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Xanadu Finance and Supply Chain

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Finance and Supply Chain

Modernize ERP-centric processes such as source-to-pay with optimized workflows built on a single system of action.

Source-to-Pay Operations



Automate sourcing, procurement, and payment processes for internal and external teams to efficiently manage the goods and services needed for business operations

Sourcing and Procurement Operations



Empower employees to easily purchase from approved suppliers and minimize rogue spending with guided workflows

Supplier Lifecycle Operations



Simplify supplier onboarding, offboarding, and engagement with a unified digital experience for your teams and suppliers

Accounts Payable Operations

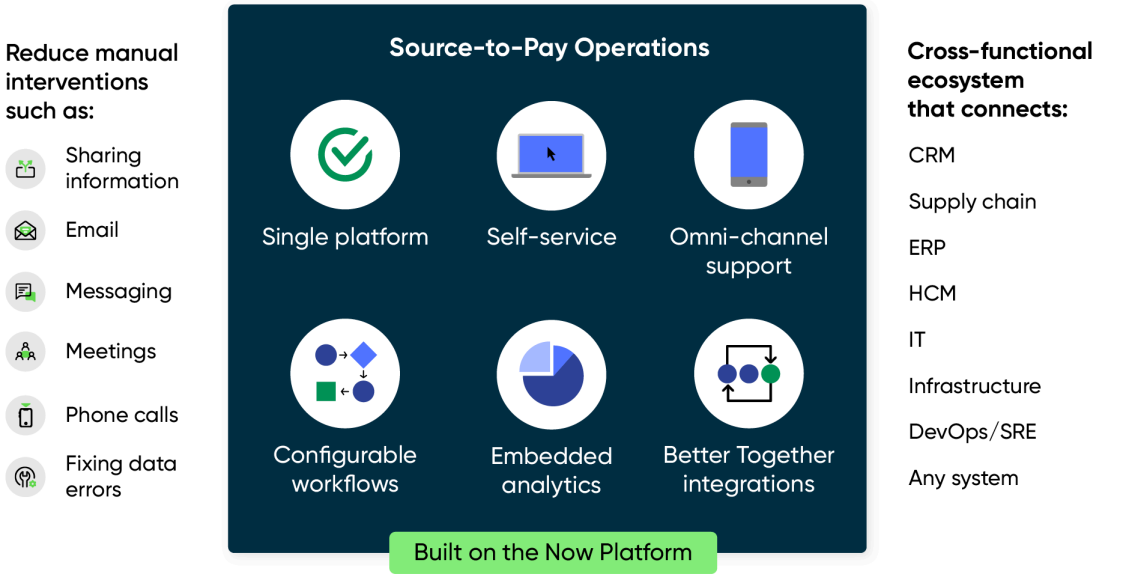


Optimize accounts payable for accurate and confident supplier payments

Source-to-Pay Operations

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

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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 ServiceNow AI 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.

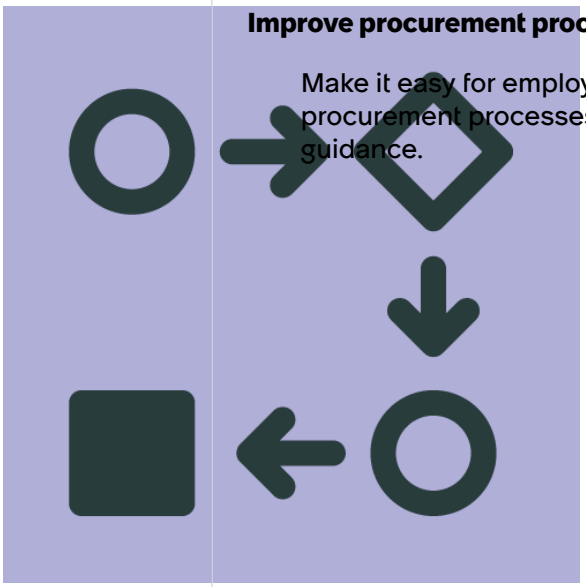
You can also leverage intelligence to enable continuous process improvement. This allows you to:

- 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.

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- 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.



Improve procurement processing and drive compliant outcomes

Make it easy for employees and procurement to make procurement processes easier and trackable, with omni-channel guidance.



Accelerate supplier qualification and enhance accuracy

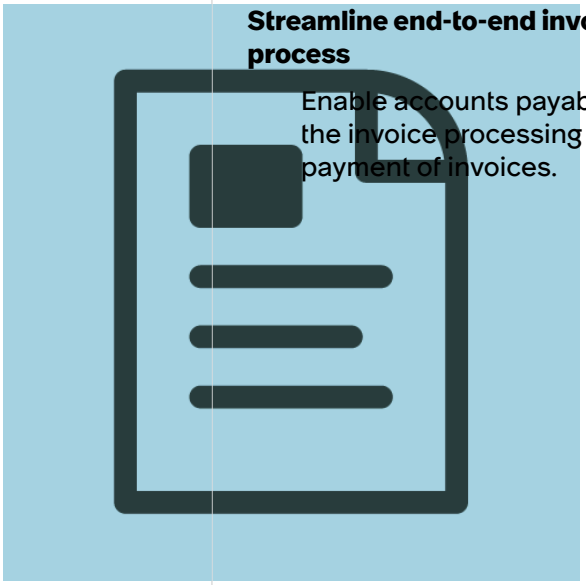
Enhance the supplier experience by enabling suppliers to complete onboarding tasks, raise requests, and get answers to questions quickly.



Transform supplier management with digital experiences

Access supplier information easily, identify key supplier contacts, and collaborate in real time to resolve issues that impact production.

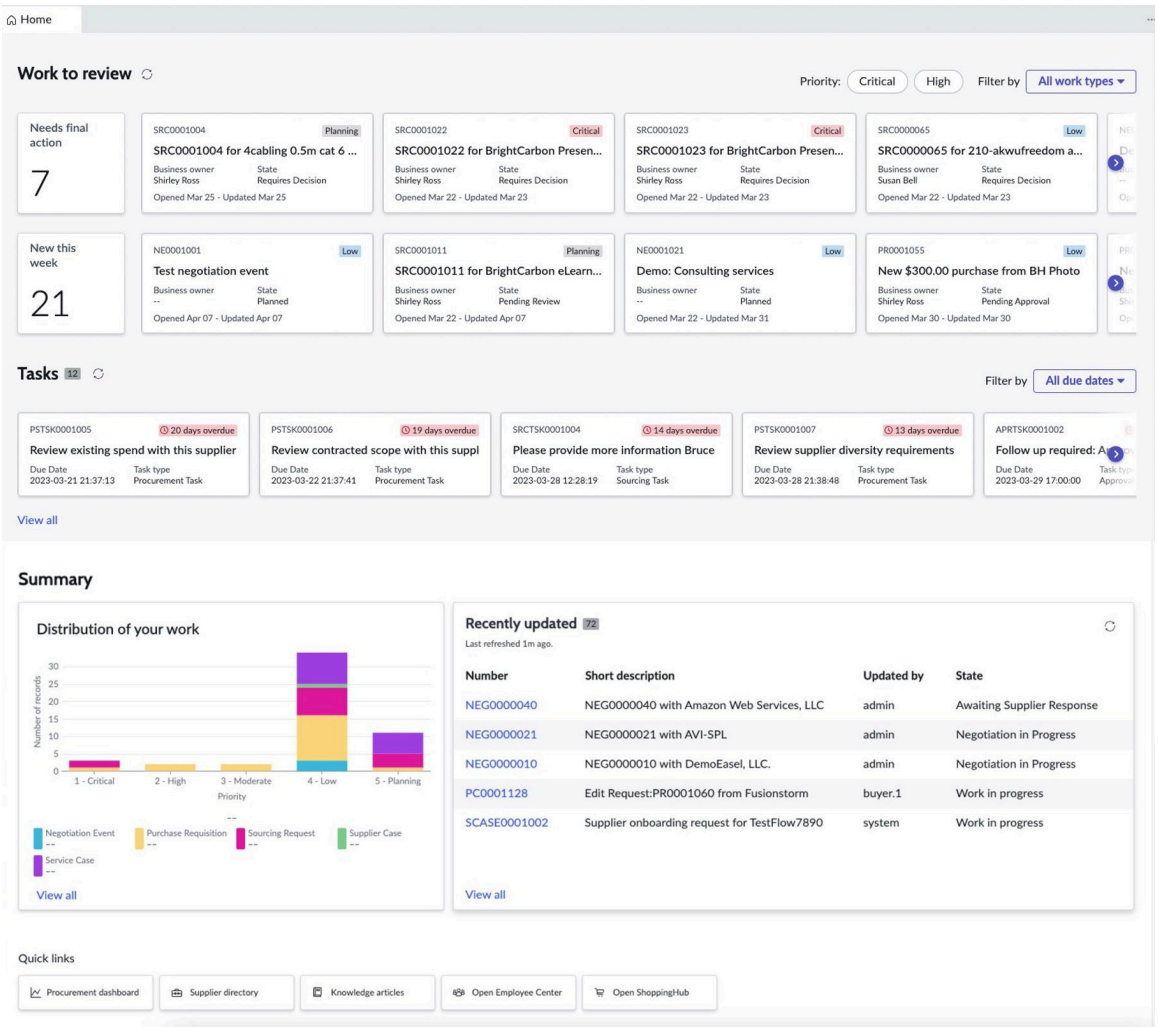
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Streamline end-to-end invoice processing and expedite the payment process

Enable accounts payable teams to simplify and speed up the invoice processing cycle and ensure timely and accurate payment of invoices.

Improve procurement processing and drive compliant outcomes

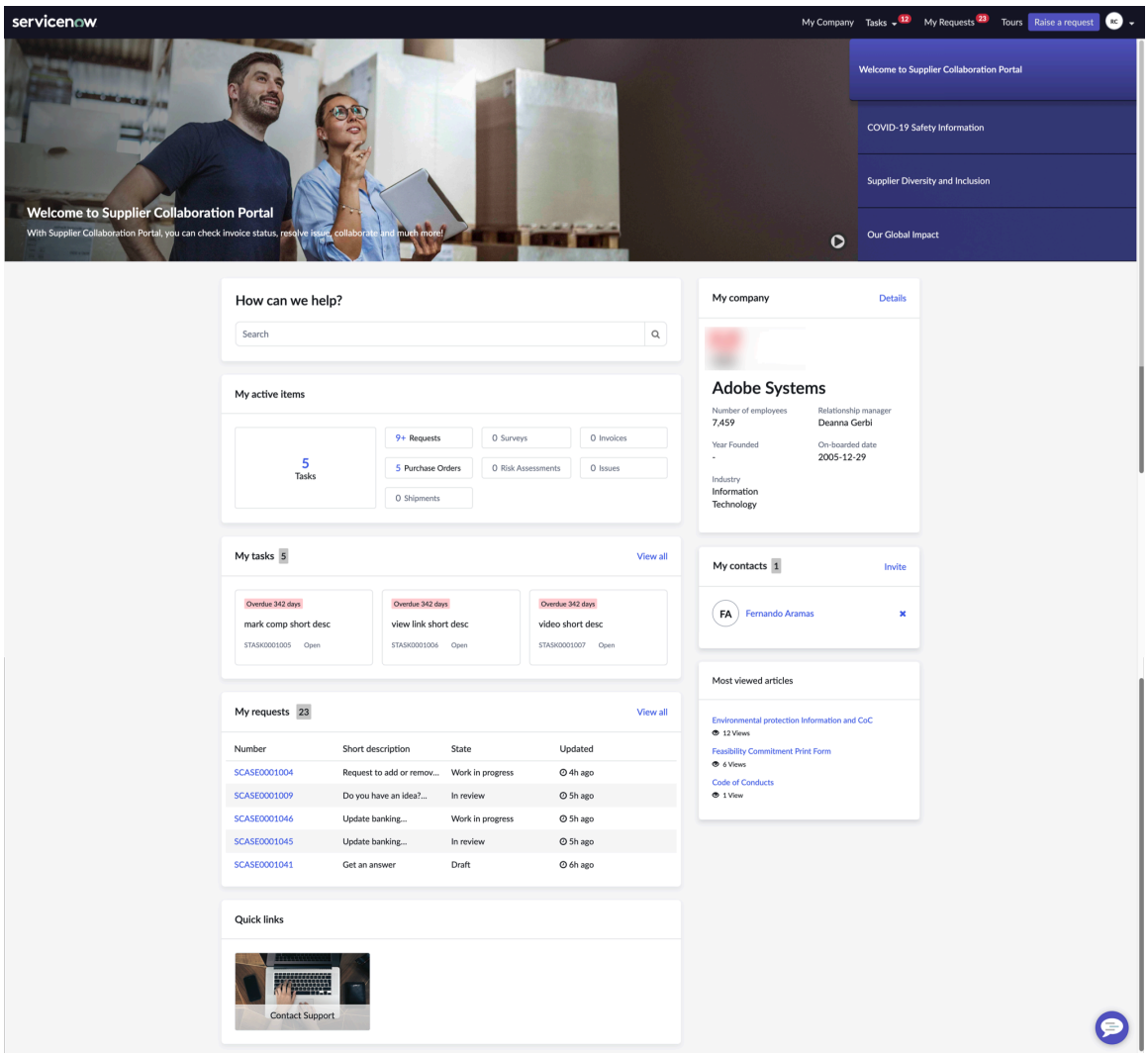


Help employees self service their requests through intuitive workflows, knowledge base, and virtual agents. Increase spend under management and employee engagement with omni-channel guided experiences that meet employees where they work. Use step-by-step playbooks

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to make processes easier and trackable. Increase contract utilization and compliance by including controls in digital workflows.

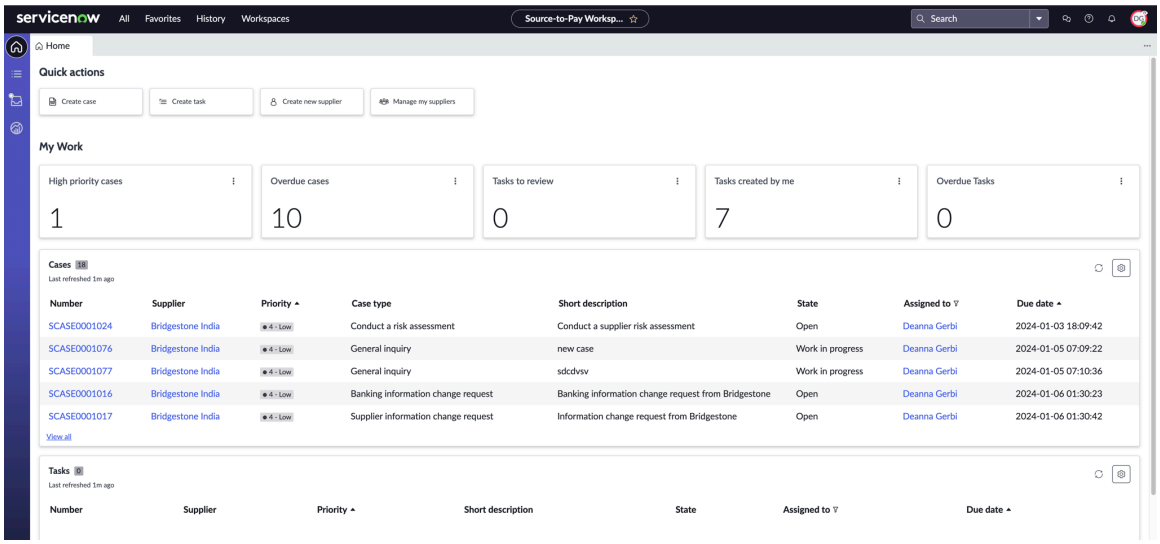
Accelerate supplier qualification and enhance accuracy



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.

