo} that enables a Java application (ServiceNow SAP Connector Jar) to communicate with SAP systems via RFC/BAPI protocol. The SAP JCo supports both communication directions: inbound Remote Function Calls (Java calls ABAP) as well as outbound Remote Function Calls (ABAP calls Java). SAP Documentation [Link](#).
- IDOC - IDoc is an SAP object that carries data of a business transaction from one system to another in the form of electronic message. IDoc is an acronym for Intermediate Document.

The purpose of an IDoc is to transfer data or information from SAP to other systems and vice versa.

- OData is an Open Data Protocol used in web technologies. OData is used by SAP to make SAP data accessible to other platforms so that the non-SAP users can also access this data to develop web applications, websites, mobile apps, etc.

Communication with SAP

SAP uses different protocols for mediated communication.

- Following are the ways to have data in/out of SAP:
- RFC/BAPI (sync typically)
- IDOCS (async)
- REST/OData (sync)
- SOAP (async typically)
- SAP supports all these protocols, and what is used at the customer side depends on their preference and legacy footprint.
- Sometimes a customer may prefer a mediated communication, using either on-prem middleware (SAP PI/PO, or API management-Apigee for e.g.), or a cloud middleware (SAP BTP Integration Suite – API management or Cloud Platform Integration, or SAP Data intelligence/Data Suite).

Typical SAP Implementations

SAP implementations can be categorized as on-premises implementation, on-premises implementation on Azure or AWS, and cloud implementation.

- On-premises implementation:

Everything is managed and maintained by the customer in their physical locations. Both SAP ECC and SAP S4 HANA can be implemented in this model.

- On-premises implementation on Azure or AWS:

The SAP instance could be on a cloud instance like Azure or AWS, but it's still a type on-premises implementation as it is within a firewall, with the only difference being that the instance is hosted on a cloud server. Both SAP ECC and SAP S4 HANA can be implemented in this model.

- Cloud implementation:

The SAP instance is on a true cloud system. Only SAP S4 HANA can be implemented in this model, and SAP ECC can't be implemented in this category.

The current default SAP integration workflows offered by ServiceNow cater to the implementation of the first two types. However, it doesn't exclude customers from implementing on cloud, which can easily be achieved by converting the wrapper function modules into web service WSDLs. However, this requires customizations at SAP and ServiceNow.

Integration Hub Actions

Integration Hub Spoke and actions provide customers with an ability to communicate with an external system.

Integration Hub Spoke and actions provide customers with an ability to communicate with an external system. For example, the integration hub action of “Create Purchase Order” within the spoke of SAP ECC will create the purchase order in SAP ECC provided the right payload data is passed to the Integration Hub Action. There also actions within a spoke that can retrieve the data from SAP. These actions form the building blocks to build a workflow which orchestrates the entire complex integration into a seamless and easy to use workflow.

Out of the box integration hub actions that will be shipped by ServiceNow are provided in the below table. Note that all these actions are built to work JCo connector mechanism and not based on SOAP, REST, or OData. There are also some specific Integration Hub Actions which are based on IDOC which will be added to the below table as and when the development is done.

Integration Hub Actions

| S.No | Action Name | Underlying BAPI | Comments |
|------|----------------------------------|--|----------|
| 1 | Create Purchase Order | ZSN_BAPI_PO_CREATE | |
| 2 | Update Purchase Order | ZSN_BAPI_PO_CHANGE | |
| 3 | Cancel Purchase Order | ZSN_BAPI_PO_CHANGE | |
| 4 | Create Goods Receipt | ZSN_BAPI_GOODSMVT_CREATE | |
| 5 | Cancel Goods Receipt | ZSN_BAPI_GOODSMVT_CANCEL | |
| 6 | Create Invoice | ZSN_BAPI_INCOMINGINV_CREATE | |
| 7 | Cancel Invoice | ZSN_BAPI_INCOMINGINV_CANCEL | |
| 8 | Material primary (Get) | ZSN_BAPI_GETMATERIALDATA | |
| 9 | Vendor/Supplier (Get and Create) | ZSN_BAPI_VENDORCREATE ZSN_BAPI_GET_VENDORDATA | |
| 10 | Legal Entity (Get) | ZSN_BAPI_GET_DATA | |
| 11 | Ledger Account (Get) | ZSN_BAPI_GET_DATA | |
| 12 | Plant Address (Get) | ZSN_BAPI_GET_DATA | |
| 13 | Cost Center (Get) | ZSN_BAPI_GET_DATA | |

Integration Hub Actions (continued)

| | | |
|----|----------------------|-------------------|
| 14 | Purchase Org (Get) | ZSN_BAPI_GET_DATA |
| 15 | Currencies (Get) | ZSN_BAPI_GET_DATA |
| 16 | FX Rates (Get) | ZSN_BAPI_GET_DATA |
| 17 | Payment Terms (Get) | ZSN_BAPI_GET_DATA |
| 18 | Purchase Group (Get) | ZSN_BAPI_GET_DATA |

Integration workflow using custom BAPIs

BAPIs contain the list of attributes that can be provided by while using the BAPI. For example – fetch supplier standard SAP BAPI may have 40 attributes while the general usage across customers may-be much more like 60 attributes. So, usage of standard BAPIs will restrict the customers to use only 40 attributes.

In addition to the above there are also cases where there are complex objects like create purchase order which has multiple entities like purchase order header, purchase order line, along with some additional work like populating tax code for tax calculation, defaulting plant address and orchestrating all of that in a standard BAPI with limited attributes restricts the kind of functionality that can be provided to the customer.

In view of the above, this integration was built with Custom BAPIs which is a like a super set consisting of almost all the attributes (either in terms of getting the attributes or posting the transactions by populating those attribute values).

Using custom BAPIs will require some additional work on the customer side to do configure some transport files and load it on SAP Server. However, all this work will be done and provided by Bristlecone team on ServiceNow store which can be easily downloaded and leveraged by customer to do the necessary pre-requisite steps.

Prerequisite

Before integrating your application with SAP ECC and SAP S4 HANA, it is important to set up some prerequisite tools.

SAP ECC Spoke Configuration

Configure SAP ECC Spoke as a prerequisite for Source-to-Pay integration with SAP ECC and SAP S\$ HANA.

The SAP ECC RFC spoke is built by Bristlecone, Inc. Manage items, journals, procurements, and others, in SAP ECC RFC account from your ServiceNow instance.

Request apps on Store

View the ServiceNow Store website to view and request applications.

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released

apps, see the [ServiceNow Store version history release notes](#). Starting on 3/1/2022, all SAP spokes will be available only on the Store.

Integration Hub Subscription

To configure SAP ECC Spoke Configuration, you must need an Integration Hub Subscription package.

This spoke requires an Integration Hub subscription package. For more information, see [Legal schedules - Integration Hub overview](#).

Spoke version

SAP ECC RFC spoke v 1.4.0(to be decided) is the latest spoke version.

Supported versions

View the SAP ECC RFC versions that are compatible with later versions of SAP ECC and SAP S4 HANA.

This spoke was built for these SAP ECC RFC versions, but may be compatible with later versions:

SAP application version: SAP ECC6 (Spoke is developed on EHp8).

NetWeaver Version: SAP NW 7.5.

SAP JCo: 3.0.20 or later.

To download the SAP JCo visit <https://support.sap.com/en/product/connectors/jco.html>.

Spoke requirements

You must configure SAP ECC RFC account and obtain SAP proprietary JAR files and other required files to fulfill a Spoke requirement.

Contact the admin of your SAP ECC RFC account and obtain these SAP proprietary JAR files and other required files:

- sapjco3.jar.
- libsapjco3.so: If your MID Server is installed on a Linux machine, obtain this file.
- sapjco3.dll: If your MID Server is installed on a Windows machine, obtain this file.

A JAR file, sapConnector-1.0.1.jar, is available along with the spoke to provide custom interface to interact and execute RFCs and IDocs in the SAP ECC RFC account. The JAR file is installed as part of the spoke in your ServiceNow instance.

Copy and record the client value of the target host where the SAP ECC RFC server is installed.

Configure the values of these system properties:

- com.snc.process_flow.reporting.serialized.val_size_limit: This property serializes JSON objects and ensures that the data is in the required format. Specify the number of bytes as per your requirement. For more information, see
- glide.rest.max_content_length: This property specifies the payload size. Specify the maximum payload size you want to use in your flows. The maximum value you can specify for this property is 25 MB.

Spoke dependencies

Install the necessary plugins to integrate Source-to-Pay with SAP ECC and SAP S4 HANA.

If you're having trouble installing the app, ensure that these dependent plugins are installed:

- Complex Object (com.glide.cobject)
- ServiceNow IntegrationHub Runtime (com.glide.hub.integration.runtime)
- ServiceNow Flow Designer - Dynamic Inputs (com.glide.hub.dynamic_inputs)
- ServiceNow Flow Designer - Dynamic Outputs (com.glide.hub.dynamic_outputs)
- OOB Plugins
- Shopping Hub with dependencies and demo data
- Utility Actions Spoke
- Finance - ERP Integration
- Supplier Life Cycle Management
- Purchase and Receipt automation
- Purchase Modification Experience Pack for Procurement Case Management

Import SAP Transport Request

Perform necessary steps to import the SAP Transport Request.

Copy Co and Data files to the System

Copy the Co and Data files of the transport request to the respective co-files and data Folder on the system.

Assign respective permissions and owner to the files.

Add transport request to the queue

Log in to your SAP system and enter transaction **STMS_IMPORT** in the command field.

Go to Extrasàother RequestsàAdd. In the **Add Transport Request to Import Queue**, which opens up, enter the Transfer Request Name, check the Import again box if the request has been imported previously.

This adds the Transport Request to the **Import Queue**.

Import Transport Request

Select the desired **Transport Request** from the **Import Queue**.

Click on the Import Symbol () in the toolbar to import the Request.

In the **Import Transport Request** that shows up input the **Target Client** and choose the required actions from the **Import Options** list.

The Transport Request has now been imported.

Run through

Execute RFC

Execute RFC from the available list.

Process flow:

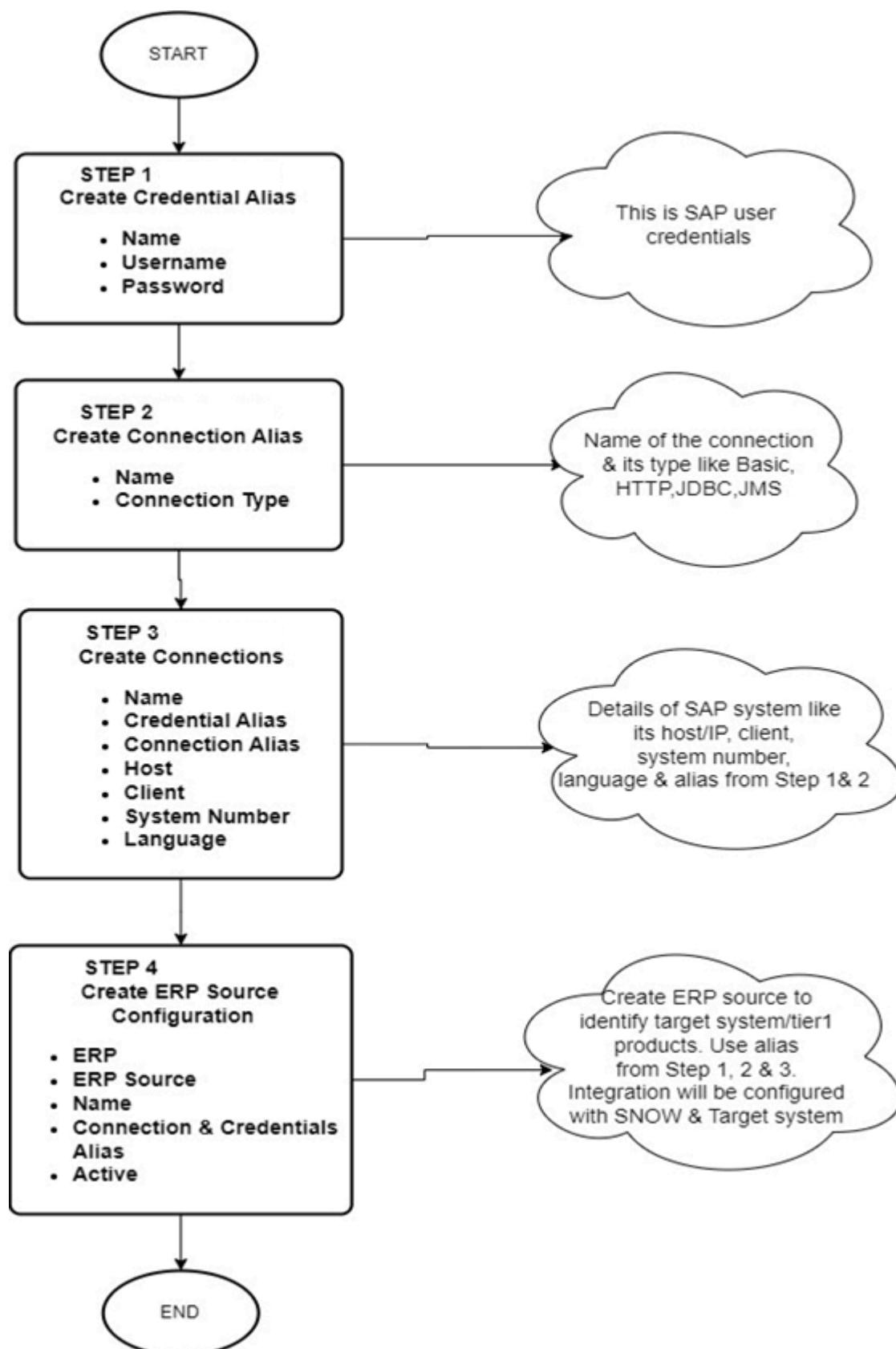
Step 1 - Create a record for SAP system in Connection and Credential alias table.

Step 2 - Create Credential for connecting to SAP system.

Step 3 - Add Mid server and credentials to the connection.

Step 4 - Create ERP Source in ERP source configuration table.

Step 5 - Create Service, add flow and give the necessary inputs in the fields.



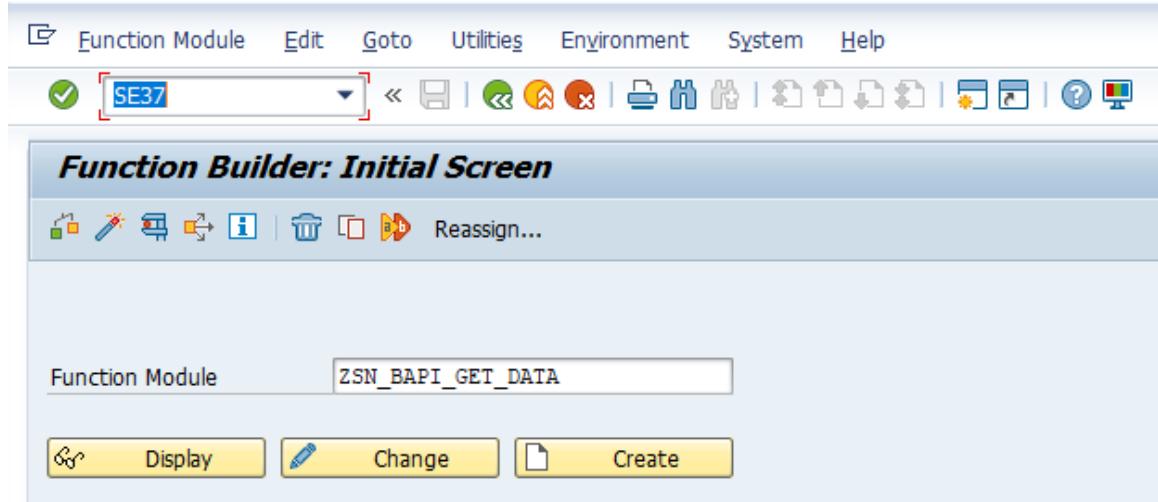
Name: ZSN_BAPI_GET_DATA

Query parameters to execute RFC

| Title | Type | Description |
|---------------|--------------------|---|
| Input | | |
| 1 | Connection Alias - | Connection Alias for SAP ECC – RFC |
| 2 | RFC | The Reference to records (SAP RFC Name and Application Component) in SAP RFC Table |
| 3 | Input | Input fields for the selected RFC, represented in a flat structure |
| Output | | |
| 1 | Response | The response for the execution of selected RFC in SAP |
| 2 | Action Status | If the request is executed successfully, Status is set to "Success". If there is a failure in SAP ECC - RFC, Status is set to "Error" |
| 3 | Error Message | Reason for error. Populated only when an error occurs. Error returned from SAP in the RETURN parameter. No or empty response received from SAP |

- Error! Reference source not found.

Function Builder Initial Screen



- Error! Reference source not found.Error! Reference source not found.

Enter the IMPORT, CHANGING, and TABLES parameters

Test Function Module: Initial Screen

Debugging Test data directory

Test for function group ZSN_BAPI_FG
Function module ZSN_BAPI_GET_DATA
Uppercase/Lowercase

RFC target sys:

| Import parameters | Value |
|-------------------|-------|
| IV_QUERY_TABLE | T001 |
| IV_DELIMITER | , |
| IV_NO_DATA | |
| IV_ROWSKIPS | 0 |
| IV_ROWCOUNT | 0 |
| IV_RECCOUNT_ONLY | |

| Tables | Value |
|------------|-----------|
| IT_OPTIONS | 0 Entries |
| IT_FIELDS | 0 Entries |
| IT_DATA | 0 Entries |

- Results data

Test Function Module: Result Screen

Test for function group ZSN_BAPI_FG
Function module ZSN_BAPI_GET_DATA
Uppercase/Lowercase

Runtime: 394,093 Microseconds

RFC target sys:

| Import parameters | Value |
|-------------------|-------|
| IV_QUERY_TABLE | T001 |
| IV_DELIMITER | , |
| IV_NO_DATA | 0 |
| IV_ROWSKIPS | 0 |
| IV_ROWCOUNT | 0 |
| IV_RECCOUNT_ONLY | |

| Export parameters | Value |
|-------------------|---------|
| ET_RETURN | 1 Entry |

| Tables | Value |
|------------|-------------|
| IT_OPTIONS | 0 Entries |
| Result: | 0 Entries |
| IT_FIELDS | 0 Entries |
| Result: | 80 Entries |
| IT_DATA | 0 Entries |
| Result: | 172 Entries |

- Error! Reference source not found

Results data

Structure Editor: Display ET_RETURN from Entry 1

Column Entry Metadata

1 Entry

| T | ID | NUM | MESSAGE |
|---|---------|-----|---|
| S | ZSN_MSG | 006 | Table data load successfully completed. |

Results data

Structure Editor: Display IT_DATA from Entry 1

Column Entry Metadata

172 Entries

WA

```
COUNT:171
MANDT:800,BURRS:0001,BUTXT:SAP A.G.,ORT01:Walldorf,LAND1:DE,WAERS:FUR,SPRAS:D,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:1,RCOMP:,ADNR:0000676399,
MANDT:800,BURRS:0005,BUTXT:BestRun Germany new GL,ORT01:Frankfurt,LAND1:DE,WAERS:EUR,SPRAS:D,KTOPL:INT,WAABW:90,PERIV:K4,KOKFI:2,RCOMP:000005,ADNR:0000051230,
MANDT:800,BURRS:0006,BUTXT:BestRun US INC New GL,ORT01:New York,LAND1:US,WAERS:USD,SPRAS:E,KTOPL:CAU,WAABW:90,PERIV:K4,KOKFI:2,RCOMP:000006,ADNR:0000051231,
MANDT:800,BURRS:0007,BUTXT:BestRun NEW GL,ORT01:Frankfurt,LAND1:DE,WAERS:EUR,SPRAS:D,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:000007,ADNR:0000051232,
MANDT:800,BURRS:0008,BUTXT:BestRun US INC New GL 8,ORT01:New York,LAND1:US,WAERS:USD,SPRAS:E,KTOPL:CAU,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:,ADNR:0000051233,
MANDT:800,BURRS:1000,BUTXT:Best Run (do not change!),ORT01:Frankfurt,LAND1:DE,WAERS:EUR,SPRAS:D,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:001000,ADNR:0000051234,
MANDT:800,BURRS:1002,BUTXT:BestRun Singapore,ORT01:Singapore,LAND1:SG,WAERS:SGD,SPRAS:E,KTOPL:,WAABW:00,PERIV:K4,KOKFI:,RCOMP:001002,ADNR:,
MANDT:800,BURRS:1005,BUTXT:Subsidiary Germany,ORT01:Frankfurt,LAND1:DE,WAERS:EUR,SPRAS:D,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:001005,ADNR:0000051235,
MANDT:800,BURRS:1020,BUTXT:ABIN India ltd,ORT01:Bangalore,LAND1:IN,WAERS:INR,SPRAS:E,KTOPL:IO01,WAABW:00,PERIV:K4,KOKFI:1,RCOMP:ABIN,,ADNR:0000740500,
MANDT:800,BURRS:1109,BUTXT:Tetra Pak,ORT01:Lund,LAND1:SE,WAERS:EUR,SPRAS:V,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:1,RCOMP:001109,ADNR:0000734453,
MANDT:800,BURRS:2000,BUTXT:BestRun UK,ORT01:London,LAND1:GB,WAERS:GBP,SPRAS:E,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002000,ADNR:0000000122,
MANDT:800,BURRS:2100,BUTXT:BestRun Portugal,ORT01:Lisbon,LAND1:PT,WAERS:EUR,SPRAS:E,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002100,ADNR:0000000253,
MANDT:800,BURRS:2200,BUTXT:BestRun France,ORT01:Paris,LAND1:FR,WAERS:EUR,SPRAS:E,KTOPL:CAR,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002200,ADNR:0000000257,
MANDT:800,BURRS:2201,BUTXT:BestRun France affiliate,ORT01:Paris,LAND1:FR,WAERS:EUR,SPRAS:E,KTOPL:CAR,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002201,ADNR:0000051031,
MANDT:800,BURRS:2222,BUTXT:Ma sté ,ORT01:Paris,LAND1:FR,WAERS:EUR,SPRAS:E,KTOPL:CAR,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002222,ADNR:000005721397,
MANDT:800,BURRS:2223,BUTXT:Ma sté bis,ORT01:Paris,LAND1:FR,WAERS:EUR,SPRAS:E,KTOPL:CAR,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002223,ADNR:000005721398,
MANDT:800,BURRS:2224,BUTXT:Ma sté américaine,ORT01:New York,LAND1:US,WAERS:USD,SPRAS:E,KTOPL:CAR,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002224,ADNR:0000721399,
MANDT:800,BURRS:2300,BUTXT:BestRun Espana,ORT01:Barcelona,LAND1:ES,WAERS:EUR,SPRAS:E,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002300,ADNR:00000003755,
MANDT:800,BURRS:2400,BUTXT:BestRun Filiale 1 IT,ORT01:,LAND1:IT,WAERS:EUR,SPRAS:D,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002400,ADNR:00000006825,
MANDT:800,BURRS:2500,BUTXT:BestRun Netherlands,ORT01:Rotterdam,LAND1:NL,WAERS:EUR,SPRAS:E,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002500,ADNR:00000009846,
MANDT:800,BURRS:2600,BUTXT:BestRun Italia,ORT01:Milano,LAND1:IT,WAERS:EUR,SPRAS:E,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002600,ADNR:0000045141,
MANDT:800,BURRS:2700,BUTXT:BestRun Schweiz,ORT01:Biel 1 Biinne,LAND1:CH,WAERS:CH,SPRAS:D,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002700,ADNR:0000043520,
MANDT:800,BURRS:2800,BUTXT:BestRun China,ORT01:China,LAND1:CN,WAERS:CHY,SPRAS:E,KTOPL:CACN,WAABW:00,PERIV:K4,KOKFI:2,RCOMP:002800,ADNR:0000047144,
MANDT:800,BURRS:2820,BUTXT:BestRun China Mat.Ledger,ORT01:China,LAND1:CN,WAERS:CHY,SPRAS:E,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:002820,ADNR:,
MANDT:800,BURRS:2821,BUTXT:BestRun US MaterialLedger,ORT01:Palo Alto,LAND1:US,WAERS:USD,SPRAS:E,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:003000,ADNR:,
MANDT:800,BURRS:2900,BUTXT:BestRun Schweden,ORT01:Stockholm,LAND1:SE,WAERS:SEK,SPRAS:V,KTOPL:INT,WAABW:10,PERIV:K4,KOKFI:2,RCOMP:,ADNR:0000056165,
```

Installed plugins

SAP Integration functionality can easily be setup by the users by installing the following plugins from the ServiceNow store.

- ERP integration Framework (com.sn_fcms_intg_source)
- Primary Data integration with SAP (com.sn_sap_data_int)
- Sourcing and Procurement Operations Integration with SAP (com.sn_psm_sap_int)
- Supplier Lifecycle Operations Integration with SAP (com.sn_slm_sap_int)
- Accounts Payable Operations Integration with SAP (com.sn_apm_sap_int)

Interface Table and Attributes fetched from SAP

Configure the transformation and mapping of the attributes for **Legal Entities** that are pulled from SAP and populated in the staging table **sn_sap_data_int_le_stg**.

Attributes for **Legal Entities** are pulled from SAP and are populated in the staging table: **sn_sap_data_int_le_stg**. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Plugin Name – ERP integration Framework

Use the plugin `sn_fcms_intg_source` to integrate ERP framework.

Objects included in the plugin.

- ERP Source Configuration page
- Enhanced the above page to include connection alias
- Enhanced the above page to seed the integration service jobs required to fetch the data from SAP ECC and SAP S4 HANA
- Sub-flows
- `identify_target_erp`
- `purchase_order_error_handling`
- `goods_receipt_error_handling`
- `invoice_receipt_error_handling`

Note – Errors will create a task which is in the source to pay common table (`sn_shop_error_task`) and this table is used by errors for all 3 products for Sourcing and Procurement Operations (SPO), Supplier Lifecycle Operations (SLO), and Accounts Payable Operations (APO).

The screenshot shows the ServiceNow interface for the `ERP Source Configuration` page. At the top, it says `SAP ECC ERP`. Below that, there's a note: "This record is in the Primary Data Integration with SAP application, but Salesforce Spoke is the current application. To edit this record click here." The main area shows the configuration details:

| | | | |
|------------|---------|------------------|----------------------------|
| ERP source | SAP ECC | Name | SAP ECC ERP |
| | | Connection alias | sn_sap_ecc_rfc_spo.SAP_ECC |

Below this, there's a table titled "Integration Services (12)". It lists various services with their names, applications, active status, flows, import set tables, order, and properties. Some rows are highlighted in blue. The table includes columns for Name, Application, Active, Flow, Import set tables, Order, and Properties. The properties column contains JSON-like strings for each row.

Primary Data integration with SAP plugin

Use the SAP plugin to integrate primary data.

Short Name – `sn_sap_data_int`.

Objects included in the plugin are:

- Integration Services
- Legal Entity uses sub-flow - `fetch_legal_entities_from_sap_ecc` and `fetch_legal_entities_from_sap_s4hana`
- Currency – uses sub-flow - `fetch_currencies_from_sap_ecc` and `fetch_currencies_from_sap_s4hana`

- FX Currency Conversion Rates – uses sub-flow - fetch_fx_rates_from_sap_ecc and fetch_fx_rates_from_s4hana
- Cost Center – uses sub-flow - fetch_cost_centers_from_sap_ecc and fetch_cost_centers_from_sap_s4hana
- Purchase Group – uses sub-flow - fetch_purchasing_groups_from_sap_ecc and fetch_purchasing_groups_from_sap_s4hana
- Payment Terms – uses sub-flow - fetch_payment_terms_from_sap_ecc and fetch_payment_terms_from_sap_s4hana
- Purchasing Organizations - fetch_purchasing_organisations_from_sap_ecc and fetch_purchasing_organisations_from_sap_s4hana
- Ledger Account - fetch_gl_accounts_from_sap_ecc and fetch_gl_accounts_from_sap_s4hana
- Plant Address - fetch_plant_addresses_from_sap_ecc and fetch_plant_addresses_from_sap_s4hana
- Vendor primary - Fetch Suppliers from SAP ECC and Fetch Suppliers from SAP S4 HANA

Sourcing and Procurement Operations Integration with SAP plugin

Use the SAP plugin to integrate with Sourcing and Procurement operations.

Short Name – sn_psm_sap_int.

Objects included in the plugin are:

- Integration Services
- Material primary uses sub-flow - Fetch Materials from SAP ECC and Fetch Materials from SAPS4HANA)
- Service primary uses sub-flow - fetch_services_from_sap_ecc and fetch_services_from_sap_s4hana
- Sub-flows/workflows
- create_goods_receipt_in_sap_ecc
- create_goods_receipt_in_sap_s4hana
- create_purchase_order_in_sap_ecc
- create_purchase_order_in_sap_s4hana
- create_service_goods_receipt_in_sap_ecc
- update_purchase_order_in_sap_ecc (also handles cancellation)
- update_purchase_order_in_sap_s4hana (also handles cancellation)

Supplier Lifecycle Operations Integration with SAP plugin

Use the sn_slm_sap_int plugin to integrate with Supplier Lifecycle operations.

Short Name – sn_slm_sap_int.

Objects included in the plugin are:

- Sub-flows/Workflows
- create_supplier_in_sap_ecc_v2
- create_supplier_in_sap_s4hana_v2

- update_supplier_in_sap_ecc_v2
- update_supplier_in_sap_s4hana_v2

Accounts Payable Operations Integration with SAP plugin

Use the `sn_apm_sap_int` plugin to integrate with Accounts Payable Operations.

Short Name – `sn_apm_sap_int`

Objects included in the plugin are:

- Sub-flows/Workflows
- `create_invoice_in_sap_ecc`
- `create_invoice_in_sap_s4hana`

Sample Integration Flow Use Case

The Sample Integration Flow use case describes the inbound and outbound data flow.

This section contains an example use case so that the overall data flow (both inbound and outbound) can be explained.

Let us say Customer ABC Inc is using the below systems for a Procure to Pay flow:

- ServiceNow's application for
- Self Service Procurement (Shopping Hub)
- Purchase Requisition to PO Flow (Procurement Workspace)
- SAP ECC for
- Sending POs to Supplier
- Recording Receipts
- Creating Supplier Invoice by matching to the POs
- Payment to Supplier
- Clearing the payments in Bank Statement

To achieve the above use case, the customer will need to follow multiple steps:

Step 1 – Install ServiceNow Applications.

- Implement ServiceNow's Shopping Hub and Procurement Workspace where
- Employees can use Shopping Hub to create Purchase Requisition and sourcing requests
- Fulfillers can convert the SRs into PRs and PRs into POs
- Ability to push the POs created in SPO into SAP ECC
- Continue to use System of record of SAP ECC for
- Ingesting POs from ServiceNow
- Recording Receipts
- Creating Supplier Invoice by matching to the POs
- Payment to Supplier
- Clearing the payments in Bank Statement

Step 2 – Primary data.

- To create a purchase requisition in ServiceNow, the following information is required:
- Supplier
- Supplier Product (setting up supplier product requires product category and product model)
- Contract
- Delivery Address
- Accounts (Capex/Opex)
- Legal Entity
- Employee
- The above primary data should have a source of truth system – meaning any new record creation or updates to the existing records will be done in that respective system and then the data will be pushed into the third-party system.
- Out of the box integration flows with SAP ECC and SAP S4 HANA are built with the following assumptions:
 - Source of truth will be SAP system for the following primary entities:
 - Product Category and Product Model
 - Delivery Address (mapped to plant location)
 - GL Accounts
 - Purchasing Org
 - Cost Center
 - Purchase Group
 - Legal Entity/Company Code
 - Currencies/FX Rate
 - Payment Term
 - Supplier (if no SLO is installed)
- primary data needs to be synced periodically to ensure that the latest and updated primary data becomes available in ServiceNow application. This is ensured by:
 - Building Jobs which can be scheduled to be run at various intervals like every hour or every day or any other time frame as required by customer
 - These jobs will have an ability to pull the data incrementally or full pull
 - Underlying logic in the job will be to call the respective primary data integration hub action

Step 3 – Transaction data.

- Once the record (like PO) is created in ServiceNow then the same needs to be pushed into SAP ECC or SAP S4 HANA because as per the use case the downstream processing needs to happen in SAP ECC or SAP S4 HANA
- To achieve this the out of the box integration flows provide
- Sub-flows which contain the logic of when to trigger the integration (like as soon as ordered or approved or any other state)
- Sub-flows also take the SPO PO Payload data and convert it into the payload required by the integration hub action and pass the data to integration hub action

- Integration Hub action saves the record in the SAP system and gets back the ERP number and ERP Line number and stamp it back on SPO PO (for a happy flow)
- For an error flow the error message from SAP system is captured by the Integration Hub Action and create a task on the transaction record and assign it to a user so that the user can review, correct the data, and resubmit the same for integration
- If the SAP system is down for patching and say 50 POs get created in that time – then it may not be easy to open each PO and re-submit for integration. In such a case the job is provided which when run will pick all POs in error status and trigger the integration

Integration setup

Create ERP source for each legal entity and associate to an ERP target.

Before going into the detailed steps for integration setup, below is some background information:

- ERP source is a user defined primary data. Customers can create as many ERP sources as they want but ideally, they must create one ERP source per legal entity. For example:
- There is a customer by name ABC, and they have operations in USA and Singapore, and they have incorporated one legal entity per country
- Such customer can create
- One ERP source by the name US Operations
- Second ERP Source by the name Singapore Operations
- Each of the above source is associated to the legal entity created in ServiceNow system
- Now whenever a transaction record is created in ServiceNow system - the ERP source is identified from the legal entity
- Each ERP source can be associated to a target ERP system
- Continuing the above example if customer ABC is using
- SAP for US Operations
- Oracle for Singapore Operations
- Then they can mark the target ERP (like Oracle and SAP) for the respective ERP source configured by them. In the above example it will be mapped as under:
- US Operations – SAP ECC
- Singapore Operations - Oracle

Customers can easily setup the integration by following the below steps:

- Navigate to ERP Source configuration page – (see screenshot below)
- Map the target ERP system with the right ERP Source
- Provide the connection details in the Connection Alias Field (Connection Alias consists of the instance URL, Username and Password for the destination ERP)
- In Service configuration tab – all the jobs which are required to fetch the primary data is configured. Users can schedule the jobs as per the requirement like run daily, hourly, whether to do a full pull or incremental pull, whether to pull full material primary data or primary data for plant etc.
- Each of the primary data, considerations and the link to the recording is explained in their respective sections

This screenshot shows the ServiceNow interface for managing ERP source configurations. The top navigation bar indicates the current application is 'Salesforce Spoke' and the record type is 'ERP Source Configuration SAP ECC ERP'. A note at the top states: 'This record is in the Primary Data Integration with SAP application, but Salesforce Spoke is the current application. To edit this record click here.'