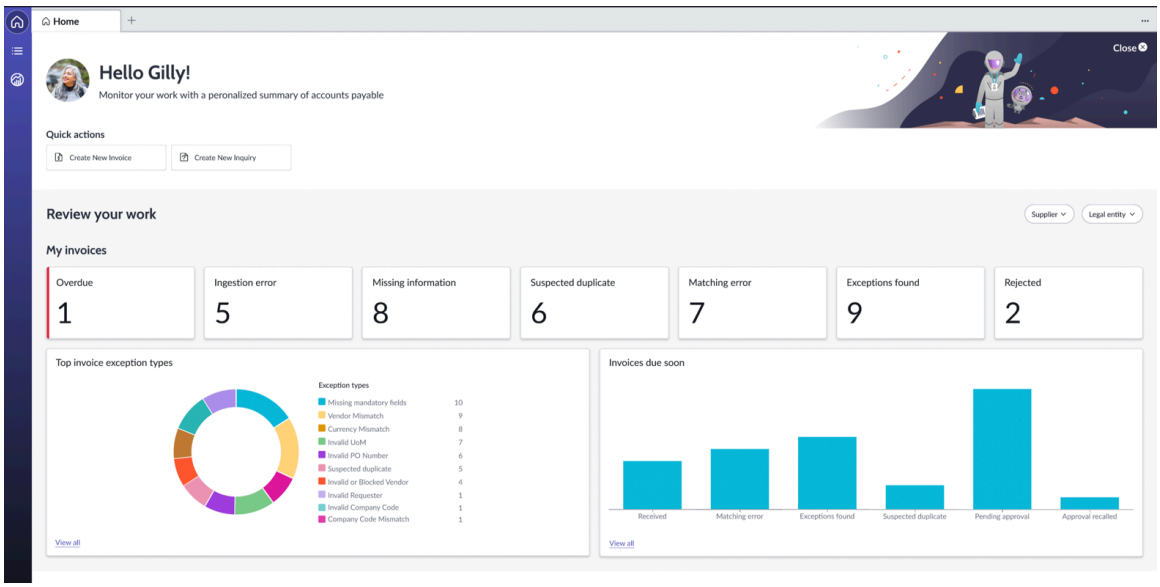
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Transform supplier management with digital experiences



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



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 third-party applications

Source-to-Pay Operations supports the following integrations:

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Source-to-Pay integration framework

Install an optional third-party ERP integration application that enables primary data, fixed assets, purchase order, receipt, invoice, and tax integration capabilities between S2P and the third-party ERP application.

Source-to-Pay Operations integration with SAP ECC and SAP S4 HANA

Send purchase orders, receipts, suppliers, and payables invoices created in Source-to-Pay Operations to SAP ECC and SAP S4 HANA.

Source-to-Pay Operations integration with 3CLogic

Enhance the end-user experience with voice and SMS capabilities.

Learn

- What is Sourcing and Procurement Operations (SPO)?
- What is Supplier Lifecycle Operations (SLO)?
- What is Accounts Payable Operations (APO)?
- What are Finance and Supply Chain (FSC) workflows?

Get started

- Log in to your ServiceNow account and find additional information about Source-to-Pay Operations, at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Work with an implementation specialist to achieve your desired business outcomes. To learn more, visit the Customer Success Center.
- Connect with other Source-to-Pay Operations users at Now Community
- Explore which other tools can optimize your Source-to-Pay Operations experience, like Virtual Agent, and Knowledge Management.

Products, features, and customer journeys

- Source-to-Pay Operations purchasing and sourcing workflows
- Now Assist for Source-to-Pay Operations
- Sourcing and Procurement Operations
- Supplier Lifecycle Operations
- Accounts Payable Operations
- Source-to-Pay Workspace
- Source-to-Pay Integrations
- Improve sourcing experience when working with new suppliers

Source-to-Pay Operations purchasing and sourcing workflows

Gain deeper insights into the complete process of sourcing, procuring, and paying for goods and services by exploring the Source-to-Pay purchasing and sourcing workflows.

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Get started

Source-to-Pay Operations purchasing and sourcing workflows

ource-to-Pay purchasing workflow

Source-to-Pay sourcing workflow

Learn about the end-to-end purchasing process and its key user personas

Learn about the end-to-end sourcin process and its key user personas

Source-to-Pay purchasing workflow

Gather a high-level understanding of the end-to-end purchasing workflow with the Sourcing and Procurement Operations (SPO) and Accounts Payable Operations (APO) products within the Source-to-Pay (S2P) suite.

Prerequisites

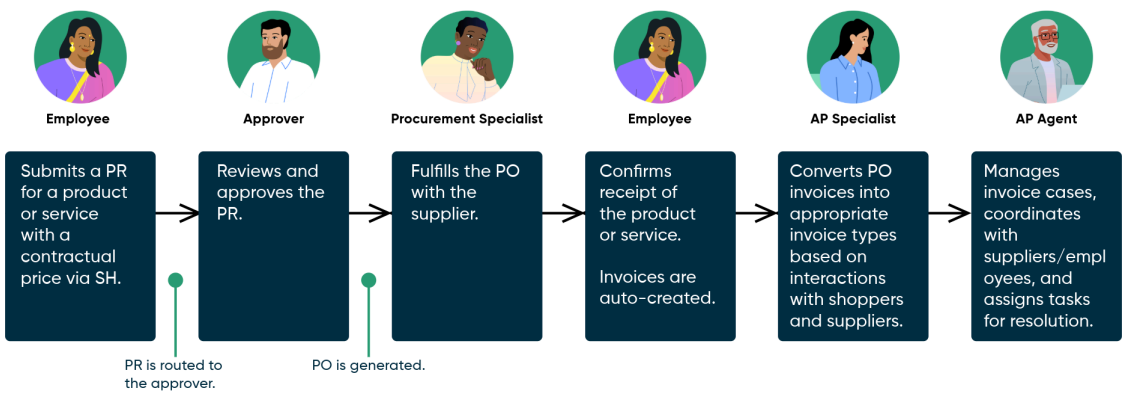
Install and activate the necessary plugins. For information on the respective product plugins and installation sequence, see:

- SPO: Application plugin installation sequence
- APO: Application plugin installation sequence in Accounts Payable Operations

Workflow of the purchasing process

The following figure shows how different personas use the various applications withing the SPO and APO products to complete the end-to-end purchasing process within the Source-to-Pay (S2P) suite.

Workflow of the purchasing process



In this workflow:

1. An employee performs a quick checkout with a product or service that has a contractual price. A purchase requisition is created. For more information, see Order a product with quick checkout.

   Alternatively, an employee performs a full checkout with products or services that have contractual prices. For more information, see Complete your checkout.

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Role: sn_shop.shopper.

Application portal: Shopping Hub.

2. Approval rules route the purchase request to one or more assigned approvers.
3. An approver reviews the purchase request and approves it. A purchase order is created. For more information, see Approve a request from Employee Center.

   Role: sn_shop.procurement_specialist.

   Application portal: Employee Center.

4. A procurement specialist fulfills the purchase order from the associated supplier.

   Role: sn_shop.procurement_specialist.

   Application portal: Source-to-Pay Workspace.

5. On fulfillment, the employee confirms receipt of the requested product. For more information, see Confirm receipt of your order from Shopping Hub Home and Confirm receipt of your order from Employee Center.

   Role: sn_shop.shopper.

   Application portal: Shopping Hub or Employee Center.

6. Invoices are auto-created. When invoices aren't auto-submitted or don't match the purchase orders, or when invoice exceptions must be resolved, an accounts payable specialist gets involved. For more information, see Accounts Payable Invoice Processing.

   Alternatively, the accounts payable specialist manually creates invoices. For more information, see Accounts Payable Specialist manual tasks.

   Role: sn_ap_apm.accounts_payable_specialist.

   Application portal: Source-to-Pay Workspace.

7. The accounts payable specialist converts invoices of purchase order type to invoice types such as non-purchase order, credit memo, and debit memo, based on their interactions with shoppers and suppliers of business services. For more information, see Accounts Payable Specialist manual tasks.

   Role: sn_ap_apm.accounts_payable_specialist.

   Application portal: Source-to-Pay Workspace.

8. An accounts payable agent manages and works on assigned invoice cases, requests more information from suppliers or employees if necessary, and creates and assigns tasks to the users. For more information, see Invoice Case Management.

   Role: sn_ap_cm.agent.

   Application portal: Source-to-Pay Workspace.

9. The employee, approver, procurement specialist, accounts payable specialist, and accounts payable agent have complete visibility into the status of the workflow through process completion, from their respective portals.

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Source-to-Pay sourcing workflow

Gather a high-level understanding of the end-to-end sourcing workflow with the Sourcing and Procurement Operations (SPO), Supplier Lifecycle Operations (SLO), and Accounts Payable Operations (APO) products within the Source-to-Pay (S2P) suite.

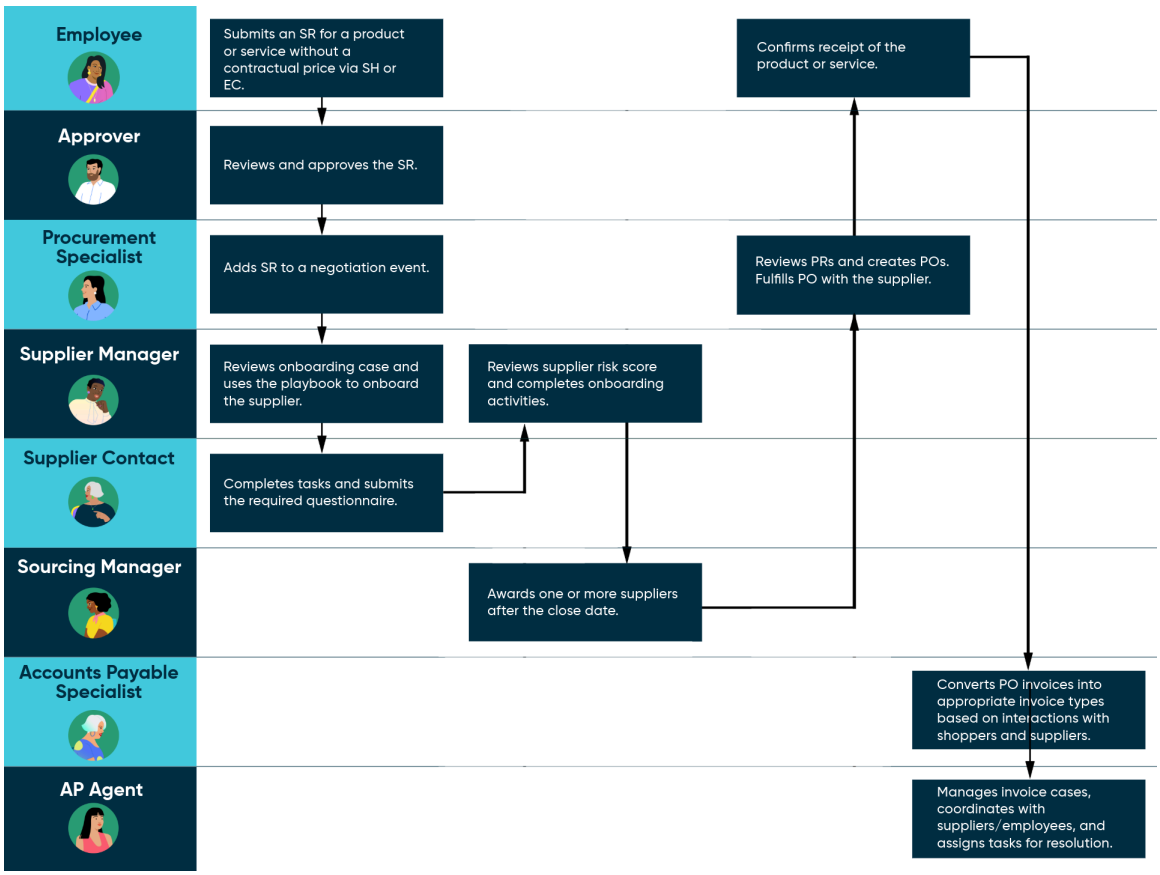
Prerequisites

Install and activate the necessary plugins. For more information on the respective product plugins and installation sequence, see:

- SPO: Application plugin installation sequence
- SLO: Supplier Lifecycle Operations plugin installation sequence
- APO: Application plugin installation sequence in Accounts Payable Operations

Workflow of the sourcing process

The following figure shows how different personas use the various applications withing the SPO, SLO, and APO products to complete the end-to-end sourcing process within the Source-to-Pay (S2P) suite.



In this workflow:

1. An employee creates a sourcing request for a product or service that doesn't have a contractual price, or isn’t available in the catalog. For more information, see Complete sourcing checkout and Requesting for products or services that you don't see on ShoppingHub, respectively.

   Role: sn_shop.shopper.

   Application portal: Shopping Hub and Employee Center respectively.

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2. Approval rules route the sourcing request to one or more assigned approvers.
3. An approver reviews the sourcing request and approves it. For more information, see Approve a request from Employee Center.

   Role: sn_shop.procurement_specialist.

   Application portal: Employee Center.
4. Work assignment rules route the sourcing request to an assigned procurement specialist.
5. The procurement specialist, with the contained role of a sourcing manager, adds the sourcing request to a negotiation event. For more information, see Add a sourcing request to a negotiation event.

   Role: sn_shop.procurement_specialist.

   Application portal: Source-to-Pay Workspace.
6. Negotiations are auto-created with qualified suppliers. For more information, see Sourcing intake guided experience with playbooks.

   If sourcing with a new supplier, see Improve sourcing experience when working with new suppliers.

   Role: sn_shop.procurement_specialist.

   Application portal: Source-to-Pay Workspace.
7. Begin the qualification process to onboard the new supplier. For more information, see Supplier qualification.

   Role: sn_shop.procurement_specialist.

   Application portal: Source-to-Pay Workspace.
8. Review the supplier onboarding case and start the supplier onboarding using playbooks. For more information, see Using the supplier onboarding playbook to onboard suppliers.

   The playbook automatically creates supplier tasks to conduct risk assessment and to collect supplier information, such as banking information and location details.

   Role: sn_slm.manager.

   Application portal: Source-to-Pay Workspace.
9. The supplier manager assigns the supplier tasks to the supplier contact.

   Role: sn_slm.manager.

   Application portal: Source-to-Pay Workspace.
10. The supplier contact completes the following tasks:
    - 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.

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Application portal: Supplier Collaboration Portal.

11. After the supplier manager reviews the supplier risk score and completes the different activities in each stage of the playbook, the supplier is successfully onboarded.

    Role: sn_slm.manager.

    Application portal: Source-to-Pay Workspace.

12. On reaching supplier responses close date, the sourcing manager awards one or more suppliers. For more information, see Award multiple suppliers from a negotiation event.

    Role: sn_shop.procurement_specialist.

    Application portal: Source-to-Pay Workspace.

13. Purchase requisitions are auto-created. The procurement specialist reviews the purchase requisitions and its associated purchase lines, and creates purchase orders. For more information, see SPO list page.

    Role: sn_shop.procurement_specialist.

    Application portal: Source-to-Pay Workspace.

14. On fulfillment, the employee confirms receipt of the requested product. For more information, see Confirm receipt of your order from Shopping Hub Home and Confirm receipt of your order from Employee Center.

    Role: sn_shop.shopper.

    Application portal: Shopping Hub or Employee Center.

15. Invoices are auto-created. When invoices aren't auto-submitted or don't match the purchase orders, or when invoice exceptions must be resolved, an accounts payable specialist gets involved. For more information, see Accounts Payable Invoice Processing.

    Alternatively, the accounts payable specialist manually creates invoices. For more information, see Accounts Payable Specialist manual tasks.

    Role: sn_ap_apm.accounts_payable_specialist.

    Application portal: Source-to-Pay Workspace.

16. The accounts payable specialist converts invoices of purchase order type to invoice types such as non-purchase order, credit memo, and debit memo, based on their interactions with shoppers and suppliers of business services. For more information, see Accounts Payable Specialist manual tasks.

    Role: sn_ap_apm.accounts_payable_specialist.

    Application portal: Source-to-Pay Workspace.

17. An accounts payable agent manages and works on assigned invoice cases, requests more information from suppliers or employees if necessary, and creates and assigns tasks to the users. For more information, see Invoice Case Management.

    Role: sn_ap_cm.agent.

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Application portal: Source-to-Pay Workspace.

18. The employee, approver, sourcing manager, procurement specialist, supplier manager, accounts payable specialist, and accounts payable agent have complete visibility into the status of the workflow through process completion, from their respective portals.

Now Assist for Source-to-Pay Operations

Use the ServiceNow® Now Assist for Source-to-Pay Operations applications to help fulfillers quickly summarize cases and procurement records, keeping them informed on progress and action items.

Get started

Now Assist for Source-to-Pay Operations

Now Assist for Sourcing and Procurement Operations	Now Assist for Supplier Lifecycle Operations	Now Assist for Accounts Payable Operations
		
Learn about Now Assist for Sourcing and Procurement Operations	Learn about Now Assist for Supplier Lifecycle Operations	Learn about Now Assist for Accounts Payable Operations

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 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.

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Explore



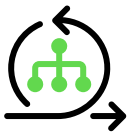
Learn about how procurement specialists, supplier managers, accounts payable specialists use Source-to-Pay Workspace.

Configure



Plan and configure your Source-to-Pay Workspace.

Use



Create knowledge base articles

Reference



Get details about Source-to-Pay Workspace components and glossary.

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
Accounts Payable Specialist: View your open requests and purchasing to-dos. **Note:** This role contains the PCM Agent role, and therefore has access to the same home page and modules as the PCM Agent.	sn_shop.accounts_payable_specialist
Admin role for Canvas Core Application: View and make configuration changes to the widgets.	canvas_admin
Supplier Fulfiller: • Create tasks • View suppliers related to assigned cases or tasks	sn_slm.fulfiller

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End user and goal	Required role
• View assigned cases and tasks, or tasks that are created by them • Update assigned cases and tasks, or tasks that are created by them	
Supplier Manager: • 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
Supplier Administrator: Create, view, update, and delete all the suppliers, cases, and tasks.	sn_slm.admin

Exploring Source-to-Pay Workspace

Learn about the key features and capabilities of Source-to-Pay Operations.

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.

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

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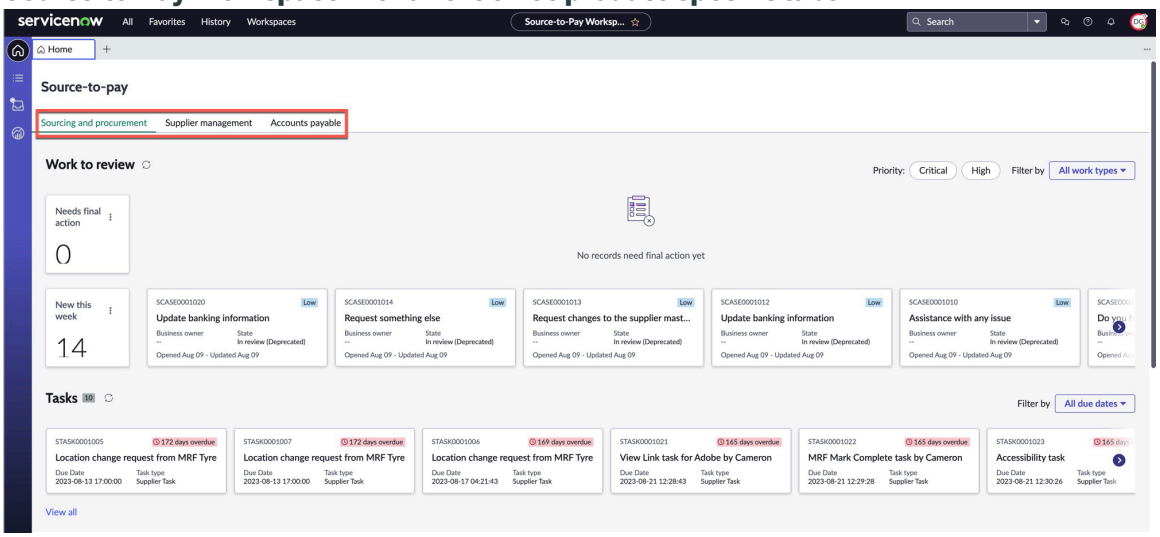
Let's consider a scenario where:

- 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 SPO list page.
- **Supplier management**: Select this tab to view the landing page for Supplier Lifecycle Operations. For more information, see SLO landing page.
- **Accounts payable**: Select this tab to view the landing page for Accounts Payable Operations.

Source-to-Pay Workspace with all the three product-specific tabs



SPO landing page

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.

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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		
Needs final action	Widget	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. 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. Filter by priority and work type such as purchase requisitions, sourcing requests, negotiation events, and cases, for focused results.
New this week	Widget	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. 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. Filter by priority and work type such as purchase requisitions, sourcing requests, negotiation

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Title	Type	Description
		events, and cases, for focused results.
Tasks		
Tasks	Widget	View the total number of open purchasing tasks assigned to the logged-in user. Select a widget to view the details of that record. Select **View all** to view the complete list of tasks. You can also view up to four records in this section, with their task number, state, short description, and opened date. Filter by due dates for focused results.
Summary		
Distribution of your work	Stacked bar chart	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. Select a bar area to view the complete list of records within that time frame. Select **View all** to view the complete list of records. **Note:** The logged-in user can view only the work that is specific to their role.
Recently updated	Widget	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.
Quick actions		
Procurement dashboard	Widget	Open a new tab with the procurement dashboards,

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Title	Type	Description
		where dashboards are filtered by the Sourcing and Procurement Operations group.
Supplier directory	Widget	Open the list of suppliers in the workspace.
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.

SLO landing page

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.

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Title	Type	Description
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		
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	Displays a list of cases assigned to the logged-in user. This list shows only five cases by default. Click **View all** to view the list of all the cases.
Tasks	List	Displays a list of tasks assigned to the logged-in user. This list shows only five tasks by default. Click **View all** to view the list of all the tasks.
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.

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Role-based access to quick actions in the Source-to-Pay Workspace

Role	Available quick action
Supplier Administrator [sn_slm.admin]	• Create case • Create task • Create new supplier • Manage my suppliers
Supplier Manager [sn_slm.manager]	• Create case • Create task • Create new supplier • Manage my suppliers
Supplier Owner [sn_slm.owner]	• 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**
- **Risk**
- **Performance**
- **KPI management**
- **Subsidiaries**
- **Documents**

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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. You can edit the supplier details, if needed.
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. Select 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're currently viewing.
Supplier news	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. By default, Supplier Lifecycle Operations retrieves supplier news and activities using the Bing News Search API. 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.
Related Links	Displays links that enable you to view additional information pertaining to suppliers: • Banking information • Product codes • Email domains • Contracts • Supplier products
Supplier locations	Displays the geographical location of the suppliers on a map. **Note:** The Map UI component for threat and alert data feeds (com.sn_fam_map) plugin enables you to view and manage this section. Verify that you have configured the FAM map properties. For more information, see Configure properties for Supplier Lifecycle Operations.

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Sections on the About tab (continued)

Title	Description
	You can do the following: • 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. It also contains the following links: • **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 parentheses. • **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 parentheses. **Note:** The **View pending** and **View registered** links are displayed only when a supplier has more than 5 supplier contacts.
Option	
Contextual side panel	This panel appears below the UI actions. Select the supplier overview icon ( ) to open the following panels: • 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. Select the attachments icon ( ) to open the Attachments panel, which enables you to attach documents to the case. 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.

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Sections on the About tab (continued)

Title	Description
Options to sync supplier data with an external third-party application	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 Select **Sync with external data** to synchronize with an external third-party application to update the supplier details in the Source-to-Pay Workspace **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. For more information, see Synchronize supplier data using external third-party application.
Options to create supplier cases and supplier tasks	Select the **Create** drop-down list to view these options: • **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.

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Fields on the Details tab (continued)

Field	Description
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.
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.
Risk assessments	Displays a list of risk assessments for the supplier. **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.

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Modules on the Related work tab (continued)

Module	Description
	Note: This module is displayed only if you have installed the Sourcing and Purchasing Automation (com.snc.sn_pr) plugin.
Purchase orders	Displays a list of purchase orders for the supplier. **Note:** This module is displayed only if you have installed the Sourcing and Purchasing Automation (com.snc.sn_pr) and Source-to-Pay Common Architecture (com.snc.sn_shop) plugins.
Shipments	**Note:** This module is displayed only if you have installed the Supply Chain Exception Management (com.snc.sn_scm_core) plugin.
Invoices	Displays a list of invoices for the supplier. **Note:** This module is displayed only if you have installed the Sourcing and Purchasing Automation (com.snc.sn_pr) and Source-to-Pay Common Architecture (com.snc.sn_shop) plugins.

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.

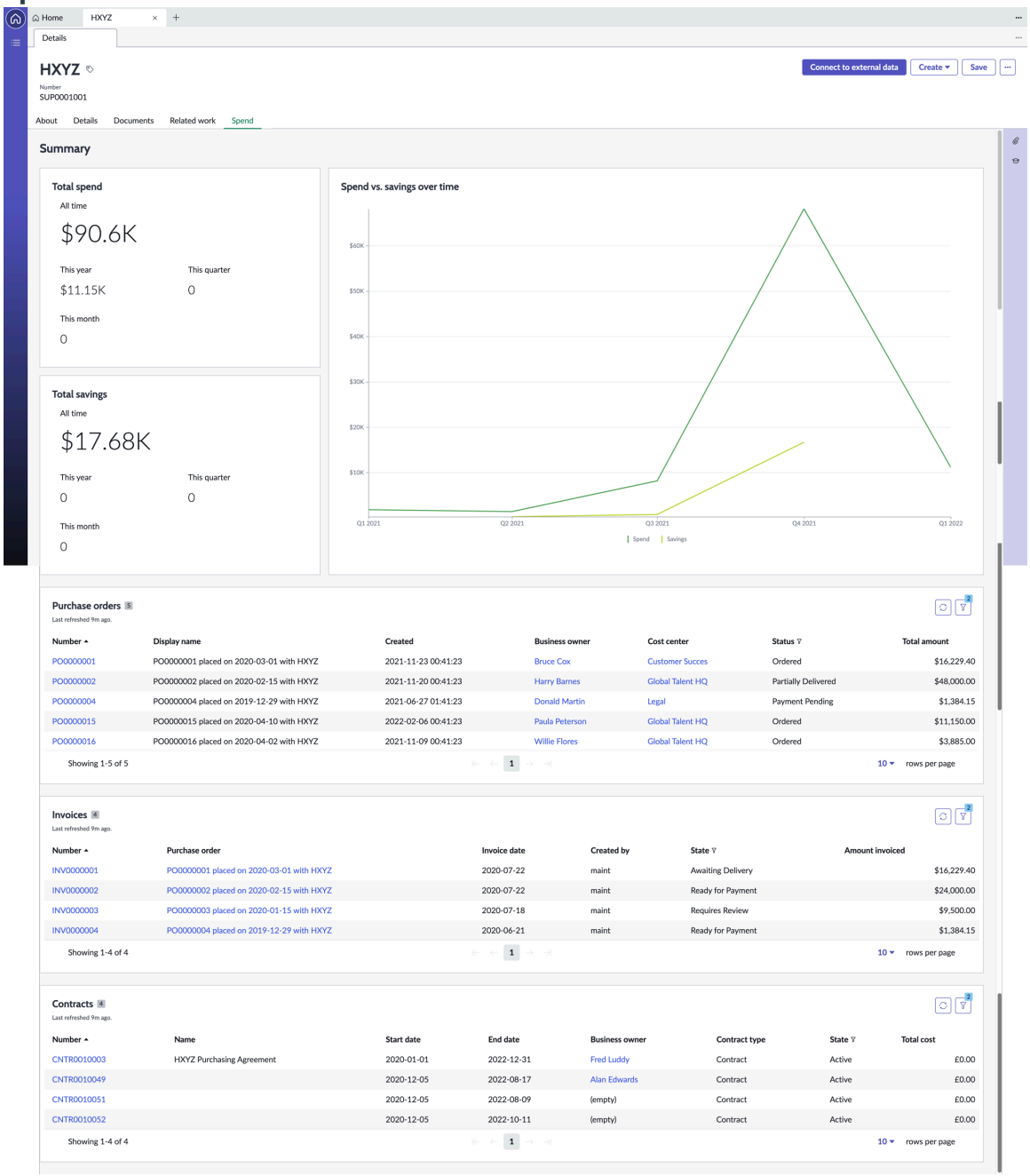
Note:

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.

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Spend tab



Sections on the Spend tab

Title	Type	Description
Summary - Total Spend		
All Time	Widget	View the total spend till date.
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 quarter.

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Sections on the Spend tab (continued)

Title	Type	Description
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 quarter.
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		
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.

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Sections on the Spend tab (continued)

Title	Type	Description
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

Risk tab

The **Risk** tab displays third-party name and process information, summary reports, risk intelligence scores, and tracking data for issues and tasks. On most reports, you can select an item to view the underlying data.

The **Risk** tab is displayed only if you have installed the Third-party Risk Management [com.sn_vdr_risk_asmt] and GRC: Vendor Risk Management Workspace (com.sn_vdr_risk_asmt_workspace) plugins.