The main area displays a table of integration services:

| Name | Application | Active | Flow | Import set tables | Order | Properties |
|-------------------------|---|--------|---|--------------------------------|-------|--|
| Currency | Primary Data Integration with SAP | false | Fetch Currencies from SAP ECC | sn.sap.data_int_currency_stg | 10 | {"query": ""} |
| Legal Entity | Primary Data Integration with SAP | false | Fetch Legal Entities from SAP ECC | sn.sap.data_int_le_stg | 20 | {"query": ""} |
| FX Exchange | Primary Data Integration with SAP | false | Fetch FX Rates from SAP ECC | sn.sap.data_int_fx_rate_stg | 30 | {"query": "KURST = '001'"} |
| Cost Center | Primary Data Integration with SAP | false | Fetch Cost Centers from SAP ECC | sn.sap.data_int_cc_stg | 40 | {"query": ""} |
| Purchase Group | Primary Data Integration with SAP | false | Fetch Purchasing Groups from SAP ECC | sn.sap.data_int_purc_grp_stg | 50 | {"query": ""} |
| Payment Terms | Primary Data Integration with SAP | false | Fetch Payment Terms from SAP ECC | sn.sap.data_int_pay_term_stg | 60 | {"query": ""} |
| Purchasing Organisation | Primary Data Integration with SAP | false | Fetch Purchase Organizations from SAP ECC | sn.sap.data_int_purc_org_stg | 70 | {"query": ""} |
| Ledger Account | Primary Data Integration with SAP | false | Fetch GL Accounts from SAP ECC | sn.sap.data_int_gl_stg | 80 | {"query": "BUKRS = '2000'"} |
| Plant Address | Primary Data Integration with SAP | false | Fetch Plant Addresses from SAP ECC | sn.sap.data_int_plant_addr_stg | 90 | {"query": ""} |
| Vendor Master | Primary Data Integration with SAP | false | Fetch Suppliers from SAP ECC | sn.sap.data_int_supplier_stg | 100 | {"low": "2000", "high": "", "sign": "!"}, {"opti...} |
| Materials | Sourcing and Procurement Operations Inte... | true | Fetch Materials from SAP ECC | sn.psm.sap_int_product_stg | 110 | {"low": "2000", "high": "", "sign": "!"}, {"opti...} |
| Services | Sourcing and Procurement Operations Inte... | true | Fetch Services from SAP ECC | sn.psm.sap_int_services_stg | 120 | {"query": ""} |

Material Primary Data Integration

Integrate Material Primary Data (Product Category and Product Model) and pull the material information from SAP.

Important considerations

Supplier product hierarchy comprises of the product model and supplier associated with the product.

ServiceNow's product of Sourcing and Procurement Operations has the following product hierarchy:

- Product Category
- Product Model
- Supplier Product

Supplier product is a combination of the Product Model plus Supplier. For example, the product of "Apple iPhone 14 Pro (128 GB) - Deep Purple" and this product is sold by 2 resellers "Reseller A" and "Reseller B" then they are created as 2 Supplier products within ServiceNow system. SAP does not have an equivalent of a Supplier Product and hence the Material primary data is imported from SAP system as Product Model and the users will have to do an additional step of creating a supplier product out of that product model.

Mapping of attributes from SAP to SPO product

Map the attributes pulled from SAP to the corresponding fields in the Source to Pay operations product.

The attributes pulled from SAP are mapped to the corresponding fields in the ServiceNow Product Model. Refer to the table below for more details.

Mapping Model for Material primary

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|-----------|-----------|-----------------|------------|------------|
|-----------|-----------|-----------------|------------|------------|

Mapping Model for Material primary (continued)

| | | | | |
|-------------|----------------|----------------------|---------------------|------------|
| MARA | _STTPEC_PRDCAT | Product Category | product_category | cmdb_model |
| MAKT | MAKTX | Material Description | description | cmdb_model |
| MARC | MATNR | Material No | name | cmdb_model |
| MARA | MATKL | Material Group | cmdb_model_category | cmdb_model |
| MARA | MEINS | Base Unit of Measure | asset_tracking_unit | cmdb_model |
| MARC | MATNR | Material No | model_number | cmdb_model |
| MARC | MATNR | Material No | display_name | cmdb_model |
| MAKT | MAKTX | Material Description | short_description | cmdb_model |

Interface Table and Attributes fetched from SAP

Map the interface table and attributes fetched from the SAP into the `sn_psm_sap_int_product_stg` table.

Attributes for Material primary are pulled from SAP and populated in the table `sn_psm_sap_int_product_stg`. In addition to the attributes that are mapped – another list of 139 frequently used attributes by SAP are being pulled from SAP and if the customer must use any of those attributes, then they can easily do so by configuring the transform and mapping of such fields.

The integration logic is built with a view that it should be scalable and any attributes that maybe used in the future is also being pulled and only the configuration of transform and mapping needs to be done which is a very easy step to do and any customer can do using the UI (no code is required to be written to do transformation and mapping).

Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Associated Transform Map

Use **Transform Materials** to map the materials table against the ServiceNow Product Model.

Table Transform Map - Transform M... Copy

Name: Transform Materials
Source table: Materials [sn_psm_sap_int_product_stg]
Application: Sourcing and Procurement Operations
Created: 2023-01-13 11:55:07
Target table: Product Model [cmdb_model]
Order: 100

Active:
Run business rules:
Enforce mandatory fields: No
Copy empty fields:
Create new record on empty coalesce fields:

Field Maps (8)

| Source field | Target field | Coalesce |
|--|---------------------|----------|
| [Script] | product_category | false |
| material_description | description | false |
| material_number | name | false |
| [Script] | cmdb_model_category | false |
| <input checked="" type="checkbox"/> [Script] | asset_tracking_unit | false |
| material_number | model_number | false |
| material_number | display_name | true |
| material_description | short_description | false |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

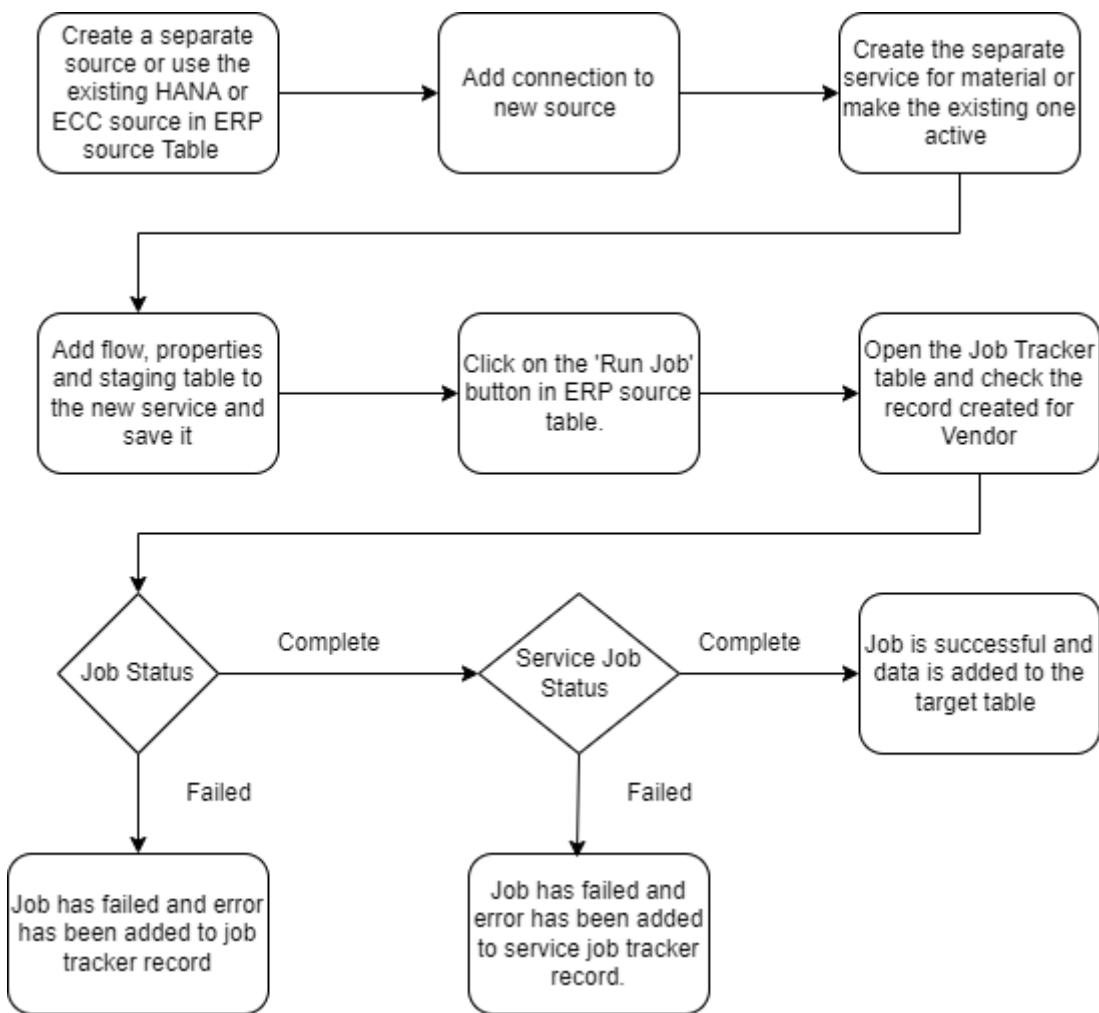
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run.
If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query Parameters used to filter data

Use the query parameter to filter materials data.

Query Parameter used to filter Materials data are:

- Low – Plant Range
- High- Plant Range
- Sign – I is Include and E is Exclude (if range is given as 1000 high and 2000 as low and sign is given as I then it gets data from 1000 to 2000, if we give E then it means other than 1000 to 2000 – rest all data will be fetched)
- Option – EQ is Equal and BT is Between
- full_pull – True or False
- row_count – To determine the batch size – for example if there are 1000 material records and user wants to process in a batch of 10 then they need to give the row count as 100.

Service Primary Data Integration

This section covers the integration of Service Primary Data (Product Category and Product Model) and includes the details on how to pull the service primary data information from SAP.

Important considerations

Integrate Material Primary Data (Product Category and Product Model) and pull the material information from SAP.

This will be same as that of material master.

Mapping of the attributes from SAP to SPO product

Map the attributes pulled from SAP to the corresponding fields in the Source to Pay operations product.

The attributes pulled from SAP are mapped to the corresponding fields in the ServiceNow Service Product Model. Refer the table below for more details.

Data Map for Services

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|--------------|-----------|-------------------------------|----------------------|----------------------------|
| ASMD | ASNUM | Activity Number | model_number | cmdb_service_product_model |
| ASMD | ASNUM | Activity Number | name | cmdb_service_product_model |
| ASMD | MEINS | Base Unit of Measure | asset_tracking_unit | cmdb_service_product_model |
| ASMD | MATKL | Material Group | product_category | cmdb_service_product_model |
| ASMD | STLVPOS | Standard Service Catalog Item | product_catalog_item | cmdb_service_product_model |
| ASMDT | ASKTX | Service short text | description | cmdb_service_product_model |
| ASMDT | ASKTX | Service short text | short_description | cmdb_service_product_model |

Interface Table and Attributes fetched from SAP

Attributes for **Services** are pulled from SAP and are populated in the **sn_psm_sap_int_services_stg** staging table.

Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Associated Transform services

Use the **Transform Services** to map the Services table against the ServiceNow Service Product Model.

The screenshot shows the 'Table Transform Map - Transform M...' screen. At the top, there's a message: 'This record is in the Sourcing and Procurement Operations Integration with SAP application, but Global is the current application. To edit this record click [here](#)'. Below this, the 'Transform Materials' configuration includes:

- Name:** Transform Materials
- Application:** Sourcing and Procurement Operations
- Created:** 2023-01-13 11:55:07
- Source table:** Materials [sn_psm_sap_int_product_stg]
- Target table:** Product Model [cmdb_model]
- Order:** 100
- Active:** checked
- Run business rules:** checked
- Enforce mandatory fields:** No
- Copy empty fields:** checked
- Create new record on empty coalesce fields:** checked

Below this is a 'Field Maps (7)' tab, which lists the mapping between source and target fields:

| Source field | Target field | Coalesce |
|-------------------------------|----------------------|----------|
| standard_service_catalog_item | product_catalog_item | false |
| service_short_text | description | false |
| activity_number | name | false |
| base_unit_of_measure | asset_tracking_unit | false |
| [Script] | product_category | false |
| activity_number | model_number | true |
| service_short_text | short_description | false |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

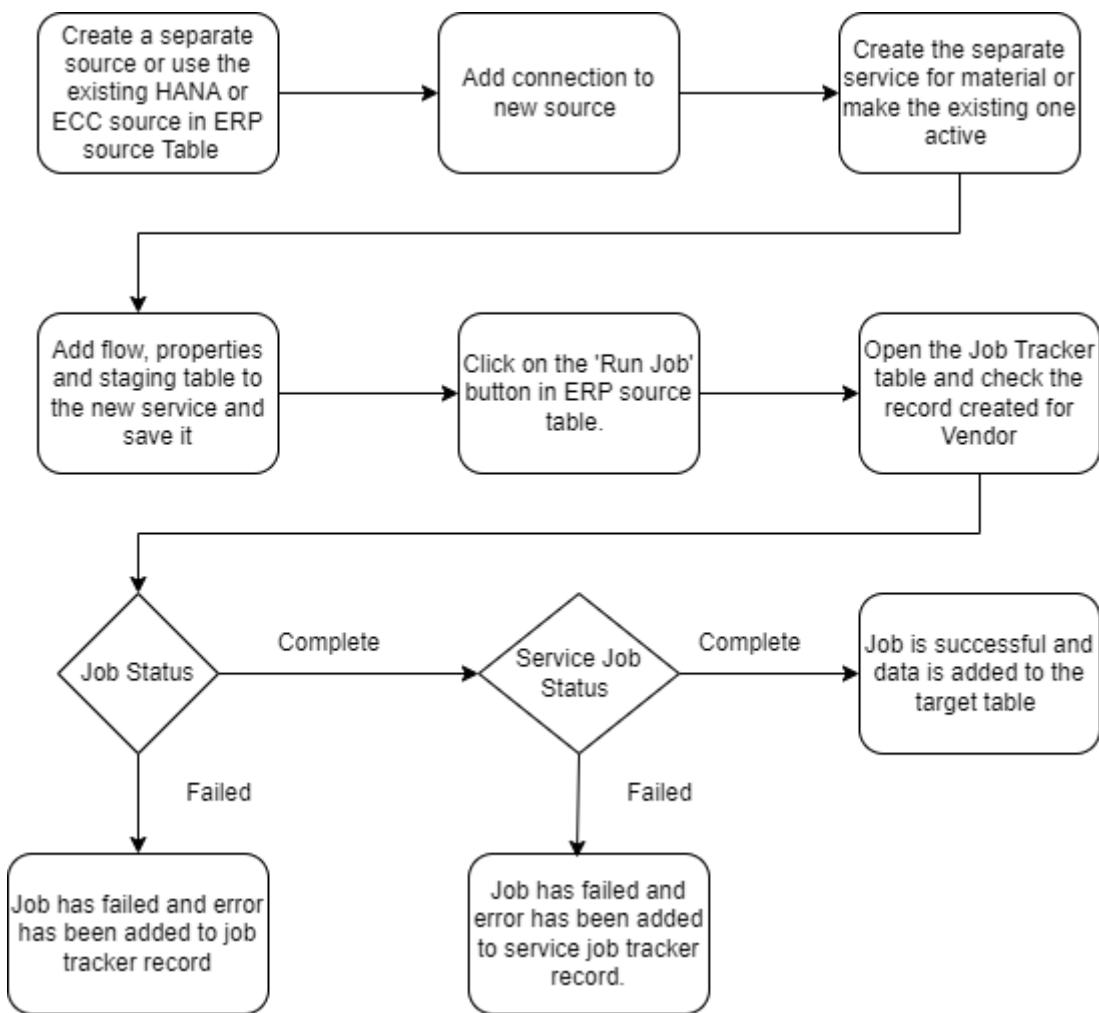
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query Parameters used in data retrieval

Use query parameter to filter ASNUM Service data.

The screenshot shows the ServiceNow interface for configuring an integration service. The service is named 'Services' and is associated with the 'SAP ECC ERP' source configuration. It uses the 'Fetch Services from SAP ECC' flow and is set to active. A query parameter 'ASNUM = '000000000000100001'' is defined. The application is set to 'sys_scope' and 'Sourcing and Procurement Operations'. The import set table is 'sn_psm_sap_int_services_stg'. The order is 120.

Primary Key in SAP Services table which needs to be provided in query parameter.

ASNUM = '000000000000100001'.

Plant Address Integration

Integrate Plant Address (CMN Location, Office Location and Deliver To location) and fetch the Plant Address information from SAP.

Important address considerations

ServiceNow captures the address information at different levels and maps it to the associated legal entity.

- CMN location: Standard platform table which captures the address information
- Office Location: All the office locations and it appears as a location to be selected in the shopping hub during checkout
- Deliver to Location: This is the location entered at run time by the shopper. This can be the shopper's home address.

Sap Requirements

SAP has a plant address associated to every legal entity. SAP also requires a plant address as mandatory field when creating a PO. In other words, no PO can be created on SAP side without a plant address.

All Plant Addresses are fetched from SAP (for all company codes) and the following is done:

- Records are created in CMN Location
- Records are created in Office Location (Note that the count may mismatch with CMN because CMN data is not striped by Legal Entity, but Office Location has Legal entity – so if one address has multiple legal entities then CMN may have only one record, but Office location will have a higher number)
- One record per legal entity is created in the custom table of sn_sap_data_int_erp_plant_address_mapping. This location will be used when shopper creates the custom delivery location that is not available in SAP. The integration logic fetches the first plant ID for the legal entity of the PO and passes that as a plant address to SAP. Also note that the deliver to address is also passed but this logic is to derive the plant ID, which is a mandatory field for SAP to create the PO.

Mapping of location attributes from SAP to SPO product

Fetch and map the attributes from SAP to the corresponding fields in the ServiceNow CMN location and Office Location table.

Data Map for Plant Address-CMN_LOCATION

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|-----------|-----------|-----------------|------------|--------------|
| T001W | LAND1 | Country | country | cmn_location |
| T001W | NAME1 | Name 1 | name | cmn_location |
| T001W | PSTLZ | Postal Code | zip | cmn_location |
| T001W | ORT01 | City | city | cmn_location |

Data Map for Plant Address-CMN_LOCATION (continued)

| | | | | |
|--------------|-------|--------------|--------|--------------|
| T001W | REGIO | Region | state | cmn_location |
| T001W | STRAS | Street/House | street | cmn_location |

Data Map for Plant Address-SN_SHOP_OFFICE_LOCATION

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|--------------|-----------|-----------------|--------------|-------------------------|
| T001K | BUKRS | Company Code | legal_entity | sn_shop_office_location |
| T001W | NAME1 | Name 1 | name | sn_shop_office_location |
| T001W | REGIO | Country | country | sn_shop_office_location |
| NA | NA | NA | location | sn_shop_office_location |

Data Map for Plant Address-ERP_Plant

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|--------------|-----------|-----------------|-----------------|---|
| NA | NA | NA | location | sn_sap_data_int_erp_plant_address_mapping |
| T001K | BUKRS | Company Code | legal_entity | sn_sap_data_int_erp_plant_address_mapping |
| NA | NA | NA | erp_source | sn_sap_data_int_erp_plant_address_mapping |
| T001W | NAME1 | Name 1 | name | sn_sap_data_int_erp_plant_address_mapping |
| T001W | LAND1 | Country | country | sn_sap_data_int_erp_plant_address_mapping |
| T001W | WERKS | Plant | erp_location_id | sn_sap_data_int_erp_plant_address_mapping |
| T001W | LAND1 | Country | country | sn_sap_data_int_erp_plant_address_mapping |

Interface table and attributes fetched from SAP

Fetch the attributes for Plant Address from SAP and populate in the `sn_sap_data_int_plant_add_stg` staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document).

Associated Transform Location Map

Map the Plant Address table to the ServiceNow Address tables.

Transform Plant Address-CMN_LOCATION, Transform Plant Address-SN_SHOP_OFFICE_LOCATION, and Transform Plant Address-ERP_Plant, are used to map the Plant Address table to the ServiceNow Address

This screenshot shows the 'Table Transform Map' screen for the 'Transform Plant Address - CMN_LOCATION' record. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', and a search bar. The main area displays the following details:

- Name:** Transform Plant Address - CMN_LOCATION
- Source table:** Plant Address [sn_sap_data_int_plant_add_stg]
- Target table:** Location [cmn_location]
- Order:** 80
- Application:** Primary Data Integration with SAP
- Created:** 2022-11-17 00:16:51
- Run script:** [disabled]
- Active:** Yes
- Run business rules:** Yes
- Enforce mandatory fields:** No
- Copy empty fields:** [disabled]
- Create new record on empty coalescence fields:** [disabled]

A note at the top states: "This record is in the Primary Data Integration with SAP application, but Global is the current application. To edit this record click [here](#)".

tables.

This screenshot shows the 'Field Maps (6)' tab within the same transform map record. It lists six field mappings:

| Source field | Target field | Coalesce |
|------------------------------|--------------|----------|
| country_key | country | true |
| city | city | false |
| street_and_house_number | street | false |
| region_state_province_county | state | false |
| postal_code | zip | false |
| [Script] | name | true |

This screenshot shows the 'Table Transform Map' screen for the 'Transform Plant Address - SN_SHOP_OFFICE_LOCATION' record. The top navigation bar and application context are identical to the previous screenshot. The main area displays the following details:

- Name:** Transform Plant Address - SN_SHOP_C
- Source table:** Plant Address [sn_sap_data_int_plant_add_stg]
- Target table:** Office Location [sn_shop_office_location]
- Order:** 90
- Application:** Primary Data Integration with SAP
- Created:** 2022-11-17 23:01:01
- Run script:** [disabled]
- Active:** Yes
- Run business rules:** Yes
- Enforce mandatory fields:** No
- Copy empty fields:** [disabled]
- Create new record on empty coalescence fields:** [disabled]

A note at the top states: "This record is in the Primary Data Integration with SAP application, but Global is the current application. To edit this record click [here](#)".

| Source field | Target field | Coalesce |
|--------------|--------------|----------|
| [Script] | country | true |
| [Script] | location | true |
| [Script] | name | true |
| [Script] | legal_entity | true |

Name: Transform Plant Address - ERP PLANT

Source table: Plant Address [sn_sap_data_int_plant_add_stg]

Target table: ERP Plant Address Mapping [sn_sap_data_int_erp_plant_address_mapping]

Created: 2022-11-17 22:58:30

Order: 100

Active: Yes

Run business rules: No

Enforce mandatory fields: No

Copy empty fields: No

Create new record on empty coalesce fields: No

| Source field | Target field | Coalesce |
|--------------|-----------------|----------|
| [Script] | legal_entity | true |
| [Script] | country | false |
| erp_source | erp_source | false |
| [Script] | location | false |
| [Script] | name | true |
| plant | erp_location_id | true |
| country_key | country | false |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

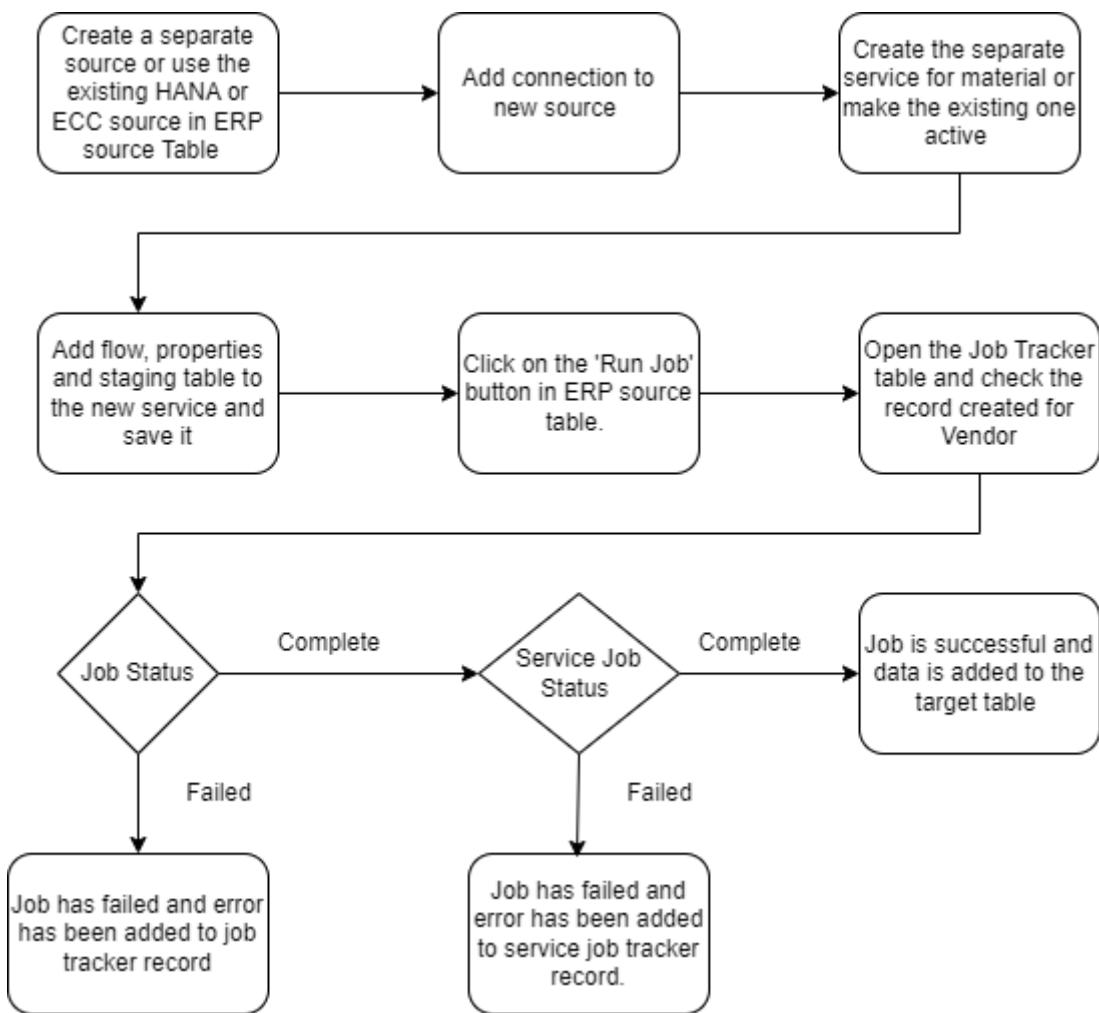
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query Parameters used to filter address data

Use WERKS as the query parameter to filter Plant Address data.

This screenshot shows the configuration details for an integration service named "Plant Address".

- Name:** Plant Address
- ERP source configuration:** SAP ECC ERP
- Flow:** Fetch Plant Addresses from SAP ECC
- Properties:** query (with value WERKS = '0001')
- Application:** Primary Data Integration with SAP
- Import set tables:** sn_sap_data_int_plant_add_stg
- Order:** 90
- Status:** Active (checkbox checked)

A note at the top states: "This record is in the Primary Data Integration with SAP application, but Global is the current application. To edit this record click [here](#)".

GL Accounts

Integrate and pull the GL Accounts with SAP.

Important considerations for GL account

Integrate and pull the GL Accounts with SAP.

No specific considerations for pulling GL Accounts.

Mapping of attributes from SAP to SPO in GL account

Fetch and map SAP attributes with the corresponding fields in the ServiceNow GL Account table.

Data Map for Ledger Accounts

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|-------------|-----------|---|-------------------|-------------------|
| SKB1 | STEXT | G/L account additional text | short_description | sn_fin_gl_account |
| SKB1 | MWSKZ | Tax Category in Account primary Record | category | sn_fin_gl_account |
| SKB1 | XSPEB | Indicator: Is account blocked for posting? | Inactive | sn_fin_gl_account |
| SKB1 | WAERS | Account currency | account_currency | sn_fin_gl_account |
| NA | NA | NA | erp_source | sn_fin_gl_account |
| SKB1 | XOPVW | Indicator: Open Item Management? | item_management | sn_fin_gl_account |
| SKB1 | HKTID | ID for account details | display_name | sn_fin_gl_account |
| SKB1 | XSALH | Indicator: Manage Balances in Local Currency Only | local_currency | sn_fin_gl_account |
| SKB1 | SAKNR | G/L Account Number | gl_account | sn_fin_gl_account |
| SKB1 | BUKRS | Client | legal_entity | sn_fin_gl_account |

Interface table and Ledger account attributes

Fetch the attributes for Ledger Account from SAP and populate in the `sn_sap_data_int_gl_stg` staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Associated Transform Map for Ledger Accounts

Map the Transform Ledger Accounts to the ServiceNow Product Model.

The screenshot shows the 'Table Transform Map - Transform Le...' screen. At the top, there's a navigation bar with 'All', 'Favorites', 'History', and a search bar. Below the header, a message indicates the record is in the 'Primary Data Integration with SAP' application but 'Global' is the current application. The main area contains several configuration fields:

- Name:** Transform Ledger Accounts
- Source table:** Ledger Accounts (`sn_sap_data_int_gl_stg`)
- Active:**
- Run business rules:**
- Enforce mandatory fields:** No
- Copy empty fields:**
- Create new record on empty co-alypse fields:**
- Application:** Primary Data Integration with SAP
- Created:** 2022-11-03 01:15:25
- Target table:** Ledger Account [`sn_fin_gl_account`]
- Order:** 70
- Run script:**

Below this, the 'Field Maps (10)' tab is selected in a tab bar, showing a list of mappings:

| Source field | Target field | Coalesce |
|---|--------------------------------|----------|
| <code>gl_account_additional_text</code> | <code>short_description</code> | false |
| <code>tax_category_in_account_master_record</code> | <code>category</code> | false |
| <code>indicator_is_account_blocked_for_posting</code> | <code>inactive</code> | false |
| <code>account_currency</code> | <code>account_currency</code> | false |
| <code>erp_source</code> | <code>erp_source</code> | true |
| <input checked="" type="checkbox"/> <code>indicator_open_item_management</code> | <code>item_management</code> | false |
| <code>id_for_account_details</code> | <code>display_name</code> | false |
| <code>indicator_manage_balances_in_local_curre...</code> | <code>local_currency</code> | false |
| <code>gl_account_number</code> | <code>gl_account</code> | true |
| [Script] | <code>legal_entity</code> | true |

At the bottom of the table view, there are navigation buttons for page 1 of 10.

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

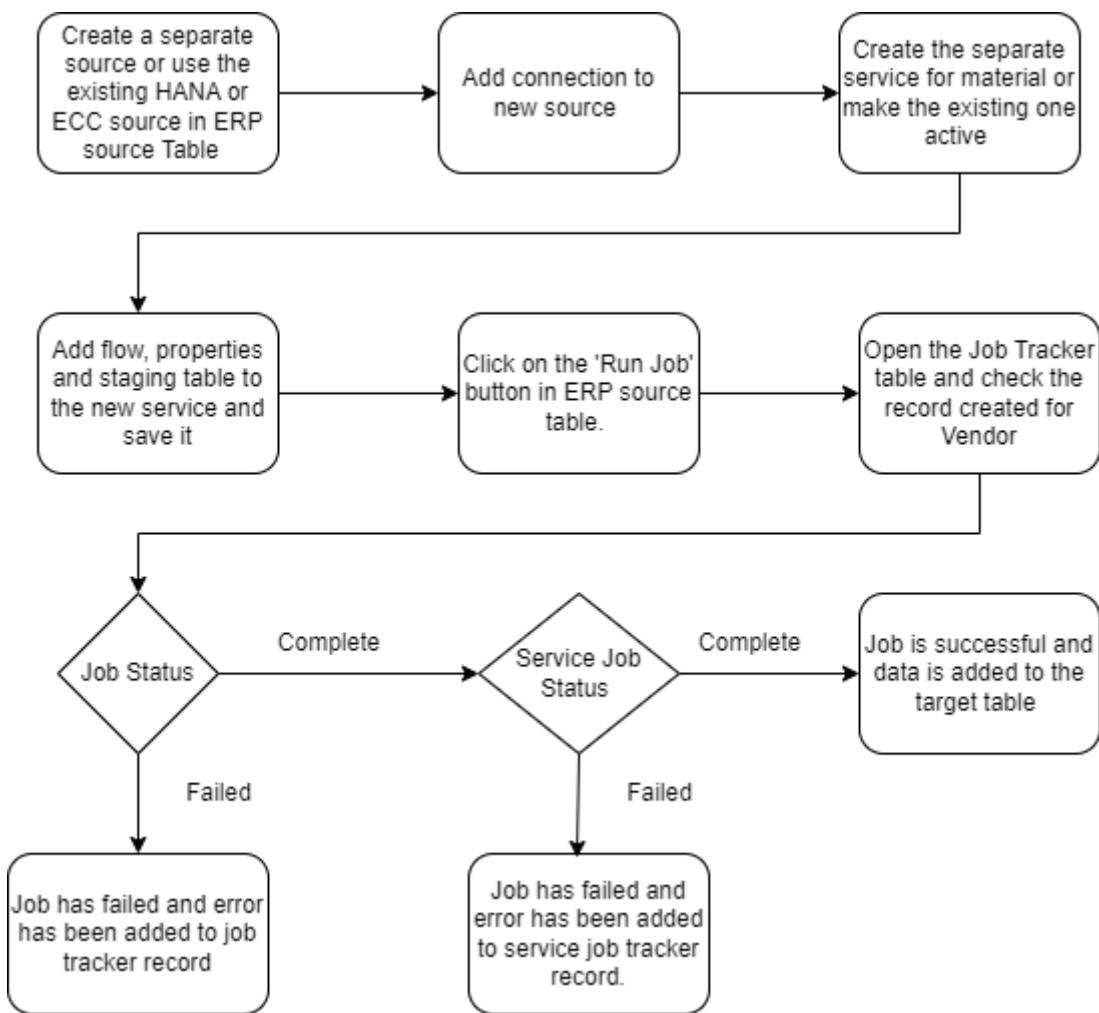
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query parameters used in ledger account

Use BUKRS as query parameter to filter Ledger Account data.

The screenshot shows the configuration for an integration service named "Integration Service - Ledger Account". Key settings include:

- Name:** Ledger Account
- ERP source configuration:** SAP ECC ERP
- Flow:** Fetch GL Accounts from SAP ECC
- Active:** Yes
- Properties:** query
- BUKRS:** '2000'
- Application:** Primary Data Integration with SAP
- Import set tables:** sn_sap_data_int_gl_stg
- Order:** 80

Query parameter available to pull the GL Account is by Company Code – BUKRS stands for Company Code in SAP terminology.

Legal Entity and Company Code

Integrate the Legal Entity or Company Code and include the details on how to pull the Legal Entity or Company Code information from SAP.

Important considerations for legal entity and company code

Integrate the Legal Entity or Company Code and include the details on how to pull the Legal Entity or Company Code information from SAP.

No specific important considerations for Legal Entity/ Company Code.

Mapping of legal entity attributes

Map the attributes fetched from SAP to the corresponding fields in the ServiceNow Legal Entity table.

Refer to the table below for more details.

Data Map for Legal Entities

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|-----------|------------|---------------------------------|------------------|---------------------|
| T001 | BUKRS | Company Code | ERP company code | sn_fin_legal_entity |
| T001 | BUTXT | Name of Company Code or Company | Legal name | sn_fin_legal_entity |
| T001 | ORT01 | City | City | sn_fin_legal_entity |
| T001 | LAND1 | Country Key | Country | sn_fin_legal_entity |
| T001 | WAERS | Currency Key | Local currency | sn_fin_legal_entity |
| T001 | RCOMP | Company | Industry | sn_fin_legal_entity |
| T001 | ADRNR | Address | Street | sn_fin_legal_entity |
| T001 | BUKRS_GLOB | Name of global company code | company | sn_fin_legal_entity |

Interface table and attributes fetched from SAP

Fetch the attributes for Legal entity from SAP and populate in the `sn_sap_data_int_le_stg` staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document).

Associated legal entity transform map

Map the Transform Legal Entity Address table to the ServiceNow Product Model.

Transform Legal Entities is used to map the Legal Entities table to the ServiceNow Product Model

| Source field | Target field | Coalesce |
|--|--|----------|
| name_of_global_company_code | company | false |
| company_code | erp_company_code | true |
| company | industry | false |
| country_key | country | false |
| currency_key | local_currency | false |
| <input checked="" type="checkbox"/> erp_source | <input checked="" type="checkbox"/> erp_source | false |
| city | city | false |
| address | street | false |
| name_of_company_code_or_company | legal_name | false |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

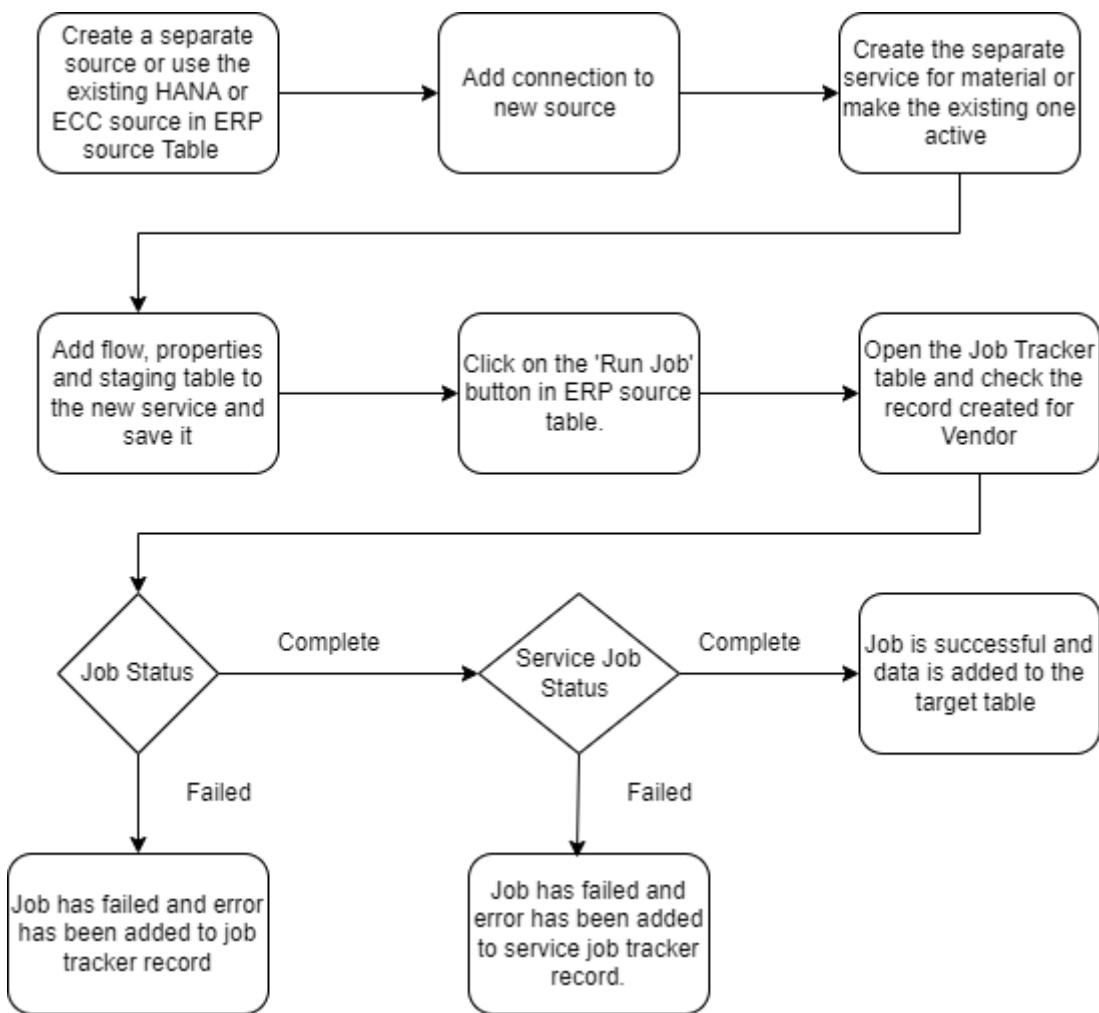
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query Parameters used for legal entity

Use BUKRS as query parameter to filter Ledger Account data.

The screenshot shows the configuration for an integration service named "Integration Service - Legal Entity". Key settings include:

- Name:** Legal Entity
- ERP source configuration:** SAP ECC ERP
- Flow:** Fetch Legal Entities from SAP ECC
- Properties:** query (with value BUKRS = '1000')
- Application:** Primary Data Integration with SAP
- Import set tables:** sn_sap_data_int_le_stg
- Order:** 20

Currencies

Integrate the currency and include the details on how to pull the primary information of the currency from SAP.

Important considerations for currency

Out of the box, ServiceNow instances have 5 currencies, but SAP has a lot more currencies. All the currencies which are not available in ServiceNow are pulled into ServiceNow. The 5 currencies which exist are also updated with the data from SAP.

Mapping of the currency attributes

Map the attributes fetched from SAP to the corresponding fields in the ServiceNow currency table.

Refer the table below for more details.

Data map for Currencies

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|--------------|-----------|-------------------|------------|-------------|
| TCURC | WAERS | ISO Currency Code | code | fx_currency |
| TCURC | LTEXT | Name | name | fx_currency |

Interface table and attributes for currency

Fetch the attributes for currency from SAP and populate in the `sn_sap_data_int_currency_stg` staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Associated transform currency map

Map the Transform currency table to the ServiceNow Product Model.

| Source field | Target field | Coalesce |
|--------------|--------------|----------|
| long_text | name | false |
| currency_key | code | true |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

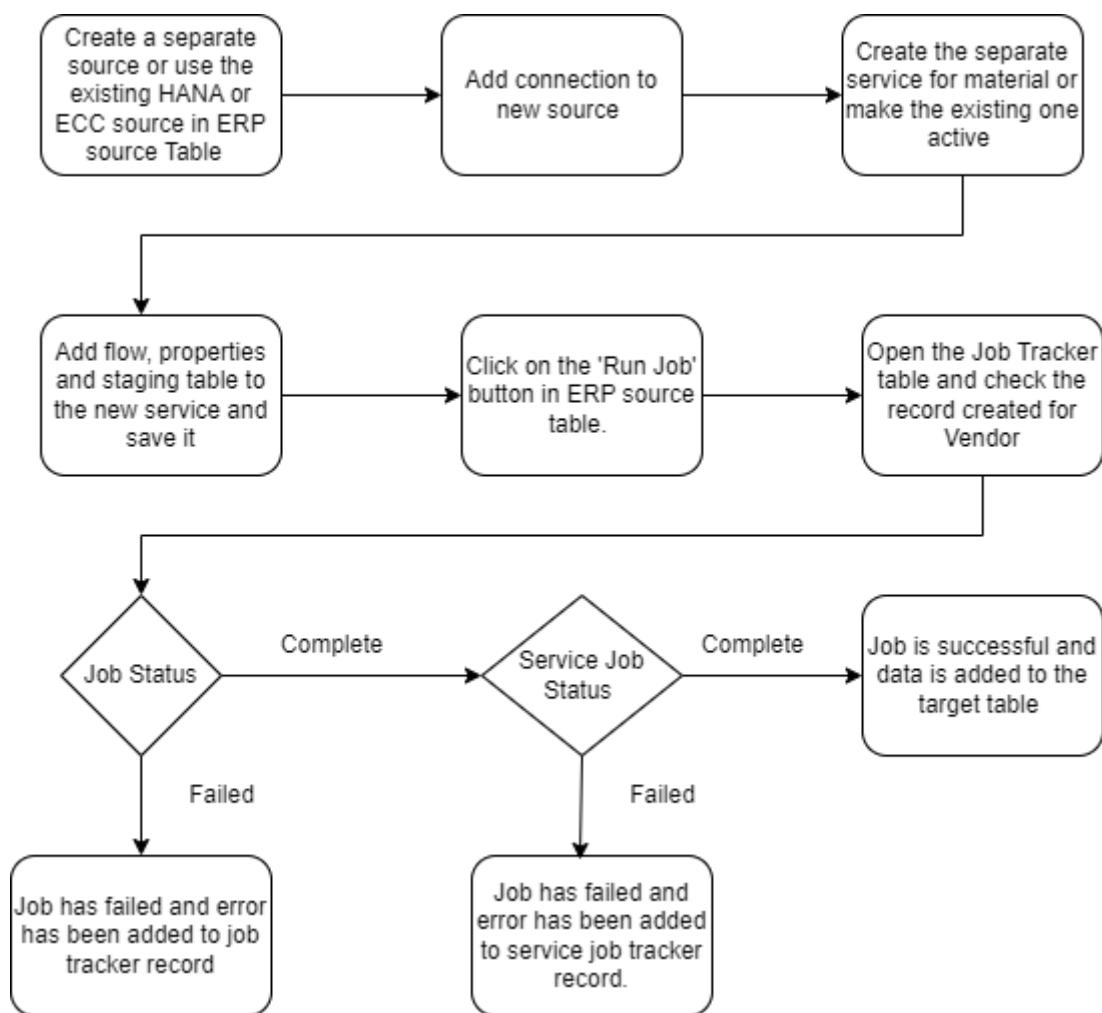
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run.
If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query parameters used in currency filter

Use WAERS as query parameter to filter currency data.

Query Parameter used to filter Currencies data is **WAERS**

The screenshot shows the ServiceNow Integration Service - Currency configuration page. The service is named 'Currency'. It has an 'ERP source configuration' of 'SAP ECC ERP', a 'Flow' of 'Fetch Currencies from SAP ECC', and a 'Properties' section with a query of 'WAERS = 'USD''. The 'Import set tables' is set to 'sn_sap_data_int_currency_stg'. The application scope is 'sys_scope' and the order is 10.

Currency Key in SAP is WAERS.

FX conversion rates

Integrate the FX Conversion Rates and include the details on how to pull the primary information of the FX Conversion Rates from SAP.

Important considerations for FX conversion rate

Integrate the FX Conversion Rates and include the details on how to pull the primary information of the FX Conversion Rates from SAP.

No specific important considerations for FX Currency Conversion Rates.

Mapping of the currency conversion rate

Map the attributes fetched from SAP to the corresponding fields in the ServiceNow FX Currency Conversion Rate table.

Refer the table below for more details.

Data Map for FX Rates

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|--------------|-----------|--------------------|---------------|----------------|
| TCURR | KURST | Exchange rate type | rate_type | sn_fin_fx_rate |
| TCURR | FCURR | From currency | from_currency | sn_fin_fx_rate |
| TCURR | TCURR | To-currency | to_currency | sn_fin_fx_rate |
| TCURR | UKURS | Exchange Rate | rate | sn_fin_fx_rate |
| TCURR | GDATU | Valid from | span_start | sn_fin_fx_rate |
| TCURR | GDATU | Valid from | span_end | sn_fin_fx_rate |

Data Map for FX Rates (continued)

| | | | | |
|----|----|----|------------|----------------|
| NA | NA | NA | erp_source | sn_fin_fx_rate |
|----|----|----|------------|----------------|

Interface table and attributes fetched from SAP for FX

Fetch the attributes for FX Rates from SAP and populate in the `sn_sap_data_int_fx_rate_stg` staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document).

Associated FX rate transform map

Map the Transform FX Rates table to the ServiceNow Product Model.

| Source field | Target field | Coalesce |
|--------------------|---------------|----------|
| effective_date | span_start | true |
| [Script] | span_end | false |
| exchange_rate | rate | false |
| erp_source | erp_source | true |
| from_currency | from_currency | true |
| exchange_rate_type | rate_type | true |
| to_currency | to_currency | true |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

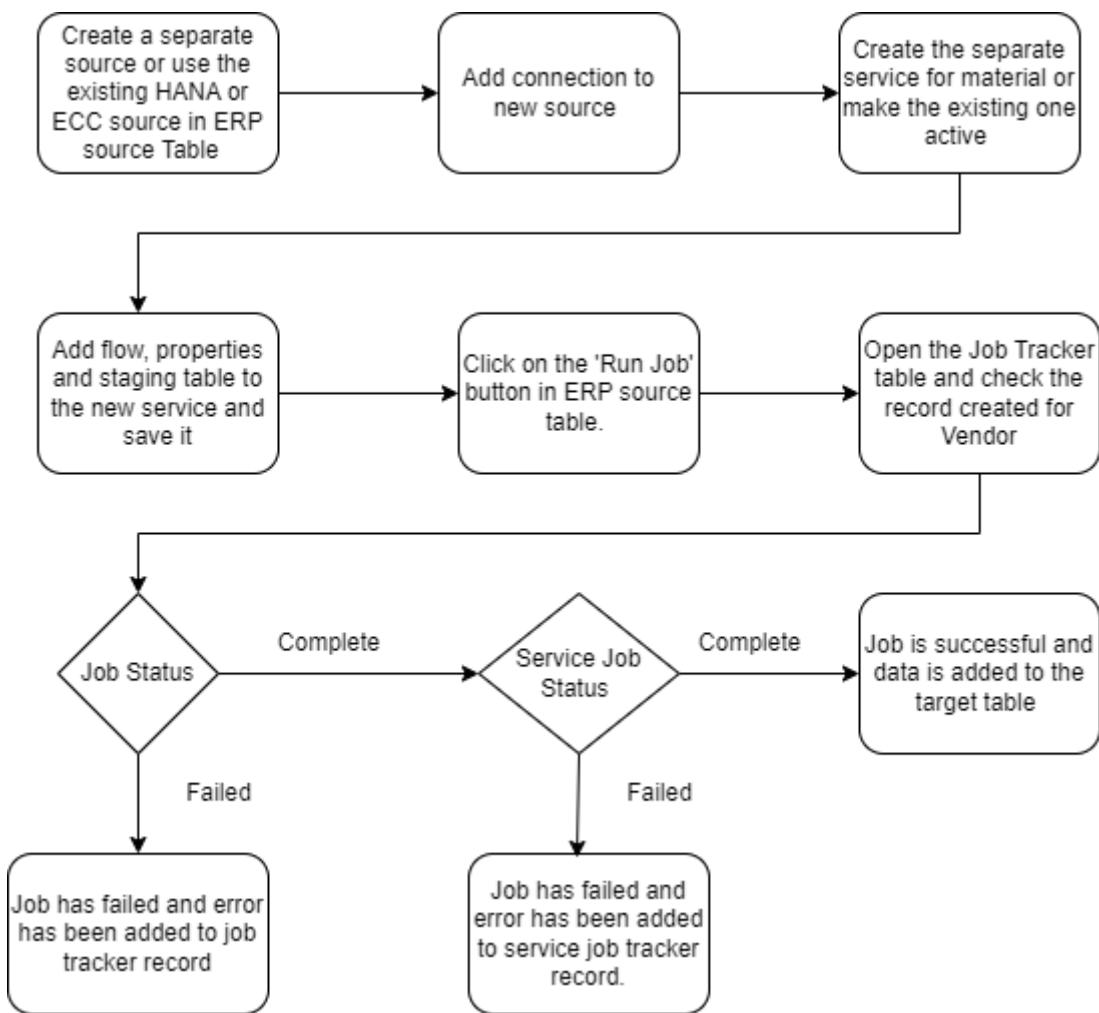
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query parameters for FX rate

Use KURST which is the exchange rate type as query parameter to filter FX rate data.

Query Parameter used to filter FX Rates data is **KURST which is exchange rate type**

The screenshot shows the configuration of an integration service named 'FX Exchange'. Key settings include:

- Name:** FX Exchange
- ERP source configuration:** SAP ECC ERP
- Flow:** Fetch FX Rates from SAP ECC
- Active:** checked
- Properties:** query (with the value 'KURST = '001'' entered)
- Application:** Primary Data Integration with SAP
- Import set tables:** sn_sap_data_int_fx_rate_stg
- Order:** 30

Payment term

Integrate the Payment term and include details on how to pull the primary information of the Payment term from SAP.

Important considerations for Payment Term

Integrate the Payment term and include details on how to pull the primary information of the Payment term from SAP.

No specific important considerations for Payment Terms.

Mapping of attributes for payment table

Map the attributes fetched from SAP to the corresponding fields in the ServiceNow Payment Term table.

Refer the table below for more details.

Data Map for Payment Terms

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|-----------|----------------|---|---------------------|----------------------|
| T052 | ZTERM | Terms of payment | payment_term | sn_shop_payment_term |
| T052 | TEXT1 | Own explanation | short_description | sn_shop_payment_term |
| T052 | ZTAG3 or ZTAG1 | days_from_baseline_date_for_payment_3' is present then it is mapped to net days to Pay else if 'days_from_baseline_date_for_payment_1' is consider as net days to pay | net_days_to_pay | sn_shop_payment_term |
| T052 | ZPRZ1 | cash_discount_percentage_rate_1 | discount_percentage | sn_shop_payment_term |
| NA | NA | NA | type | sn_shop_payment_term |
| T052 | ZTAG1 | days_from_baseline_date_for_payment_1 | discount_days | sn_shop_payment_term |

Interface Table and Attributes for Payment term

Fetch the attributes for Payment terms from SAP and populate in the `sn_sap_data_int_pay_term_stg` staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Associated transform map for payment term

Map the Transform Payment terms table to the ServiceNow Product Model.

Name: Payment Terms

Application: Primary Data Integration with SAP

Source table: Payment Terms
[sn_sap_data_int_pay_term_stg]

Target table: Payment Terms
[sn_shop_payment_term]

Order: 100

Active:

Run business rules:

Enforce mandatory fields: No

Copy empty fields:

Create new record on empty coalesce fields:

Field Maps (6)

| Source field | Target field | Coalesce |
|---------------------------------|---------------------|----------|
| own_explanation | short_description | false |
| [Script] | net_days_to_pay | false |
| payment_term | payment_term | true |
| cash_discount_percentage_rate_1 | discount_percentage | false |
| [Script] | type | false |
| [Script] | discount_days | false |

Retrieve Primary Data from SAP

Retrieve Payment term primary data from SAP into the ServiceNow primary data tables.

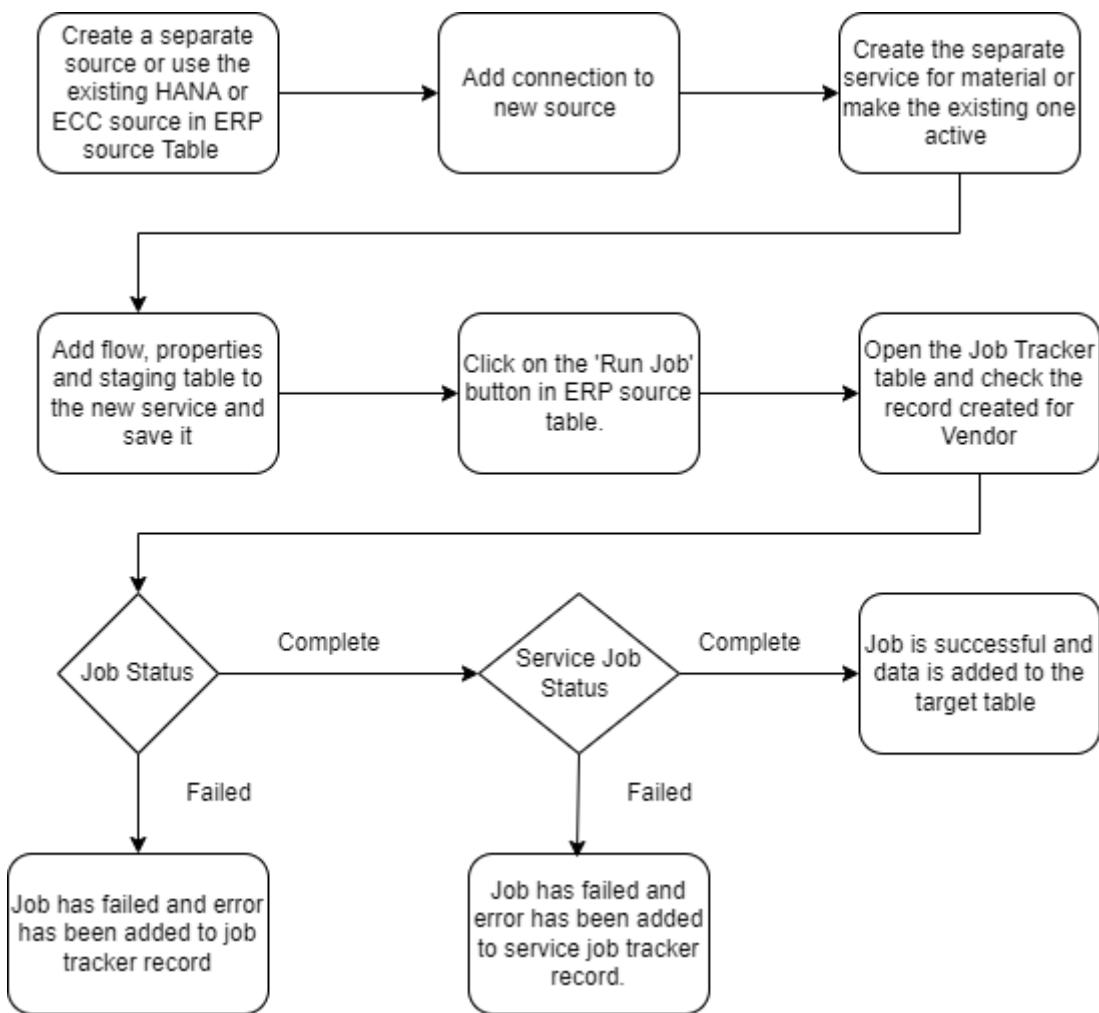
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run.
If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query Parameters used in payment terms data

Use ZTERM as query parameter to filter FX Payment terms data.

The screenshot shows the configuration for an Integration Service named "Payment Terms".

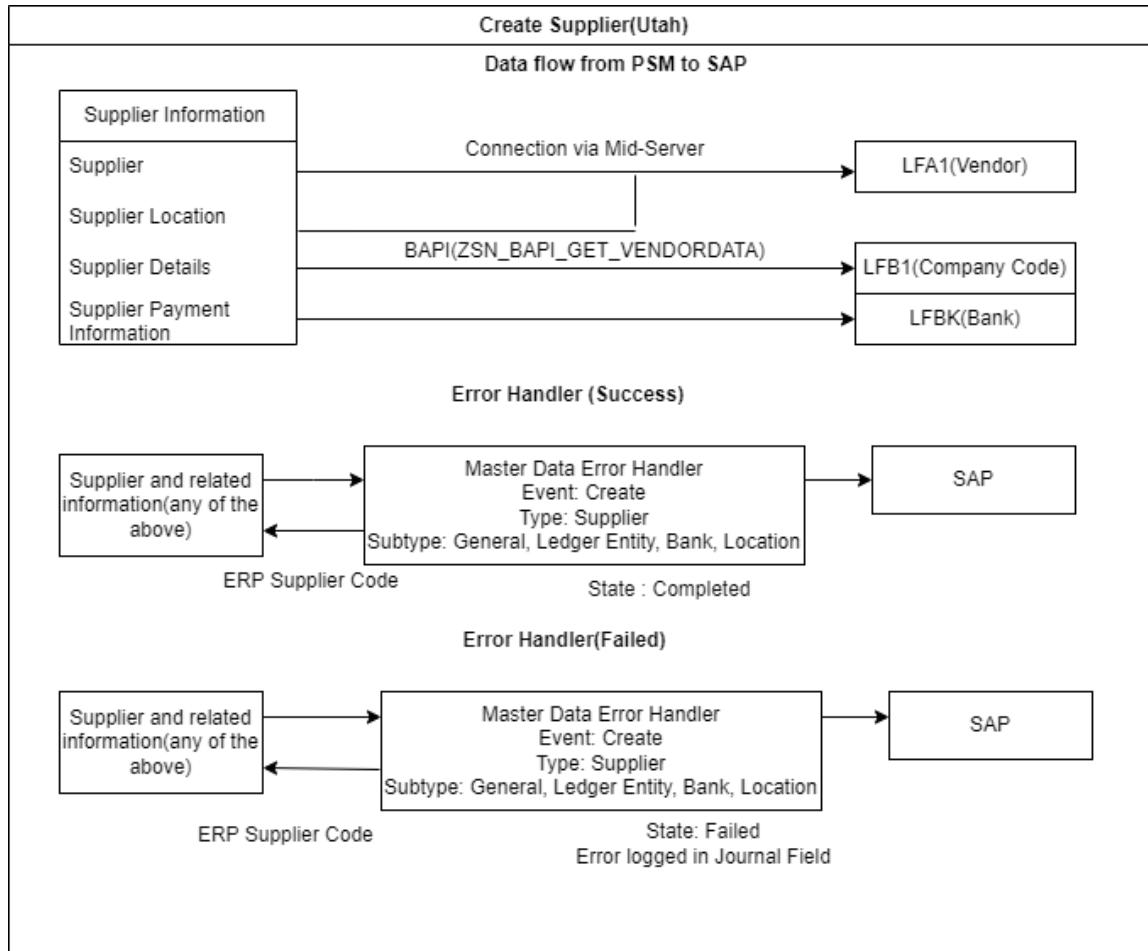
- Name:** Payment Terms
- ERP source configuration:** SAP ECC ERP
- Flow:** Fetch Payment Terms from SAP EC
- Properties:** query (containing ZTERM = '0001')
- Application:** Primary Data Integration with SAP
- Import set tables:** sn_sap_data_int_pay_term_stg
- Order:** 60

Payment terms is referred as ZTERM in SAP.

Supplier

Integrate the Supplier or Vendor and include details on how to pull the primary information of the Supplier or Vendor from SAP.

This section covers the integration of Supplier/ Vendor primary and includes the details on how to pull the Supplier/Vendor primary information from SAP.



Important considerations for supplier

Integrate the Supplier or Vendor and include details on how to pull the primary information of the Supplier or Vendor from SAP.

Following data is fetched from SAP for a supplier/Vendor:

- Legal Name
- Supplier addresses – All the addresses of the supplier are fetched and stored in the M2M location table
- Legal entity, payment term, recon account, payment method and hold payment is also fetched and displayed in the Supplier LE Mapping Tab
- Supplier bank account information like Bank Name, Currency, Primary, Country is also fetched from SAP and displayed in the Supplier Bank Account tab

Mapping of the attributes for supplier

Map the attributes fetched from SAP to the corresponding fields in the ServiceNow Supplier table.

Refer the table below for more details.

Data Map for Vendors

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|-----------|-----------|--|------------------------------|----------------------|
| LFA1 | LIFNR | Account Number of Vendor or Creditor | erp_company_code | sn_fin_supplier |
| LFA1 | KUNNR | Customer Number | customer_number | sn_fin_supplier |
| LFM1 | WAERS | Purchase order currency | accepted_purchasing_currency | sn_fin_supplier |
| LFA1 | TXJCD | Tax Jurisdiction | tax_jurisdiction | sn_fin_supplier |
| LFB1 | ZTERM | Terms of Payment Key | payment_term | sn_shop_payment_term |
| LFA1 | PFACH | PO Box | pobox_number | sn_fin_supplier |
| | | | onboarded | sn_fin_supplier |
| LFM1 | EKORG | Purchasing Entities | purchasing_entities | sn_fin_supplier |
| NA | NA | NA | erp_source | sn_fin_supplier |
| LFA1 | ERDAT | Date on which the Record Was Created | onboarded_date | sn_fin_supplier |
| LFB1 | AKONT | Reconciliation Account in General Ledger | gl_account | sn_fin_gl_account |
| LFA1 | NAME1 | Name 1 | legal_name | sn_fin_supplier |
| LFM1 | INCO1 | Incoterms (Part 1) | incoterm | sn_fin_supplier |

Interface table and attributes of vendor

Fetch the attributes for vendors from SAP and populate in the *sn_sap_data_int_supplier_stg* staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

Find all the attributes of staging table in the appendix.

Associated transform suppliers

Transform Suppliers is used to map the Vendors table to the ServiceNow Product Model.

Table Transform Map - Transform Suppliers

This record is in the Primary Data Integration with SAP application, but Global is the current application. To edit this record click [here](#).

| Name | Transform Suppliers | Application | Primary Data Integration with SAP |
|---|--|--------------|-----------------------------------|
| Source table | Vendors [sn_sap_data_int_supplier_stg] | Created | 2022-11-09 11:54:44 |
| Active | <input checked="" type="checkbox"/> | Target table | Supplier [sn_fin_supplier] |
| Run business rules | <input checked="" type="checkbox"/> | Order | 100 |
| Enforce mandatory fields | No | Run script | <input type="checkbox"/> |
| Copy empty fields | <input type="checkbox"/> | | |
| Create new record on empty coalescence fields | <input type="checkbox"/> | | |

| Field Maps (6) | | | Transform Scripts |
|--------------------------|--------------------------------------|------------------|-------------------|
| <input type="checkbox"/> | Source field | Target field | Coalesce |
| | account_number_of_vendor_or_creditor | erp_company_code | true |
| | customer_number | customer_number | false |
| <input type="checkbox"/> | [Script] | onboarded | false |
| | erp_source | erp_source | true |
| | vendor_created_date | onboarded_date | false |
| | name_1 | legal_name | false |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

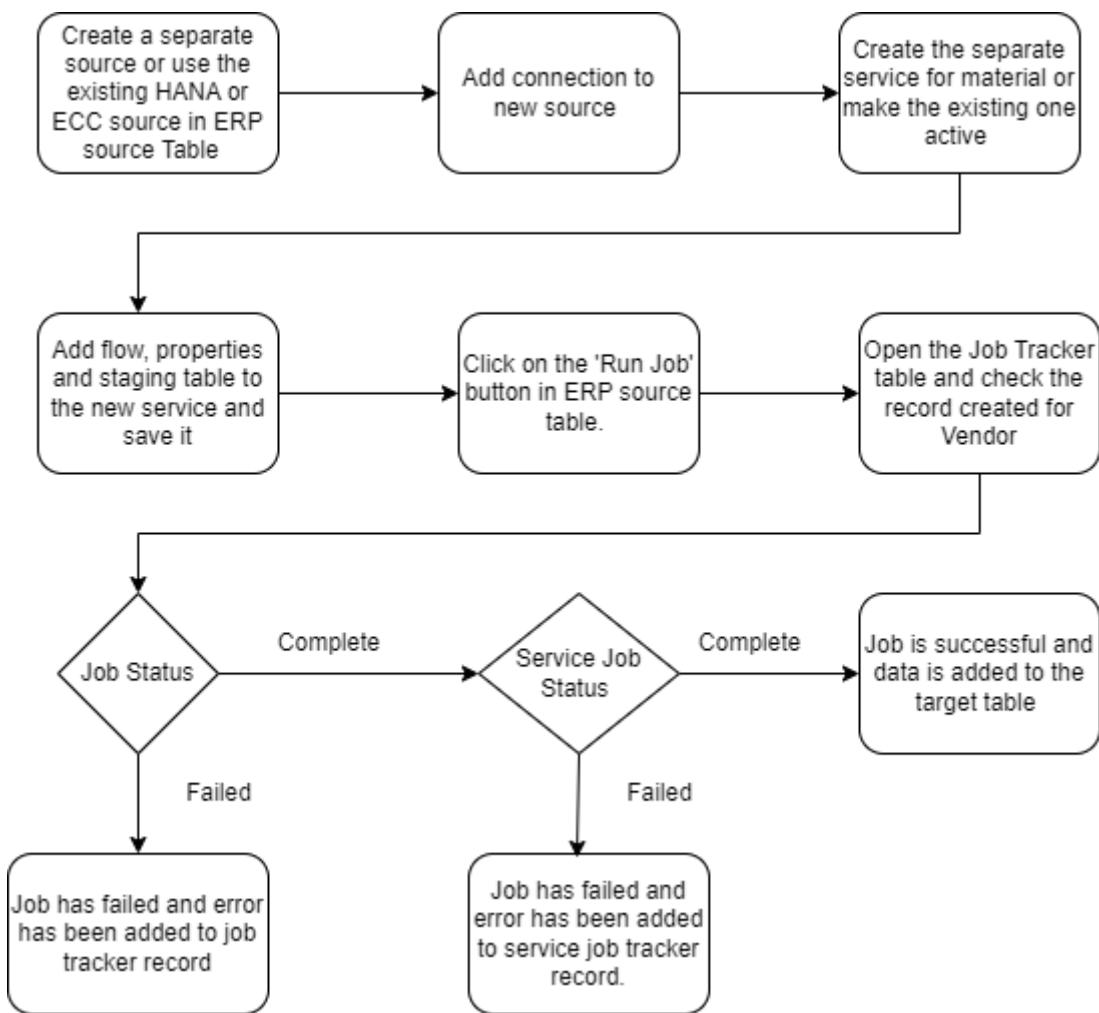
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query Parameters used in vendor data

Use vendor data as query parameter to filter vendor terms data.

Query Parameters used to filter Vendors data are:

- low – Company Code value
- high – Company Code value
- Sign – I is Include and E is Exclude (if range is given as 1000 high and 2000 as low and sign is given as I then it gets data from 1000 to 2000, if we give E then it means other than 1000 to 2000 – rest all data will be fetched)
- Option – EQ is Equal and BT is Between
- full_pull – True or False
- row_count – To determine the batch size – for example if there are 1000 material records and user wants to process in a batch of 10 then they need to give the row count as 100.

Integration Service - Vendor Master

Name | name: Vendor Master

Application | sys_scope: Primary Data Integration with SAP

ERP source configuration | erp_source_configuration: SAP ECC ERP

Import set tables | import_set_tables: sn_sap_data_int_supplier_stg

Flow | flow: Fetch Suppliers from SAP ECC

Order | order: 100

Properties | properties:

- low: 1000
- high: Value
- sign: I
- option: EQ
- full_pull: True
- row_count: 300

Active | active:

Update | Delete

Purchase org

Integrate the Purchase Org and include details on how to pull the primary information of the Purchase Org from SAP.

Important considerations for purchase org

Integrate the Purchase Org and include details on how to pull the primary information of the Purchase Org from SAP.

There is no specific important consideration for Purchase Org.

Mapping of the purchase entity attributes

Map the attributes fetched from SAP to the corresponding fields in the ServiceNow Purchasing Entity table.

Data Map for Purchase Organizations

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|--------------|-----------|--|--------------|--------------------------|
| T024E | BUKRS | Company Code | legal_entity | sn_fin_purchasing_entity |
| NA | NA | NA | erp_source | sn_fin_purchasing_entity |
| T024E | EKORG | Purchasing Organisation | erp_number | sn_fin_purchasing_entity |
| T024E | EKOTX | Description of Purchasing Organisation | name | sn_fin_purchasing_entity |

Interface Table and Attributes for purchase organization

Fetch the attributes for Purchase Organizations from SAP and populate in the *sn_sap_data_int_purc_org_stg* staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Associated Transform purchase organization

Transform Purchase Organizations is used to map the Purchase Organizations table to the ServiceNow Product Model.