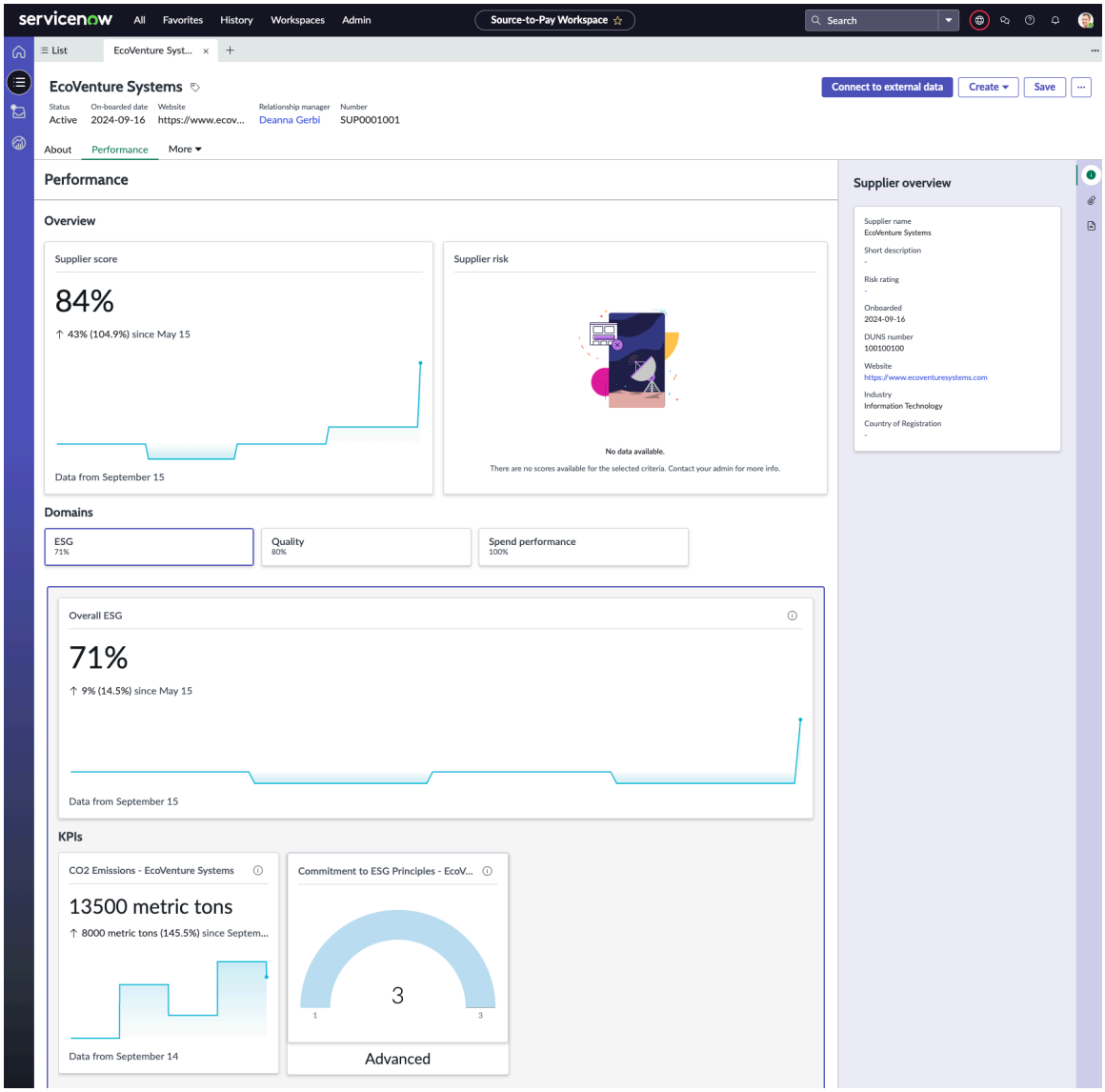
To know more about the information displayed on the **Risk** tab, see Viewing summarized risk information for a third party.

Performance

The **Performance** tab displays the Dashboard which enables monitoring and managing supplier performance effectively and making data-driven decisions. You can view the overall supplier score, risk score, individual KPI scores, and domain-specific scores.

The **Performance** tab is displayed only if you have installed the KPI Framework (com.snc.sn_kpi) and Supplier Relationship and Performance Management (com.snc.sn_slm_perf) plugins.

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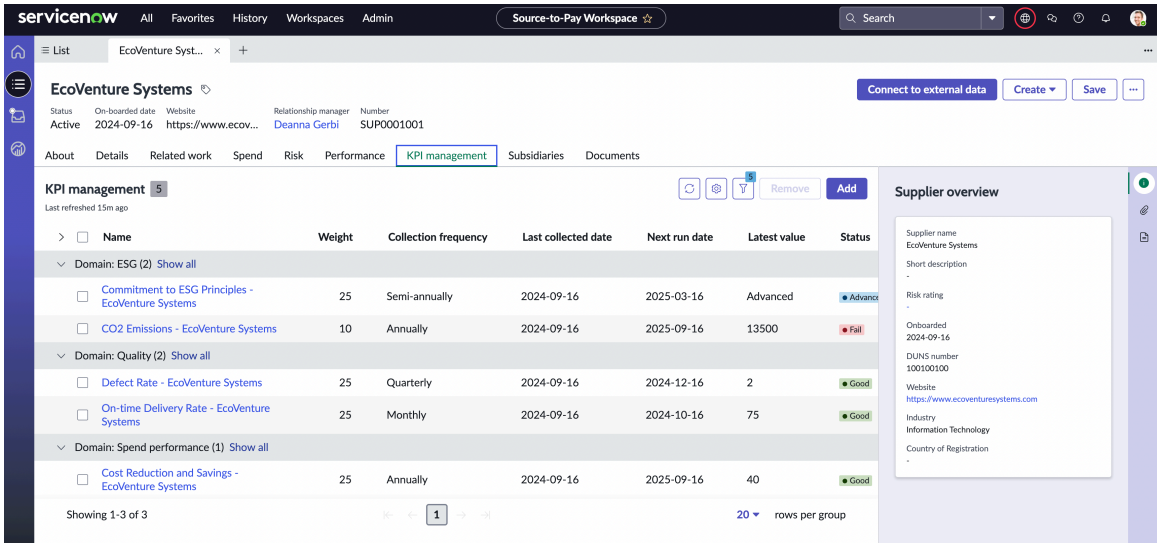
To know more about the information displayed on the **Performance** tab, see View supplier performance dashboard.

KPI Management

The **KPI Management** tab provides comprehensive visibility into the performance scores of all KPIs. KPIs are grouped by domains (such as Inventory and Quality) and include critical details such as weight, frequency, and status.

The **KPI Management** tab is displayed only if you have installed the KPI Framework (com.snc.sn_kpi) and Supplier Relationship and Performance Management (com.snc.sn_slm_perf) plugins.

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To know more about the information displayed on the **KPI Management** tab, see Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace.

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	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.

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Case Details page options (continued)

Option	Description

	Each case displays information in the following tabs:
	• **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.
	  ○ 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.
	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.
	• **Approvals** tab: Lists the approval records, their approval status, and the persons who need to approve this case.
	Important:
	Supplier Lifecycle Operations creates an approval record if the "Ask For Approval" action is a part of any SLO flow. This approval record can be approved by the user who belongs to the Supplier Administrators group (sys_user_group table). For more information, see Add a user to a group.
	• **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.
	Note:
	The **Risk Assessments** and **Tiering Assessments** tabs are shown only for a supplier case of type **Supplier onboarding**.

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Case Details page options (continued)

Option	Description
	• **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	This panel appears below the UI actions. Select the supplier overview icon ( ) to open the following panels: • Supplier overview: Displays the following information about the supplier. ○ **Supplier**: Name of the supplier. ○ **Short description**: Brief description about the supplier. ○ **Risk rating**: The risk rating of the supplier. The risk rating scale helps business users better understand risk assessment results. For example, in the default settings, risk scores in the 20 through 39 range indicate high risk, while scores in the 60 through 79 range indicate low risk. Depending on the risk score of the supplier, the following risk ratings are displayed: ▪ 1 - Very High ▪ 2 - High ▪ 3 - Moderate ▪ 4 - Low ▪ 5 - Very Low For more information about risk ratings and risk scores, see Set up risk rating scales for scoring . ○ **Onboarded**: Status of whether the supplier is onboarded into the ERP system. The options are Yes or No. ○ **DUNS number**: Unique, 9-digit identifier for a supplier. ○ Website: Website of the supplier. ○ **Industry**: Industry to which the supplier belongs. ○ **Country of Registration**: The country in which the supplier is registered. • 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.

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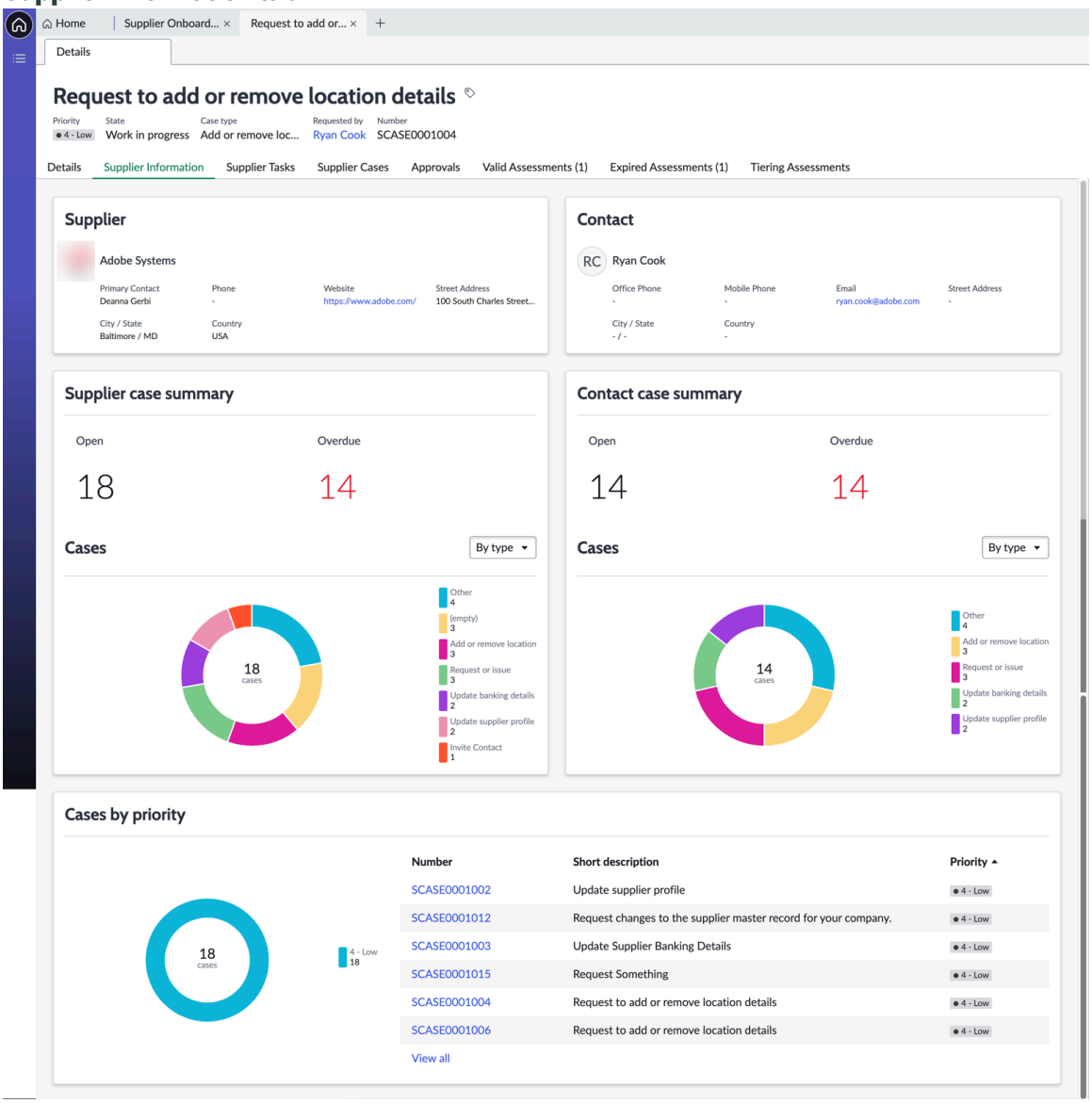
Case Details page options (continued)

Option	Description
	Select the attachments icon ( ) to open the Attachments panel, which enables you to attach documents to the case. 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.

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



Sections

The **Supplier Information** tab includes the following sections.

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Sections on the Supplier Information tab

Section	Description
Supplier	Displays the following information about the supplier: • Primary Contact • Phone • Website • Street Address • City/State • Country
Contact	Displays the following information about the contact: • 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.

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Reports on the Supplier Information tab (continued)

Title	Type	Description
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. 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.

APO landing page

Use the Source-to-Pay 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 Source-to-Pay Workspace by navigating to **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.

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.

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.

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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.

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Landing page view for task owner

The following information is displayed on the landing page when you log in to the workspace with the task owner role.

Note:
For a detailed analysis on each component, select the respective widget or chart.

Title	Type	Description
Work assigned to you		
Open tasks	Widget	Displays the number of invoice tasks in Open status. Select **View all** to view a list of all the invoices that are in open state.
Tasks by state	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.
Your tasks		
Exception task	Filter	Displays the card view of invoice tasks. Filter by due dates to view details of exception tasks for task owners that are due soon.
Summary		
Unassigned tasks	Widget	View the list of invoice tasks that are assigned to the assignment group of the current user. For more information on the fields of invoice tasks, see Create New Invoice task form

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.

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- 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.

SPO list page

As a Procurement Case Management (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.

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, and the activity stream for that record that contains comments, work notes, and emails.

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
  - Contract requests

    Note:
    This tab is available for sourcing requests, negotiation events, negotiations, purchase requisitions, and purchase lines, only if you have the Source-to-Pay Operations with Contract Management Pro plugin (com.snc.sn_spend_clm) installed.

  - Cases
  - Interaction-related records

    Note:
    This tab is typically available for cases.

- **Agreements**

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  - Related contracts
  - Signed contracts
  - Draft contracts
  - Other legal documents
- **Sourcing approach**
  - Sourcing requests
  - Negotiations
  - Purchase lines

Note:
This tab is typically available for negotiation events.

- **Emails**
  - Draft emails
  - Sent emails

Note:
You can customize the related lists to be displayed in these related work item tabs by updating the 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.

Form grouping

As sourcing and purchasing fulfillers working on sourcing requests in the Source-to-Pay Workspace, view the sourcing request form data in organized sections as follows, making it easier for you to find the information that you must focus on.

- Sourcing Request
- Requested Product
- Negotiation Event

The Purchase Lines and Contract Requests related lists also display the information that are most important for the sourcing and purchasing fulfillers.

Further, the purchase line (PRL) form is organized into sections, displaying relevant fields, based on whether you're viewing it as part of the sourcing and negotiating processes, or the purchasing process.

Here are the section details of a purchase line with details of the relevant fields.

- Purchase Line

Note:
In case a purchase line is canceled as part of the sourcing process, this section provides details on the cancellation reason and canceled by. This information isn't provided for active purchase lines.

- Supplier and Pricing

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Note:
As part of a purchase requisition, pricing related information such as starting unit price, negotiated unit price, total line amount, and so on, are provided for the purchase line.

- Delivery

Note:

  - For goods to be sourced, the requested delivery date is displayed.
  - For services to be sourced, requested start and end dates are displayed.
  - This section isn't available for purchase lines of type handing fee.

- Accounting, Receiving, and Payment

To debug why a particular field is visible or hidden, navigate to Form Builder from the sourcing request form and select each field to understand which UI Policy is applicable.

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 on 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.

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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.

SLO list page

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	• 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. • Open interactions: Displays the interactions that are assigned to you. For more information, see Create a supplier case.
Review needed	• Unassigned cases: Displays a list of all the unassigned cases. • Unassigned tasks: Displays a list of all the unassigned tasks. For more information, see Create a task for a supplier case from the Source-to-Pay Workspace.
All work	• 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.

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Modules and sub-modules on the List page (continued)

Module	Sub-module
	For more information, see Interaction Management in Supplier Lifecycle Operations.
Knowledge	Supplier articles: Displays a list of knowledge articles for suppliers.
Primary Data	Suppliers: Displays a list of active suppliers.

APO 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 Source-to-Pay 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 .

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

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- 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 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

Configuring Source-to-Pay Workspace

Plan and configure your implementation for Source-to-Pay Workspace.

- For more information on configuring Sourcing and Procurement Operations, see Configuring Sourcing and Procurement Operations.
- For more information on configuring Supplier Lifecycle Operations, see Configuring Supplier Lifecycle Operations.
- For more information on configuring Source-to-Pay Workspace, see Configuring Accounts Payable Operations.