The screenshot shows the 'Table Transform Map - Transform Pu...' screen in ServiceNow. At the top, it displays the application as 'Primary Data Integration with SAP' and the creation date as '2022-10-12 06:54:41'. The 'Name' is set to 'Transform Purchase Organizations'. The 'Source table' is 'Purchase Organizations [sn_sap_data_int_purc_org_stg]' and the 'Target table' is 'Purchasing Entity [sn_fin_purchasing_entity]'. The 'Order' is set to 100. Various checkboxes are checked, such as 'Run business rules', 'Enforce mandatory fields (No)', and 'Run script'. The 'Field Maps (4)' tab is selected, showing four mappings:

| Source field | Target field | Coalesce |
|--|--------------|----------|
| company_code | legal_entity | false |
| erp_source | erp_source | false |
| purchasing_organisation | erp_number | true |
| description_of_purchasing_organisation | name | false |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

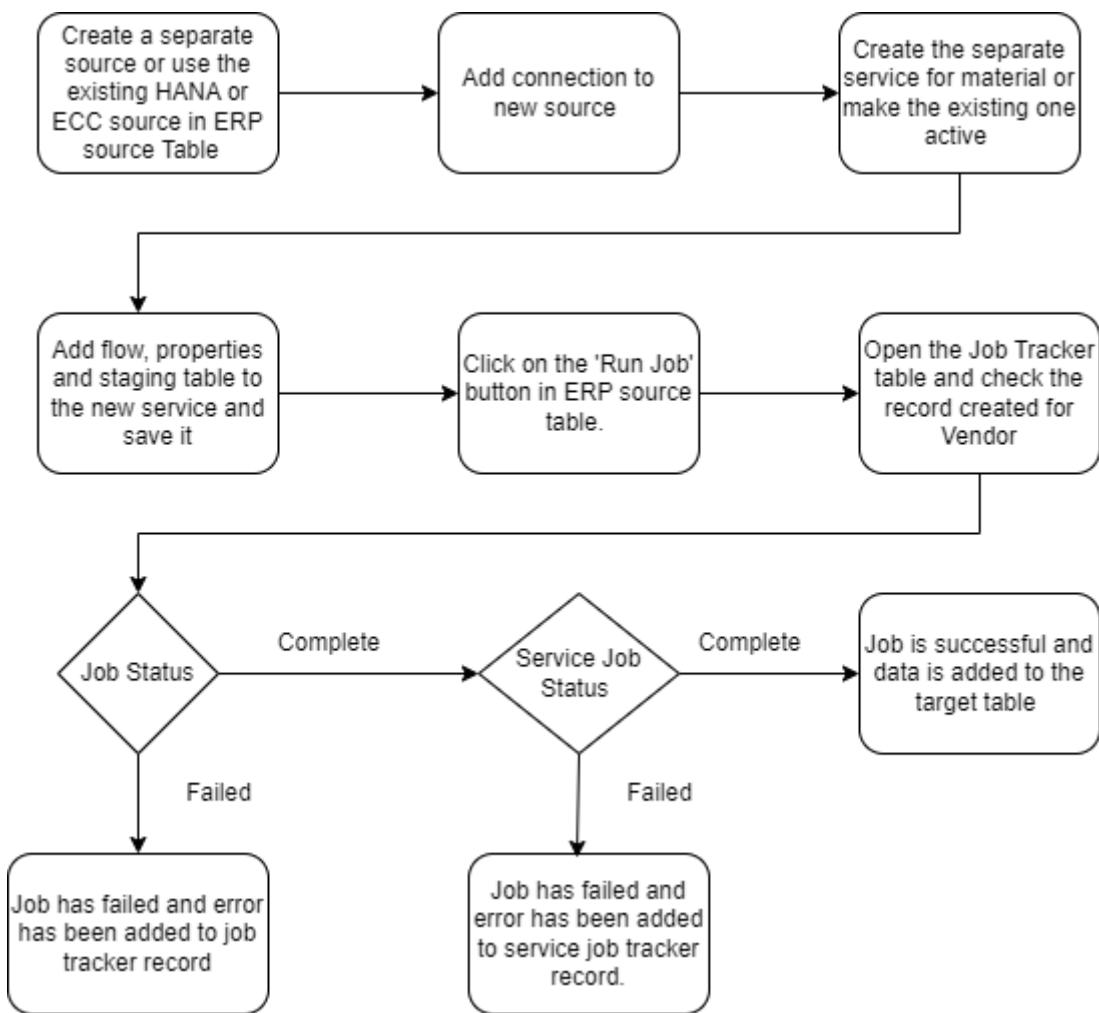
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query parameters used to filter purchase organization

Use **EXORG** – (purchasing org is represented by **EKORG** in SAP) as query parameter to filter Purchase Org data.

Query Parameter used to filter Purchase Org is **EXORG – (purchasing org is represented by EKORG in SAP)**

The screenshot shows the configuration for an integration service named "Purchasing Organisation". Key settings include:

- Name / name:** Purchasing Organisation
- ERP source configuration / erp_source_configuration:** SAP ECC ERP
- Flow / flow:** Fetch Purchase Organizations from [Search] [Copy]
- Active / active:** checked
- Properties / properties:** query
- Application / sys_scope:** Primary Data Integration with SAP
- Import set tables / import_set_tables:** sn_sap_data_int_purc_org_stg
- Order / order:** 70

At the bottom, there are "Update" and "Delete" buttons.

Cost center

Integrate the Cost Center and include details on how to pull the primary information of the Cost Center from SAP.

Important considerations for cost center

No specific important considerations for Cost Center entity.

Mapping of attributes in cost center

Map the attributes fetched from SAP to the corresponding fields in the ServiceNow Cost Center table.

Refer the table below for more details.

Data Map for Cost Centers

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|-----------|------------|--|-------------------|-----------------|
| CSKT | KTEXT | name | name | cmn_cost_center |
| CSKT | DATAB | Valid-From Date | valid_from | cmn_cost_center |
| CSKT | DATBI | Valid To Date | valid_to | cmn_cost_center |
| CSKT | KOKRS | Controlling Area | controlling_area | cmn_cost_center |
| CSKT | KOSARS | Cost Center Category | cost_center_type | cmn_cost_center |
| CSKT | BUKRS | Company Code | legal_entity | cmn_cost_center |
| CSKT | KOSTL | Cost Center | code | cmn_cost_center |
| CSKT | VERAK_USER | User Responsible | manager | cmn_cost_center |
| CSKT | BKZKP | Lock Indicator for Actual Primary Postings | available_for_use | cmn_cost_center |
| CSKT | PRCTR | Profit Center | profit_center | cmn_cost_center |

Interface table and Cost Center attributes

Fetch the attributes for Cost Centers from SAP and populate in the `sn_sap_data_int_cc_stg` staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Associated transform cost center

Transform Cost Centers is used to map the Cost Centers table to the ServiceNow Product Model.

The screenshot shows the 'Table Transform Map - Transform Cost Centers' page in ServiceNow. At the top, it displays the application name 'Primary Data Integration with SAP'. Below this, there are several configuration fields:

- Name:** Transform Cost Centers
- Application:** Primary Data Integration with SAP
- Created:** 2022-10-17 22:42:08
- Source table:** Cost Centers [sn_sap_data_int_cc_stg]
- Target table:** Cost Center [cmn_cost_center]
- Order:** 100
- Active:** checked
- Run business rules:** checked
- Enforce mandatory fields:** No
- Run script:** checked
- Copy empty fields:** checked
- Create new record on empty coalesce fields:** checked

Below these settings is a table titled 'Field Maps (10)'. This table maps source fields from the SAP table to target fields in the ServiceNow table. The columns are 'Source field', 'Target field', and 'Coalesce'. The data in the table is as follows:

| Source field | Target field | Coalesce |
|--|-------------------|----------|
| valid_from_date | valid_from | false |
| user_responsible | manager | false |
| cost_center_category | cost_center_type | false |
| controlling_area | controlling_area | true |
| company_code | legal_entity | false |
| cost_center | code | true |
| name | name | false |
| lock_indicator_for_actual_primary_postings | available_for_use | false |
| valid_to_date | valid_to | true |
| profit_center | profit_center | false |

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

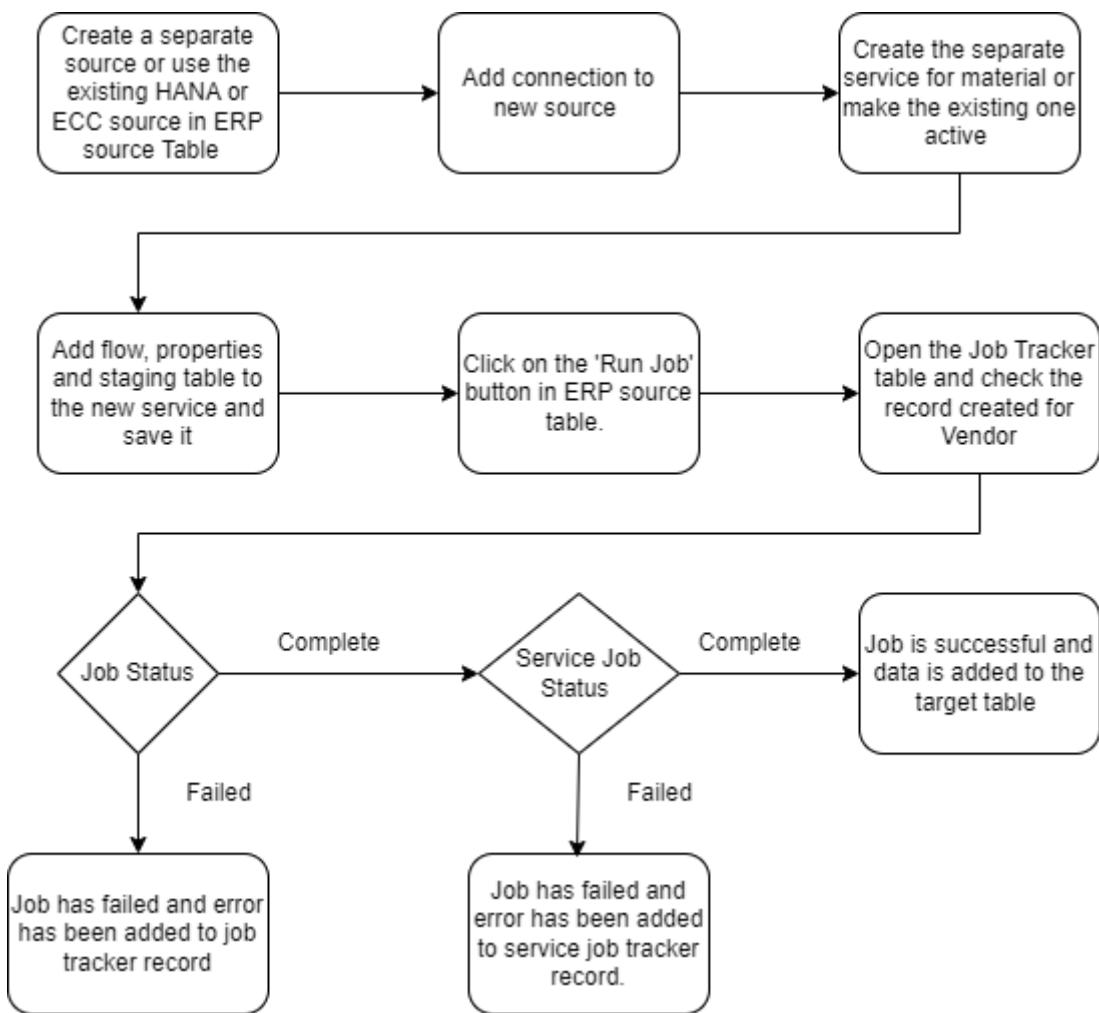
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query parameters in cost center

Query Parameter used to filter Cost Centers data is **WAERS**.

The screenshot shows the ServiceNow interface for an integration service named "Integration Service - Currency". The configuration includes:

- Name | name:** Currency
- ERP source configuration | erp_source_configuration:** SAPECC ERP
- Flow | flow:** Fetch Currencies from SAP ECC
- Active | active:** checked
- Properties | properties:** query (containing "WAERS = 'USD'")
- Application | sys_scope:** Primary Data Integration with SAP
- Import set tables | import_set_tables:** sn_sap_data_int_currency_stg
- Order | order:** 10

Purchase group

Integrate the Purchase Group and include details on how to pull the primary information of the Purchase Group from SAP.

Important considerations of purchase group

Integrate the Purchase Group and include details on how to pull the primary information of the Purchase Group from SAP.

No specific important considerations for Purchase Group.

Mapping attributes for Purchase Group

Map the attributes fetched from SAP to the corresponding fields in the ServiceNow Department table.

Refer the table below for more details.

Attribute fields

| SAP Table | SAP Field | SAP Description | SNOW Field | SNOW Table |
|-------------|-----------|---------------------------------|-------------|----------------|
| T024 | EKGRP | Purchasing Group | id | cmn_department |
| T024 | EKNAM | Description of purchasing group | description | cmn_department |

Interface table and attributes of purchase group

Fetch the attributes for Purchase Group from SAP and populate in the *Transform Purchase Group* staging table. Customers can use the no code UI and configure the transformation and mapping of the desired attributes.

(Find all the attributes of staging table in the appendix section of this document)

Associated transform purchase group

Transform Purchase Group is used to map the Purchase Group table to the ServiceNow Product Model.

| Field Maps (2) | | Transform Scripts | | |
|--------------------------|---------------------------------|-------------------|-----------------------------|--|
| | | | Actions on selected rows... | |
| <input type="checkbox"/> | Source field | Target field | Coalesce | |
| | description_of_purchasing_group | description | false | |
| | purchasing_group | id | true | |

1 to 2 of 2

Retrieve Primary Data from SAP

Retrieve primary data from SAP into the ServiceNow primary data tables.

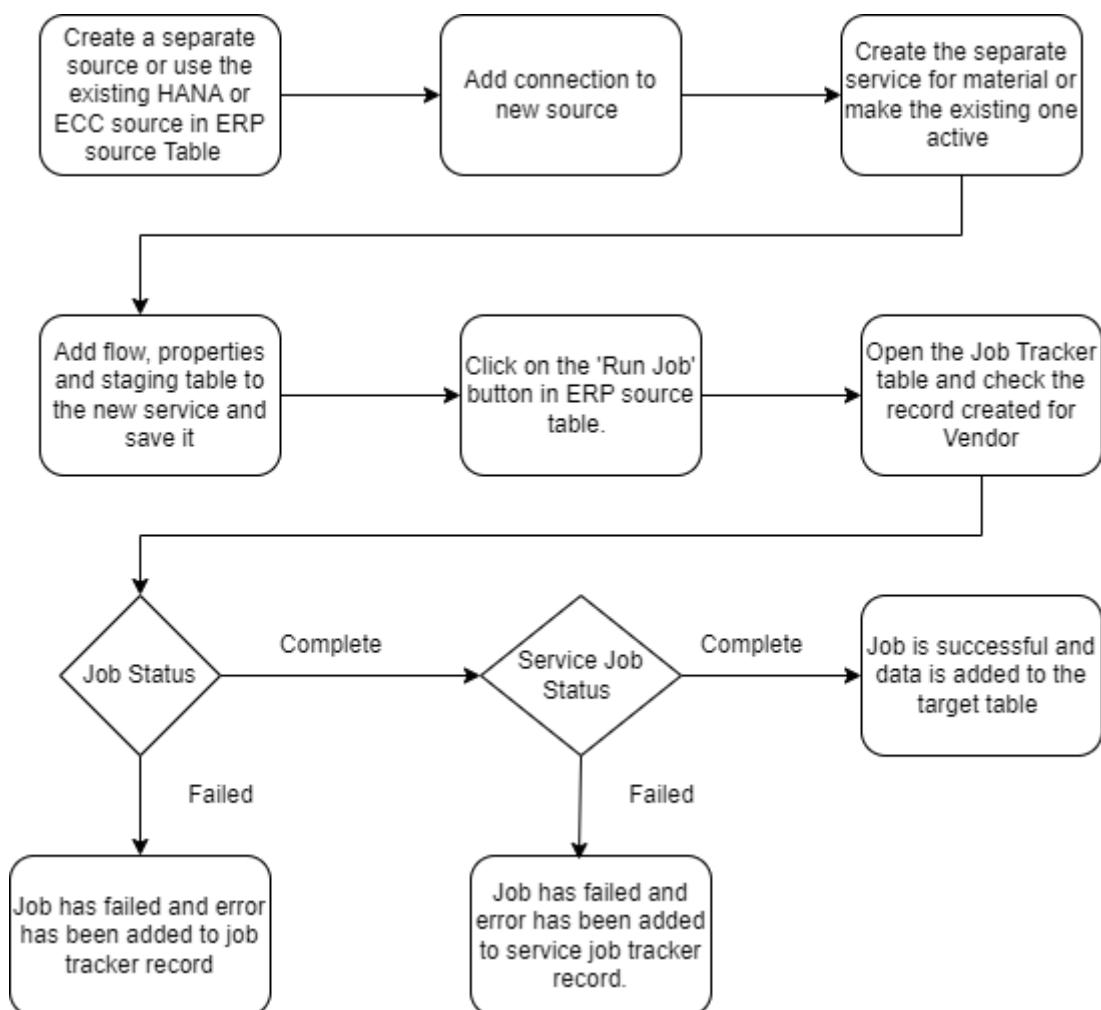
Before you begin

Role required: admin

Procedure

1. Go to ERP Source Page.
2. Navigate to SAP ECC.
3. Enter the query parameters.
4. Click **Run Job** button to run the service.
5. Navigate to the Job Tracker table and verify if the record is created for the service job run. If the job fails, the error is listed in the service job tracker or job tracker record.

The following diagram illustrates the process of retrieving the primary data from SAP.



Query parameters used in purchase group

Query Parameter used to filter Purchase Group data is EKGRP.

The screenshot shows the ServiceNow interface for configuring an integration service. The title bar says "Integration Service - Purchase Group". The main area displays various configuration settings:

- Name:** Purchase Group
- ERP source configuration:** SAP ECC ERP
- Flow:** Fetch Purchasing Groups from SAP EC
- Active:** checked
- Properties:** query
- EKGRP = '001'**
- Application:** Primary Data Integration with SAP
- Import set tables:** sn_sap_data_int_purc_grp_stg
- Order:** 50

A note at the top states: "This record is in the Primary Data Integration with SAP application, but Global is the current application. To edit this record click [here](#)".

Transaction Integration

Transactions are performed upon retrieving the data. You can integrate the transactions that provides seamless experience for procurement.

Go over the subsequent sections to make your procurement experience seamless.

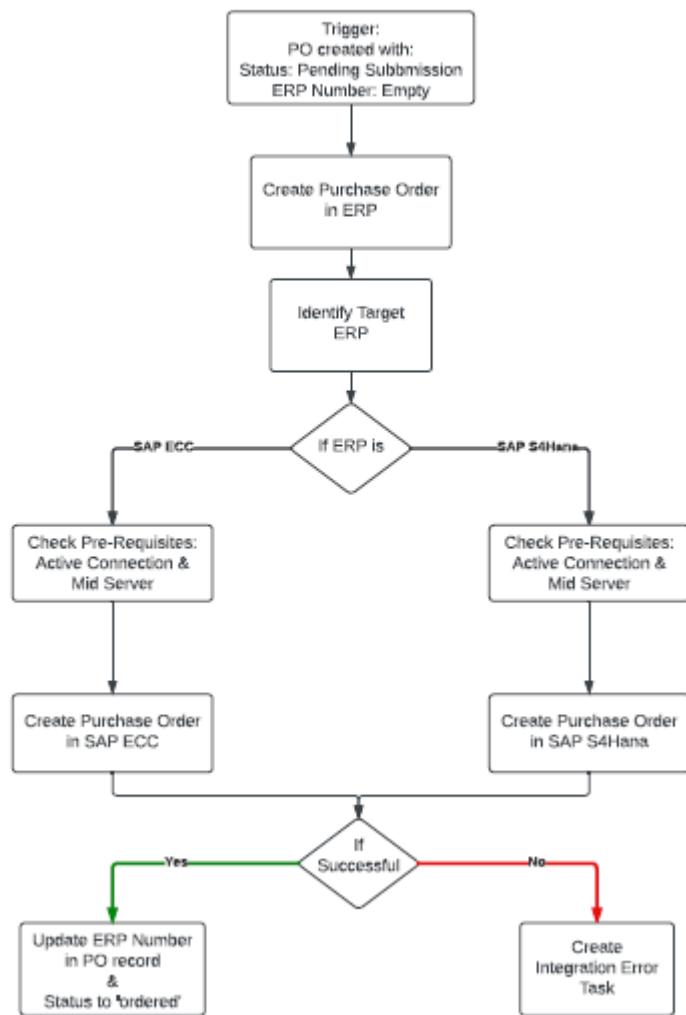
Learn how to:

- Create Purchase Order
- Generate Receipts
- Create Invoice
- Create Vendor/ Supplier

Purchase order

A purchase order is a binding contract between a buyer and a supplier that authorizes a purchasing transaction. It contains the descriptions, quantities, prices, applicable discounts, payment terms, delivery dates, and other associated terms and conditions with the supplier.

Create Purchase Order Transaction Flow



Create purchase order

You can create a purchase order in Sourcing and Procurement Operations.

Follow these steps below to create a PO.

1. Login to **SPO**. Impersonate the user and navigate to **Shopping Hub**.
2. Select the preferred **Delivery location**, **Supplier**, and the **Products available** with the selected Supplier.
3. Select a Goods Product and add it to the cart. Similarly, you can add a product of type service to the cart.
4. Now, Open the cart, validate the quantity of products and the total price, and then click on checkout.
5. Select a **Delivery location**, **Delivery date** and **Payment method**. Now, provide a reason for the Purchase and click **Complete checkout**.
6. Next, a **PR-Purchase Requisition** is created for the same. To see this created PR, navigate to **Procurement Workspace** and select Requisitions option.

Requisitions

| Number | Assigned to | Supplier | Requisition type | Order type | State | Total amount | Business owner |
|-----------|-------------|-------------|------------------|------------|--------------|--------------|----------------|
| PR0001066 | (empty) | SAPTest1085 | Net New | Standard | Final Review | \$10.00 | naveen shop |

7.

8. Open the PR, you can see one entry against the selected PR in the Purchase Line in the **Details** tab assure the **State** dropdown value appears to be **Final Review**. Now, click on **Create Purchase Order** button present on the top-right corner of the screen.

New \$10.00 purchase from SAPTest1085

| Number | State | Supplier product | Product type | Purchased quantity | Total line amount | Expected delivery date | Start date | End date | Recipient |
|------------|----------|------------------|--------------|--------------------|-------------------|------------------------|------------|----------|-------------|
| PRL0001107 | Approved | Pro_100-510 | Good | 1 | \$10.00 | 2023-06-29 | | | naveen shop |

9.

New \$10.00 purchase from SAPTest1085

Create Purchase Order

Purchase Requisition

| | |
|--|-------------------------------|
| Number PR0001066 | State Final Review |
| Requisition type Net New | Purchase PRC0001054 |
| Assigned to naveen shop | Negotiation Purchase order |
| Business owner naveen shop | |
| Submitted by naveen shop | |
| Short description New \$10.00 purchase from SAPTest1085 | |

10. **Purchase Order** is created along with a **receipt task** entry in the **Purchasing Tasks** tab. You can now see an **ERP Number** and PO **Status** is set to Ordered in the **Details** tab.

Purchase Order

| | |
|------------|----------------------|
| Number | Status |
| PO0001058 | Ordered |
| ERP number | Purchase requisition |
| 4500041222 | PRO001066 |

Compose

Type your Comments here

Attachments

No Attachments Available

11.

| Number | Assigned to | State | Short description | Due date | Task type | Sub type |
|-------------|-------------|-------|--|----------|-----------|--------------|
| RTSK0001048 | naveen shop | Open | Confirm receipt of deliveries from SAPTest1085 | | | Receipt Task |

Purchasing Tasks

Last refreshed just now:

Attachments

No Attachments Available

12. Now, Login to SAP and validate the PO generated using the ERP Number

Standard PO 4500041222 Created by admin

| S... | Itr | A | Material | Short Text | PO Quantity | OUn | C Deliv. Date | Net Price | Curr... | Per | O... | Matl Group | Plnt | Handover Lo... | Stor. Location |
|---|-----|---|----------|--------------|-------------|-----|---------------|-----------|---------|-----|------|---------------|------------------|----------------|----------------|
| <input type="checkbox"/> | 10 | K | 100-510 | Ball bearing | 1 | PC | D 06/29/2023 | 10.00 | USD | 1 | PC | Metal Proce.. | Heathrow / Hayes | | |
| <input type="button" value="Add Planning"/> | | | | | | | | | | | | | | | |

13. Item Detail

Standard PO 4500041222 Created by admin

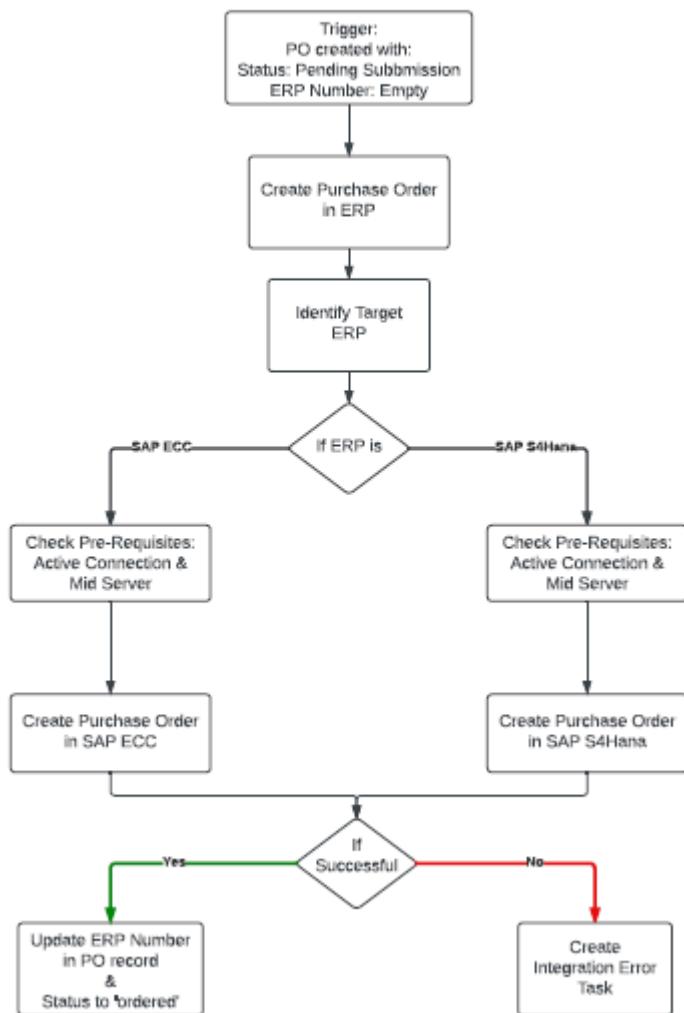
| Item | [10] 100-510 , Ball bearing | ^ | | | | | | | | |
|-------------------------------------|-------------------------------|-------------------|---------------------------|---------|------------|--------------------|----------|-------|------------------|-----|
| Material Data | Quantities/Weights | Delivery Schedule | Delivery | Invoice | Conditions | Account Assignment | Call-Off | Texts | Delivery Address | ... |
| <input type="button"/> AccAssCat | Cost center | Distribution | Single account assignment | | CoCode | BestRun UK | | | | |
| Unloading Point | | Recipient | | | | | | | | |
| GL Account | 400000 | | | | | | | | | |
| Business Area | 3000 | | | | | | | | | |
| CO Area | 1000 | | | | | | | | | |
| Cost Center | 2-3100 | | | | | | | | | |
| Profit Center | 1000 | | | | | | | | | |
| Earmarked funds | 0 | | | | | | | | | |
| <input type="button" value="More"/> | | | | | | | | | | |

14.

Update purchase order

You can update an existing purchase order.

Create Purchase Order
Transaction Flow



Do the following to update an existing PO.

1. Log in to SPO. Impersonate the user and navigate to Shopping Hub.
2. Go to User Profile. Select **My Purchases** from the list that opens.
3. You can now see a list of submitted POs. Select the PO you wish to update.

The screenshot shows the ServiceNow interface for managing purchases. At the top, there's a navigation bar with links for 'Categories', 'Suppliers', 'Select location', 'Search' (with a magnifying glass icon), a shopping cart icon, and a 'Don't see what you need?' button. Below the navigation is a breadcrumb trail: 'Home > My purchases'. The main title 'My purchases' is centered above a search bar with placeholder text 'Enter keywords or purchase number' and a search icon. To the right of the search bar is a 'Filter by Open' dropdown. Below the search area are two buttons: 'View by purchase (30)' and 'View by line (45)'. A dropdown menu for sorting is shown with 'Sort by Date submitted'. The main content area displays a list of purchase orders. One specific order, 'PO0001058 placed on 2023-06-28 with SAPTest1085', is highlighted with a red box. This order details are as follows:

- Supplier:** SAPTest1085
- Purchase Order Number:** PO0001058 (1 purchase line)
- Total amount:** \$10.00
- Date submitted:** 2023-06-28
- Delivery:** 2023-06-29
- Payment:** (status not specified)

4. Next page shows you the details of the PO selected. It also gives information about the constituent Purchase Lines. Click on the **Edit** button to update the PO.

This screenshot shows the detailed view of the purchase order from the previous step. The top navigation and breadcrumb trail are identical. The main content starts with a sidebar on the left containing links for 'Purchase', 'To-dos', 'Activity', and 'Attachments'. The main panel displays the purchase details for 'PO0001058 placed on 2023-06-28 with SAPTest1085'. Key details shown include:

- Supplier:** SAPTest1085
- Purchase Order Number:** PO0001058 (1 purchase line)
- Total amount:** \$10.00
- Date submitted:** 2023-06-28
- Delivery:** 2023-06-29
- Remaining balance:** \$10.00

Below this, a section titled 'Purchase lines (1)' is highlighted with a red box. It shows a single line item:

- Estimated delivery:** 2023-06-29
- Supplier:** SAPTest1085
- Item:** Pro_100-510
- Unit:** Piece
- Total line amount:** \$10.00

5. The subsequent page showcases a list of Purchase Lines.

This screenshot shows the 'Edit a purchase' page for the selected purchase order. The top navigation and breadcrumb trail are consistent. The main content is titled 'Edit a purchase' and includes a note: 'The questions below are pre-populated with the existing data. For any questions or updates, go to your [purchase details](#) activity feed and send a comment to @primarycontact.' Below this, it says 'Total items to edit: 1' with a link to edit. The central part of the page is a table for managing purchase lines:

| ShoppingHub: Add a line | | Add | Remove | | | |
|-------------------------------------|------------|--------------------|--------|-------------|------------------|---------------|
| □ | PRL/POL | Would you like to: | Edited | Supplier | Supplier Product | Is this a quo |
| <input checked="" type="checkbox"/> | POL0001092 | Browse catalog | No | SAPTest1085 | Pro_100-600 | Good |

At the bottom of the table, there are buttons for 'Attachments + Add File' and 'Submit request'.

6. Update an individual purchase line by doing the following:

- a. Refer the above image. Click on the preview icon present to the left of the Purchase Line. A Preview window opens.
- b. Here, change the product quantity as per your requirement.

POL0001092

Supplier
SAPTest1085

Supplier Product *Pro_100-600

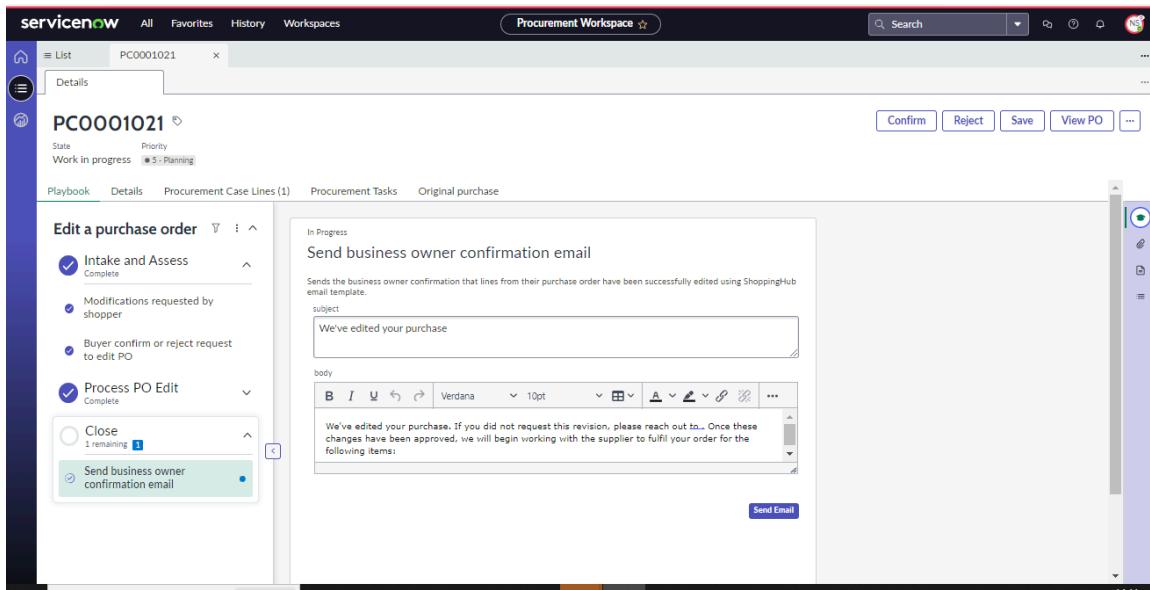
Quantity *1

Where do you think you'll have this delivered? ⓘ
To a saved location

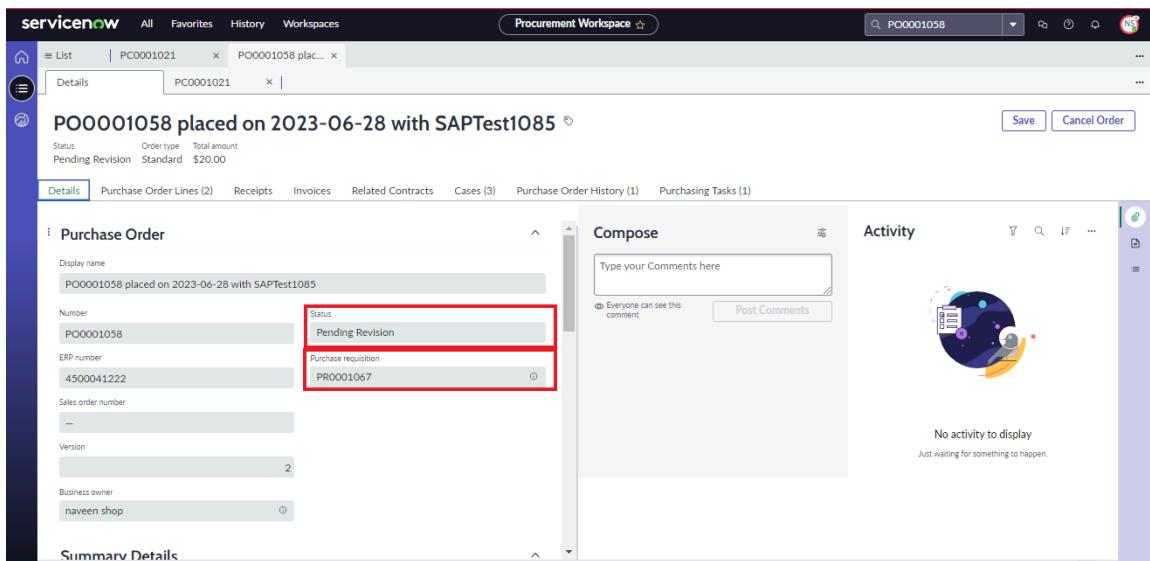
Address *
3 Nobel Drive, Heathrow, Hayes, LO UB3 5EY

Cancel Update

- c. Click **Update** to save your changes.
- d. Enable the check box present to the left of the Purchase Line grid and click on **Submit Request**.
- e. Once the request is submitted, a case is created in Procurement Workspace.
- f. So, go to the Procurement Workspace, open the respective Case, and select it to view the details.
- g. In the subsequent window that opens, give conformation to the update request raised by the Supplier.
- h. Click **Send Email** to send the automated confirmation email to the supplier.



- i. Now, go to List Menu -> All Purchase Orders and select the updated PO from the list.
- j. In the details tab the PO's status should be Pending Revision.



- k. Now, click on the preview icon in the Purchase Requisition textbox. A **Proposed revision** window opens. Here, navigate to **Related Purchase Requisition** tab. Here you can see the requisition to be in the state of "Final Review".
- l. Next, go to the Details tab where once again you can see the State to be in "**Final Review**".
- m. Click **Update Purchase Order**.