Configuring knowledge bases to enable guest users to publish knowledge articles from the Source-to-Pay Workspace

Configure knowledge bases so that you can publish the created knowledge articles.

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Configure knowledge bases from the Source-to-Pay Workspace

Configure a knowledge base so that you can publish the knowledge base articles from the Source-to-Pay Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Knowledge** > **Administration** > **KNowledge Bases**.
2. Select the knowledge base that you want to configure.
   For example, select **Purchase and Expense** or **Supplier Knowledge**.
3. On the Can Read related list, select **Edit**.
4. In the Collection list, search for the **Guest User** role.
5. Move the **Guest User** role from the Collection list to the Can Read list.
6. Select **Save**.

Publish a knowledge article from the Source-to-Pay Workspace

After creating a knowledge base article, publish the article from the Source-to-Pay Workspace to make it available for external users.

Before you begin

Role required: sn_slm.manager, sn_shop.procurement_specialist_manager, or admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ) and
3. Navigate to **Lists** > **Knowledge**, and then select one of the following:
   - **Supplier articles**
   - **Procurement articles**
4. Under the Number column, select the link to a knowledge base article to open it.
5. Select **Publish**.
   A confirmation message appears, informing you that the knowledge base article will be published and be visible to the unauthenticated users.
6. Select **Publish**.

Using Source-to-Pay Workspace

Procurement specialists, sourcing managers, supplier managers, supplier contacts, accounts payable specialists use the Source-to-Pay Workspace to work on various requests, cases, negotiations, accelerate supplier onboarding, minimize supplier risk, validate invoice processing cases, and maximize productivity.

- For more information on using Sourcing and Procurement Operations, see Using Sourcing and Procurement Operations.
- For more information on using Supplier Lifecycle Operations, see Using Supplier Lifecycle Operations.
- For more information on using Source-to-Pay Workspace, see Using Accounts Payable Operations.

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Create a known error article from the Source-to-Pay Workspace

Create known error articles to document the root cause and the workaround of a problem to help with resolving incidents.

Before you begin

Role required: sn_slm.manager, sn_shop.procurement_specialist_manager, or admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ().
3. Navigate to **Lists** > **Knowledge**, and then select one of the following:
   - **Supplier articles**
   - **Procurement articles**
4. Select **New**.
5. In the Create article dialog box, do the following:
   - In the **Knowledge Base** field, select **Purchase and Expense** or **Supplier Knowledge**.
   - In the **Article Template** field, select **Known Error article**.
   - Select **Create Article.**
6. On the Create New Known Error article form, fill in the fields.

Field	Description
Number	Read-only field. Unique number to identify the known error article.
Knowledge base	Knowledge base to which this article belongs.
Category	Category of the article. Use the category picker to select an existing category or subcategory.
Valid to	Date after which the known error article is deleted from the database. After this date, the article does not appear in the search result.
Version	Read-only field. Managed by the Knowledge Management process when changes are made to a published article.
Workflow	Status of the article.
Source Task	Read-only field. The Problem record on which you are creating the article.
Attachment link	Select the check box so that the article appears as an attachment in the Problem record. If you do not select the check box, the content of the article appears in the work note of the Problem.

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Field	Description
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 known error.
Description	Detailed explanation of the known error.
Workaround	Method that you have used to overcome the problem. It can be a way of dealing with a problem or making something work despite the problem not being resolved.
Cause	Information about what had caused the problem.

7. Select **Save**.

Create a knowledge base article from the Source-to-Pay Workspace

Create knowledge base articles within a knowledge base to share information across your organization.

Before you begin

Role required: sn_slm.manager, sn_shop.procurement_specialist_manager, or admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Navigate to **Lists** > **Knowledge**, and then select one of the following:
   - **Supplier articles**
   - **Procurement articles**
4. Select **New**.
5. In the Create Article dialog box, do the following:
   - In the **Knowledge Base** field, select **Purchase and Expense** or **Supplier Knowledge**.
   - In the **Article Template** field, select **Standard**.
   - Select **Create Article.**
6. On the Create New Knowledge 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. Use the category picker to select an existing category or subcategory. You can create a category or subcategory to suit your requirements.

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Field	Description
Schedule publish date	Date in future when the article is published automatically. If approvals are enabled, the approval process must be completed before this date.
Valid to	Validity of the article.
Version	Read-only field. Managed by the Knowledge Management process when changes are made to a published 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.

7. Select **Save**.

Source-to-Pay Workspace reference

Reference topics provide additional information about articles, lists and forms that you use in Source-to-Pay Workspace.

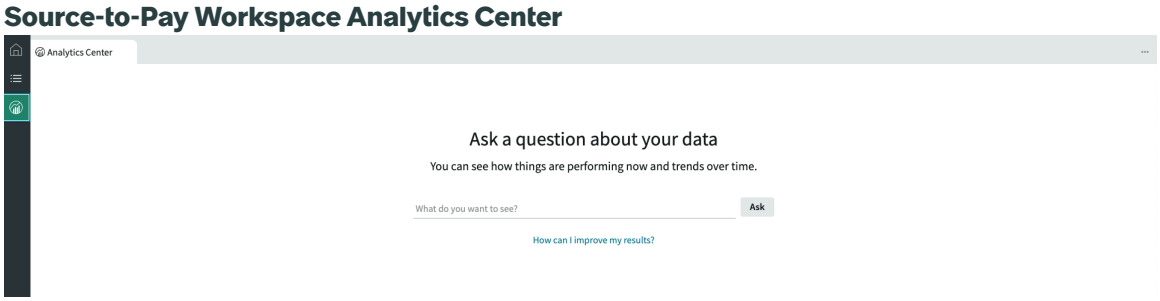
- For more information on Sourcing and Procurement Operations, see SPO landing page.
- For more information on Supplier Lifecycle Operations, see SLO landing page.
- For more information on Source-to-Pay Workspace, see APO landing page.

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.

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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

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    - 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

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.

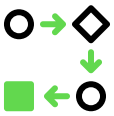
If you do not get the desired search results, select **How can I improve my results?** to view tips and suggestions on improving your search.

Source-to-Pay Integrations

You can find all the Source-to-Pay third-party integrations on the ServiceNow Store, and this section helps you understand these integrations.

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Source-to-Pay integration applications

Integrating with third-party applications  Extend the capabilities of Source-to-Pay Operations by integrating with third-party applications	**Integrating Sourcing and Procurement Operations (SPO) with other applications**  Extend the capabilities of Sourcing and Procurement Operations and connect with other departments by integrating with other applications	**Integrating Supplier Lifecycle Operations (SLO) with other applications**  Extend the capabilities of Supplier Lifecycle Operations by integrating with other applications
Integrating Accounts Payable Operations (APO) with other applications  Extend the capabilities of Accounts Payable Operations by integrating with other applications		

Source-to-Pay integration with third-party applications

Extend the capabilities of Source-to-Pay Operations by integrating with third-party applications.

Source-to-Pay integration framework

As part of the Source-to-Pay (S2P) integration framework, customers can install an optional third-party ERP integration application that enables primary data, fixed assets, purchase order, receipt, invoice, and tax integration capabilities between S2P and the third-party ERP application. For more information, see Source-to-Pay integration framework.

Source-to-Pay Operations integration with SAP

Source-to-Pay Operations integration with SAP provides integration workflows for integrating the Sourcing and Procurement Operations, Supplier Lifecycle Operations, and Accounts Payable Operations. For more information, see Source-to-Pay integration with SAP ECC and SAP S4 HANA.

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Source-to-Pay integration with 3CLogic

Integrate Source-to-Pay Operations with 3CLogic Cloud Contact Center solution to enhance the end-user experience with voice and SMS capabilities. 3CLogic is a ServiceNow partner that provides native voice and SMS capabilities to complement ServiceNow's existing digital channels. For more information, see About 3CLogic.

Source-to-Pay integration with Oracle EBS

Integrate Source-to-Pay Operations with Oracle EBS to handle sales orders, procurement, finance, and so on, in Oracle EBS from your ServiceNow instance. For more information, see Source-to-Pay integration with Oracle EBS.

Source-to-Pay integration with SAP Ariba

Integrate Source-to-Pay Operations with SAP Ariba to handle sales orders, procurement, finance, and so on, in Coupa from your ServiceNow instance. For more information, see Source-to-Pay integration with SAP Ariba.

Source-to-Pay integration with Coupa

Integrate Source-to-Pay Operations with Coupa to handle sales orders, procurement, finance, and so on, in Coupa from your ServiceNow instance. For more information, see Source-to-Pay integration with Coupa.

Integrations

- Source-to-Pay integration framework
- Source-to-Pay integration with SAP ECC and SAP S4 HANA
- Source-to-Pay Integration with 3CLogic
- Source-to-Pay integration with Oracle EBS
- Source-to-Pay integration with SAP Ariba
- Source-to-Pay integration with Coupa

Source-to-Pay integration framework

As part of the Source-to-Pay (S2P) integration framework, customers can install an optional third-party ERP integration application that enables primary data, fixed assets, purchase order, receipt, invoice, and tax integration capabilities between S2P and the third-party ERP application.

Primary data entities include:

- Supplier
- Profit center
- Cost center
- Ledger accounts
- Purchase organizations
- Asset category
- Material mapping
- Unit of measure

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While the third-party application is the system of record for primary data, S2P is the system of record for purchase orders and receipts. Invoices are either created manually in S2P or through an external supplier portal (for example, Ariba). For tax calculation and integration, see Tax calculations.

The integration between S2P and the third-party application requires settings on both sides so that these applications function properly together.

- Integration settings on Source-to-Pay side
- Integration setting on the third-party side.

Applications required for third-party integration

The integration requires the Finance – ERP Integration store application.

Permissions and roles for third-party integration

The following ServiceNow roles are required for integration:

- System administrator (admin) for installation of the integration application.
- Procurement Specialist (sn_shop.procurement_specialist) for defining the ERP source.
- FCA Integration user (sn_fcms_intg.integration_user) for ERP source configurations such as web service authorization, web services for Park and Post, Reverse, and User and Role mapping.

  Add the following roles to the FCA Integration user:

  - Import_transformer
  - Soap

MID Server required for third-party integration

This integration requires an installed and configured MID Server in your ServiceNow instance to connect to the ERP system server. See Installing the MID Server for details.

Note:
The MID Server integration is required only for an ERP integration using SOAP services.

Inbound staging tables for Source-to-Pay Operations

The inbound staging tables for Source-to-Pay Operations temporarily store source-to-pay data before it is sent to the Source-to-Pay primary data tables.

Inbound staging tables for Sourcing and Procurement Operations

The inbound staging tables for Sourcing and Procurement Operations temporarily store sourcing and procurement data before it is sent to the SPO primary data tables.

CMDB Model Category Stage inbound staging table

The CMDB Model Category Stage inbound [sn_fcms_intg_cmdb_model_category_stage] staging table temporarily stores important data about product model categories before this data is sent to the primary table.

The following table lists the mandatory fields for the CMDB Model Category Stage inbound [sn_fcms_intg_cmdb_model_category_stage] staging table.

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CMDB Model Category Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Name	String	Name of the CMDB model category.

CMDB Service Model Stage inbound staging table

The CMDB Service Model Stage inbound [sn_fcms_intg_cmdb_service_model_stage] staging table temporarily stores important data about service models before this data is sent to the primary table.

The following table lists the mandatory fields for the CMDB Service Model Stage inbound [sn_fcms_intg_cmdb_service_model_stage] staging table.

CMDB Service Model Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Model number	String	Unique identifier for the service model.

CMN Location Stage inbound staging table

The CMN Location Stage inbound [sn_fcms_intg_cmn_location_stage] staging table temporarily stores important data about locations before this data is sent to the primary table.

The following table lists the mandatory fields for the CMN Location Stage inbound [sn_fcms_intg_cmn_location_stage] staging table.

CMN Location Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Country	String	Name of the country where the CMN location belongs.

Catalog Import staging table

The Catalog Import [sn_spend_intg_imp_catalog] staging table temporarily stores important data about catalog imports before this data is sent to the primary table.

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Catalog Import

Fields	Data type	Description
Available for countries	String	Countries where the product is available.
Available Units	String	Number of units of a product that are available.
Bundle	Boolean	Indicates whether the Product Model is of type bundle.
Bundled Components	String	Bundle model components as a json array.
Catalog id	String	Unique identifier for each catalog of the purchase order.
Category UNSPSC code	String	
Contract end date	String	Date on which the contract term ends.
Contract number	String	
Contract start date	String	Date on which the contract term starts.
Customer id	String	Unique identifier for the customer.
Delivery time	String	Estimated number of days it takes to ship a product to the customer.
Images	String	List of strings that specify the image URLs for the supplier product.
Manufacturer/publisher name	String	Name of the manufacturer or publisher.
Manufacturer/publisher part number (MPN)	String	Manufacturer or publisher's unique identifier for the product.
Negotiated currency	String	Currency used in price negotiation.
Negotiated price	String	Unit price of a product as negotiated through a contract with the supplier .
Parent Bundle Part Number (MPN/SKU)	String	Manufacturer/publisher/ supplier part number of the parent bundle.
Product attributes	String	Attributes of the product.
Product category	Reference	Reference to the Product category.
Product category name	String	Category of the product.

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Catalog Import (continued)

Fields	Data type	Description
Product description	String	Description of the product.
Product name	String	Name of the product or service purchased from a supplier.
Provider	Reference	
Sales end date	String	Date when a product is discontinued or removed from the catalog.
Sales start date	String	Date when a product is published in the catalog.
Supplier id	String	Supplier ID for which the purchase order is generated.
Supplier part number	String	Supplier part number of the supplier product.
Third party import ID	String	Unique identifier for external data imports.
Third-party category	Reference	Reference to the Third Party category.
Unit	String	Unit or rate at which the product is sold by the supplier.

Catalog Error staging table

The Catalog Error [sn_spend_intg_catalog_error] staging table temporarily stores important data about any catalog errors before this data is sent to the primary table.

Catalog Error

Field	Data type	Description
Manufacturer/publisher part number (MPN)	String	Manufacturer or publisher's unique identifier for the product.
Supplier part number	String	Unique identifier assigned by a supplier to a specific product or part that they provide.

Cost Center Stage inbound staging table

The Cost Center Stage inbound [sn_fcms_intg_imp_cost_center] staging table temporarily stores important data about cost centers before this data is sent to the primary table.

The following table lists the mandatory fields for the Cost Center Stage inbound [sn_fcms_intg_imp_cost_center] staging table.

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Cost Center Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Name	String	Name of the cost center.

Department Stage inbound staging table

The Department Stage inbound [sn_fcms_intg_department_stage] staging table temporarily stores important data about departments before this data is sent to the primary table.

The following table lists the mandatory fields for the Department Stage inbound [sn_fcms_intg_department_stage] staging table.

Department Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Department name	String	Name of the department.

ERP Plant Address Mapping Stage inbound staging table

The ERP Plant Address Mapping Stage inbound [sn_fcms_intg_erp_plant_address_mapping_stage] staging table temporarily stores important data about ERP plant address before this data is sent to the primary table.

The following table lists the key fields for the ERP Plant Address Mapping Stage inbound [sn_fcms_intg_erp_plant_address_mapping_stage] staging table.

Note:
There are no mandatory fields for this table.

ERP Plant Address Mapping Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Name	String	Name of the ERP plant.

FX Currency Stage inbound staging table

The FX Currency Stage inbound [sn_fcms_intg_fx_currency_stage] staging table temporarily stores important data about FX currencies before this data is sent to the primary table.

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The following table lists the mandatory fields for the FX Currency Stage inbound [sn_fcms_intg_fx_currency_stage] staging table.

FX Currency Stage inbound staging table

Field	Data type	Description
ISO currency code	String	Unique three-letter currency code as defined by the International Organization for Standardization (ISO).
Name	String	Name of the currency.

FX Rate Stage inbound staging table

The FX Rate Stage inbound [sn_fcms_intg_fx_rate_stage] staging table temporarily stores important data about FX rates before this data is sent to the primary table.

The following table lists fields for the FX Rate Stage inbound [sn_fcms_intg_fx_rate_stage] staging table.

FX Rate Stage inbound staging table

Field	Data type	Description
Conversion date	String	Date of currency conversion.
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records. This is a mandatory field.
Exchange rate	Floating point number	Rate of exchange for currency conversion. This is a mandatory field.
From currency	String	Currency that is imported from. This is a mandatory field.
Rate type	String	Specifies the type of exchange rate used for currency conversion.
Span end	String	End date for the FX rate schedule.
Span start	String	Start date for the FX rate schedule.
To currency	String	Currency that is imported to. This is a mandatory field.

Fixed asset details stage inbound table

The Fixed asset details inbound [sn_fcms_intg_imp_fixed_asset_details] staging table temporarily stores important data about imported invoice line before this data is sent to the primary table.

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Fixed asset details inbound staging table

The following table lists the fields for the Fixed asset details inbound [sn_fcms_intg_imp_fixed_asset_details] staging table.

Fixed asset details stage

Field	Data type	Description
Asset id	String	Unique identifier for the fixed asset.
Asset number	String	Unique identifier generated within the ERP system for the fixed asset.
Capitalize on	String	Date on which the requester assumes the liability of the fixed asset, depending on the supplier incoterm.
Currency	String	Currency associated with the purchase of the fixed asset.
Depreciated amount	String	Amount that the fixed asset has depreciated by over time.
Depreciation life-cycle	String	Length of time in which the fixed asset is fully depreciated.
Depreciation start date	String	Start date of depreciation cycle.
Depreciation term	String	Frequency of depreciation throughout the life-cycle of the fixed asset.
ERP Asset number	String	Unique identifier generated within the ERP system for the fixed asset.
ERP Asset sub number	String	Unique identifier number that, when paired with the Asset number, identifies an asset.
ERP source	String	ERP source from which the fixed asset is imported.
Original value	String	Amount originally paid for the fixed asset.
Remaining value	String	Amount that the fixed asset is worth the current day, after factoring in depreciation.
Salvage value	String	Amount that the fixed asset is worth after it has come to the end of its life.

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GL Account Stage inbound staging table

The GL Account Stage inbound [sn_fcms_intg_gl_account_stage] staging table temporarily stores important data about General Ledger (GL) accounts before this data is sent to the primary table.

The following table lists the mandatory fields for the GL Account Stage inbound [sn_fcms_intg_gl_account_stage] staging table.

GL Account Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
GL account	String	General ledger account number.

Import Availability Updates inbound staging table

The Import Availability Updates inbound [sn_spend_intg_imp_availability] staging table temporarily stores important data about cost allocations before this data is sent to the primary table.

The following table lists the mandatory and optional fields for the Import Availability Updates inbound [sn_spend_intg_imp_availability] staging table.

Import Availability Updates inbound staging table

Field	Data type	Description
Available Units	String	Units that are available to be sold.
Customer ID	String	Unique identifier for each customer of the purchase order.
Catalog ID	String	Unique identifier for each catalog of the purchase order.
Supplier ID	String	Supplier ID for which the purchase order is generated.
Supplier part number	String	Supplier part number of the supplier product.
Third party import ID	String	Unique identifier for external data imports.
Unit	String	Unit or rate in which this product is sold by the supplier.

Availability Error staging table

The Availability Error [sn_spend_intg_availability_error] staging table stores important data about availability error so that an ERP integrator can export this data to a third-party ERP system.

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Availability Error staging table

The following table lists fields for the Availability Error [sn_spend_intg_availability_error] staging table.

Availability Error staging table

Field	Data type	Description
Supplier part number	String	Unique number that is used by the supplier to identify this product.

Inbound Cost Allocation staging table

The Inbound Cost Allocation [sn_spend_intg_imp_cost_allocation] staging table temporarily stores important data about cost allocations before this data is sent to the primary table.

The following table lists the fields for the Inbound Cost Allocation [sn_spend_intg_imp_cost_allocation] staging table.

Inbound Cost Allocation staging table

Field	Data type	Description
Allocate by	String	Determines whether the cost allocation is based on amount or percentage.
Allocation amount	String	Amount that is allocated.
Allocation percentage	String	Percentage of cost allocation.
Cost center	String	Cost center associated with the cost allocation.
Cost owner	String	User who incurs the cost of the allocated transaction amount.
ERP CA number	String	CA number from the ERP system.
ERP line number	String	Purchase order line number from the ERP system. This is a mandatory field.
ERP PO number	String	Purchase order number from the ERP system. This is a mandatory field.
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records. This is a mandatory field.
Order line	String	Order line associated with the cost allocation.

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Inbound Invoice staging table

The Inbound Invoice [sn_shop_invoice] staging table temporarily stores important data about shopping invoices before this data is sent to the primary table.

Inbound Invoice staging table

The following table lists fields for Inbound Invoice [sn_shop_invoice] staging table.

Inbound Invoice staging table

Field	Data type	Description
External invoice number	String	Invoice number originated from a third party application. This is a mandatory field.
Inbound source	String	Individual or group who owns the invoice.
Currency	String	Currency format associated with this invoice.
Discounts	String	Discounts applied on the invoice.
ERP number	String	Unique number generated within the ERP system for the purchase order.
ERP source	String	The available ERP. This is a mandatory field.
External invoice number	String	Invoice number originated from a third party application. This is a mandatory field.
External invoice source	String	Name of the third party application associated with the invoice. This is a mandatory field.
Final tax	String	Total amount of tax to be paid.
Inbound source	String	External source system from where the invoice is received.
Invoice date	String (yyyy-mm-dd)	Date on which the invoice is created. This is a mandatory field.
Invoice date	String	Date on which the invoice was created.
Invoice line count	String	Total number of invoice lines in an invoice.
Invoice type	String	Type of the invoice for processing.
Legal entity	String	Name of the legal entity of the supplier.
Original invoice	String	Unique invoice number created by the Supplier.
Other charges	String	Other additional charges associated with the invoice. This is a mandatory field.
Payment terms	String	The agreed upon time and conditions under which a payment to a supplier is made.

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Inbound Invoice staging table (continued)

Field	Data type	Description
Purchase order	String	The purchase order against which the invoice is created.
Remit to city	String	City to which the payment is made.
Remit to country	String	Country to which the payment is made.
Remit to state/ province	String	State to which the payment is made.
Remit to street	String	Street to which the payment is made.
Remit to zip/ postal code	String	Zip code to which the payment is made.
Ship from city	String	City from which the items on the purchase order are shipped.
Ship from country	String	Country from which the items on the purchase order are shipped.
Ship from state/ province	String	State from which the items on the purchase order are shipped.
Ship from street	String	Street from which the items on the purchase order are shipped.
Ship from zip/ postal code	String	Zip code from which the items on the purchase order are shipped.
Shipping amount	String	Shipping charges incurred for the invoice.
Ship to city	String	City to which the items on the purchase order should be shipped.
Ship to country	String	Country to which the items on the purchase order should be shipped.
Ship to state/ province	String	State to which the items on the purchase order should be shipped.
Ship to street	String	Street to which the items on the purchase order should be shipped.
Ship to zip/postal code	String	Zip code to which the items on the purchase order is shipped.
Status	String	Current status of the inbound invoice.
Subtotal	String	Total amount of money to be paid to the supplier excluding tax and shipping charges. This is a mandatory field.
Supplier	String	Name of the supplier from whom the good or service is procured. This is a mandatory field.
Supplier invoice number	String	Unique invoice number created by the Supplier.

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Inbound Invoice staging table (continued)

Field	Data type	Description
Supplier tax id	String	Tax ID associated to the third party reseller.
Supplier tax rate	String	Supplier tax rate.
Target ERP	String	Target ERP where the invoice is posted.
Tax amount	String	Tax amount levied on the total invoice amount.
Third party import ID	String	A unique identifier for external data imports.

Inbound Purchase Order staging table

The Inbound Purchase Order [sn_fcms_intg_imp_order] staging table temporarily stores important data about purchase orders before this data is sent to the primary table.

The following table lists fields for the Inbound Purchase Order [sn_fcms_intg_imp_order] staging table.

Inbound Purchase Order staging table

Field	Data type	Description
Blanket order end date	String	Date on which the blanket order is expected to end. If you're unsure of the delivery date of the product, you can provide an estimated time frame, which then creates a blanket order.
Blanket order start date	String	Date on which the blanket order is expected to start. If you're unsure of the delivery date of the product, you can provide an estimated time frame, which then creates a blanket order.
Business owner	String	The user who placed the order.
Cost center	String	Cost center that incurs the expense of the order.
ERP PO number	String	Purchase order number from the ERP system. This is a mandatory field.
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records. This is a mandatory field.
Legal entity	String	Legal entity corresponding to a purchase.
Order type	String	Type of the purchase order- Standard or Blanket.
Payment term	String	The agreed upon time and conditions under which a payment to a supplier is made.
PO amount	String	Total amount of the purchase order.

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Inbound Purchase Order staging table (continued)

Field	Data type	Description
PO amount currency	String	Currency of the purchase order.
PO status	String	Status of the purchase order.
Purchasing organization	String	The organization making the purchase order.
Supplier company name	String	Supplier company name for which the purchase order is generated.

Inbound Purchase Order Line staging table

The Inbound Purchase Order Line [sn_fcms_intg_imp_order_line] staging table temporarily stores important data about purchase order lines before this data is sent to the primary table.

The following table lists the mandatory fields for the Inbound Purchase Order Line [sn_fcms_intg_imp_order_line] staging table.

Inbound Purchase Order Line staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
ERP PO number	String	Purchase order number from the ERP system.
ERP PO line number	String	Purchase order line number from the ERP system.

Inbound Receipt staging table

The Inbound Receipt [sn_fcms_intg_imp_receipt] staging table temporarily stores important data about receipts before this data is sent to the primary table.

The following table lists the mandatory fields for the Inbound Receipt [sn_fcms_intg_imp_receipt] staging table.

Inbound Receipt staging table

Field	Data type	Description
ERP PO line number	String	Purchase order line number from the ERP system.
ERP PO number	String	Purchase order number from the ERP system.

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Inbound Receipt staging table (continued)

Field	Data type	Description
ERP receipt number	String	Unique number generated within the ERP system for the receipt.
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Milestone	String	Milestone associated with the receipt.
Percentage received	String	Percentage of the service received. This field is visible only for a service receipt.
PO line number	String	Purchase order line number against which the receipt of the product is acknowledged.
Quantity received	String	Quantity of product received as part of the receipt.
State	String	Current state of the receipt.
Supplier product	String	Supplier product for which the receipt is generated.
Type	String	Type of the receipt based on the product type. For example, Goods Receipt or Services Receipt.

Legal Entity Stage inbound staging table

The Legal entity stage inbound [sn_fcms_intg_legal_entity_stage] staging table temporarily stores important data about legal entities before this data is sent to the primary table.

The following table lists the fields for the Legal Entity Stage inbound [sn_fcms_intg_legal_entity_stage] staging table.

Legal Entity Stage inbound staging table

Field	Data type	Description
City	String	City where the legal entity is located.
Country	String	Country where the legal entity is located.
ERP company code	String	Company code of the supplier in the ERP system. This is a mandatory field.
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records. This is a mandatory field.
Global company	String	Global company that the entity is linked to.

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Legal Entity Stage inbound staging table (continued)

Field	Data type	Description
Industry	String	Industry type of the legal entity.
Legal name	String	Legal name of the entity that corresponds to its operating location.
Local currency	String	Local currency that corresponds to the entity's operating location.
Street	String	Street where the legal entity is located.

Office Location Stage inbound staging table

The Office Location Stage inbound [sn_fcms_intg_office_location_stage] staging table temporarily stores important data about office locations before this data is sent to the primary table.

The following table lists the mandatory fields for the Office Location Stage inbound [sn_fcms_intg_office_location_stage] staging table.

Office Location Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Country	String	Name of the country where the office location belongs.

Order Acknowledgement staging table

The Order Acknowledgment [sn_spend_intg_imp_purchase_order_ack] staging table temporarily stores important data about order acknowledgements before this data is sent to the primary table.

Order Acknowledgment staging table

Field	Data type	Description
Customer id	String	Unique identifier for a customer.
Estimated arrival date	String	Date on which the order is expected to arrive.
Purchase order line number	String	Line number against which the receipt of the product is acknowledged.
Purchase order number	String	Unique number for the purchase order.
Sales order line number	String	Unique identifier for each item on a sales order.

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Order Acknowledgment staging table (continued)

Field	Data type	Description
Sales order number	String	Unique identifier for a customer's purchase.
Status code	String	Code indicating the current status.
Status message	String	A message that indicates the current status.
Supplier id	String	Unique identifier for the supplier.
Third party import ID	String	Unique identifier for external data imports.

Order Acknowledgement Error staging table

The Order Acknowledgement Error [sn_spend_intg_order_ack_error] staging table temporarily stores important data about any errors in the order price imports before this data is sent to the primary table.

Order Acknowledgement Error

Field	Data type	Description
Sales order line number	String	Unique identifier for each item on a sales order.
Sales order number	String	Unique identifier for a customer's purchase.

Payment Terms Stage inbound staging table

The Payment Terms Stage inbound [sn_fcms_intg_payment_term_stage] staging table temporarily stores important data about payment terms before this data is sent to the primary table.

The following table lists the mandatory fields for the Payment Terms Stage inbound [sn_fcms_intg_payment_term_stage] staging table.

Payment Terms Stage inbound staging table

Field	Data type	Description
Payment term	String	Term for making the payment.

Price Import staging table

The Price Import [sn_spend_intg_imp_price] staging table temporarily stores important data about price imports before this data is sent to the primary table.

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Price Import staging table

Field	Data type	Description
Catalog id	String	Unique identifier for each catalog of the purchase order.
Contract end date	String	Date on which the contract term ends.
Contract number	String	Unique number of the contract.
Contract start date	String	Date on which the contract term starts.
Customer id	String	Unique identifier for a customer.
Negotiated currency	String	Currency used in price negotiation.
Negotiated price	String	Unit price of a product as negotiated through a contract with the supplier.
Supplier id	String	Unique identifier for the supplier.
Supplier part number	String	Unique identifier assigned by a supplier to a specific product or part that they provide.
Third party import ID	String	Unique identifier for external data imports.

Price Error outbound staging table

The Price Error [sn_spend_intg_price_error] staging table stores important data about pricing error so that an ERP integrator can export this data to a third-party ERP system.

Price Error staging table

The following table lists fields for the Price Error [sn_spend_intg_price_error] staging table.

Price Error staging table

Field	Data type	Description
Supplier part number	String	Unique number that is used by the supplier to identify this product.

Product Model Stage inbound staging table

The Product Model Stage inbound [sn_fcms_intg_cmdb_model_stage] staging table temporarily stores important data about product models before this data is sent to the primary table.

The following table lists the mandatory fields for the Product Model Stage inbound [sn_fcms_intg_cmdb_model_stage] staging table.

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Product Model Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Model number	String	Unique identifier for the product model.