Proposed revision to PO0001058 for SAPTest1085

| Number | Assigned to | Supplier | Requisition type | Order type | State | Total amount | Business owner |
|-----------|-------------|-------------|------------------|------------|-----------------|--------------|----------------|
| PR0001066 | (empty) | SAPTest1085 | Net New | Standard | Closed Complete | \$10.00 | naveen shop |
| PR0001069 | (empty) | SAPTest1085 | Revision | Standard | Final Review | \$40.00 | naveen shop |

Proposed revision to PO0001058 for SAPTest1085

Purchase Requisition

| | | | |
|-------------------|--|----------------|---------------------------------------|
| Number | PR0001069 | State | Final Review |
| Requisition type | | Purchase | PRC0001054 |
| Revision | | | |
| Assigned to | | Negotiation | |
| Business owner | naveen shop | Purchase order | PO0001058 placed on 2023-06-28 with f |
| Submitted by | naveen shop | | |
| Short description | Proposed revision to PO0001058 for SAPTest1085 | | |

Compose

Activity

- System Field changes • 2023-06-30 01:37:50 State Final Review was Awaiting Task Completion
- System Field changes • 2023-06-30 01:37:49 State Awaiting Task Completion was Pending Approval
- System Field changes • 2023-06-30 01:37:47 State Pending Approval was Pending Review
- System Field changes • 2023-06-30 01:37:45 State Pending Review

- n. A message reading "Purchase Order updated successfully" appears on the screen. Go back to the Purchase Order details tab. Here you will find the status of PO changing from **Pending Submission** to **Ordered**.

PO0001058 placed on 2023-06-28 with SAPTest1085

Purchase Order

| | | | |
|--------------------|---|--------------------------------------|---|
| Display name | PO0001058 placed on 2023-06-28 with SAPTest1085 | | |
| Number | PO0001058 | Status | Ordered |
| ERP number | 4500041222 | System has modified this field value | system has modified this field value |
| Sales order number | — | Purchase requisition | PR0001069 |
| Version | 3 | System has modified this field value | naveen_shop has modified this field value |
| Business owner | naveen shop | | |

Compose

Activity

No activity to display
Just waiting for something to happen.

- o. Also, The Purchase Requisition state changes to **Closed Complete**. Same goes with the state of the associated case.

The screenshot shows the ServiceNow Procurement Workspace. A purchase order has been placed with the number PO0001058, dated 2023-06-28, by user SAPTest1085. The status is Pending Revision. There are three cases associated with this purchase order:

| Number | Case type | Assignment group | Assigned to | State | Created |
|-----------|-----------------|------------------|-------------|------------------|---------------------|
| PC0001018 | Edit a purchase | (empty) | (empty) | Closed Completed | 2023-06-29 02:01:35 |
| PC0001019 | Edit a purchase | (empty) | (empty) | Closed Completed | 2023-06-29 03:19:12 |
| PC0001021 | Edit a purchase | (empty) | (empty) | Closed Completed | 2023-06-30 01:28:10 |

The screenshot shows the ServiceNow Purchase Requisition screen for purchase order PR0001067. The state is Closed Complete. The requisition details include:

- Number: PR0001067
- Requisition type: Purchase
- Revision: PRC0001054
- Assigned to: —
- Business owner: naveen shop
- Submitted by: naveen shop
- Short description: Proposed revision to PO0001058 for SAPTest1085

On the right, there is an activity log showing system changes:

- System: Field changes • 2023-06-29 02:22:31 State: Closed Complete was Awaiting Task Completion
- System: Field changes • 2023-06-29 02:22:00 State: Awaiting Task Completion was Pending Submission
- System Administrator: Field changes • 2023-06-29 02:21:58 State: Pending Submission was Final Review
- System: —

p. Validate the PO Update in SAP using the ERP Number.

The screenshot shows the SAP Standard PO screen for document number 4500041222. The vendor is 338 SAPTest1085. The document date is 06/28/2023. The table shows the following purchase order lines:

| S... | Itm | A | I | Material | Short Text | PO Quantity | OUn | C | Deliv. Date | Net Price | Curr... | Per | O... | Matl Group | Plnt | Hanc |
|------|-----|---|---|----------|--------------|-------------|-----|---|-------------|-----------|---------|-----|------|---------------|------------------|------|
| | 10 | K | | 100-510 | Ball bearing | 1 | PC | D | 06/29/2023 | 10.00 | USD | 1 | PC | Metal Proce.. | Heathrow / Hayes | |
| | 20 | K | | 100-600 | Support base | 2 | PC | D | 07/01/2023 | 20.00 | USD | 1 | PC | Metal Proce.. | Heathrow / Hayes | |
| | 30 | K | | 100-600 | Support base | 1 | PC | D | 07/01/2023 | 20.00 | USD | 1 | PC | Metal Proce.. | Heathrow / Hayes | |

7. Add a new purchase order line withing the same PO by doing the following:

- a. Click on Add button to add a product to the existing PO.

The screenshot shows the 'Edit a purchase' page in ServiceNow. At the top, there's a navigation bar with 'Search', a shopping cart icon, and a link to 'Don't see what you need?'. Below the navigation, the URL 'Home > My purchases > PO0001058' is visible. The main title is 'Edit a purchase' with a subtitle: 'The questions below are pre-populated with the existing data. For any questions or updates, go to your [purchase details](#) activity feed and send a comment to @primarycontact.' A note says 'Total items to edit: 1'. Below this, a table lists a single purchase order line: 'PRL/POL' (checkboxes), 'Would you like to:' (radio buttons for 'Browse catalog' and 'Edit'), 'Supplier' (SAPTest1085), 'Supplier Product' (Pro_100-600), and 'Is this a quo' (Good). There are 'Add' and 'Remove' buttons at the top right of the table. Below the table, there's an 'Attachments' section with a '+ Add File' button. At the bottom right is a 'Submit request' button.

- b. In the Add window enter product details.

The screenshot shows the 'Add' dialog box. It has a title 'Add' and a close button 'X'. Inside, there's a section for 'Would you like to:' with a dropdown menu set to 'Browse catalog'. Below it is a 'Supplier' section with 'SAPTest1085'. The main area contains several input fields: 'Supplier Product *' (Pro_100-600), 'Quantity *' (1), and 'Expected Delivery Date *' (2023-07-01). These three fields are all enclosed in a large red rectangular box. At the bottom, there's a question 'Where do you think you'll have this delivered?' followed by a text input field. At the very bottom right are two buttons: 'Cancel' and 'Add', with 'Add' also highlighted with a red box.

- c. A **Purchase Order Line** gets added on the Edit a Purchase page. Enable the checkbox against this line and click on Submit Request button.

The screenshot shows the 'Edit a purchase' screen in ServiceNow. At the top, there are navigation links for 'Categories', 'Suppliers', 'Select location', and a button for 'Don't see what you need?'. Below the header, the breadcrumb trail shows 'Home > My purchases > PO0001058'. The main title is 'Edit a purchase'. A note states: 'The questions below are pre-populated with the existing data. For any questions or updates, go to your [purchase details](#) activity feed and send a comment to @primarycontact.' Below this, it says 'Total items to edit: 1'. The central part of the screen is a table titled 'ShoppingHub: Add a line' with columns: PRL/POL, Would you like to: Edited, Supplier, Supplier Product, and Is this a quo. One row is visible, showing 'PRL/POL' as 'POL0001091', 'Would you like to:' as 'No', 'Supplier' as 'SAPTest1085', 'Supplier Product' as 'Pro_100-510', and 'Is this a quo' as 'Good'. There are 'Add' and 'Remove' buttons at the top of the table. Below the table, there's a section for 'Attachments' with a '+ Add File' button. At the bottom right is a 'Submit request' button.

- d. Once the request is submitted, a **case** will be created in **Procurement Workspace**.
- e. So, go to the Procurement Workspace, open the respective Case, and select it to view the details.
- f. In the subsequent window that opens, give conformation to the update request raised by the Supplier.
- g. Click on **Send Email** button to send the automated confirmation Email to the Supplier.
- h. Now, select the edited PO from the list that opens after navigating through List menu->All Purchase Orders
- i. In the details tab the PO's status should be **Pending Revision**.
- j. Now, click on the preview icon in the Purchase Requisition textbox. A **Proposed revision** window opens. Here, the state of PR is in Final Review.
- k. Navigate to **Related Purchase Requisition** tab. Here you can see the requisition to be in the state of "Final Review".

The screenshot shows the 'Proposed revision to PO0001058 for SAPTest1085' page. At the top, there are tabs for 'List' (selected), 'Details' (PR0001067), and other options. The main title is 'Proposed revision to PO0001058 for SAPTest1085'. Below the title, there are fields for 'State' (set to 'Final Review'), 'Order type' (Standard), 'Total amount' (\$30.00), and 'Priority' (5 - Planning). The 'Purchase Requisition' section shows details like Number (PR0001067), Requisition type (Revision), and Purchase number (PRC0001054). The 'Compose' section has a 'Comments' tab where users can type comments. The 'Activity' section shows two system-level field change events. The 'Agent Assist' sidebar shows a cartoon character and a search bar for 'Proposed revision to PO0001058 for SAPTest1085'.

- l. Next, go to the Details tab and click on "**Update Purchase Order**" button.
- m. A message reading "Purchase Order updated successfully" appears on the screen. Go back to the Purchase Order details tab. Here you will find the status of PO changing from **Pending Submission** to **Ordered**.
- n. Also, The Purchase Requisition state changes to **Closed Complete**. Same goes with the state of the associated case.

Purchase Order Details

Purchase Order

- Status: Ordered (highlighted with a red box)
- Number: PO0001058
- ERP number: 4500041222
- Sales order number: PRO001067
- Version: 2
- Business owner: naveen shop

Compose

Type your Comments here

Activity

Attachments

No Attachments Available

- o. Validate the PO update in SAP using the ERP Number.

Standard PO 4500041222 Created by admin

Header

| S... | Itm | A | Material | Short Text | PO Quantity | OUn | C | Deliv. Date | Net Price | Curr... | Per | O... | Matl Group | Plnt | Hanc |
|------|-----|---|----------|--------------|-------------|-----|---|-------------|-----------|---------|-----|------|----------------|------------------|------|
| | 10 | K | 100-510 | Ball bearing | 1 | PC | D | 06/29/2023 | 10.00 | USD | 1 | PC | Metal Proce... | Heathrow / Hayes | |
| | 20 | K | 100-600 | Support base | 1 | PC | D | 07/01/2023 | 20.00 | USD | 1 | PC | Metal Proce... | Heathrow / Hayes | |

Addl Planning

Item Detail

Standard PO 4500041222 Created by admin

Header

Item Overview

Item [20] 100-600 , Support base

Material Data Quantities/Weights Delivery Schedule Delivery Invoice Conditions Account Assignment Call-Off Texts Delivery Address > ...

| Unloading Point | AccAssCat | Cost center | Distribution | Single account assignment | CoCode | BestRun UK |
|-----------------|-----------|-------------|--------------|---------------------------|--------|------------|
| G/L Account | 400000 | | | | | |
| Business Area | 3000 | | | | | |
| CO Area | 1000 | | | | | |
| Cost Center | 2-3100 | | | | | |
| Profit Center | 1000 | | | | | |
| Earmarked funds | 0 | | | | | |

More

- 8. Delete a product or cancel a purchase order by doing the following:

- a. Select the Purchase Line you want to delete Click on Remove button.

The screenshot shows the 'Edit a purchase' screen. At the top, there's a search bar and a 'Don't see what you need?' link. Below the header, it says 'Categories', 'Suppliers', and 'Select location'. The main area is titled 'Edit a purchase' with a note about pre-populated data. It shows 'Total items to edit: 2'. A table lists two purchase lines:

| | PRL/POL | Would you like to: | Edited | Supplier | Supplier Product | Is this a quo |
|-------------------------------------|------------|--------------------|--------|-------------|------------------|---------------|
| <input checked="" type="checkbox"/> | POL0001091 | Browse catalog | No | SAPTest1085 | Pro_100-510 | Good |
| <input type="checkbox"/> | POL0001092 | Browse catalog | No | SAPTest1085 | Pro_100-600 | Good |

At the bottom, there are 'Attachments' and 'Submit request' buttons, with the 'Submit request' button also highlighted with a red border.

- b. Click on **Submit Request**.
- c. Once the request is submitted, a **case** will be created in **Procurement Workspace**.
- d. So, go to the Procurement Workspace, open the respective Case, and select it to view the details.
- e. In the subsequent window that opens, give conformation to the update request raised by the Supplier.
- f. Click on **Send Email** button to send the automated confirmation Email to the Supplier.
- g. Now, select the edited PO from the list that opens after navigating through List menu->All Purchase Orders.
- h. Go to the Details, Purchase Order Lines and Cases tab one by one.
- i. You can see the **status** of **Purchase Order Line** and **State** of respective **Case** has been set to **Closed Canceled**.

The screenshot shows the 'Procurement Workspace' with a purchase order details page. The purchase order number is PO0001058, placed on 2023-06-28 with supplier SAPTest1085. The 'Purchase Order Lines' section shows two lines:

| Number | ERP line number | Status | Supplier | Supplier product | Product type | Purchased quantity | Received quantity | Expected delivery date | Start date |
|------------|-----------------|-----------------|-------------|------------------|--------------|--------------------|-------------------|------------------------|------------|
| POL0001091 | 00010 | Closed Canceled | SAPTest1085 | Pro_100-510 | Good | 1 | 0 | 2023-06-29 | |
| POL0001092 | 00020 | Ordered | SAPTest1085 | Pro_100-600 | Good | 2 | 0 | 2023-07-01 | |

- j. In the **Details** tab, the **Status of Purchase Order** is set to **Closed Canceled** if all its constituent Purchase Order Lines have been deleted (or are in **Closed Canceled** Status) else the status remains as **Ordered**.

PO0001058 placed on 2023-06-28 with SAPTest1085

Status: Ordered

Number: PO0001058

ERP number: 4500041222

Sales order number: -

Version: 2

Business owner: naveen shop

Activity: No activity to display

k. Now, you can validate the same in SAP.

| S.. | Itm | A | I | Material | Short Text | PO Quantity | O... | C Deliv. Date | Net Price | Curr... | Per | O... | Matl Group | PInt | Handover ... | Stor. L |
|--------------------------|-----|---|---|----------|--------------|-------------|------|---------------|-----------|---------|-----|--------------|------------------|------|--------------|---------|
| <input type="checkbox"/> | 10 | K | | 100-510 | Ball bearing | 1 PC | D | 06/29/2023 | 10.00 USD | 1 | PC | Metal Proce. | Heathrow / Hayes | | | |
| <input type="checkbox"/> | 20 | K | | 100-600 | Support base | 1 PC | D | 07/01/2023 | 20.00 USD | 1 | PC | Metal Proce. | Heathrow / Hayes | | | |

Attributes transferred from SPO to SAP

A purchase order is a binding contract between a buyer and a supplier that authorizes a purchasing transaction. It contains the descriptions, quantities, prices, applicable discounts, payment terms, delivery dates, and other associated terms and conditions with the supplier.

Information transfer for Purchase Order generation

| SPO | SAP Field | Component | |
|-----------------------|--------------|------------|-----------|
| Business owner | Purch.Group | PUR_GROUP | |
| Legal Entity | Company Code | COMP_CODE | PO Header |
| Created By | Created By | CREATED_BY | |

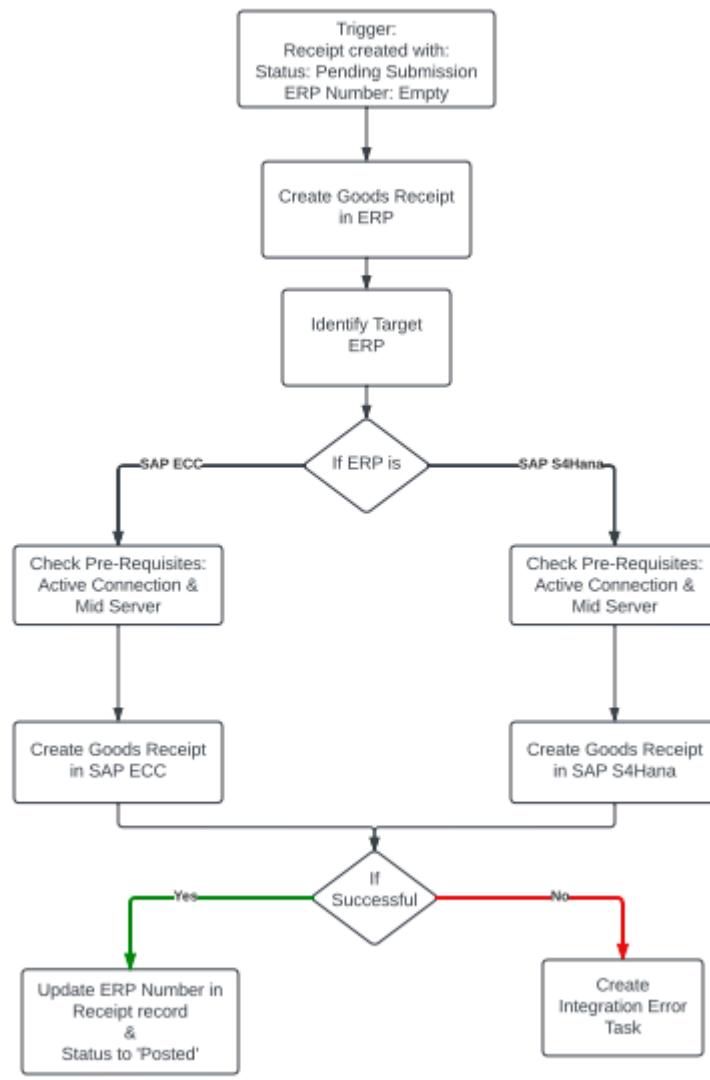
Information transfer for Purchase Order generation (continued)

| | | |
|------------------------------------|----------------------|------------|
| Purchasing Organization | Purch.Org | PURCH_ORG |
| Terms of Payment | Payment Terms | PMNTTRMS |
| Currency | Currency | CURRENCY |
| Supplier | Vendor | VENDOR |
| Account Assignment Category | Acct Assignment Cat. | ACCTASSCAT |
| Unit price | Net Price | NET_PRICE |
| Short Description | Short Text | SHORT_TEXT |
| Product model | Material | MATERIAL |
| Quantity | Quantity | QUANTITY |
| Product category | Material Group | MATL_GROUP |
| Plant | Plant | PLANT |
| Unit | Order Unit | PO_UNIT |
| Cost Center | Cost Center | COSTCENTER |
| General Ledger Account | G/L Account | GL_ACCOUNT |

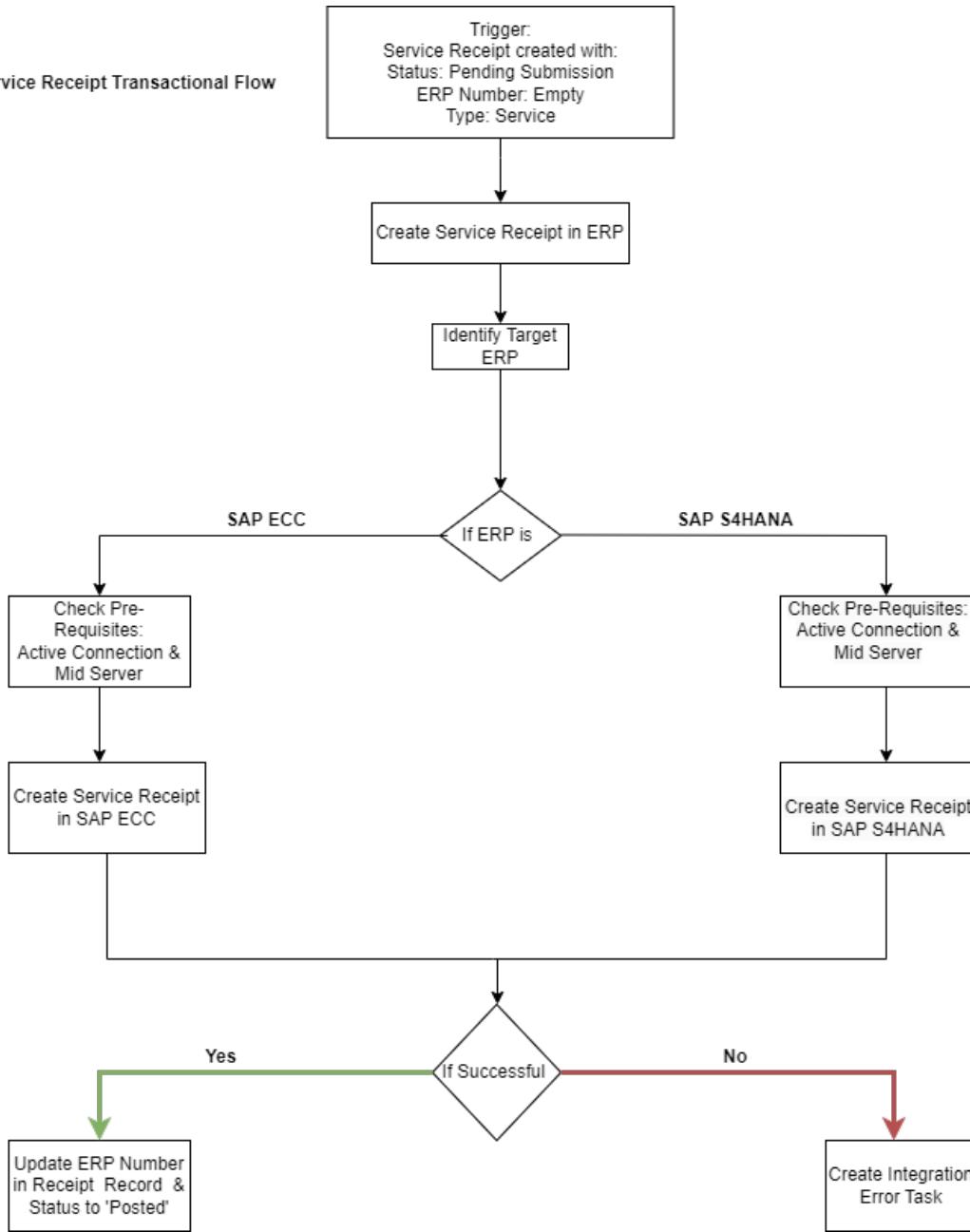
Generate receipt

Identify the target ERP and generate receipt accordingly.

Create Goods Receipt
Transaction Flow



Create Service Receipt Transactional Flow

**Creating receipt**

You can create a receipt in Sourcing and Procurement Operations.

Do the following to generate a receipt.

1. Login to **SPO**. Go to Procurement Workspace Select the PO whose receipt must be created.
2. Po details are displayed.
3. In the **Purchasing Task** tab, make a note of the **Receipt Task number**.
4. Now, go to Shopping Hub and select **My to-dos** from the User Profile dropdown.

The screenshot shows the ServiceNow interface for managing suppliers. At the top, there's a navigation bar with 'servicenow', 'Categories', 'Suppliers', 'Search', and a shopping cart icon. A dropdown menu 'My to-dos' is open, showing options like 'My purchases', 'My requests', 'Buy it again', 'Recently viewed', and 'Logout'. Below the menu, the supplier details for 'HT1122' are displayed, including sections for 'Preferred' and 'Onboarded' status.

5.

6. A list of products delivered from the supplier will be listed.

This screenshot shows the 'My to-dos' page. It features a search bar, filter options, and a list of tasks. One task, 'Confirm receipt of deliveries from HT1122', is highlighted with a red box. Below the task, there are details: Due Date, Primary contact, and Number RT9K0001084.

7. _____

8. Search the Receipt Task number/ to-do number acquired in step 2.

9. A list of related products is shown.

10. Now, mention the date on which you have received all the products and click on **Receive All** button.

To-do

Deliver to: Anusha ECC, Alsterdorfer Stras...

Search

Don't see what you need?

Activity

Attachments

Received all!

| Product | Pending receipt |
|-----------------|-----------------|
| Product_100-890 | 5 Received |

11.

12. Now a GR has been created Verify the receipt tab to view the **ERP number** (generated) and the status of the receipt. (**Posted**)

PR0001268 x PO0001197 plac... x

Details POL0001241 x

PO0001197 placed on 2023-05-18 with HT1122

Receipts [1]

| Number | Received by | Received | Quantity received | Percentage received | Purchase order line |
|-------------|-------------|------------|-------------------|---------------------|---------------------|
| RCPT0001015 | Anusha ECC | 2023-05-18 | 5 | 5 | POL0001241 |

Showing 1-1 of 1

20 rows per page

PR0001268 x PO0001197 plac... x

Details POL0001241 x RCPT0001015 x

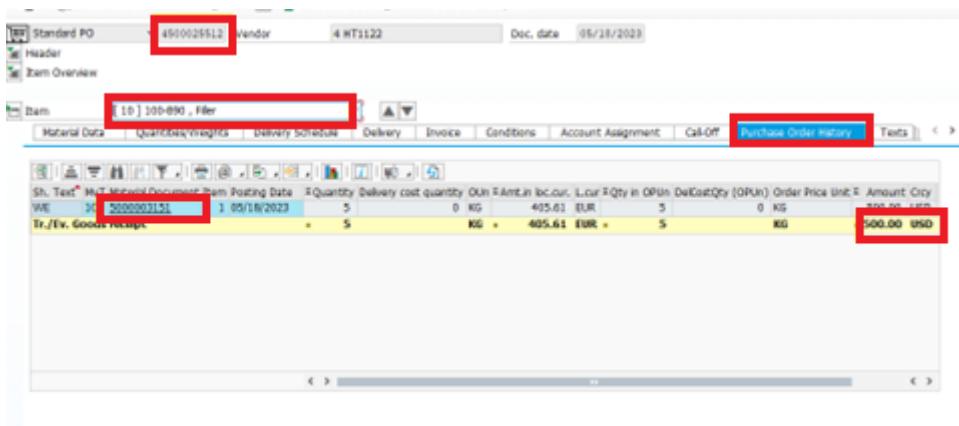
RCPT0001015

Receipt

| | | | |
|-------------|-------------|------------------|-----------------|
| Number | RCPT0001015 | Status | Posted |
| ERP number | 5000003151 | Supplier product | Product_100-890 |
| Received by | Anusha ECC | Type | Goods Receipt |

Summary Details

| | | | |
|---------------------|------------|-------------------|---|
| Purchase order line | POL0001241 | Quantity received | 5 |
|---------------------|------------|-------------------|---|



- 13.** Validate the generated receipt in SAP.

Attributes transferred from SPO to SAP

An invoice is a transaction record between a supplier and business owner.

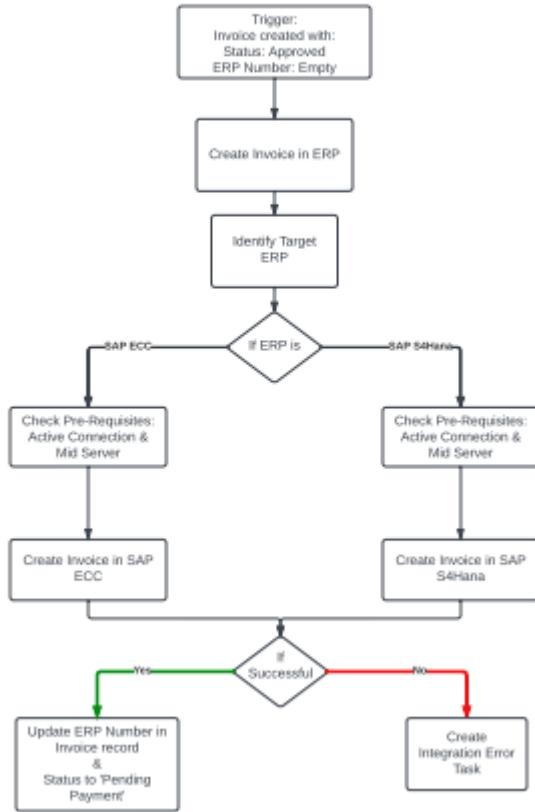
Information transfer for Receipt generation

| SPO | SAP Field | Component |
|---|------------------------------|------------|
| Purchase order number | Material Document | PO_NUMBER |
| Quantity in unit of entry | Quantity | ENTRY_QNT |
| Supplier | Vendor | VENDOR |
| Movement type (inventory management) | Default value to 101 | MOVE_TYPE |
| Date received | Posting Date in the Document | DOC_DATE |
| Date received | Document Date in Document | PSTNG_DATE |

Invoice

An invoice is a transaction record between a supplier and business owner.

Create Invoice Transaction Flow



Creating an invoice

You can create an invoice in Accounts Payable Operations.

Once you have generated a receipt, follow these steps to create an invoice.

1. Login to **APO**. Impersonate with **APSUser**. Go to Procurement Workspace Select the PO whose invoice must be created.
2. Since a receipt has been created for this PO, in the Details tab you can see the status to be **Delivered** and one data entry in the Receipt task as well.

PO0001061 placed on 2023-07-04 with SAPTest1085

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|----------------------|-----------|--------------|----------|--------------|---|--|--|--|--|--------|-----------|--------|-----------|--|--|------------|------------|----------------------|-----------|--|--|--------------------|---|--|--|--|--|---------|---|--|--|--|--|----------------|-------------|--|--|--|--|
| Status | Delivered | Order type | Standard | Total amount | \$120.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Details Purchase Order Lines (1) Receipts (1) Invoices Related Contracts Cases Purchasing Tasks (1) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Purchase Order <table border="1"> <tr><td>Display name</td><td colspan="5">PO0001061 placed on 2023-07-04 with SAPTest1085</td></tr> <tr><td>Number</td><td>PO0001061</td><td>Status</td><td colspan="3">Delivered</td></tr> <tr><td>ERP number</td><td>4500043541</td><td>Purchase requisition</td><td colspan="3">PR0001071</td></tr> <tr><td>Sales order number</td><td colspan="5">—</td></tr> <tr><td>Version</td><td colspan="5">1</td></tr> <tr><td>Business owner</td><td colspan="5">naveen shop</td></tr> </table> | | | | | | Display name | PO0001061 placed on 2023-07-04 with SAPTest1085 | | | | | Number | PO0001061 | Status | Delivered | | | ERP number | 4500043541 | Purchase requisition | PR0001071 | | | Sales order number | — | | | | | Version | 1 | | | | | Business owner | naveen shop | | | | |
| Display name | PO0001061 placed on 2023-07-04 with SAPTest1085 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number | PO0001061 | Status | Delivered | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ERP number | 4500043541 | Purchase requisition | PR0001071 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sales order number | — | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Version | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Business owner | naveen shop | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Summary Details | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

3.

4. Now, browse the **Invoice list** and click on **New** button to create an Invoice.

Invoices [14]

| Number | ERP number | Supplier | Status | Invoice date | Amount invoiced (Transaction currency) | Purchase order |
|------------|------------|-------------|------------------|--------------|--|---|
| INV0001003 | 5105611369 | SAPTest1085 | Pending payment | 2023-06-22 | \$10.00 | PO0001001 placed on 2023-06-22 with SAPTest1085 |
| INV0001004 | 5105611370 | SAPTest1085 | Pending payment | 2023-06-22 | \$180.00 | PO0001002 placed on 2023-06-22 with SAPTest1085 |
| INV0001005 | 5105611371 | SAPTest1085 | Pending payment | 2023-06-22 | \$20.00 | PO0001010 placed on 2023-06-22 with SAPTest1085 |
| INV0001006 | | USSU-VSF04 | Approved | 2023-06-22 | \$400.00 | PO0001007 placed on 2023-06-22 with USSU-VSF04 |
| INV0001007 | | USSU-VSF04 | Approved | 2023-06-22 | \$20.00 | PO0001035 placed on 2023-06-22 with USSU-VSF04 |
| INV0001008 | 5100001936 | USSU-VSF04 | Pending payment | 2023-06-22 | \$20.00 | PO0001035 placed on 2023-06-22 with USSU-VSF04 |
| INV0001009 | 5105611372 | SAPTest1085 | Pending payment | 2023-06-22 | \$80.00 | PO0001037 placed on 2023-06-22 with SAPTest1085 |
| INV0001010 | 5100001937 | USSU-VSF04 | Pending payment | 2023-06-22 | \$100.00 | PO0001039 placed on 2023-06-22 with USSU-VSF04 |
| INV0001011 | | USSU-VSF04 | Exceptions found | 2023-06-23 | \$20.00 | PO0001044 placed on 2023-06-23 with USSU-VSF04 |
| INV0001012 | 5105611373 | SAPTest1085 | Pending payment | 2023-06-23 | \$10.00 | PO0001051 placed on 2023-06-23 with SAPTest1085 |
| INV0001013 | | SAPTest1085 | Draft | 2023-06-26 | \$10.00 | PO0001050 placed on 2023-06-23 with SAPTest1085 |

5.

6. In the **Create New Invoice** window that opens enter Supplier invoice number. Select a Supplier, Purchase order and Invoice date. Enter value for Subtotal and Default tax code.

7. Click on **Save**.

Create New Invoice

Details

Invoice

Number: INV0001018
Supplier invoice number: 1234567
Type: PO Invoice

Summary Details

Supplier: SAPTest1085
Purchase order: PO0001061 placed on 2023-07-04 with SAPTest1085

Subtotal: USD (\$)-120
Tax amount: USD (\$)-

Attachments
No Attachments Available
Browse

Save

8.

9. Go to the **Invoice Line** tab, click on **New** and in the **Create New Invoice Line** window that opens input the important fields: Line description, Purchase order line number, Invoice line quantity, Line unit price and Subtotal.

10. Click on **Save**.

Create New Invoice Line

Invoice Line

Invoice: INV0001018
Line description: Test
Purchase order line: POL0001095

ERP line number:

Summary Details

Invoice line quantity: 6
Line unit price: 20
Subtotal: USD (\$)-120
Tax amount: USD (\$)-
Line amount invoiced: USD (\$)-

Attachments
No Attachments Available
Browse

Save

11.

12. Click on **ViewInvoiceProcessing case** to view Invoice details.

13. Next, click on **Submit Invoice**

The screenshot shows the ServiceNow Procurement Workspace interface. A red box highlights the 'Submit invoice' button in the top right corner of the main content area. The page displays an invoice record for 'INVC0001017' from 'SAPTest1085'. The 'Invoice' section shows details like Type (PO Invoice), Supplier (SAPTest1085), and Subtotal (\$120). The 'Activity' panel on the right shows system field changes and status updates, including 'Pending payment' and 'Approved'.

14. If there are no exceptions encountered, the system creates an invoice with its status set to "Approved".
15. Now, the invoice execution gets triggered SAP.
16. Once successful the Invoice Status changes to Pending payment and the ERP number is generated.

The screenshot shows the ServiceNow Procurement Workspace interface. A red box highlights the 'Pending payment' status in the 'Status' field of the 'Invoice' section. Another red box highlights the 'ERP number' field, which contains '5105611429'. The 'Activity' panel on the right shows system field changes and status updates, including 'Pending payment' and 'Approved'.

17. Log in to SAP and validate the generated invoice.

| Sh. Te... | MVT Material Document Item | Posting Date | Quantity | Delivery cost quantity | OUn= | Amt.in loc.cur. | L.cur = Qty in OPUn | DelCostQty (OPUn) | Order Price Unit= | Amount | Crcy | Reference |
|-----------|----------------------------|--------------|----------|------------------------|-------|-----------------|---------------------|-------------------|-------------------|--------|------|-----------|
| WE | 101 5000005441 | 1 07/04/2023 | 6 | 0 PC | 68.76 | GBP | 6 | 0 PC | 120.00 | USD | | |
| Tr/Ev. | Goods receipt | | 6 | PC | 68.76 | GBP | 6 | PC | 120.00 | USD | | |
| RE-L | 5105611429 | 1 07/04/2023 | 6 | 0 PC | 68.76 | GBP | 6 | 0 PC | 120.00 | USD | | |
| Tr/Ev. | Invoice receipt | | 6 | PC | 68.76 | GBP | 6 | PC | 120.00 | USD | | |

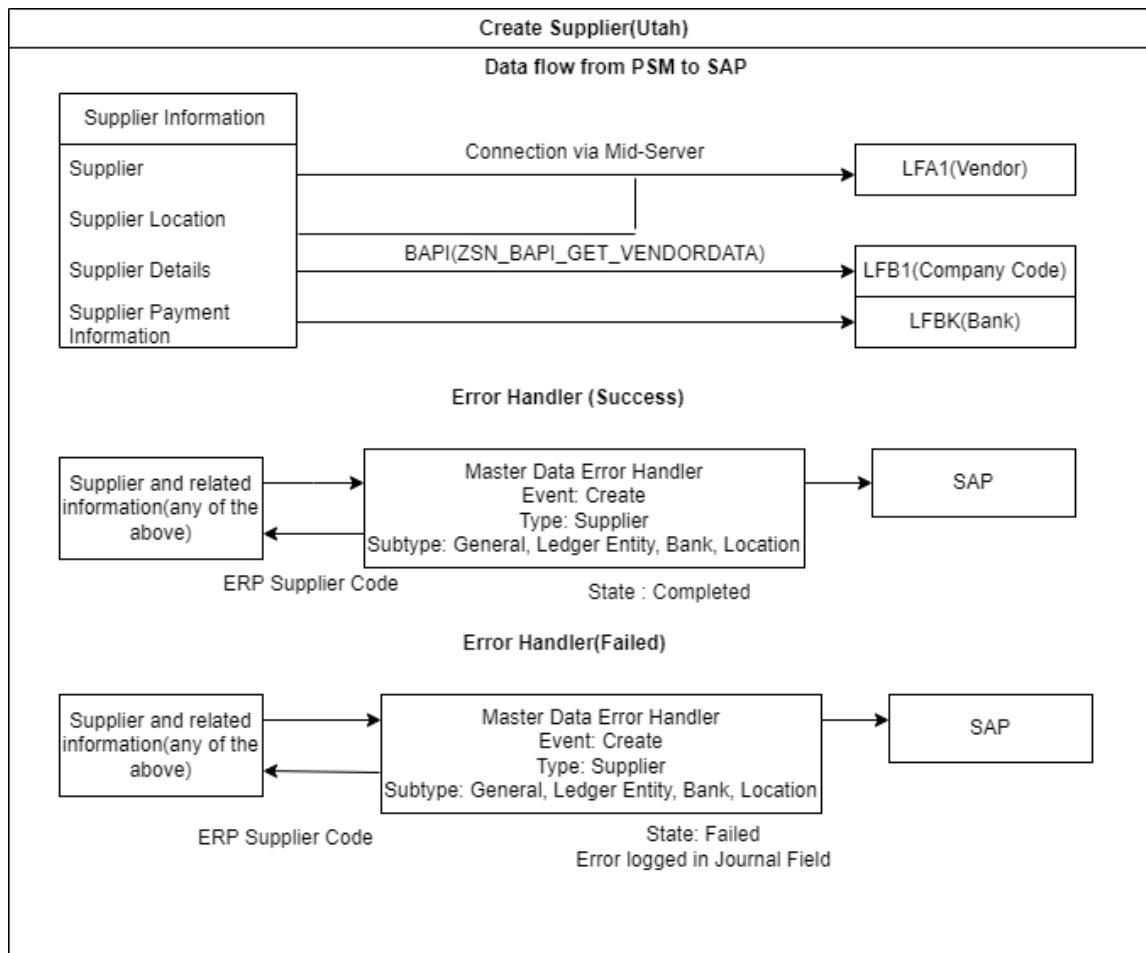
Attributes transferred from APO to SAP

Information transfer for Invoice generation

| APO | SAP Field | Component |
|-------------------------------|-------------------|--------------|
| PO Number | Material Document | PO_NUMBER |
| Invoice date | Document Date | PSTNG_DATE |
| Default Tax Code | Tax Code | TAX_CODE |
| Company Code | Company Code | COMP_CODE |
| Sub Total | Amount | GROSS_AMOUNT |
| Payment Terms | Payment Terms | PMNTRMS |
| Currency | Currency | CURRENCY |
| Invoice date | Document Date | DOC_DATE |
| Quantity | Quantity | QUANTITY |
| Sub Total at Line Item | Amount | ITEM_AMOUNT |
| Unit of measure | Order Unit | PO_UNIT |

Supplier

Integrate the supplier or vendor primary and include the details on how to pull the supplier or vendor primary information from SAP.



Create supplier

You can create a vendor or supplier in Supplier Lifecycle Operations and validate in SAP.

Do these steps to create a Vendor/Supplier in SLO and validate the same in SAP:

1. Log in to SLO.
2. Navigate to **All > Suppliers**.
3. Click **New** to add a new Supplier,
4. In the Supplier creation window that opens, remember to choose a **default view**, provide **onboarded** as **yes** and enter a valid **Legal Name**.

The screenshot shows the 'Supplier' creation page in ServiceNow. The 'Legal name' field contains 'SUP_ECC666' and is highlighted with a red box. The 'Onboarded' dropdown menu is open, showing 'Yes' selected, which is also highlighted with a red box.

5. Click on **Submit**. A new Supplier with minimal information required has now been created.
6. You are now re-directed to the **Supplier list** view page.
7. Search the recently created Supplier and select it to add more details.
8. Add **Supplier Legal Entity Mappings** and **Supplier Location**
9. Select the **Supplier Legal Entity Mappings** tab and then click **New**.

The screenshot shows the 'Supplier Legal Entity Mapping - Create SUP_ECC666' form. The 'Legal entity' field contains '2000' and is highlighted with a red box. Other fields visible include 'Payment term', 'Payment method', and 'General ledger account'. To the right, there are mapping fields for street address, city, state, country, and zipcode.

10. In the subsequent window that opens, enter the Legal Entity's details. Note, it is mandatory to enter legal entity and general ledger account fields. You can also provide Bank details here.
11. After providing all the details, click on Update.
12. Next, go to the Supplier Location tab and click **New** to add the location.

SUP_ECC666 | Supplier | Service | New Record | Supplier Location | Supplier - SUP_ECC666

| | | | |
|-------------------|--------------|-----------|------------|
| Name | Location1232 | Contact | |
| Street | Street12343 | Phone | 9876543211 |
| City | Mumbai | Fax/Phone | 1234567890 |
| State / Province | IN | Parent | |
| Zip / Postal Code | 400004 | Latitude | |
| Country | IN | Longitude | |

| Name | Contact | Phone | City | Latitude | Longitude | Updated |
|-----------------------|---------|-------|------|----------|-----------|---------|
| No records to display | | | | | | |

13. Fill in the location details and click on Submit.
14. Once all the details are entered go to **primary data error handler**.

Master Data Error Handler - MDE0001264

| | | | |
|-------------------------------------|---------------------------------|--------------------|--|
| Number/number | MDE0001264 | State/state | Completed/completed |
| Type/type | Supplier/supplier | Table/table | Supplier Legal Entity Mapping [an_fn.suppl...] |
| Subtype/subtype | - None - | RecordID/record_id | Supplier Legal Entity Mapping: SUP_ECC666 |
| Flow execution ID/flow_execution_id | 73b2e3ef9d9b215087eebed43ca171f | Event/event | Create/create |

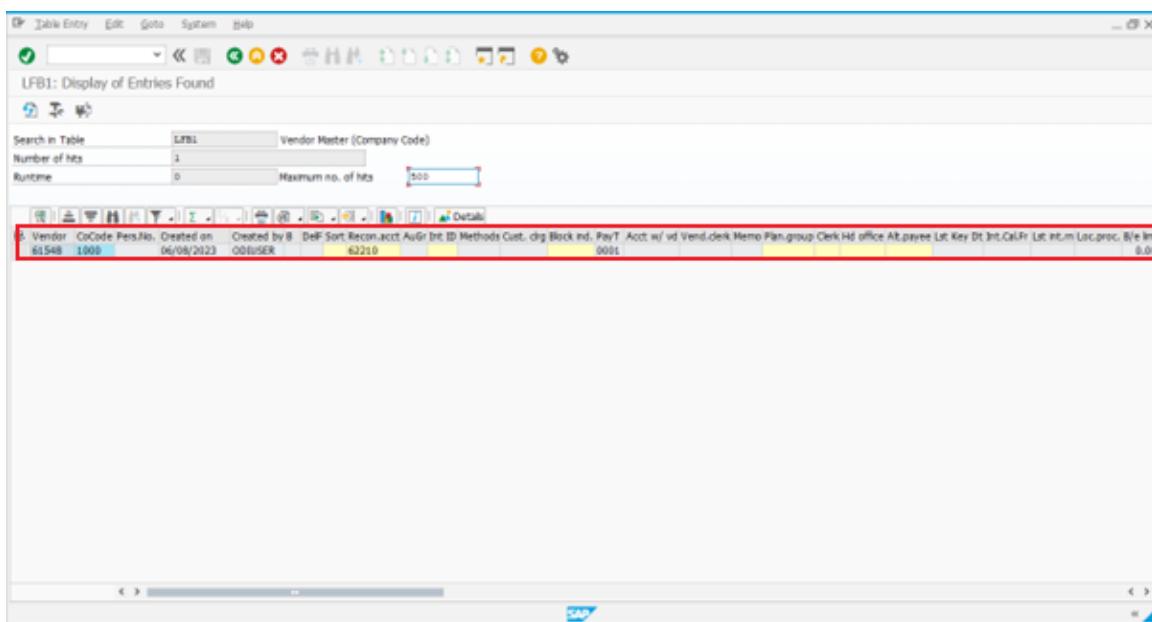
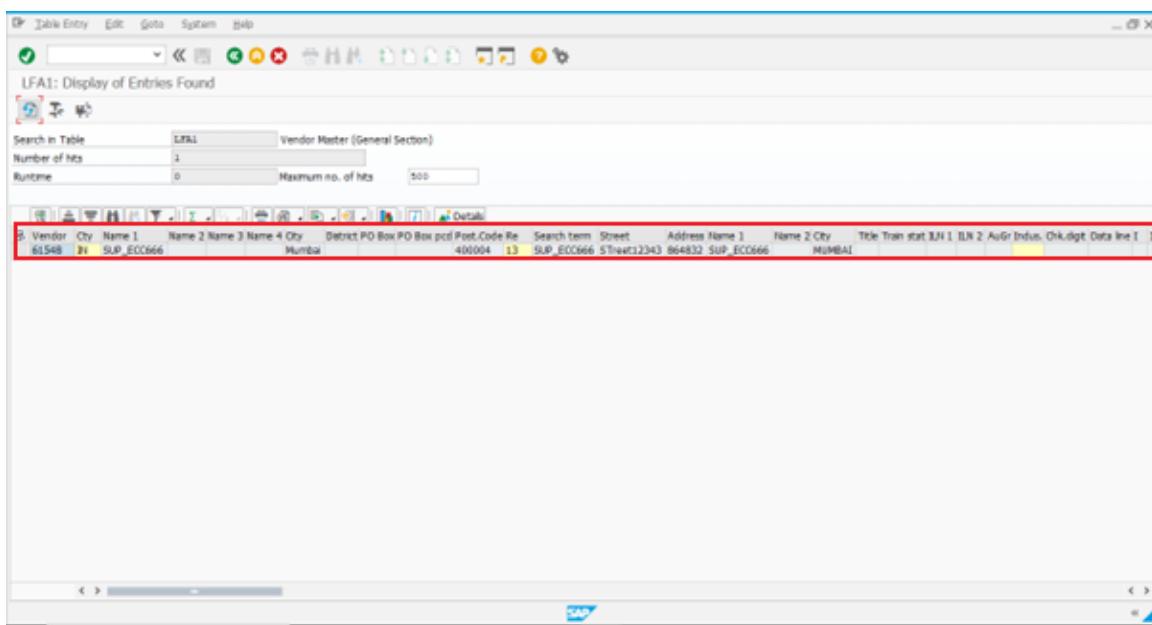
Notes

Error message/error_message

15. If the handler doesn't show any error, then the Supplier has been successfully created and an **ERP supplier code** is generated.

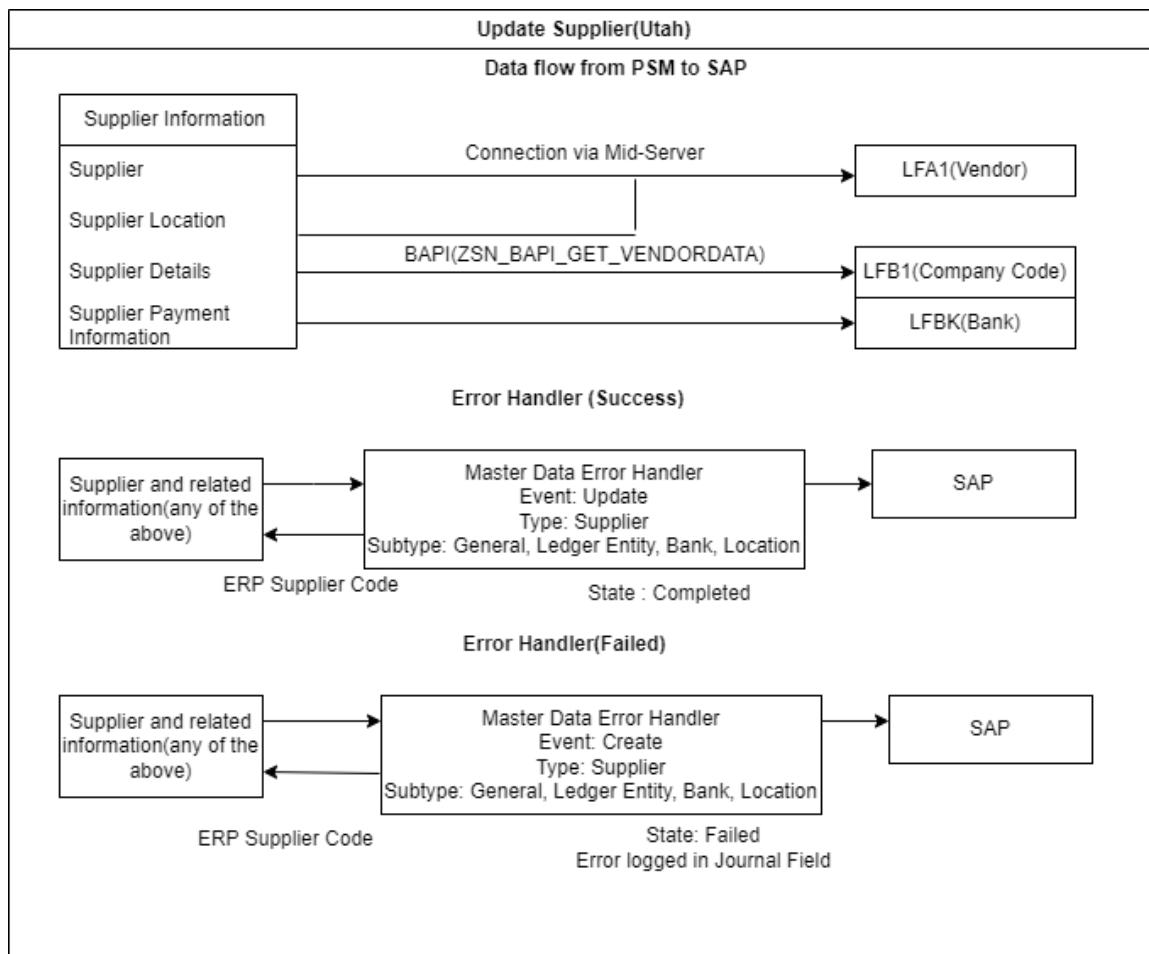
The screenshot shows the ServiceNow interface for creating a new supplier record. The top navigation bar includes tabs for 'Supplier' and 'Supplier Location'. The main title is 'Supplier - SUP_ECC666'. The 'Legal name' field is highlighted with a red box. Other visible fields include 'Number / number', 'ERP supplier code / erp_company_code', 'Parent entity / parent', 'Global company / company', 'Relationship manager / owner', 'Relationship status / status', 'Onboarded / onboarded', and 'Preferred / preferred'. Below the main form, there's a 'General' section with address fields like 'Street address / street', 'City / city', 'State / Province / state', 'Zip / Postalcode / zip', and 'Country / country'. At the bottom, there are 'Update' and 'Delete' buttons, and a tab navigation bar with links for 'Supplier Legal Entity Mappings (1)', 'Supplier Payment Information', 'Contracts', 'Purchase Orders', 'Invoices', 'Service Cases', and 'Supplier Locations (1)'. A search bar at the bottom is set to 'Supplier Legal Entity Mappings (1)'.

16. Now Login to SAP, search for the new Supplier using the ERP supplier code (eliminate the preceding 5 zeros)
17. You can see that a new vendor has been added as per the details created in SLO.



Update supplier

You can update an existing supplier in SAP.



Follow these steps to update an existing Supplier in SAP:

1. Log in to SLO.
2. Navigate to **All > Suppliers**.
3. A list of all existing Suppliers opens. Here, search the Supplier by Legal Name or Supplier Number.

The Supplier page opens with basic information like Supplier Legal Entity Mappings and Supplier Locations already filled.

- In case you update a Legal Entity, SLO will reflect this change, but SAP will add an entity keeping the previous one intact.

SUP_101 | Supplier Legal Entity | New Record | Supplier Location | Master Data Error Handler | Search | Incognito

Supplier: SUP_101

Legal entity: 2000

Payment term: 0002

Payment method: None

General ledger account: 0000062220

Bank details | Hold details | Activity

Bank details

Bank name: [redacted]

ABA routing number: [redacted]

SWIFT Code: [redacted]

IBAN: [redacted]

BSB code: [redacted]

IFSC code: [redacted]

Beneficiary name on account: [redacted]

Account number: [redacted]

Country: [redacted]

Currency: [redacted]

Primary: [redacted]

Update | Delete

- You can add or update a Supplier Location.

Location_101 | Location Service | New Record | Supplier Location | Master Data Error Handler | Search | Incognito

Name: Location_101

Street: Street101

City: Mumbai

State / Province: 33

Zip / Postal Code: 400004

Country: IN

Contact: 9830231412

Phone: 2321124

Parent: [redacted]

Latitude: [redacted]

Longitude: [redacted]

Location: Name: Search

| Name | Contact | Phone | City | Latitude | Longitude | Updated |
|-----------------------|---------|-------|------|----------|-----------|---------|
| Parent - Location_101 | | | | | | |
| No records to display | | | | | | |

- Now, go to the **Supplier Payment Information** tab to enter the Account Information.

Supplier Payment Information - SBI_Bank

Supplier: SUP_001 Primary

Account Information

| | |
|---------------------|-------------|
| * Bank name: | SBI_Bank |
| ABA routing number: | |
| SWIFT Code: | |
| IBAN: | |
| BSB code: | |
| IFSC code: | SBI00003439 |

* Beneficiary name on account: Paribhasod
* Account number: *****
Country: India
Currency: INR

Update Delete

7. Click **Submit**, and then click **Update**.

8. Log in to SAP, and search for the Supplier using ERP supplier code.

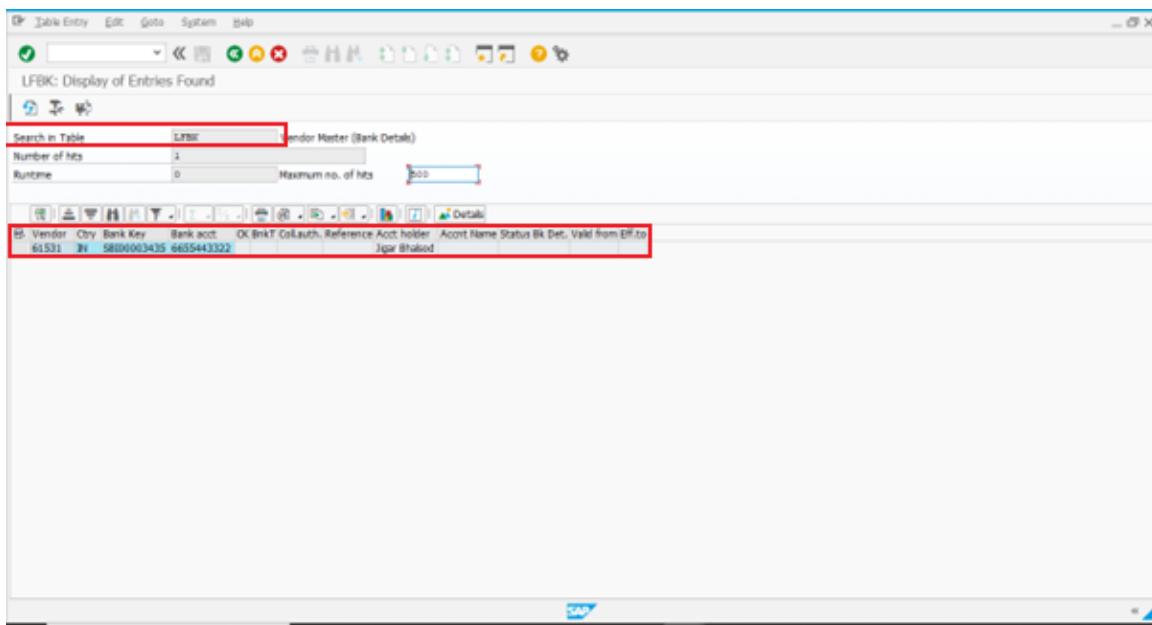
9. If the update is successful, the respective tables in SAP reflect the changes.

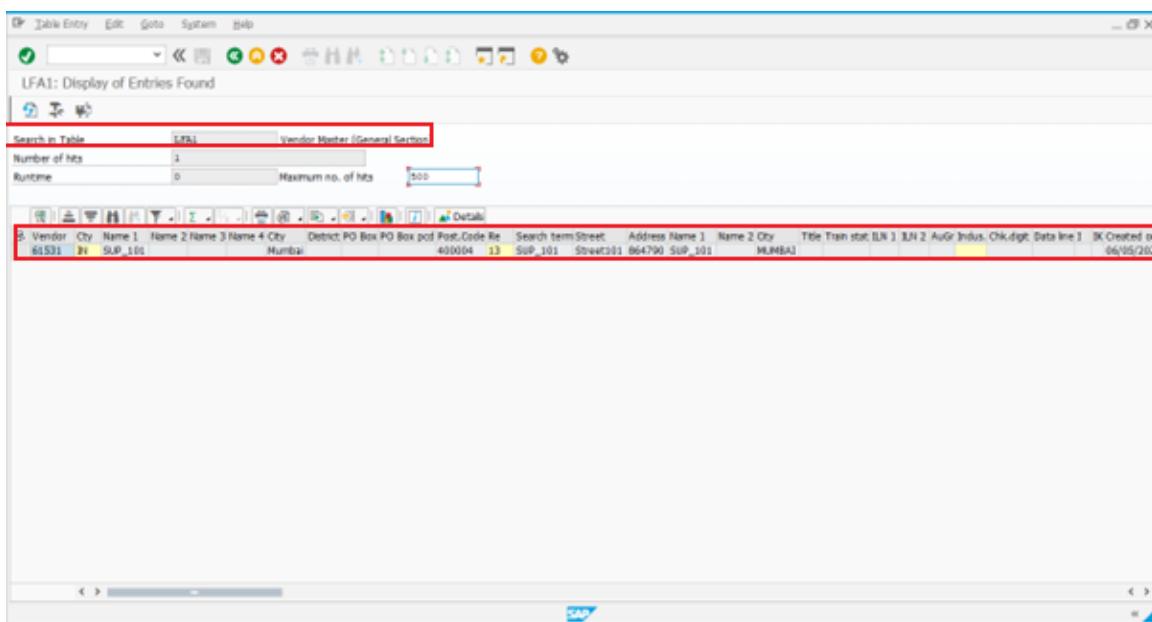
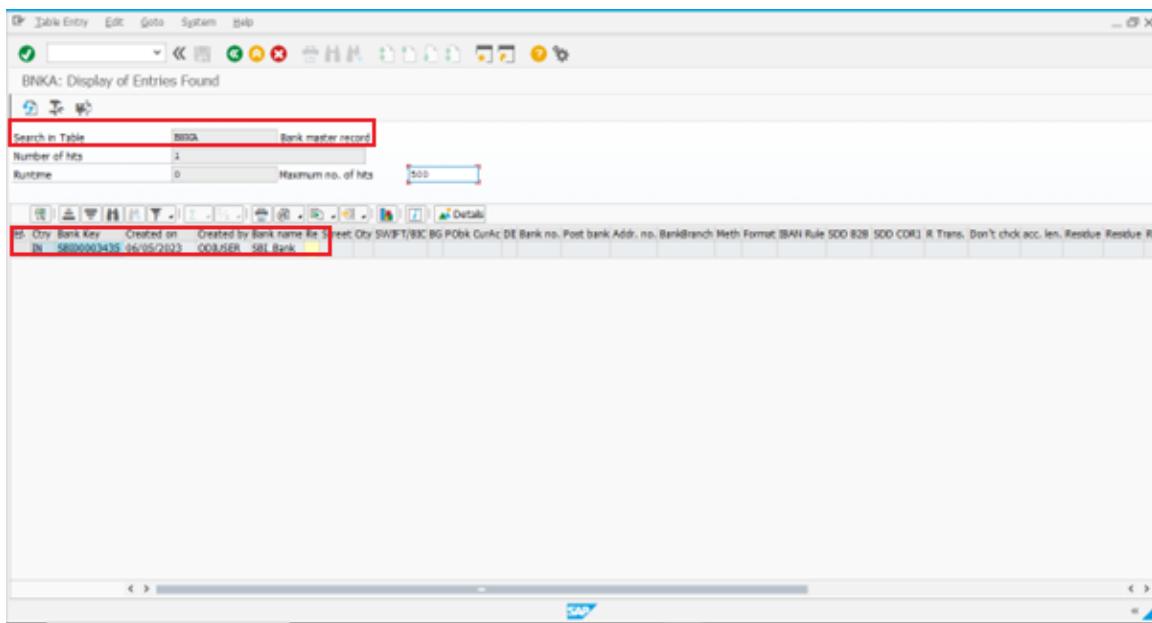
LFB1: Display of Entries Found

Search in Table: LFB1 Vendor Master (Company Code)

Number of hits: 2 Runtime: 0 Maximum no. of hits: 500

| Vendor | CoCode | PersNo. | Created on | Created by | Defl-Sort | Recon-acct | AvgR Int ID | Methods | Cust. | Org | Block Ind | PayT | Acct w/ vd | Vend | clerk | Memo | Plan | group | Clerk Id | Office | Alt-payee | Lst Key | Dt | Int | Cal | Fr | Lst Int | Intm | Loc | proc | B/E | Im |
|--------|--------|---------|------------|------------|-----------|------------|-------------|---------|-------|-----|-----------|------|------------|------|-------|------|------|-------|----------|--------|-----------|---------|----|-----|-----|----|---------|------|-----|------|------|----|
| 61531 | 1000 | | 06/05/2023 | 000USER | | | | | 62210 | | | | | 0001 | | | | | | | | | | | | | | | | | 0.00 | |
| 61531 | 2000 | | 06/05/2023 | 000USER | | | | | 62220 | | | | | 0002 | | | | | | | | | | | | | | | | | 0.00 | |





Attributes transferred from SLO to SAP

The Create Supplier table details the attributes transferred from SLO to SAP.

Information transferred in creating Supplier

| SNOW Field | SAP Field | SAP Table |
|-------------------|-------------|-----------|
| Legal Name | Name 1 | |
| Legal Name | Search term | LFA1 |
| Street | Street | |

Information transferred in creating Supplier (continued)

| | | |
|------------------------------------|------------------------|-------------|
| City | City | |
| State/Province | Region | |
| Zip/Postal Code | Postal Code | |
| Country | Country | |
| Phone | Telephone 1 | |
| Fax Phone | Fax Number | |
| Legal Entity | Company Code | |
| Payment Term | Payment Term | |
| General Ledger Account | Reconciliation Account | LFB1 |
| Country | Bank Country | |
| Account Number | Bank Account | |
| Beneficiary name on account | Account Holder | |
| IFSC Code | Bank Key | LFBK |
| BSB Code | Bank Key | |
| ABA routing number | Bank Key | |

Appendix

The staging tables are the tables used to store data which is used in migrating the data to the target table.

Material primary data staging table

Material primary data staging table lists the columns used in the staging table.

Material primary data staging table

| Table | Column name | Column label |
|------------------------|-----------------------------------|-----------------------------------|
| sn_psm_sap_int_product | assignment uom | Assignment Unit of Measurement |
| sn_psm_sap_int_product | base quantity | Base quantity |
| sn_psm_sap_int_product | base unit of measure | Base unit of measure |
| sn_psm_sap_int_product | base unit of measure desc | Base unit of measure description |
| sn_psm_sap_int_product | basic material | Basic material |
| sn_psm_sap_int_product | blocked stock | Blocked stock |
| sn_psm_sap_int_product | blocked stock returns | Blocked stock returns |
| sn_psm_sap_int_product | client | Client |
| sn_psm_sap_int_product | container requirements | Container requirements |
| sn_psm_sap_int_product | conversion group oil natural gas | Conversion group oil natural gas |
| sn_psm_sap_int_product | created on | Created on |
| sn_psm_sap_int_product | current period posting period | Current period posting period |
| sn_psm_sap_int_product | current planned price | Current planned price |
| sn_psm_sap_int_product | dangerous goods indicator profile | Dangerous goods indicator profile |

Material primary data staging table (continued)

| | |
|--|---|
| sn_psm_sap_int_product_dangerous_goods_packaging_status | Dangerous goods packaging status |
| sn_psm_sap_int_product_data_division_marc | Data division marc |
| sn_psm_sap_int_product_data_division_marc_division_1 | Data division marc division 1 |
| sn_psm_sap_int_product_data_division_mard | Data division mard |
| sn_psm_sap_int_product_date_as_of_which_the_price_is_valid | Date as of which the price is valid |
| sn_psm_sap_int_product_date_from_which_future_planned_price_1_is_valid | Date from which future planned price 1 is valid |
| sn_psm_sap_int_product_date_from_which_future_planned_price_2_is_valid | Date from which future planned price 2 is valid |
| sn_psm_sap_int_product_date_from_which_future_planned_price_3_is_valid | Date from which future planned price 3 is valid |
| sn_psm_sap_int_product_date_from_which_the_plant_specific_material_status_is_valid | Date from which the plant specific material status is valid |
| sn_psm_sap_int_product_date_of_the_last_price_change | Date of the last price change |
| sn_psm_sap_int_product_default_storage_location_for_external_procurement | Default storage location |

Material primary data staging table (continued)

for external
procurement

| | |
|--|---|
| sn_psm_sap_int_product_stgision | Division |
| sn_psm_sap_int_product_stg_source | Erp source |
| sn_psm_sap_int_product_stgial_year_of_current_period | Fiscal year of current period |
| sn_psm_sap_int_product_stgure_planned_price | Future planned price |
| sn_psm_sap_int_product_stgure_planned_price_1 | Future planned price 1 |
| sn_psm_sap_int_product_stgure_planned_price_2 | Future planned price 2 |
| sn_psm_sap_int_product_stgure_planned_price_3 | Future planned price 3 |
| sn_psm_sap_int_product_stgure_price | Future price |
| sn_psm_sap_int_product_stgoss_weight | Gross weight |
| sn_psm_sap_int_product_stgndling_unit_type | Handling unit type |
| sn_psm_sap_int_product_stghazardous_material_number | Hazardous material number |
| sn_psm_sap_int_product_stheight | Height |
| sn_psm_sap_int_product_stindustry_standard_description_such_as_ansi_or_iso | Industry standard description such as ansi or ISO |
| sn_psm_sap_int_product_stage_storage_location | Issue storage location |

Material primary data staging table (continued)

| | |
|---|---|
| sn_psm_sap_int_product_language | Language |
| sn_psm_sap_int_product_length | Length |
| sn_psm_sap_int_product_loading_units | Loading units |
| sn_psm_sap_int_product_load_without_packaging_material_vso | Load without packaging material Vehicle Space Optimization |
| sn_psm_sap_int_product_maintenance_status | Maintenance status |
| sn_psm_sap_int_product_manufacturer_number | Manufacturer number |
| sn_psm_sap_int_product_material_category | Material category |
| sn_psm_sap_int_product_material_category_desc | Material category desc |
| sn_psm_sap_int_product_material_description | Material description |
| sn_psm_sap_int_product_material_freight_group | Material freight group |
| sn_psm_sap_int_product_material_group | Material group |
| sn_psm_sap_int_product_material_group_desc | Material group desc |
| sn_psm_sap_int_product_material_is_costed_with_quantity_structure | Material is costed with quantity structure |
| sn_psm_sap_int_product_material_is_locked | Material is locked |

Material primary data staging table (continued)

| | |
|--|--|
| sn_psm_sap_int_product_material_mrp_profile | Material Requirements Planning Profile |
| sn_psm_sap_int_product_material_number | Material number |
| sn_psm_sap_int_product_material_type | Material type |
| sn_psm_sap_int_product_material_type_desc | Material type desc |
| sn_psm_sap_int_product_mrp_controller | Mrp controller |
| sn_psm_sap_int_product_mrp_group | Material Requirements Planning Group |
| sn_psm_sap_int_product_mrp_type | Material Requirements Planning Type |
| sn_psm_sap_int_product_name_of_person_who_created_the_object | Name of person who created the object |
| sn_psm_sap_int_product_net_contents | Net contents |
| sn_psm_sap_int_product_net_weight | Net weight |
| sn_psm_sap_int_product_packaging_code | Packaging code |
| sn_psm_sap_int_product_packaging_material_type | Packaging material type |
| sn_psm_sap_int_product_physical_inventory_blocking_indicator | Physical inventory blocking indicator |

Material primary data staging table (continued)

| | |
|--|--|
| sn_psm_sap_int_product_physical_inventory_indicator_for_restricted_use_stock | Physical inventory indicator for restricted use stock |
| sn_psm_sap_int_product_physical_inventory_indicator_for_whse_stock_in_current_year | Physical inventory indicator for warehouse stock in current year |
| sn_psm_sap_int_product_phys_inventory_ind_f_stock_in_qual_insp_in_current_year | Physical inventory ind F Stock in qual Insp In current year |
| sn_psm_sap_int_product_plant_field | Plant field |
| sn_psm_sap_int_product_plant_specific_material_status | Plant specific material status |
| sn_psm_sap_int_product_previous_price | Previous price |
| sn_psm_sap_int_product_price_control_indicator | Price control indicator |
| sn_psm_sap_int_product_price_unit | Price unit |
| sn_psm_sap_int_product_price_unit_of_previous_period | Price unit of previous period |
| sn_psm_sap_int_product_procurement_rule | Procurement rule |
| sn_psm_sap_int_product_procurement_type | Procurement type |
| sn_psm_sap_int_product_produced_in_house | Produced in house |
| sn_psm_sap_int_product_production_unit | Production unit |

Material primary data staging table (continued)

| | |
|---|--|
| sn_psm_sap_int_product_product_category | Product category |
| sn_psm_sap_int_product_product_hierarchy | Product hierarchy |
| sn_psm_sap_int_product_profit_center | Profit center |
| sn_psm_sap_int_product_purchase_order_unit_of_measure | Purchase order unit of measure |
| sn_psm_sap_int_product_purchasing_group | Purchasing group |
| sn_psm_sap_int_product_purchasing_value_key | Purchasing value key |
| sn_psm_sap_int_product_relevant_for_hazardous_substances | Relevant for hazardous substances |
| sn_psm_sap_int_product_return_code | Return code |
| sn_psm_sap_int_product_return_to_logistics_level | Return to logistics level |
| sn_psm_sap_int_product_serial_number_profile | Serial number profile |
| sn_psm_sap_int_product_size_dimensions | Size dimensions |
| sn_psm_sap_int_product_source_of_supply | Source of supply |
| sn_psm_sap_int_product_special_procurement_type_at_storage_location_level | Special procurement type at storage location level |
| sn_psm_sap_int_product_standard_price | Standard price |

Material primary data staging table (continued)

| | |
|--|--|
| sn_psm_sap_int_product_stndard_price_in_the_previous_period | Standard price in the previous period |
| sn_psm_sap_int_product_stgck_in_quality_inspection | Stock in quality inspection |
| sn_psm_sap_int_product_stgck_in_transfer_plant_to_plant | Stock in transfer plant to plant |
| sn_psm_sap_int_product_stgck_in_transit | Stock in transit |
| sn_psm_sap_int_product_stgck_transfer_sales_value_plant_to_plant_for_vo_mr | Stock transfer sales value plant to plant for valuation order material |
| sn_psm_sap_int_product_stgrage_bin | Storage bin |
| sn_psm_sap_int_product_stgrage_conditions | Storage conditions |
| sn_psm_sap_int_product_stgrage_location | Storage location |
| sn_psm_sap_int_product_stgrage_location_mrp_indicator | Storage Location Material Requirements Planning Indicator |
| sn_psm_sap_int_product_stgrage_percentage | Storage percentage |
| sn_psm_sap_int_product_total_stock_of_all_restricted_batches | Total stock of all restricted batches |
| sn_psm_sap_int_product_total_valuated_stock | Total valuated stock |

Material primary data staging table (continued)

| | |
|---|--|
| sn_psm_sap_int_product_total_valuated_stock_in_previous_period | Total valuated stock in previous period |
| sn_psm_sap_int_product_unit_of_dimension_for_length_width_height | Unit of dimension for length width height |
| sn_psm_sap_int_product_unit_of_issue | Unit of issue |
| sn_psm_sap_int_product_unit_of_measure_group_oil_natural_gas | Unit of measure group oil natural gas |
| sn_psm_sap_int_product_unit_of_measure_for_maximum_packing_length_width | Unit of measure for maximum packing length width |
| sn_psm_sap_int_product_utc_time_stamp_in_short_form_yyyyymmddhhmmss | Utc time stamp in short form yyyymmddhhmmss |
| sn_psm_sap_int_product_valuated_unrestricted_use_stock | Valuated unrestricted use stock |
| sn_psm_sap_int_product_valuation_area | Valuation area |
| sn_psm_sap_int_product_valuation_category | Valuation category |
| sn_psm_sap_int_product_valuation_type | Valuation type |
| sn_psm_sap_int_product_value_of_total_valuated_stock | Value of total valuated stock |
| sn_psm_sap_int_product_value_of_total_valuated_stock_in_previous_period | Value of total valuated stock in previous period |
| sn_psm_sap_int_product_volume | Volume |

Material primary data staging table (continued)

| | |
|------------------------------------|-------------|
| sn_psm_sap_int_product_volume_unit | Volume unit |
| sn_psm_sap_int_product_weight_unit | Weight unit |
| sn_psm_sap_int_product_width | Width |

Service primary data staging table

The Service primary data staging tables lists the columns in the staging table.