Purchase Entity Stage inbound staging table

The Purchase Entity Stage inbound [sn_fcms_intg_imp_purchase_entity] staging table temporarily stores important data about purchase entities before this data is sent to the primary table.

The following table lists the mandatory fields for the Purchase Entity Stage inbound [sn_fcms_intg_imp_purchase_entity] staging table.

Purchase Entity Stage inbound staging table

Field	Data type	Description
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
ERP number	String	Unique identifier for the ERP system from which data is imported.

Purchase Line Stage inbound staging table

The Purchase Entity Stage inbound [sn_spend_intg_purchase_line] staging table temporarily stores important data about purchase entities before this data is sent to the primary table.

Purchase Line Stage inbound staging table

The following table lists both the mandatory and optional fields for the Purchase Line Stage inbound [sn_spend_intg_purchase_line] staging table.

Purchase Line Stage inbound staging table

Field	Data type	Description
Account assignment category	String	Account assignment category of the purchase line.
Acknowledgement type	String	Acknowledgment type of the purchase line. Applicable only if product type is Service or Handling fee. The values are:

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
		• Milestones • Service acknowledgement • Two way match
Active	String	Indicates if the purchase line is active or not.
Additional comments	String	Additional notes about the purchase line, if any.
Address	String	Address of the purchase line.
After the fact	String	Indicates if the purchase requisition is after the fact or not.
Asset category	String	Asset category of the purchase line.
Awarded	String	Indicates who is the awarded supplier for the purchase line.
Awarded in third party	String	Indicates who is the third-party awarded supplier for the purchase line.
Business owner	String	An individual or group who owns the purchase line.
Capex account	String	Ledger account to post the capital expenses of this product after the purchase completion.
Cart line id	String	Shopping cart line ID of the purchase line.
City	String	City of the purchase line.
Contract price	String	Contract price of the purchase line.
Cost center	String	Cost center that incurs the cost of the purchase line.
Cost plan	String	Cost plan for the purchase line.
Country	String	Name of the country of the purchase line.
Country code	String	Country code of the purchase line.
Estimated shipping	String	Shipping cost estimate for the product based on the delivery location.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
Estimated tax	String	Tax estimate for the product based on the price and delivery location.
Expense account	String	Expense account associated with the purchase line.
General ledger account	String	General Ledger (GL) account associated with the purchase line.
Goods receipt required	String	Indicates if a receipt is required in addition to the invoice.
Individual unit cost	String	Cost of the individual unit.
Internal order number	String	Internal order number of the purchase line.
Legal entity	String	Internal legal entity that incurs the cost of this purchase line.
Line source	String	Line source associated with the purchase line.
Manual handling fee	String	Manual charges added for a specific supplier when a rule is triggered as a result of certain configurable conditions for a purchase requisition being met.
Maximum budget	String	Maximum budget that the shopper provides for this purchase.
Milestone payout type	String	Indicates the type of milestone payout. The options available are Amount and Percentage.
Negotiated by	String	Indicates who is responsible for negotiation.
Negotiated savings	String	Total savings through negotiation. This is calculated as: (Starting unit cost - Negotiated unit cost) x Supplier's quantity.
Negotiated unit cost	String	Cost per unit of the product after negotiation.
Negotiation	String	Negotiation associated with this purchase line.
Net amount	String	Amount included as a cost allocation on the purchase

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
		order. This doesn't include any estimates.
Non catalog purchase?	String	Indicates if the purchase is non catalog or not.
Number	String	System-generated unique identifier of the purchase line.
Parent line	String	Parent line of the purchase line.
Part requirement	String	Part requirement associated with the purchase line.
Payment allocations	String	Payment allocations of the purchase line.
Payment method	String	Indicates the payment method to the supplier.
Payment schedule	String	Indicates the schedule of payments to the supplier.
Preferred currency	String	Payment method preferred by the supplier legal entity.
Pre-paid account	String	General ledger account where purchases of this product are posted when they are prepaid.
Pre-payments required	String	Option to mark if pre-payments is required for this product.
Pricing obtained on	String	Date on which the pricing is obtained for the purchase line.
Product category	String	Product category that is sourced through this purchase line.
Product example	String	Reference URL that the shopper provides.
Product name	String	Name of the supplier product.
Product type	String	Type of the product associated with the purchase line.
Project	String	Project associated with the purchase line.
Purchase	String	Parent purchase associated with this purchase line.
Purchase order	String	Purchase order associated with the purchase line.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
Purchase order line	String	Purchase order line associated with the purchase line.
Purchase reason	String	Reason for purchasing the product.
Purchase requisition	String	Purchase requisition associated with this purchase line.
Purchased quantity	String	Quantity that has been purchased by the shopper.
Recipient	String	Recipient of the purchase line.
Requested delivery date	String	Requested delivery date of the purchased product.
Requested end date	String	Requested end date of the purchase line order.
Requested start date	String	Requested start date of the purchase line order.
Shipping method	String	Details of the carrier, the applicable suppliers, and the valid delivery location countries for those suppliers.
Shopper's original choice	String	Original or first choice of the shopper.
Short description	String	Brief description about the purchase line.
Sourcing request	String	Sourcing request associated with this purchase line.
Specific requirements	String	Requirements that the shopper specifies.
Spend categorization	String	Indicates whether negotiation with the supplier is addressable or not.
Starting unit cost	String	Cost per unit of the product prior to negotiation.
State	String	State of the purchase line.
State or province	String	State or province of the purchase line.
Street	String	Street address of the purchase line.
Supplier	String	Supplier for which the shopper places the order.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
Supplier case	String	Indicates if a supplier case is created for the supplier or not.
Supplier contact	String	Name of the supplier contact of the purchase line.
Supplier contact email	String	Registered email ID for this supplier contact.
Supplier contact first name	String	First name of the supplier contact.
Supplier contact job title	String	Job title of the supplier contact.
Supplier contact last name	String	Last name of the supplier contact.
Supplier contacted?	String	Indicates if the supplier has been contacted or not.
Supplier notes	String	Additional notes about the supplier, if any.
Supplier part auxiliary ID	String	Auxiliary ID associated with the supplier part.
Supplier product	String	Supplier product for which the purchase line is created.
Supplier's lead time (days)	String	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.
Supplier's quantity	String	Quantity that the supplier can provide.
Tags	String	Tag names for the purchase line.
Term length	String	Duration of the term.
Term value	String	Type of the term. The options are Days, Weeks, Months, and Years.
Third party Category	String	Third-party category of the purchase line.
Total bid amount	String	Supplier's quantity multiplied by negotiated unit cost. It reflects the total bid amount from that particular supplier for that purchase line.

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Purchase Line Stage inbound staging table (continued)

Field	Data type	Description
Total individual units	String	Number of fixed assets that are created depends on this value.
Total line amount	String	Total price of the purchased goods and services, including estimated tax and shipping.
Type	String	Type of the purchase line.
Unit	String	Unit of rate at which the customer purchases the product.
Upcoming date	String	Upcoming date for the purchase line.
WBS element	String	WBS element associated with the purchase line.
Zip or postal code	String	Zip code of the purchase line.

Purchase Requisition staging table

The Purchase requisition [sn_spend_intg_purchase_requisition] staging table temporarily stores important data about purchase requests before this data is sent to the primary table.

Purchase Requisition stage

Field	Data type	Description
Accounting period	String	Financial period during which expenses related to the purchase requisition are recorded.
Actual end	String	End date of a purchase requisition (PR) process.
Actual start	String	Start date or initiation date of a purchase requisition (PR) process.
Additional comments	String	Supplementary information or notes added to a purchase requisition (PR).
After the fact	String	Actions or processes related to a purchase requisition (PR) that are handled or documented after a requisition is approved.
Assigned to	String	Individual or department responsible for reviewing, approving, and processing the purchase requisition (PR).

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Purchase Requisition stage (continued)

Field	Data type	Description
Assignment group	String	Team responsible for managing a Purchase Requisition (PR) within an organization.
Business owner	String	Individual or entity that has legal ownership and control over a business.
Cost center	String	Department, unit, or segment within an organization that is responsible for managing its own budget and expenses related to purchase requisitions.
Description	String	Description of the purchase requisition.
ERP Source	String	It is a field or attribute associated with a purchase requisition that indicates the specific ERP module, system, or process from which the requisition was generated.
Group Id	String	Unique identifier assigned to a group of purchase requisitions. This identifier groups together related requisitions for easier management, tracking, and processing.
Handling fee	String	Additional charge associated with the processing of a Purchase Requisition (PR).
Legal entity	String	Legal entity within an organization that is responsible for the purchase requisition.
Location	String	Location of the legal entity.
Number	String	Unique identifier assigned to a purchase requisition document within the procurement system.
Order type	String	Classification of orders based on their nature, purpose, or processing requirements.
Payment term	String	Specific terms and conditions under which payment is to be made for the goods

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Purchase Requisition stage (continued)

Field	Data type	Description
		or services requested in a Purchase Requisition (PR).
Preferred currency	String	Currency that is preferred or required for processing a Purchase Requisition (PR).
Primary contact	String	Individual responsible for managing the Purchase Requisition (PR) process.
Priority	String	Level of urgency assigned to a Purchase Requisition (PR) within an organization's procurement process.
Purchase	String	Purchase order associated with the purchase requisition.
Purchase order	String	Official purchase order issued to the supplier.
Purchasing entity	String	Organization or department that is responsible for procurement of goods or services within a company.
Requested delivery	String	Date by which the requester of a purchase requisition (PR) expects the goods or services to be delivered.
Requisition type	String	Classification of a purchase requisition based on the nature or purpose of the requested goods or services.
Short description	String	Brief description of the purchase order.
State	String	Current state of the purchase requisition.
Submitted by	String	Individual or entity that created the purchase requisition request.
Supplier	String	Vendor or supplier from whom the requested goods or services are intended to be purchased.
Total amount	String	Total cost or value of all items or services requested in a requisition.
Total estimated shipping	String	Estimated cost associated with the shipping of goods or services.

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Purchase Requisition stage (continued)

Field	Data type	Description
Total estimated tax	String	Estimated amount of tax applicable to the goods or services requested in a Purchase Requisition (PR).

Spend Shipment Import inbound staging table

The Spend Shipment Import inbound [sn_spend_intg_imp_shipment] staging table temporarily stores important data about spend shipment imports before this data is sent to the primary table.

The following table lists both the mandatory and optional fields for the Spend Shipment Import inbound [sn_spend_intg_imp_shipment] staging table.

Spend Shipment Import inbound staging table

Field	Data type	Description
Actual shipment date	String	Date at which the product was shipped.
City	String	Name of the city of the shipment.
Country	String	Name of the country of the shipment.
Customer ID	String	Unique identifier for each customer of the shipment.
Estimated shipment date	String	Date at which the product is estimated to be shipped.
Line number	String	Line number of the shipment.
Name	String	Name of the shipment.
Order number	String	Unique order number of the shipment.
Planned shipment date	String	Date at which the product is planned to be shipped.
Product details	String	Details of the product to be shipped.
Punchout	String	Punch out details of the shipment.
Sales order line number	String	Sales order line number of the shipment.
Sales order number	String	Sales order number associated with the shipment.
Ship to	String	Shipping location of the product.
Shipment Import	String	Number of shipments to be imported.
Shipment quantity	String	Number of shipments to be shipped.
Shipment type	String	Type of shipment.
Shipping carrier	String	Name of the shipping carrier.
State	String	Name of the state of the shipment.
Street	String	Street of the shipment.
Supplier ID	String	ID of the supplier.
Supplier shipment number	String	Shipment number of the supplier.
Third party import ID	String	Third party import ID of the shipment.

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Spend Shipment Import inbound staging table (continued)

Field	Data type	Description
Tracking number	String	Tracking number of the shipment.
Zip code	String	ZIP code of the shipment.

Shipment Error staging table

The Shipment Error [sn_spend_intg_shipment_error] staging table temporarily stores important data on any shipment errors before this data is sent to the primary table.

Shipment Error

Field	Data type	Description
Sales order line number	String	Unique identifier for each item on a sales order.
Sales order number	String	Unique identifier for a customer's purchase.
Supplier shipment number	String	Shipment number of the supplier.

Supplier Product Stage inbound staging table

The Supplier Product Stage inbound [sn_spend_intg_supplier_product_stage] staging table temporarily stores important data about supplier products before this data is sent to the primary table.

The following table lists the mandatory fields for the Supplier Product Stage inbound [sn_spend_intg_supplier_product_stage] staging table.

Supplier Product Stage inbound staging table

Field	Data type	Description
Capex account	String	General ledger account where capital expenses are posted on purchase.
Currency	String	Currency format associated with the supplier
Description	String	Detailed description of the product for the buyer.
ERP source	String	ERP source used by the organization.
Expense account	String	General ledger account where operational expenses are posted on purchases.
Goods receipt required	String	Indicates if a receipt is required in addition to the invoice.
Name	String	Name of the company that the supplier is linked to.
Prepaid account	String	General ledger account where purchases of this product are posted when they are prepaid.
Product category	String	Category to which this product belongs.
Product model	String	Standardized definition for this product across suppliers.

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Supplier Product Stage inbound staging table (continued)

Field	Data type	Description
		Note: For creating a product bundle, enter the name of the product model of type bundle in this field.
Product type	String	Type of product. The options are Good or Service.
Published	String	Option for specifying if the product is to be listed on the ShoppingHub portal.
Services acknowledgement	String	All the service acknowledgments associated with the supplier.
Short description	String	Brief description of the product for the buyer.
Sourcing required	Boolean	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.
Sourcing time in days	String	Estimated number of days to process the sourcing request.
Spend categorization	String	Product that is addressable for negotiation. You can select one of these options: • Addressable: Can be considered for negotiation. • Not Addressable: Cannot be considered for negotiation.
Supplier	String	Name of the supplier.
Supplier delivers to	String	Countries where the suppliers can deliver the product.
Supplier part number	String	Unique number that is used by the supplier to identify this product.
Units	String	Unit or rate in which the product is sold by the supplier.

Third Party Sourcing Registration staging table

The Third Party Sourcing Registration [sn_spend_intg_sourcing_vendor] table temporarily stores important data on third party sourcing registrations before this data is sent to the primary table.

Third-Party Sourcing Registration

Field	Data type	Description
Third-party sourcing registration name	String	Name of the third-party sourcing registration to be integrated with ServiceNow.
Third-party sourcing registration code	String	User defined code to be associated to the third-party sourcing registration.

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Third Party Unit Mapping staging table

The Third Party Unit Mapping [sn_spend_intg_third_party_uom_map] staging table temporarily stores important data on third party mapping before this data is sent to the primary table.

Third Party Unit Mapping

Field	Data type	Description
Supplier Product	Reference	Reference to the Supplier Product.
Third-party unit	Reference	Reference to the Third Party Unit.

Third Party Unit staging table

The Third Party Unit [sn_spend_intg_third_party_uom] staging table temporarily stores important data on third party units before this data is sent to the primary table.

Third Party Unit

Field	Data type	Description
Provider	Reference	Reference to the Third Party Registration table.
Third party unit	String	Name of the third-party unit.
Unit	Reference	Reference to the Unit table.

Inbound staging tables for Supplier Lifecycle Operations

The inbound staging tables for Supplier Lifecycle Operations temporarily store supplier data before it is sent to the SLO primary data tables.

Supplier contact inbound staging table

The Supplier contact inbound [sn_fcms_intg_supplier_contact_inbound] staging table temporarily stores important data about a supplier contact before this data is sent to the Supplier Contact [vm_vdr_contact] primary table.