Service primary data staging table

| Table | Column name | Column label |
|---|-------------|--|
| sn_psm_sap_int_services_stgactivity_number | | Activity number |
| sn_psm_sap_int_services_stgauthorization_group | | Authorization group |
| sn_psm_sap_int_services_stgbase_unit_of_measure | | Base unit of measure |
| sn_psm_sap_int_services_stgcategory_of_international_article_number | | Category of international article number |
| sn_psm_sap_int_services_stgclient | | Client |
| sn_psm_sap_int_services_stgdate_of_last_change | | Date of last change |
| sn_psm_sap_int_services_stgdate_on_which_record_was_created | | Date on which record was created |
| sn_psm_sap_int_services_stgdeletion_indicator | | Deletion indicator |

Service primary data staging table (continued)

| | |
|--|---|
| sn_psm_sap_int_services_stgdenominator_for_conversion | Denominator for conversion of the base unit of measure into the unit for work |
| sn_psm_sap_int_services_stgdivision | Division |
| sn_psm_sap_int_services_stgedition_of_service_type | Edition of service type |
| sn_psm_sap_int_services_stgerp_source | Erp source |
| sn_psm_sap_int_services_stgformula_number | Formula number |
| sn_psm_sap_int_services_stggeneral_purchasing_status_for_service | General purchasing status for service |
| sn_psm_sap_int_services_stghierarchy_service_number | Hierarchy service number |
| sn_psm_sap_int_services_stginternational_article_number_universal_product_cd | International article number universal product code |
| sn_psm_sap_int_services_stgmaterial_group | Material group |
| sn_psm_sap_int_services_stgname_of_person_who_changed_object | Name of person who changed object |
| sn_psm_sap_int_services_stgname_of_person_who_created_the_object | Name of person who |

Service primary data staging table (continued)

| | | |
|---|---|--------------------|
| | | created the object |
| sn_psm_sap_int_services_stgnumerator_for_conversion_of_meins_into_iwein | Numerator for conversion of the base unit of measure into the unit for work | |
| sn_psm_sap_int_services_stgpackage_number | Package number | |
| sn_psm_sap_int_services_stgprimary_language_for_object_texts | Primary language for object texts | |
| sn_psm_sap_int_services_stgservice_category | Service category | |
| sn_psm_sap_int_services_stgservice_short_text | Service short text | |
| sn_psm_sap_int_services_stgshort_description_of_service_type | Short description of service type | |
| sn_psm_sap_int_services_stgshort_text_change_allowed | Short text change allowed | |
| sn_psm_sap_int_services_stgstandard_service_catalog_item | Standard service catalog item | |
| sn_psm_sap_int_services_stgtax_indicator_for_service_purchasing | Tax indicator for service purchasing | |
| sn_psm_sap_int_services_stgtax_tariff_code | Tax tariff code | |

Service primary data staging table (continued)

| | |
|--|-------------------------------------|
| sn_psm_sap_int_services_stguniform_resource_locator | Uniform resource locator |
| sn_psm_sap_int_services_stgunit_for_work | Unit for work |
| sn_psm_sap_int_services_stgvalidity_date_for_purchasing_status | Validity date for purchasing status |
| sn_psm_sap_int_services_stgvaluation_class | Valuation class |
| sn_psm_sap_int_services_stgwage_type | Wage type |

Plant address staging table

The Plant address primary data staging table lists the columns in the staging table.

Plant address staging table

| Table | Column name | Column label |
|-------------------------------|---|--|
| sn_sap_data_int_plant_address | activating_requirements_planning | Activating requirements planning |
| sn_sap_data_int_plant_address | address | Address |
| sn_sap_data_int_plant_address | batch_records_type_of_dms_used | Batch record type of document management system used |
| sn_sap_data_int_plant_address | business_place | Business place |
| sn_sap_data_int_plant_address | central_archiving_marker_for_primary_record | Central archiving marker for |

Plant address staging table (continued)

| | | |
|---|--|---|
| | | primary record |
| sn_sap_data_int_plant_address | | City |
| sn_sap_data_int_plant_address_code | | City code |
| sn_sap_data_int_plant_address | | Client |
| sn_sap_data_int_plant_address_company_code | | Company code |
| sn_sap_data_int_plant_address_control_data_for_fashion_bom_maintenance | | Control data for fashion bill of material maintenance |
| sn_sap_data_int_plant_address_control_of_credit_of_cost_centers | | Control of credit of cost centers |
| sn_sap_data_int_plant_address_cost_object_controlling_linking_active | | Cost object controlling linking active |
| sn_sap_data_int_plant_address_country_key | | Country key |
| sn_sap_data_int_plant_address_county_code | | County code |
| sn_sap_data_int_plant_address_customer_number_of_plant | | Customer number of plant |
| sn_sap_data_int_plant_address_distribution_channel_for_intercompany_billing | | Distribution channel for intercompany billing |
| sn_sap_data_int_plant_address_distribution_profile_at_plant_level | | Distribution profile at plant level |

Plant address staging table (continued)

| | |
|---|--|
| sn_sap_data_int_plant_address_for_intercompany_billing | Division for intercompany billing |
| sn_sap_data_int_plant_address_source | ERP source |
| sn_sap_data_int_plant_address_exchange_valuation_indicator | Exchange valuation indicator |
| sn_sap_data_int_plant_address_category_calendar_key | Factory calendar key |
| sn_sap_data_int_plant_address_indicator_batch_status_management_active | Indicator batch status management active |
| sn_sap_data_int_plant_address_indicator_conditions_at_plant_level | Indicator conditions at plant level |
| sn_sap_data_int_plant_address_indicator_season_active_in_inventory_management | Indicator season active in inventory management |
| sn_sap_data_int_plant_address_indicator_source_list_requirement | Indicator source list requirement |
| sn_sap_data_int_plant_address_available_to_promised_function_source_determination_via | Available to promise added function source determination via |
| sn_sap_data_int_plant_address_credit_allowed | Industrial product |

Plant address staging table (continued)

| | | |
|---|--|--|
| | | tax credit allowed |
| sn_sap_data_int_plant_address_language_key | | Language key |
| sn_sap_data_int_plant_address_maintenance_planning_plant | | Maintenance planning plant |
| sn_sap_data_int_plant_address_name | | Name |
| sn_sap_data_int_plant_address_name_2 | | Name 2 |
| sn_sap_data_int_plant_address_node_types_supply_chain_network | | Node type supply chain network |
| sn_sap_data_int_plant_address_number_of_days_for_firstReminder_expediter | | Number of days for first reminder expediter |
| sn_sap_data_int_plant_address_number_of_days_for_po_tolerance_compress_info_records | | Number of days for purchase order tolerance compress information records |
| sn_sap_data_int_plant_address_number_of_days_for_secondReminder_expediter | | Number of days for second reminder expediter |
| sn_sap_data_int_plant_address_number_of_days_for_thirdReminder_expediter | | Number of days for third reminder expediter |

Plant address staging table (continued)

| | |
|---|---|
| sn_sap_data_int_plant_address_order_allocation_run | Order allocation run |
| sn_sap_data_int_plant_address_plant | Plant |
| sn_sap_data_int_plant_address_plant_category | Plant category |
| sn_sap_data_int_plant_address_postal_code | Postal code |
| sn_sap_data_int_plant_address_post_box | Post office box |
| sn_sap_data_int_plant_address_purchasing_organization | Purchasing organization |
| sn_sap_data_int_plant_address_region_state_province_county | Region state province county |
| sn_sap_data_int_plant_address_rule_for_determining_the_sales_area_for_stock_transfers | Rule for determining the sales area for stock transfers |
| sn_sap_data_int_plant_address_sales_district | Sales district |
| sn_sap_data_int_plant_address_sales_organization_for_intercompany_billing | Sales organization for intercompany billing |
| sn_sap_data_int_plant_address_shipping_point_receiving_point | Shipping point receiving point |
| sn_sap_data_int_plant_address_sales_and_operations_plant | Sales and operations plant |

Plant address staging table (continued)

| | |
|---|---|
| sn_sap_data_int_plant_address_category_to_differentiate_store_dep_store_shop | category to differentiate store department store shop |
| sn_sap_data_int_plant_address_and_house_number | Street and house number |
| sn_sap_data_int_plant_address_structure_for_name_formation | Structure for name formation |
| sn_sap_data_int_plant_address_superior_department_store | Superior department store |
| sn_sap_data_int_plant_address_supply_region | Supply region |
| sn_sap_data_int_plant_address_take_regular_vendor_into_account | Take regular vendor into account |
| sn_sap_data_int_plant_address_tax_indicators_plant_purchasing | Tax indicator plant purchasing |
| sn_sap_data_int_plant_address_tax_jurisdiction | Tax jurisdiction |
| sn_sap_data_int_plant_address_text_name_of_1st_dunning_of_vendor_declarations | Text name of 1st dunning of vendor declarations |
| sn_sap_data_int_plant_address_text_name_of_3rd_dunning_of_vendor_declarations | Text name of 3rd dunning of vendor declarations |

Plant address staging table (continued)

| | |
|--|---|
| sn_sap_data_int_plant_address_name_of_the_2nd_dunning_of_vendor_declarations | Textname of the 2nd dunning of vendor declarations |
| sn_sap_data_int_plant_address_update_of_activity_consumption_in_the_quantity_structure | Update of activity consumption in the quantity structure |
| sn_sap_data_int_plant_address_updating_is_active_for_mixed_costing | Updating is active for mixed costing |
| sn_sap_data_int_plant_address_updating_is_active_in_actual_costing | Updating is active in actual costing |
| sn_sap_data_int_plant_address_valuation_area | Valuation area |
| sn_sap_data_int_plant_address_variance_key | Variance key |
| sn_sap_data_int_plant_address_vendor_number_of_plant | Vendor number of plant |
| sn_sap_data_int_plant_address_vendor_type_refinery_mill_other_brazil | Vendor type refinery mill other brazil |

GL Account staging table

The GL account staging primary data staging tables lists the columns in the staging table.

GL Account staging table

| Table | Column name | Column label |
|-------|-------------|--------------|
| | | |

GL Account staging table (continued)

| | |
|--|--|
| sn_sap_data_int_gl_stgaccounting_clerks_abbreviation | Accounting clerk abbreviation |
| sn_sap_data_int_gl_stgaccount_currency | Account currency |
| sn_sap_data_int_gl_stgaccount_is_reconciliation_account | Account is reconciliation account |
| sn_sap_data_int_gl_stgalternative_account_number_in_company_code | Alternative account number in company code |
| sn_sap_data_int_gl_stgauthorization_group | Authorization group |
| sn_sap_data_int_gl_stgcash_receipt_account | Cash receipt account |
| sn_sap_data_int_gl_stgclearing_specific_to_ledger_groups | Clearing specific to ledger groups |
| sn_sap_data_int_gl_stgclient | Client |
| sn_sap_data_int_gl_stgcommitment_item | Commitment item |
| sn_sap_data_int_gl_stgcompany_code | Company code |
| sn_sap_data_int_gl_stgdate_of_the_last_interest_calculation_run | Date of the last interest calculation |
| sn_sap_data_int_gl_stgdate_on_which_the_record_was_created | Date on which the record was created |

GL Account staging table (continued)

| | |
|---|--|
| sn_sap_data_int_gl_stgerp_source | Erp source |
| sn_sap_data_int_gl_stgfield_status_group | Field status group |
| sn_sap_data_int_gl_stgfinancial_budget_item | Financial budget item |
| sn_sap_data_int_gl_stgg_l_account_additional_text | General ledger account additional text |
| sn_sap_data_int_gl_stgg_l_account_number | General ledger account number |
| sn_sap_data_int_gl_stgd_for_account_details | ID for account details |
| sn_sap_data_int_gl_stgjindicator_account_managed_in_external_system | Indicator account managed in external system |
| sn_sap_data_int_gl_stgjindicator_account_marked_for_deletion | Indicator account marked for deletion |
| sn_sap_data_int_gl_stgjindicator_can_line_items_be_displayed_by_account | Indicator can line items be displayed by account |
| sn_sap_data_int_gl_stgjindicator_is_account_blocked_for_posting | Indicator is account blocked for posting |

GL Account staging table (continued)

| | |
|--|---|
| sn_sap_data_int_gl_stgindicator_is_account_only_posted_to Automatically | Indicator is account only posted to automatically |
| sn_sap_data_int_gl_stgindicator_manage_balances_in_local_currency Only | Indicator manage balances in local currency only |
| sn_sap_data_int_gl_stgindicator_open_item_management | Indicator open item management |
| sn_sap_data_int_gl_stgindicator_reconcil_acct_ready_for_input_at_time_of_posting | Indicator reconcil account ready for input at time of posting |
| sn_sap_data_int_gl_stgindicator_supplement_for_automatic_postings | Indicator supplement for automatic postings |
| sn_sap_data_int_gl_stgindicator_tax_code_is_not_a_required_field | Indicator tax code is not a required field |
| sn_sap_data_int_gl_stginflation_key | Inflation key |
| sn_sap_data_int_gl_stginterest_calculations_indicator | Interest calculation indicator |
| sn_sap_data_int_gl_stginterest_calculation_frequency_in_months | Interest calculation frequency in months |

GL Account staging table (continued)

| | |
|---|--|
| sn_sap_data_int_gl_stgkey_date_of_last_interest_calculation | Key date of last interest calculation |
| sn_sap_data_int_gl_stgkey_for_exchange_rate_differences_in_foreign_currency | Key for exchange rate differences in foreign currency accounts |
| sn_sap_data_int_gl_stgkey_for_sorting_according_to_assignment_numbers | Key for sorting according to assignment numbers |
| sn_sap_data_int_gl_stgmca_key | Multi-currency accounting key |
| sn_sap_data_int_gl_stgname_of_person_who_created_the_object | Name of person who created the object |
| sn_sap_data_int_gl_stgplanning_group | Planning group |
| sn_sap_data_int_gl_stgplanning_level | Planning level |
| sn_sap_data_int_gl_stgrecovery_indicator | Recovery indicator |
| sn_sap_data_int_gl_stgshort_key_for_a_house_bank | Short key for a house bank |
| sn_sap_data_int_gl_stgtax_category_in_account_primary_record | Tax category in account |

GL Account staging table (continued)

| | primary record |
|--|---|
| sn_sap_data_int_gl_stgtolerance_group_for_g_l_accounts | Tolerance group for general ledger accounts |
| sn_sap_data_int_gl_stgvaluation_group | Valuation group |
| sn_sap_data_int_gl_stgvendor_created_date | Date on which the record was created |

Legal entity and company code staging table

The Legal entity and company code staging primary data table lists the columns in the staging table.

Legal entity and company code staging table

| Table | Column name | Column label |
|-------|--|--|
| | sn_sap_data_int_le_stgaccounts_receivable_pledging_active | Accounts receivable pledging active |
| | sn_sap_data_int_le_stgactivate_account_assignment_derivation_in_funds_management | Activate account assignment derivation in funds management |
| | sn_sap_data_int_le_stgactivate_update_in_funds_management | Activate update in funds management |
| | sn_sap_data_int_le_stgadditional_settings_variant_for_bus_area_financial_statement | Additional settings variant for |

Legal entity and company code staging table (continued)

| | | |
|--|--|--|
| | | bus area financial statements |
| sn_sap_data_int_le_stgaddress | | Address |
| sn_sap_data_int_le_stgallocation_indicator | | Allocation indicator |
| sn_sap_data_int_le_stgcash_management_and_forecast_company_code | | Cash management and forecast company code |
| sn_sap_data_int_le_stgchart_of_accounts | | Chart of accounts |
| sn_sap_data_int_le_stgchart_of_accounts_according_to_country_legislation | | Chart of accounts according to country legislation |
| sn_sap_data_int_le_stgcity | | City |
| sn_sap_data_int_le_stgclient | | Client |
| sn_sap_data_int_le_stgcompany | | Company |
| sn_sap_data_int_le_stgcompany_code | | Company code |
| sn_sap_data_int_le_stgcompany_code_variant_screen | | Company code variant screen |
| sn_sap_data_int_le_stgcost_of_sales_accounting_status | | Cost of sales accounting status |
| sn_sap_data_int_le_stgcountry_key | | Country key |

Legal entity and company code staging table (continued)

| | |
|---|---|
| sn_sap_data_int_le_stgcredit_control_area | Credit control area |
| sn_sap_data_int_le_stgcurrency_key | Currency key |
| sn_sap_data_int_le_stgdeferred_tax_rule | Deferred tax rule |
| sn_sap_data_int_le_stgdocument_type_for_journal_voucher_amount_correction | Document type for journal voucher amount correction |
| sn_sap_data_int_le_stgdocument_type_for_journal_voucher_tax_code_correction | Document type for journal voucher tax code correction |
| sn_sap_data_int_le_stgdocument_type_for_provisions_for_taxes_on_services_received | Document type for provisions for taxes on services received |
| sn_sap_data_int_le_stgdocument_type_for_remittance_challans | Document type for remittance challans |
| sn_sap_data_int_le_stgenable_amount_split | Enable amount split |
| sn_sap_data_int_le_stgerp_source | ERP source |
| sn_sap_data_int_le_stgfield_status_variant | Field status variant |

Legal entity and company code staging table (continued)

| | |
|--|--|
| sn_sap_data_int_le_stgfinancial_management_area | Financial management area |
| sn_sap_data_int_le_stgfiscal_year_variant | Fiscal year variant |
| sn_sap_data_int_le_stgforeign_currency_translation_for_tax_items | Foreign currency translation for tax items |
| sn_sap_data_int_le_stgforeign_trade_import_data_control_in_mm_purchase_order | Foreign trade import data control in material movement purchase orders |
| sn_sap_data_int_le_stgforeign_trade_import_data_copying_control_for_gr | Foreign trade import data copying control for goods receipt |
| sn_sap_data_int_le_stgforeign_trade_screen_ctrl_of_imp_data_f_mm_goods_receipt | Foreign trade screen control of important data material movement goods receipt |
| sn_sap_data_int_le_stgfunds_center_can_be_assigned_to_an_account_in_hr_frf | Funds center can be assigned to an account in human resource from |

Legal entity and company code staging table (continued)

| | |
|---|---|
| sn_sap_data_int_le_stg_funds_reservation_field_status_var | Funds reservation field status |
| sn_sap_data_int_le_stg_l_account_authorization_check_in_contracts | General ledger account authorization check in contracts |
| sn_sap_data_int_le_stg_l_account_authorization_check_in_inventory_manager | General ledger account authorization check in inventory management |
| sn_sap_data_int_le_stg_l_account_authorization_check_in_po_scheduling_agreement | General ledger account authorization check in purchase order scheduling agreement |
| sn_sap_data_int_le_stg_l_account_authorization_check_in_purchase_requisition | General ledger account authorization check in purchase requisitions |
| sn_sap_data_int_le_stg_l_account_authorization_check_in_shopping_cart | General ledger account authorization check in shopping cart |
| sn_sap_data_int_le_stg_hide_entry_in_value_help | Hide entry in value help |

Legal entity and company code staging table (continued)

| | |
|--|--|
| sn_sap_data_int_le_stgindicator_base_amount_for_tax_is_net_of_discount | Indicator base amount for tax is net of discount |
| sn_sap_data_int_le_stgindicator_business_area_financial_statements_required | Indicator business area financial statements required |
| sn_sap_data_int_le_stgindicator_can_credit_control_area_be_overwritten | Indicator can credit control area be overwritten |
| sn_sap_data_int_le_stgindicator_cash_budget_management_active | Indicator cash budget management active |
| sn_sap_data_int_le_stgindicator_cash_management_activated | Indicator cash management activated |
| sn_sap_data_int_le_stgindicator_company_code_is_in_another_system | Indicator company code is in another system |
| sn_sap_data_int_le_stgindicator_discount_base_amount_is_the_net_value | Indicator discount base amount is the net value |
| sn_sap_data_int_le_stgindicator_document_date_as_the_basis_for_tax_determination | Indicator document date as the basis for tax determination |

Legal entity and company code staging table (continued)

| | |
|---|---|
| sn_sap_data_int_le_stgindicator_extended_withholding_tax_active | Indicator extended withholding tax active |
| sn_sap_data_int_le_stgindicator_financial_assets_management_active | Indicator financial assets management active |
| sn_sap_data_int_le_stgindicator_hedge_request_active | Indicator hedge request active |
| sn_sap_data_int_le_stgindicator_jva_active | Indicator joint venture accounting active |
| sn_sap_data_int_le_stgindicator_negative_postings_permitted | Indicator negative postings permitted |
| sn_sap_data_int_le_stgindicator_no_ex_rate_difference_when_clearing_in_local_currency | Indicator number exchange rate difference when clearing in local currency |
| sn_sap_data_int_le_stgindicator_post_translations_for_exchange_rate_differences | Indicator post translations for exchange rate differences |
| sn_sap_data_int_le_stgindicator_productive_company_code | Indicator productive company code |

Legal entity and company code staging table (continued)

| | |
|---|--|
| sn_sap_data_int_le_stgindicator_project_cash_management_active | Indicator project cash management active |
| sn_sap_data_int_le_stgindicator_propose_current_date_as_value_date | Indicator propose current date as value date |
| sn_sap_data_int_le_stgindicator_propose_fiscal_year | Indicator propose fiscal year |
| sn_sap_data_int_le_stgindicator_purchase_account_processing_is_active | Indicator purchase account processing is active |
| sn_sap_data_int_le_stgindicator_updating_mm_in_cash_mgmt_forecast_activated | Indicator updating material movement in cash management forecast activated |
| sn_sap_data_int_le_stgindicator_updating_sd_in_cash_mgmt_forecast_activated | Indicator updating sales and disturbution in cash management forecast activated |
| sn_sap_data_int_le_stginflation_method | Inflation method |
| sn_sap_data_int_le_stginput_tax_code_for_non_taxable_transactions | Input tax code for non-taxable transactions |

Legal entity and company code staging table (continued)

| | | | | | |
|--|-------------|----------------|--------------|-------------------|---------------|
| sn_sap_data_int_le_stgjuri | sdictio | n_for_tax_c | alculation_t | ax_jurisdiction_c | ode |
| sn_sap_data_int_le_stglanguage_key | | | | Language | key |
| sn_sap_data_int_le_stgmanag | e_variant_o | n_of_posting_p | eriod_for_c | ompany_code_ | Ledger |
| sn_sap_data_int_le_stgmaximum_exch | ange_rate_d | eviation_in_p | ercent | Maximum | exchange |
| rate | deviation | in percent | | rate | rate |
| sn_sap_data_int_le_stgmethod_for_offsetting_account_determination | | | | Method for | offsetting |
| | | | | account | account |
| | | | | determination | determination |
| sn_sap_data_int_le_stgname_of_company_code_or_company | | | | Name of | company |
| | | | | code or | code |
| | | | | company | |
| sn_sap_data_int_le_stgname_of_global_company_code | | | | Name of | global |
| | | | | company | company |
| | | | | code | code |
| sn_sap_data_int_le_stgoriginal_key_of_the_company_code | | | | Original | key of the |
| | | | | company | company |
| | | | | code | code |
| sn_sap_data_int_le_stgoutput_tax_code_for_non_taxable_transactions | | | | Output tax | code for |
| | | | | non-taxable | transactions |
| | | | | | |

Legal entity and company code staging table (continued)

| | |
|---|---|
| sn_sap_data_int_le_stgposting_period_variant | Posting period variant |
| sn_sap_data_int_le_stgprocedure_for_setting_the_posting_date | Procedure for setting the posting date |
| sn_sap_data_int_le_stgules_for_copying_from_the_sample_account_for_g_l_ac | Roles for copying from the sample account for general ledger accounts |
| sn_sap_data_int_le_stgsales_purchases_tax_group | Sales purchases tax group |
| sn_sap_data_int_le_stgurcharge_calculation_method | Surcharge calculation method |
| sn_sap_data_int_le_stgax_reporting_date_active_in_documents | Tax reporting date active in documents |
| sn_sap_data_int_le_stgvalue_added_tax_registration_number | Value added tax registration number |
| sn_sap_data_int_le_stgvat_registration_number | Vat registration number |
| sn_sap_data_int_le_stgworkflow_variant | Workflow variant |

Currency staging table

The currency staging primary data table lists the columns in the staging table.

Currency staging table

| Table | Column name | Column label |
|------------------------------|--|--|
| sn_sap_data_int_currency_stg | alternative_key_for_currencies | Alternative key for currencies |
| sn_sap_data_int_currency_stg | client | Client |
| sn_sap_data_int_currency_stg | currency_key | Currency key |
| sn_sap_data_int_currency_stg | date_until_which_the_currency_is_valid | Date until which the currency is valid |
| sn_sap_data_int_currency_stg | erp_source | ERP source |
| sn_sap_data_int_currency_stg | iso_currency_code | ISO currency code |
| sn_sap_data_int_currency_stg | long_text | Long text |
| sn_sap_data_int_currency_stg | primary_sap_currency_code_for_iso_code | Primary sap currency code for ISO code |
| sn_sap_data_int_currency_stg | short_text | Short text |

FX conversion rate staging table

The FX conversion rate staging primary data lists the columns in the staging table.

FX conversion rate staging table

| Table | Column name | Column label |
|-----------------------------|----------------|---|
| sn_sap_data_int_fx_rate_stg | client | Client |
| sn_sap_data_int_fx_rate_stg | effective_date | Date as of which the exchange rate is effective |
| sn_sap_data_int_fx_rate_stg | erp_source | Erp source |
| sn_sap_data_int_fx_rate_stg | exchange_rate | Exchange rate |

FX conversion rate staging table (continued)

| | | |
|-----------------------------|--------------------|-----------------------------------|
| sn_sap_data_int_fx_rate_stg | exchange_rate_type | Exchange rate type |
| sn_sap_data_int_fx_rate_stg | from_currency | From currency |
| sn_sap_data_int_fx_rate_stg | from_ratio | Ratio for the from currency units |
| sn_sap_data_int_fx_rate_stg | to_currency | To currency |
| sn_sap_data_int_fx_rate_stg | to_ratio | Ratio for the to-currency units |

Payment term staging table

The payment term staging primary data table lists the columns in the staging table.

Payment term staging table

| Table | Column name | Column label |
|------------------------------|---|---|
| sn_sap_data_int_pay_term_stg | account_type | Account type |
| sn_sap_data_int_pay_term_stg | additional_months | Additional months |
| sn_sap_data_int_pay_term_stg | additional_months_for_special_condition_1 | Additional months for special condition 1 |
| sn_sap_data_int_pay_term_stg | additional_months_for_special_condition_2 | Additional months for special condition 2 |
| sn_sap_data_int_pay_term_stg | additional_months_for_special_condition_3 | Additional months for special |

Payment term staging table (continued)

| | |
|---|--|
| | condition 3 |
| sn_sap_data_int_pay_term_stg_calendar_day_for_the_baseline_date_for_payment | Calendar day for the baseline date for payment |
| sn_sap_data_int_pay_term_stg_discount_percentage_rate_1 | Cash discount percentage rate 1 |
| sn_sap_data_int_pay_term_stg_discount_percentage_rate_2 | Cash discount percentage rate 2 |
| sn_sap_data_int_pay_term_stg_client | Client |
| sn_sap_data_int_pay_term_stg_date_type | Date type |
| sn_sap_data_int_pay_term_stg_days_from_baseline_date_for_payment_1 | Days from baseline date for payment 1 |
| sn_sap_data_int_pay_term_stg_days_from_baseline_date_for_payment_2 | Days from baseline date for payment 2 |
| sn_sap_data_int_pay_term_stg_days_from_baseline_date_for_payment_3 | Days from baseline date for payment 3 |
| sn_sap_data_int_pay_term_stg_day_limit | Day limit |
| sn_sap_data_int_pay_term_stg_description | Description |

Payment term staging table (continued)

| | |
|---|----------------------------------|
| sn_sap_data_int_pay_term_stg_date_for_special_condition_1 | Due date for special condition 1 |
| sn_sap_data_int_pay_term_stg_date_for_special_condition_2 | Due date for special condition 2 |
| sn_sap_data_int_pay_term_stg_date_for_special_condition_3 | Due date for special condition 3 |
| sn_sap_data_int_pay_term_stg_source | Erp source |
| sn_sap_data_int_pay_term_stg_entry_in_value_help | Hide entry in value help |
| sn_sap_data_int_pay_term_stg_language_key | Language key |
| sn_sap_data_int_pay_term_stg_number_of_the_standard_text | Number of the standard text |
| sn_sap_data_int_pay_term_stg_own_explanation | Own explanation |
| sn_sap_data_int_pay_term_stg_payment_block | Payment block |
| sn_sap_data_int_pay_term_stg_payment_method | Payment method |
| sn_sap_data_int_pay_term_stg_payment_term | Payment term |

Payment term staging table (continued)

| | |
|---|--|
| sn_sap_data_int_pay_term_start_payment_of_terms_in_remittance_voucher_paper | Print payment of terms in remittance voucher paper |
| sn_sap_data_int_pay_term_recurring_entries_add_payment_of_terms_from_primary_record | Recurring entries add payment of terms from primary record |
| sn_sap_data_int_pay_term_single_character_flag | Single character flag |
| sn_sap_data_int_pay_term_transfer_payment_block_when_changing_payment_of_terms | Transfer payment block when changing payment of terms |
| sn_sap_data_int_pay_term_transfer_payment_method_when_changing_payment_of_terms | Transfer payment method when changing payment of terms |

Supplier staging table

The supplier staging primary data table lists the columns in the staging table.

Supplier staging table

| Table | Column name | Column label |
|---------------------------------------|-------------|---------------|
| sn_sap_data_int_supplierabc_indicator | | ABC indicator |

Supplier staging table (continued)

| | |
|---|---|
| sn_sap_data_int_supplier@stgounting_clerk_abbreviation | Accounting clerk abbreviation |
| sn_sap_data_int_supplier@stgounting_clerk_fax_number_at_the_customer_vendor | Accounting clerk fax number at the customer vendor |
| sn_sap_data_int_supplier@stgounting_clerk_telephone_number_at_business_partner | Accounting clerk telephone number at business partner |
| sn_sap_data_int_supplier@stgount_holder | Account holder |
| sn_sap_data_int_supplier@stgount_number_of_primary_record_of_tax_office_responsible | Accountable number of primary record of tax office responsible |
| sn_sap_data_int_supplier@stgount_number_of_the_alternative_payee | Account number of the alternative payee |
| sn_sap_data_int_supplier@stgount_number_of_the_alternative_payee_1 | Account number of the alternative payee 1 |
| sn_sap_data_int_supplier@stgount_number_of_the_primary_record_with_fiscal_address | Address number of the primary record with fiscal address |
| sn_sap_data_int_supplier@stgount_number_of_vendor_or_creditor | Account number of |

Supplier staging table (continued)

| | vendor or creditor |
|---|--|
| sn_sap_data_int_supplier last count_number_of_vendor_or_creditor_1 | Account number of vendor or creditor |
| sn_sap_data_int_supplier last count_number_of_vendor_or_creditor_2 | Account number of vendor or creditor 2 |
| sn_sap_data_int_supplier last activity_code_for_gross_income_tax | Activity code for gross income tax |
| sn_sap_data_int_supplier last activity_code_for_social_insurance | Activity code for social insurance |
| sn_sap_data_int_supplier last activity_profile_for_purchasing_organization_controlling | Activity profile for purchasing organization controlling |
| sn_sap_data_int_supplier last dition_of_new_fields_to_lfm1_seasonal_procurement | Addition of new fields to lfm1 seasonal procurement |
| sn_sap_data_int_supplier last dition_of_new_fields_to_lfm1_seasonal_procurement1 | Addition of new fields to lfm1 seasonal procurement 1 |
| sn_sap_data_int_supplier last dress | Address |
| sn_sap_data_int_supplier last ency_location_code | Agency location code |
| sn_sap_data_int_supplier last ignment_test_group | Assignment test group |

Supplier staging table (continued)

| | |
|--|---|
| sn_sap_data_int_supplier_authority_for_exemption_from_withholding_tax | Authority for exemption from withholding tax |
| sn_sap_data_int_supplier_authorization_group | Authorization group |
| sn_sap_data_int_supplier_authorization_group_1 | Authorization group 1 |
| sn_sap_data_int_supplier_automatic_evaluated_receipt_settlement_for_return_items | Automatic evaluated receipt settlement for return items |
| sn_sap_data_int_supplier_automatic_generation_of_purchase_order_allowed | Automatic generation of purchase order allowed |
| sn_sap_data_int_supplier_average_daily_basis_points_for_purchase_cards | Average daily basis points for purchase cards |
| sn_sap_data_int_supplier_bank_account | Bank account |
| sn_sap_data_int_supplier_bank_control_key | Bank control key |
| sn_sap_data_int_supplier_bank_country | Bank country |
| sn_sap_data_int_supplier_bank_key | Bank key |
| sn_sap_data_int_supplier_bank_name | Bank name |
| sn_sap_data_int_supplier_bill_of_exchange_limit_in_local_currency | Bill of exchange |

Supplier staging table (continued)

| | | |
|---|--|---|
| | | limit in local currency |
| sn_sap_data_int_supplierblock_key_for_payment | | Block key for payment |
| sn_sap_data_int_supplierbusiness_purpose_completed_flag | | Business purpose completed flag 1 |
| sn_sap_data_int_supplierbusiness_purpose_completed_flag_1 | | Business purpose completed flag 1 ha |
| sn_sap_data_int_suppliercapital_amount | | Capital amount |
| sn_sap_data_int_suppliercarrier_confirmation_is_expected | | Carrier confirmation is expected |
| sn_sap_data_int_suppliercentrally_imposed_purchasing_block | | Centrally imposed purchasing block |
| sn_sap_data_int_suppliercentral_deletion_block_for_primary_record | | Central deletion block for primary record |
| sn_sap_data_int_suppliercentral_deletion_block_for_primary_record_1 | | Central deletion block for primary record |
| sn_sap_data_int_suppliercentral_deletion_flag_for_primary_record | | Central deletion flag for primary record |

Supplier staging table (continued)

| | |
|---|---|
| sn_sap_data_int_supplier[central_posting_block] | Central posting block |
| sn_sap_data_int_supplier[certificate_number_of_the_withholding_tax_exemption] | Certificate number of the withholding tax exemption |
| sn_sap_data_int_supplier[certificate_number_of_the_withholding_tax_exemption] | Certificate number of the withholding tax exemption 1 |
| sn_sap_data_int_supplier[certification_date] | Certification date |
| sn_sap_data_int_supplier[certification_date_for_minimum_wage] | Certification date for minimum wage |
| sn_sap_data_int_supplier[check_digit_for_the_international_location_number] | Check digit for the international location number |
| sn_sap_data_int_supplier[check_flag_for_double_invoices_or_credit_memos] | Check flag for double invoices or credit memos |
| sn_sap_data_int_supplier[city] | City |
| sn_sap_data_int_supplier[clerk_at_vendor] | Clerk at vendor |
| sn_sap_data_int_supplier[client] | Client |
| sn_sap_data_int_supplier[client_1] | Client 1 |

Supplier staging table (continued)

| | |
|---|---|
| sn_sap_data_int_supplier stage _2 | Client 2 |
| sn_sap_data_int_supplier collection _authorization | Collection authorization |
| sn_sap_data_int_supplier company _code | Company code |
| sn_sap_data_int_supplier company _code_created_date | Company code created date |
| sn_sap_data_int_supplier company _code_date_on_which_the_changes_were confirmed | Company code date on which the changes were confirmed |
| sn_sap_data_int_supplier company _id_of_trading_partner | Company ID of trading partner |
| sn_sap_data_int_supplier company _size | Company size |
| sn_sap_data_int_supplier comparison _agreement_of_business_volumes_necessary comparison | Comparison agreement of business volumes necessary |
| sn_sap_data_int_supplier completion _date_of_inspection | Completion date of inspection |
| sn_sap_data_int_supplier confirmation _control_key | Confirmation control key |
| sn_sap_data_int_supplier country _key | Country key |
| sn_sap_data_int_supplier country _version_new_fields_dates_minimum_wage_over country | Country version new fields dates minimum |

Supplier staging table (continued)

| | |
|--|--|
| | wage owner details |
| sn_sap_data_int_supplier cost gnumber | CRC number |
| sn_sap_data_int_supplier cost redit_information_number | Credit information number |
| sn_sap_data_int_supplier cost s_docking_relevant_for_collective_numbering | Cross docking relevant for collective numbering |
| sn_sap_data_int_supplier cost number | CRT number |
| sn_sap_data_int_supplier cost urrency | Currency |
| sn_sap_data_int_supplier cost omer_number | Customer number |
| sn_sap_data_int_supplier cost omer_vendor_id | Customer vendor ID |
| sn_sap_data_int_supplier cost om_office_of_exit_entry_for_foreign_trade | Custom office of exit entry for foreign trade |
| sn_sap_data_int_supplier cost _communication_line_number | Data communication line number |
| sn_sap_data_int_supplier cost e_of_birth_of_the_person_subject_to_withholding_tax | Date of birth of the person subject to withholding tax |
| sn_sap_data_int_supplier cost e_of_the_last_interest_calculation_run | Date of the last interest calculation run |

Supplier staging table (continued)

| | |
|--|---|
| sn_sap_data_int_supplier date _on_which_record_was_created | Date on which the record was created |
| sn_sap_data_int_supplier date _on_which_record_was_created_1 | Date on which record was created |
| sn_sap_data_int_supplier date _on_which_the_changes_were_confirmed | Date on which the changes were confirmed |
| sn_sap_data_int_supplier declaration _regimen_for_pis_or_cofins | Declaration regimen for PIS or COFINS |
| sn_sap_data_int_supplier delete _flag_for_vendor_at_purchasing_level | Delete flag for vendor at purchasing level |
| sn_sap_data_int_supplier deletion _bock_for_primary_record_company_code_level | Deletion bock for primary record company code level |
| sn_sap_data_int_supplier deletion _bock_for_primary_record_company_code_level | Deletion bock for primary record company code level |
| sn_sap_data_int_supplier deletion _flag_for_primary_record_company_code_level | Deletion flag for primary record company code level |
| sn_sap_data_int_supplier distribution _type_for_employment_tax | Distribution type for |

Supplier staging table (continued)

| | |
|--|--|
| | employment tax |
| sn_sap_data_int_supplierdistrict | District |
| sn_sap_data_int_supplierdistrict_1 | District 1 |
| sn_sap_data_int_supplierdistrict_2 | District 2 |
| sn_sap_data_int_suppliereconomic_activity_national_classification | Economic Activity National Classification |
| sn_sap_data_int_supplieremail_address_for_avis_hash_value | Email address for avis hash value |
| sn_sap_data_int_suppliererpsource | Erp source |
| sn_sap_data_int_supplierexternal_manufacturer_code_name_or_number | External manufacturer code name or number |
| sn_sap_data_int_supplierfactory_calendar_key | Factory calendar key |
| sn_sap_data_int_supplierfashion_specific_fields_for_vendor_primary | Fashion specific fields for vendor primary |
| sn_sap_data_int_supplierfaxnumber | Fax number |
| sn_sap_data_int_supplierfirstname | First name |
| sn_sap_data_int_supplierfirsttelephone_number | First telephone number |

Supplier staging table (continued)

| | |
|---|--|
| sn_sap_data_int_supplier_foreign_national_registration | Foreign national registration |
| sn_sap_data_int_supplier_forwarding_agent_freight_group | Forwarding agent freight group |
| sn_sap_data_int_supplier_function_that_will_be_blocked | Function that will be blocked |
| sn_sap_data_int_supplier_future_withholding_tax_code | Future withholding tax code |
| sn_sap_data_int_supplier_group_for_calculation_schema_vendor | Group for calculation schema vendor |
| sn_sap_data_int_supplier_group_key | Group key |
| sn_sap_data_int_supplier_head_office_account_number | Head office account number |
| sn_sap_data_int_supplier_house_number_is_no_longer_used_from_release_4_6b | House number is no longer used from release 4 6b |
| sn_sap_data_int_supplier_icms_taxpayer | ICMS taxpayer |
| sn_sap_data_int_supplier_include_lfm1_lfm2 | Include lfm1 lfm2 |
| sn_sap_data_int_supplier_incoterms_location_1 | Incoterms location 1 |
| sn_sap_data_int_supplier_incoterms_location_2 | Incoterms location 2 |

Supplier staging table (continued)

| | |
|--|--|
| sn_sap_data_int_supplierinstgterms_part_1 | Incoterms part 1 |
| sn_sap_data_int_supplierinstgterms_part_2 | Incoterms part 2 |
| sn_sap_data_int_supplierinstgterms_version | Incoterms version |
| sn_sap_data_int_supplierinstgtermsturns_vendor | Indicates whether vendor is returns vendor |
| sn_sap_data_int_supplierinstgator_alternative_payee_in_document_allowed | Indicator alternative payee in document allowed |
| sn_sap_data_int_supplierinstgator_alternative_payee_using_account_number | Indicator alternative payee using account number |
| sn_sap_data_int_supplierinstgator_alternative_payee_using_account_number_1 | Indicator alternative payee using account number 1 |
| sn_sap_data_int_supplierinstgator_business_partner_subject_to_equalization_tax | Indicator business partner subject to equalization tax |
| sn_sap_data_int_supplierinstgator_clearing_between_customer_and_vendor | Indicator clearing between customer and vendor |

Supplier staging table (continued)

| | |
|---|---|
| sn_sap_data_int_supplier_index_compilation_active_for_purchase_orders | Indicator document Index compilation active for purchase orders |
| sn_sap_data_int_supplier_index_for_one_time_account | Indicator for one time account |
| sn_sap_data_int_supplier_index_for_periodic_account_statements | Indicator for periodic account statements |
| sn_sap_data_int_supplier_index_for_service_based_invoice_verification | Indicator for service-based invoice verification |
| sn_sap_data_int_supplier_index_goods_receipt_based_invoice_verification | Indicator goods receipt-based invoice verification |
| sn_sap_data_int_supplier_index_compilation_for_subsequent_settlement_active | Indicator index compilation for subsequent settlement active |
| sn_sap_data_int_supplier_index_local_processing | Indicator local processing |
| sn_sap_data_int_supplier_index_pay_all_items_separately | Indicator pay all items separately |

Supplier staging table (continued)

| | |
|---|--|
| sn_sap_data_int_supplier_indicator_plan_level_relevant | Indicator plant level relevant |
| sn_sap_data_int_supplier_indicator_relevant_for_agency_business | Indicator relevant for agency business |
| sn_sap_data_int_supplier_indicator_relev_to_price_determination_vend_hierarchy | Indicator relev To price determination vend Hierarchy |
| sn_sap_data_int_supplier_indicator_send_payment_advice_via_edi | Indicator send payment advices via EDI |
| sn_sap_data_int_supplier_indicator_send_payment_advice_by_xml | Indicator send payment advice by xml |
| sn_sap_data_int_supplier_indicator_vendor_subject_to_subsequent_settlement_accounting | Indicator vendor subject to subsequent settlement accounting |
| sn_sap_data_int_supplier_indicator_vendor_subrange_relevant | Indicator vendor subrange relevant |
| sn_sap_data_int_supplier_indicator_whether_discount_in_kind_granted | Indicator whether discount in kind granted |
| sn_sap_data_int_supplier_industry_key | Industry key |

Supplier staging table (continued)

| | |
|---|---|
| sn_sap_data_int_supplierindustry_main_type | Industry main type |
| sn_sap_data_int_supplierinstruction_key_for_data_medium_exchange | Instruction key for data medium exchange |
| sn_sap_data_int_supplierinterest_calculation_frequency_in_months | Interest calculation frequency in months |
| sn_sap_data_int_supplierinterest_calculation_indicator | Interest calculation indicator |
| sn_sap_data_int_supplierinternational_bank_account_number | International bank account number |
| sn_sap_data_int_supplierinternational_bank_country_key | International bank country key |
| sn_sap_data_int_supplierinternational_bank_key | International bank key |
| sn_sap_data_int_supplierinternational_location_number_part_1 | International location number part 1 |
| sn_sap_data_int_supplierinternational_location_number_part_2 | International location number part 2 |
| sn_sap_data_int_supplierinternet_address_of_partner_company_clerk | Internet address of partner company clerk |

Supplier staging table (continued)

| | |
|---|--|
| sn_sap_data_int_supplier[stage]_issued_by | Issued by |
| sn_sap_data_int_supplier[key]_date_of_last_interest_calculation | Key date of last interest calculation |
| sn_sap_data_int_supplier[key]_for_dunning_notice_grouping | Key for dunning notice grouping |
| sn_sap_data_int_supplier[key]_for_payment_grouping | Key for payment grouping |
| sn_sap_data_int_supplier[key]_for_sorting_according_to_assignment_numbers | Key for sorting according to assignment numbers |
| sn_sap_data_int_supplier[key]_for_the_sex_of_the_person_subject_to_withholding_tax | Key for the sex of the person subject to withholding tax |
| sn_sap_data_int_supplier[language]_language_key | Language key |
| sn_sap_data_int_supplier[last_review]_external | Last review external |
| sn_sap_data_int_supplier[ledger]_management_expiration_date | Ledger management expiration date |
| sn_sap_data_int_supplier[legal]_nature | Legal nature |
| sn_sap_data_int_supplier[fa1]_extension_with_new_fields_seasonal_procurement | extension with new fields |

Supplier staging table (continued)

| | |
|--|---|
| | seasonal procurement |
| sn_sap_data_int_supplier fb1 extension_with_new_fields_seasonal_procurement | extension with new fields seasonal procurement 1 |
| sn_sap_data_int_supplier fb1 extension_with_new_fields_seasonal_procurement | extension with new fields seasonal procurement |
| sn_sap_data_int_supplier fb1 extension_with_new_fields_seasonal_procurement | extension with new fields seasonal procurement 1 |
| sn_sap_data_int_supplier fb1 table_of_value_added_tax | Liable of value added tax |
| sn_sap_data_int_supplier list of_respected_payment_methods | List of respected payment methods |
| sn_sap_data_int_supplier local _authority_additional_fields_address | Local authority additional fields address |
| sn_sap_data_int_supplier main _economic_activity | Main economic activity |
| sn_sap_data_int_supplier memo no | Memo |

Supplier staging table (continued)

| | |
|--|---|
| sn_sap_data_int_supplier_mto_company_indicator | Micro company indicator |
| sn_sap_data_int_supplier_mto_minimum_order_value | Minimum order value |
| sn_sap_data_int_supplier_mto_minority_indicators | Minority indicators |
| sn_sap_data_int_supplier_mto_mode_of_transport_for_foreign_trade | Mode of transport for foreign trade |
| sn_sap_data_int_supplier_name_1 | Name 1 |
| sn_sap_data_int_supplier_name_2 | Name 2 |
| sn_sap_data_int_supplier_name_3 | Name 3 |
| sn_sap_data_int_supplier_name_4 | Name 4 |
| sn_sap_data_int_supplier_name_of_person_who_created_the_object | Name of person who created the object |
| sn_sap_data_int_supplier_name_of_person_who_created_the_object_1 | Name of person who created the object 1 |
| sn_sap_data_int_supplier_name_of_person_who_created_the_object_2 | Name of person who created the object 2 |
| sn_sap_data_int_supplier_name_of_representative | Name of representative |
| sn_sap_data_int_supplier_natural_person | Natural person |

Supplier staging table (continued)

| | |
|--|--------------------------------------|
| sn_sap_data_int_supplier net _fields_for_localization | New fields for localization |
| sn_sap_data_int_supplier offset _method | Offset method |
| sn_sap_data_int_supplier offset _percentage | Offset percentage |
| sn_sap_data_int_supplier order _acknowledgment_requirement | Order acknowledgment requirement |
| sn_sap_data_int_supplier order _entry_by_vendor | Order entry by vendor |
| sn_sap_data_int_supplier org account_number_with_the_vendor | Our account number with the vendor |
| sn_sap_data_int_supplier org account_number_with_the_vendor_1 | Our account number with the vendor 1 |
| sn_sap_data_int_supplier part _bank_type | Part bank type |
| sn_sap_data_int_supplier payment _block | Payment block |
| sn_sap_data_int_supplier payment _method_supplement | Payment method supplement |
| sn_sap_data_int_supplier payment _office | Payment office |
| sn_sap_data_int_supplier payment _order_subscriber_number | Payment order subscriber number |
| sn_sap_data_int_supplier payment _terms_key_for_credit_memos | Payment terms key |

Supplier staging table (continued)

| | | |
|---|---|---------------------|
| | | for credit memos |
| sn_sap_data_int_supplier[personnel_number] | | Personnel number |
| sn_sap_data_int_supplier[place_of_birth_of_the_person_subject_to_withholding] | Place of birth of the person subject to withholding tax | |
| sn_sap_data_int_supplier[planned_delivery_time_in_days] | Planned delivery time in days | |
| sn_sap_data_int_supplier[planning_calendar] | Planning calendar | |
| sn_sap_data_int_supplier[planning_cycle] | Planning cycle | |
| sn_sap_data_int_supplier[planning_group] | Planning group | |
| sn_sap_data_int_supplier[plant_own_or_external] | Plant own or external | |
| sn_sap_data_int_supplier[postal_code] | Postal code | |
| sn_sap_data_int_supplier[posting_block_for_company_code] | Posting block for company code | |
| sn_sap_data_int_supplier[posting_block_for_company_code_1] | Posting block for company code | |
| sn_sap_data_int_supplier[post_office_box] | Post office box | |
| sn_sap_data_int_supplier[post_office_box_city] | Post office boxcity | |

Supplier staging table (continued)

| | |
|--|--|
| sn_sap_data_int_supplierpost_office_box_postal_code | Post office box postal code |
| sn_sap_data_int_supplierprepayment_relevance_vendor_primary | Prepayment relevance vendor primary |
| sn_sap_data_int_supplierprevious_primary_record_number | Previous primary record number |
| sn_sap_data_int_supplierprice_determination_pricing_date_control | Price determination pricing date control |
| sn_sap_data_int_supplierprice_marking_vendor | Price marking vendor |
| sn_sap_data_int_supplierprobable_time_until_check_is_paid | Probable time until check is paid |
| sn_sap_data_int_supplierprocessor_group | Processor group |
| sn_sap_data_int_supplierprofession | Profession |
| sn_sap_data_int_supplierprofile_for_transferring_material_data_via_intermediate_document | Profile for transferring material data via intermediate document |
| sn_sap_data_int_supplierpstfields_for_company_code_specific_primary_data_field | Pst fields for company code specific primary data field |

Supplier staging table (continued)

| | |
|--|--|
| sn_sap_data_int_suppliers <p>urchase_order_currency</p> | Purchase order currency |
| sn_sap_data_int_suppliers <p>urchasing_block_at_purchasing_organization_level</p> | Purchasing block at purchasing organization level |
| sn_sap_data_int_suppliers <p>urchasing_block_at_purchasing_organization_level_1</p> | Purchasing block at purchasing organization level |
| sn_sap_data_int_suppliers <p>urchasing_group</p> | Purchasing group |
| sn_sap_data_int_suppliers <p>urchasing_group_1</p> | Purchasing group 1 |
| sn_sap_data_int_suppliers <p>urchasing_organization</p> | Purchasing organization |
| sn_sap_data_int_suppliers <p>ack_jobbing_vendor</p> | Rack jobbing vendor |
| sn_sap_data_int_suppliers <p>conciliation_account_in_general_ledger</p> | Reconciliation account in general ledger |
| sn_sap_data_int_suppliers <p>conciliation_account_in_general_ledger_1</p> | Reconciliation account in general ledger |
| sn_sap_data_int_suppliers <p>reference_account_group_for_one_time_account_vendor</p> | Reference account group for one time account vendor |

Supplier staging table (continued)

| | |
|--|--|
| sn_sap_data_int_supplierreference_details | Reference details |
| sn_sap_data_int_supplierregion_state_province_county | Region state province county |
| sn_sap_data_int_supplierregion_state_province_county_1 | Region state province county |
| sn_sap_data_int_supplierregistered_for_social_insurance | Registered for social insurance |
| sn_sap_data_int_supplierrelease_approval_group | Release approval group |
| sn_sap_data_int_supplierrelease_creation_profile | Release creation profile |
| sn_sap_data_int_supplierreport_key_for_data_medium_exchange | Report key for data medium exchange |
| sn_sap_data_int_supplierresponsible_salesperson_at_vendor_office | Responsible salesperson at vendor office |
| sn_sap_data_int_supplierrestriction_profile_for_purchasing_order_based_load_building | Restriction profile for purchasing order-based load building |
| sn_sap_data_int_supplierrevaluation_allowed | Revaluation allowed |
| sn_sap_data_int_supplierrgtissue_date | RG issue date |

Supplier staging table (continued)

| | |
|--|--|
| sn_sap_data_int_supplier_rg_number | RG number |
| sn_sap_data_int_supplier_ritg_number | RIC number |
| sn_sap_data_int_supplier_rne_issue_date | RNE Issue date |
| sn_sap_data_int_supplier_rounding_profile | Rounding profile |
| sn_sap_data_int_supplier_schedulling_procedure | Scheduling procedure |
| sn_sap_data_int_suppliersetup_search_term_for_matchcode_search | Search term for matchcode search |
| sn_sap_data_int_suppliersetup_search_term_for_matchcode_search_1 | Search term for matchcode search 1 |
| sn_sap_data_int_suppliersetup_search_term_for_matchcode_search_2 | Search term for matchcode search 2 |
| sn_sap_data_int_suppliersetup_second_telephone_number | Second telephone number |
| sn_sap_data_int_supplierservice_agent_procedure_group | Service agent procedure group |
| sn_sap_data_int_suppliershipment_statistics_group_transportation_service_agent | Shipment statistics group transportation service agent |

Supplier staging table (continued)

| | |
|--|---|
| sn_sap_data_int_suppliershipping_conditions | Shipping conditions |
| sn_sap_data_int_suppliershort_key_for_a_house_bank | Short key for a house bank |
| sn_sap_data_int_suppliersort_field | Sort field |
| sn_sap_data_int_suppliersstaging_time_in_days | Staging time in days |
| sn_sap_data_int_suppliersstaging_time_in_days_1 | Staging time in days 1 |
| sn_sap_data_int_suppliersstandard_carrier_access_code | Standard carrier access code |
| sn_sap_data_int_suppliersstate | State |
| sn_sap_data_int_suppliersstatus_of_change_authorization_company_code_level | Status of change authorization company code level |
| sn_sap_data_int_suppliersstatus_of_data_transfer_into_subsequent_release | Status of data transfer into subsequent release |
| sn_sap_data_int_suppliersstreet_and_house_number | Street and house number |
| sn_sap_data_int_suppliersstreet_no_longer_used_from_release_4_6b | Street no longer used from release 4 6b |
| sn_sap_data_int_supplierssubcontracting_management | Subcontracting management |

Supplier staging table (continued)

| | |
|--|---|
| sn_sap_data_int_suppliers_subcontractor_information | Subcontractor information |
| sn_sap_data_int_suppliers_subcontractor_type | Subcontractor type |
| sn_sap_data_int_suppliers_subledger_account_preprocessing_procedure | Subledger account preprocessing procedure |
| sn_sap_data_int_suppliers_subsidy_indicator_for_determining_the_reduction_rate | Subsidy indicator for determining the reduction rates |
| sn_sap_data_int_suppliers_swift_or_bic_for_international_payment | SWIFT or BIC for international payment |
| sn_sap_data_int_supplier_taxbase_in_percentage | Tax base in percentage |
| sn_sap_data_int_supplier_taxdeclaration_type | Tax declaration type |
| sn_sap_data_int_supplier_taxjurisdiction | Tax jurisdiction |
| sn_sap_data_int_supplier_taxnumber_1 | Tax number 1 |
| sn_sap_data_int_supplier_taxnumber_2 | Tax number 2 |
| sn_sap_data_int_supplier_taxnumber_3 | Tax number 3 |
| sn_sap_data_int_supplier_taxnumber_4 | Tax number 4 |
| sn_sap_data_int_supplier_taxnumber_5 | Tax number 5 |
| sn_sap_data_int_supplier_taxnumber_at_responsible_tax_authority | Tax number at |

Supplier staging table (continued)

| | | |
|---|--|---|
| | | responsible tax authority |
| sn_sap_data_int_supplier[tax]number_type | | Tax number type |
| sn_sap_data_int_supplier[tax]split | | Tax split |
| sn_sap_data_int_supplier[tax]type | | Tax type |
| sn_sap_data_int_supplier[tele]box_number | | Telebox number |
| sn_sap_data_int_supplier[tele]tex_number | | Teletex number |
| sn_sap_data_int_supplier[tele]x_number | | Telex number |
| sn_sap_data_int_supplier[terms_of_liability] | | Terms of liability |
| sn_sap_data_int_supplier[terms_of_payment_key] | | Terms of payment key |
| sn_sap_data_int_supplier[terms_of_payment_key_1] | | Terms of payment key 1 |
| sn_sap_data_int_supplier[time_of_last_change_confirmation] | | Time of last change confirmation |
| sn_sap_data_int_supplier[title] | | Title |
| sn_sap_data_int_supplier[tolerance_group_for_the_business_partner_general_ledger_account] | | Tolerance account group for the business partner general ledger account |
| sn_sap_data_int_supplier[tolerance_group_invoice_verification] | | Tolerance group |

Supplier staging table (continued)

| | |
|---|---|
| | invoice verification |
| sn_sap_data_int_supplier train _station | Train station |
| sn_sap_data_int_supplier transportation_chain | Transportation chain |
| sn_sap_data_int_supplier transportation_chain_1 | Transportation chain 1 |
| sn_sap_data_int_supplier transportation_zone_to_or_from_which_the_goods_are | Trade operation zone to or from which the goods are delivered |
| sn_sap_data_int_supplier type_of_business | Type of business |
| sn_sap_data_int_supplier type_of_industry | Type of industry |
| sn_sap_data_int_supplier uniform_resource_locator | Uniform resource locator |
| sn_sap_data_int_supplier unit_of_measure_group | Unit of measure group |
| sn_sap_data_int_supplier us_government_vendor_primary_data_additional_fields | U.S. federal government vendor primary data additional fields |
| sn_sap_data_int_supplier validity_date_for_withholding_tax_exemption_certificate | Validity date for withholding tax exemption certificate |

Supplier staging table (continued)

| | |
|--|---|
| sn_sap_data_int_supplier_stg_date_of_certification | Validity date of certification |
| sn_sap_data_int_supplier_stg_from | Valid from |
| sn_sap_data_int_supplier_stg_to | Valid to |
| sn_sap_data_int_supplier_stg_added_service_determination_mode | Value added service determination mode |
| sn_sap_data_int_supplier_stg_added_tax_registration_number | Value added tax registration number |
| sn_sap_data_int_supplier_stg_vendor_account_group | Vendor account group |
| sn_sap_data_int_supplier_stg_vendor_account_number | Vendor account number |
| sn_sap_data_int_supplier_stg_vendor_created_date | Vendor created date |
| sn_sap_data_int_supplier_stg_vendor_indicator_relevant_for_proof_of_delivery | Vendor indicator relevant for proof of delivery |
| sn_sap_data_int_supplier_stg_vendor_is_in_execution | Vendor is in execution |
| sn_sap_data_int_supplier_stg_vendor_is_prompt_payment_act_relevant | Vendor is prompt payment act relevant |
| sn_sap_data_int_supplier_stg_vendor_primary_company_code | Vendor primary |

Supplier staging table (continued)

| | company code |
|--|---|
| sn_sap_data_int_supplier_vendor_primary_data_brazil | Vendor primary data brazil |
| sn_sap_data_int_supplier_vendor_primary_general_section | Vendor primary general section |
| sn_sap_data_int_supplier_vendor_quality_management_system | Vendor Quality Management System |
| sn_sap_data_int_supplier_vendor_recipient_type | Vendor recipient type |
| sn_sap_data_int_supplier_vendor_return_material_authorization_number | Vendor Return Material Authorization Number |
| sn_sap_data_int_supplier_vendor_service_level | Vendor service level |
| sn_sap_data_int_supplier_vendor_sort_criterion_for_materials | Vendor sort criterion for materials |
| sn_sap_data_int_supplier_vendor_telephone_number | Vendor telephone number |
| sn_sap_data_int_supplier_withholding_tax_code | Withholding tax code |
| sn_sap_data_int_supplier_withholding_tax_country_key | Withholding tax country key |

Purchasing group staging table

The purchasing group staging primary data table lists the columns in the staging table.

Purchasing group staging table

| Table | Column name | Column label |
|--|-------------|---------------------------------------|
| sn_sap_data_int_purc_grp_stgclient | | Client |
| sn_sap_data_int_purc_grp_stgdescription_of_purchasing_group | | Description of purchasing group |
| sn_sap_data_int_purc_grp_stgerp_source | | Erp source |
| sn_sap_data_int_purc_grp_stg_email_address | | E mail address |
| sn_sap_data_int_purc_grp_stgfax_number_of_purchasing_buyer_group | | Fax number of purchasing buyer group |
| sn_sap_data_int_purc_grp_stgpurchasing_group | | Purchasing group |
| sn_sap_data_int_purc_grp_stgpool_output_device | | Spool output device |
| sn_sap_data_int_purc_grp_stgtelephone_no_dialling_code_number | | Telephone number dialling code number |
| sn_sap_data_int_purc_grp_stgtelephone_no_extension | | Telephone number extension |
| sn_sap_data_int_purc_grp_stgtelephone_number_of_purchasing_group_buyer_group | | Telephone number of purchasing group |

Purchasing group staging table (continued)

buyer
group

Cost center staging table

The cost center staging primary data table lists the columns in the staging table.

Cost center staging table

| Table | Column name | Column label |
|------------------------|--|--|
| sn_sap_data_int_cc_stg | alternative_function_of_cost_center | Alternative function of cost center |
| sn_sap_data_int_cc_stg | append_structure_for_regulatory_reporting | Append structure for regulatory reporting |
| sn_sap_data_int_cc_stg | application | Application |
| sn_sap_data_int_cc_stg | business_area | Business area |
| sn_sap_data_int_cc_stg | city | City |
| sn_sap_data_int_cc_stg | client | Client |
| sn_sap_data_int_cc_stg | company_code | Company code |
| sn_sap_data_int_cc_stg | completion_flag_for_the_cost_center_primary_record | Completion flag for the cost center primary record |
| sn_sap_data_int_cc_stg | controlling_area | Controlling area |
| sn_sap_data_int_cc_stg | costing_sheet | Costing sheet |
| sn_sap_data_int_cc_stg | cost_center | Cost center |

Cost center staging table (continued)

| | |
|--|---|
| sn_sap_data_int_cc_stgcost_center_category | Cost center category |
| sn_sap_data_int_cc_stgcost_collector_key | Cost collector key |
| sn_sap_data_int_cc_stgcountry_key | Country key |
| sn_sap_data_int_cc_stgco_cca_overhead_key | Controlling cost center accounting overhead key |
| sn_sap_data_int_cc_stgcreated_on | Created on |
| sn_sap_data_int_cc_stgcurrency_key | Currency key |
| sn_sap_data_int_cc_stgdata_communication_line_no | Data communication line number |
| sn_sap_data_int_cc_stgdata_communication_line_number | Data communication line number |
| sn_sap_data_int_cc_stgdepartment | Department |
| sn_sap_data_int_cc_stgdistrict | District |
| sn_sap_data_int_cc_stgentered_by | Entered by |
| sn_sap_data_int_cc_stgequity_type | Equity type |
| sn_sap_data_int_cc_stgerp_source | ERP source |
| sn_sap_data_int_cc_stgfax_number | Fax number |
| sn_sap_data_int_cc_stgfist_telephone_number | First telephone number |
| sn_sap_data_int_cc_stgfunctional_area | Functional area |

Cost center staging table (continued)

| Table Name | Function of cost center |
|--|--|
| sn_sap_data_int_cc_stgfunction_of_cost_center | Function of cost center |
| sn_sap_data_int_cc_stgindicator_for_allowed_allocation_methods | Indicator for allowed allocation methods |
| sn_sap_data_int_cc_stgindicator_for_recording_consumption_quantities | Indicator for recording consumption quantities |
| sn_sap_data_int_cc_stgindicator_object_is_statistical | Indicator object is statistical |
| sn_sap_data_int_cc_stgjib_jibe_class | JIB JIBE class |
| sn_sap_data_int_cc_stgjib_jibe_subclass_a | JIB JIBE subclass a |
| sn_sap_data_int_cc_stgjoint_venture | Joint venture |
| sn_sap_data_int_cc_stgjoint_venture_object_type | Joint venture object type |
| sn_sap_data_int_cc_stglanguage_key | Language key |
| sn_sap_data_int_cc_stglock_indicator_for_actual_primary_postings | Lock indicator for actual primary postings |
| sn_sap_data_int_cc_stglock_indicator_for_actual_revenue_postings | Lock indicator for actual revenue postings |
| sn_sap_data_int_cc_stglock_indicator_for_commitment_update | Lock indicator for commitment update |

Cost center staging table (continued)

| | |
|---|---|
| sn_sap_data_int_cc_stglock_indicator_for_planning_revenues | Lock indicator for planning revenues |
| sn_sap_data_int_cc_stglock_indicator_for_plan_primary_costs | Lock indicator for plan primary costs |
| sn_sap_data_int_cc_stglock_indicator_for_plan_secondary_costs | Lock indicator for plan secondary costs |
| sn_sap_data_int_cc_stglogical_system | Logical system |
| sn_sap_data_int_cc_stgname | Name |
| sn_sap_data_int_cc_stgname_1 | Name 1 |
| sn_sap_data_int_cc_stgname_2 | Name 2 |
| sn_sap_data_int_cc_stgname_3 | Name 3 |
| sn_sap_data_int_cc_stgname_4 | Name 4 |
| sn_sap_data_int_cc_stgobject_number | Object number |
| sn_sap_data_int_cc_stgperson_responsible | Person responsible |
| sn_sap_data_int_cc_stgplant | Plant |
| sn_sap_data_int_cc_stgpostal_code | Postal code |
| sn_sap_data_int_cc_stgpost_office_box | Post office box |
| sn_sap_data_int_cc_stgpost_office_box_postal_code | Post office box postal code |

Cost center staging table (continued)

| | |
|---|--|
| sn_sap_data_int_cc_stgpo_box | Post office box |
| sn_sap_data_int_cc_stgprinter_destination_for_cctr_report | Printer destination for cost centre report |
| sn_sap_data_int_cc_stgprofit_center | Profit center |
| sn_sap_data_int_cc_stgpo_box_postal_code | Post office Box postal code |
| sn_sap_data_int_cc_stgreccovery_indicator | Recovery indicator |
| sn_sap_data_int_cc_stgregion_state_province_county | Region state province county |
| sn_sap_data_int_cc_stgregulatory_indicator | Regulatory indicator |
| sn_sap_data_int_cc_stgsecond_telephone_number | Second telephone number |
| sn_sap_data_int_cc_stgstandard_hierarchy_area | Standard hierarchy area |
| sn_sap_data_int_cc_stgstreet_and_house_number | Street and house number |
| sn_sap_data_int_cc_stgsubsequent_cost_center | Subsequent cost center |
| sn_sap_data_int_cc_stgtax_jurisdiction | Tax jurisdiction |
| sn_sap_data_int_cc_stgtelebox_number | Telebox number |

Cost center staging table (continued)

| | |
|---|---|
| sn_sap_data_int_cc_stgtelefex_number | Teletex number |
| sn_sap_data_int_cc_stgtelelex_number | Telex number |
| sn_sap_data_int_cc_stgtemplate_activity_dependent_allocation_to_cost_center | Template activity dependent allocation to cost center |
| sn_sap_data_int_cc_stgtemplate_activity_independent_allocation_to_cost_center | Template activity independent allocation to cost center |
| sn_sap_data_int_cc_stgtemplate_actual_statistical_key_figure_on_cost_center | Template actual statistical key figure on cost center |
| sn_sap_data_int_cc_stgtemplate_act_stat_key_figure_cost_center_activity_type | Template act stat key figure cost center activity type |
| sn_sap_data_int_cc_stgtemplate_for_activity_dependent_formula_planning | Template for activity dependent formula planning |
| sn_sap_data_int_cc_stgtemplate_for_activity_independent_formula_planning | Template for activity independent formula planning |
| sn_sap_data_int_cc_stgtitle | Title |
| sn_sap_data_int_cc_stgusage_of_the_condition_table | Usage of the condition table |

Cost center staging table (continued)

| | |
|--|------------------|
| sn_sap_data_int_cc_stguser_responsible | User responsible |
| sn_sap_data_int_cc_stgvalid_from_date | Valid from |
| sn_sap_data_int_cc_stgvalid_to_date | Valid to |