Supplier contact inbound staging table

The following table lists the mandatory fields for the Supplier contact inbound [sn_fcms_intg_supplier_contact_inbound] staging table.

Supplier contact inbound staging table

Field	Data type	Description
First name	String	First name of the supplier contact.
Last name	String	Last name of the supplier contact.
Email	Email	Email address of the supplier contact.

Supplier inbound staging table

The Supplier inbound [sn_fcms_intg_imp_supplier] staging table temporarily stores important data about the supplier before this data is sent to the Supplier [sn_fin_supplier] primary table.

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Supplier inbound staging table

The following table lists fields for the Supplier inbound [sn_fcms_intg_imp_supplier] staging table.

Supplier inbound staging table

Field	Data type	Description
Accepted purchasing currency	String	Currency value in which purchase orders for this supplier must be created.
City	String	City where the supplier is located.
Company overall rating	String	Overall rating of the company.
Company type	String	Industry type of the supplier.
Country	String	Country where the supplier is located.
Country of registration	String	Country where the supplier is registered.
County / District	String	County or district where the supplier is located.
Customer number	String	Unique identifier for the organization to the supplier.
Domain	String	Domain name of the supplier.
Duns	String	Unique 9-digit identifier for a supplier.
Employee number	String	Employee number of the supplier contact.
ERP company code	String	Company code of the supplier in the ERP system.
ERP company code	String	Company code of the supplier in the ERP system.
ERP source	String	ERP source used by the organization.
Fax number	String	Number to which documents can be faxed to the supplier.
Founded year	String	Year the organization was founded.
General ledger account	String	Accounts payable reconciliation account for the supplier.
Goods shipped from	String	Location from where the supplier ships out the products.
Incoterm	String	Set of 11 internationally recognized rules that define the responsibilities of sellers and buyers.

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Supplier inbound staging table (continued)

Field	Data type	Description
		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: • Carriage and Insurance Paid to (CIP) • Carriage Paid to (CPT) • Cost and Freight (CFR) • Cost, Insurance, and Freight (CIF) • 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)
Industry	String	Industry type of the supplier.
Legal entities	String	Name of the legal entity.
Legal name	String	Legal name of the supplier that corresponds to its operating location.
Locations count	String	Number of places where the supplier operates.
Logo URL	String	Image URL of the supplier's logo.
Long description	String	Detailed description of the supplier.
Off-boarded date	String	Date of the supplier's termination from the organization.
Onboarded	String	Indicates whether the supplier is onboarded into the ERP system.
On-boarded by	String	Employee responsible for onboarding the supplier.
On-boarded date	String	Onboarding date of the supplier.
Parent company	String	Parent company of the supplier.
Payment term	String	Agreed upon time and conditions for payment to the supplier.
PO box number	String	Post office box number where the supplier correspondence and payments are made.
Posting Block	String	Postal block where the supplier is located.

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Supplier inbound staging table (continued)

Field	Data type	Description
Primary phone number	String	Primary phone number.
Purchasing entities	String	Purchasing entities that are allowed to purchase from the supplier.
Short description	String	Brief description about the supplier.
State / Province	String	State or province where the supplier is located.
Status	String	
Street address	String	Street where the supplier is located.
Sustainability rating	String	The business relationship designated to the entity.
Tax id	String	Tax ID of the organization.
Tax jurisdiction	String	Taxation authority that imposes the taxes.
Twitter	String	Twitter account of the supplier.
URL	String	URL of the supplier.
Wikipedia	String	Wikipedia page of the supplier.
YouTube	String	Youtube channel of the supplier.
Zip / Postal code	String	Zip code or postal code where the supplier is located.

Supplier legal entity mapping inbound staging table

The Supplier legal entity mapping inbound [sn_fcms_intg_supplier_legal_entity_inbound] staging table temporarily stores important data about the legal entities of a supplier before this data is sent to the Supplier Legal Entity Mapping (sn_fin_supplier_detail) primary table.

Supplier legal entity mapping inbound staging table

The following table lists the mandatory fields for the Supplier legal entity mapping inbound [sn_fcms_intg_supplier_legal_entity_inbound] staging table.

Supplier legal entity mapping inbound staging table

Field	Data type	Description
Legal entity	String	Name of the legal entity of the supplier.
Supplier	String	Name of the supplier.

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Supplier location inbound staging table

The Supplier location inbound [sn_fcms_intg_supplier_location_inbound] staging table temporarily stores important data about the geographical location of a supplier before this data is sent to the Supplier Location [sn_slm_m2m_location] and Location [cmn_location] primary tables.

Supplier location inbound staging table

The following table lists the mandatory fields for the Supplier location inbound [sn_fcms_intg_supplier_location_inbound] staging table.

Supplier location inbound staging table

Field	Data type	Description
Company	String	Name of the company that the supplier is linked to.
Zip/Postal code	String	The zip code of the supplier location.
ERP source	String	ERP source from which data is imported.

Supplier payment inbound staging table

The Supplier payment inbound [sn_fcms_intg_supplier_payment_inbound_stage] staging table temporarily stores important data about the payment information of a supplier before this data is sent to the Supplier Payment Information [sn_fin_supplier_payment] primary table.

Supplier payment inbound staging table

The following table lists the mandatory fields for the Supplier payment inbound [sn_fcms_intg_supplier_payment_inbound_stage] staging table.

Supplier payment inbound staging table

Field	Data type	Description
Supplier	Reference	The supplier that the payment information is for.
Bank name	String	Name of the bank.
Account number	Password2	Account number of the beneficiary.

Inbound staging tables for Accounts Payable Operations

The inbound staging tables for Accounts Payable Operations temporarily stores invoice data before it is sent to the APO primary data tables.

Invoice import inbound staging table

The invoice import inbound [sn_spend_intg_imp_invoice] staging table temporarily stores important data about the imported invoice before this data is sent to the [sn_shop_invoice] primary table.

Invoice Import inbound staging table

The following table lists fields for the invoice import inbound [sn_spend_intg_imp_invoice] staging table.

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Invoice import inbound staging table

Field	Data type	Description
Amount invoiced	String	Total amount a supplier is expected to be paid.
Business owner	String	Individual or group who owns the invoice.
Currency	String	Currency format associated with this invoice.
Discounts	String	Discounts applied on the invoice.
ERP number	String	Unique number generated within the ERP system for the purchase order.
ERP source	String	The available ERP. This is a mandatory field.
External invoice number	String	Invoice number originated from a third party application. This is a mandatory field.
External invoice source	String	Name of the third party application associated with the invoice. This is a mandatory field.
Final tax	String	Total amount of tax to be paid.
Inbound source	String	External source system from where the invoice is received.
Invoice date	String (yyyy-mm-dd)	Date on which the invoice is created. This is a mandatory field.
Invoice date	String	Date on which the invoice was created.
Invoice line count	String	Total number of invoice lines in an invoice.
Invoice type	String	Type of the invoice for processing.
Legal entity	String	Name of the legal entity of the supplier.
Original invoice	String	Unique invoice number created by the Supplier.
Other charges	String	Other additional charges associated with the invoice. This is a mandatory field.
Payment terms	String	The agreed upon time and conditions under which a payment to a supplier is made.
Purchase order	String	The purchase order against which the invoice is created.
Remit to city	String	City to which the payment is made.
Remit to country	String	Country to which the payment is made.
Remit to state/ province	String	State to which the payment is made.
Remit to street	String	Street to which the payment is made.

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Invoice import inbound staging table (continued)

Field	Data type	Description
Remit to zip/ postal code	String	Zip code to which the payment is made.
Ship from city	String	City from which the items on the purchase order are shipped.
Ship from country	String	Country from which the items on the purchase order are shipped.
Ship from state/ province	String	State from which the items on the purchase order are shipped.
Ship from street	String	Street from which the items on the purchase order are shipped.
Ship from zip/ postal code	String	Zip code from which the items on the purchase order are shipped.
Shipping amount	String	Shipping charges incurred for the invoice.
Ship to city	String	City to which the items on the purchase order should be shipped.
Ship to country	String	Country to which the items on the purchase order should be shipped.
Ship to state/ province	String	State to which the items on the purchase order should be shipped.
Ship to street	String	Street to which the items on the purchase order should be shipped.
Ship to zip/postal code	String	Zip code to which the items on the purchase order is shipped.
Status	String	Current status of the inbound invoice.
Subtotal	String	Total amount of money to be paid to the supplier excluding tax and shipping charges. This is a mandatory field.
Supplier	String	Name of the supplier from whom the good or service is procured. This is a mandatory field.
Supplier invoice number	String	Unique invoice number created by the Supplier.
Supplier tax id	String	Tax ID associated to the third party reseller.
Supplier tax rate	String	Supplier tax rate.
Target ERP	String	Target ERP where the invoice is posted.
Tax amount	String	Tax amount levied on the total invoice amount.
Third party import ID	String	A unique identifier for external data imports.

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Import error staging table

The Import error [sn_spend_intg_import_error] staging table temporarily stores important data on errors before this data is sent to the primary table.

Import error staging table

Field	Data type	Description
Error message	String	A message that describes the error encountered.
Outbound status	Reference	Indicates the status of outgoing transactions.

Invoice line import inbound staging table

The Invoice line import inbound [sn_spend_intg_imp_invoice_line] staging table temporarily stores important data about imported invoice line before this data is sent to the [sn_shop_invoice_line] primary table.

Invoice line import inbound staging table

The following table lists the mandatory fields for the Invoice line import inbound [sn_spend_intg_imp_invoice_line] staging table.

Invoice line import inbound staging table

Field	Data type	Description
Cost center	String	Cost center for which the invoice is generated.
Currency	String	Currency format associated with the invoice.
ERP line number	String	ERP line number.
ERP source	String	Available ERP source. This is a mandatory field.
External invoice number	String	Invoice number from external invoice.
External invoice source	String	Name of the third party application associated with the invoice. Derive logic from external invoice number. This is a mandatory field.
Final tax	String	Final tax.
GL account	String	Account used to generate the invoice.
Inbound source	String	External invoice source.
Line amount invoiced	String	The total cost which is being billed for this good or service.
Line description	String	Description of the invoice line.

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Invoice line import inbound staging table (continued)

Field	Data type	Description
		This is a mandatory field.
Line quantity	Decimal number	Number of items that have been invoiced. This is a mandatory field.
Line unit price	Decimal number	Unit price of the line item in the invoice. This is a mandatory field.
Purchase order line	String	Purchase line related to the invoiced amount.
Ship to city	String	City to which the items on the purchase order should be shipped.
Ship to country	String	Country to which the items on the purchase order should be shipped.
Ship to state/ province	String	State to which the items on the purchase order should be shipped.
Ship to street	String	Address to which the items on the purchase order should be shipped.
Ship to zip/ postal code	String	Zip code to which the items on the purchase order should be shipped.
Status	String	Current status of this invoice line.
Subtotal	Decimal number Example (12345.65)	Total amount of money to be paid to the supplier excluding tax and shipping charges. This is a mandatory field.
Supplier part number	String	Supplier part number of the supplier product.
Supplier tax rate	String	Supplier tax rate.
Target ERP	String	ERP number of inbound source.
Tax amount	String	Tax for the invoice amount.
Tax code	String	Tax code of the invoice.
Third party import ID	String	Unique identifier for external data imports.
Unit	String	The unit or rate in which this product is sold by the supplier.

Invoice payment detail import inbound table

The Invoice Payment detail import inbound [sn_spend_intg_imp_invoice_payment_detail] staging table temporarily stores important data about supplier before this data is sent to the [sn_shop_invoice_payment_detail] primary table.

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Invoice payment detail import inbound staging table

The following table lists the fields for the Invoice payment detail import inbound [sn_spend_intg_imp_invoice_payment_detail] staging table.

Invoice payment detail import inbound staging table

Field	Data type	Description
Currency	String	Currency used in the invoice. This is a mandatory field.
ERP invoice number	String	Unique identifier for invoices in the ERP system. This is a mandatory field.
ERP Source	String	Specifies the original source of ERP. This is a mandatory field.
ERP supplier code	String	ERP supplier code from the external supplier. This is a mandatory field.
Payment amount	Decimal number	Total amount to be paid. This is a mandatory field.
Payment date	String (yyy-mm-dd)	Date by which payment is to be completed. This is a mandatory field.
Payment method	Choice Example: bank_transfer/ cash_payment/ cheque /credit_card / debit_card /wire_transfer	Mode through which the payment is done. This is a mandatory field.
Payment reference ID	Alphanumeric	A unique ID to track the payment details. This is a mandatory field.
Remit to city	String	City to which the payment is made. This is a mandatory field.
Remit to country	String	Country to which the payment is made in ISO 3166 format. Example:US This is a mandatory field.

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Invoice payment detail import inbound staging table (continued)

Field	Data type	Description
Remit to state/ province	String	State or province to which the payment is made. This is a mandatory field.
Remit to street	String	Street address to which the payment is made. This is a mandatory field.
Remit to ZIP/postal code	String	Zip or postal code address to which the payment is made. This is a mandatory field.
Scheduled payment date	String (yyyy-mm-dd)	Date at which the payment will be made. This is a mandatory field.
Third party import ID	String	Unique identifier for imported data set.

Organization tax details inbound staging table

The Organization tax details inbound [sn_fcms_intg_org_tax_detail_inbound] staging table temporarily stores important data about an organization's tax information before this data is sent to the Organization Tax Details [sn_fin_org_tax_detail] primary table.

Organization tax details inbound staging table

The following table lists the mandatory fields for the Organization tax details inbound [sn_fcms_intg_org_tax_detail_inbound] staging table.

Organization tax details inbound staging table

Field	Data type	Description
Organization	String	Name of the organization.
Tax ID	String	Tax ID of the organization.

Invoice tax line staging table

The invoice tax line inbound [sn_spend_intg_imp_invoice_tax_line] staging table temporarily stores important data about the invoice tax line before this data is sent to the [sn_shop_invoice_tax_line] primary table.

Invoice tax line inbound staging table

The following table lists the fields for the invoice tax line inbound [sn_shop_invoice_tax_line] staging table.

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Invoice tax line inbound staging table

Field	Data type	Description
Tax Type	String	Type of the tax applicable on the invoice.
Taxable Amount	FX Currency	The amount of tax applicable on an invoice.
Supplier Tax	String	The amount charged by the supplier.
Supplier Tax Rate	Decimal	The tax rate calculated by the third-party tax calculation engine.

Outbound staging tables for Source-to-Pay Operations

The outbound staging tables for Source-to-Pay Operations store source-to-pay data before it is exported to a third-party ERP system.

Outbound staging tables for Sourcing and Procurement Operations

The outbound staging tables for Sourcing and Procurement Operations store sourcing and procurement data before it is exported to a third-party ERP system.

Outbound Cost Allocation staging table

The Outbound Cost Allocation [sn_spend_intg_outbound_cost_allocation] staging table stores important data about the cost allocations created so that an ERP integrator can export this data to a third-party ERP system.

The following table lists the key fields for the Outbound Cost Allocation [sn_spend_intg_outbound_cost_allocation] staging table.

Note:
There are no mandatory fields for this table.

Outbound Cost Allocation staging table

Field	Data type	Description
Allocation amount	String	Amount of cost that is allocated for expenditure.
Allocate by	String	Determines if the cost allocation is made by amount or percentage.
Allocation percentage	String	Percentage of the cost allocated. This field is visible only if the allocation type is set to **Percentage**.
Allocation type	String	Specifies how the cost is allocated. For example, Cost center, Employee credit, or Payroll.
Cost center	String	Cost center that incurs the cost of this allocated transaction amount.
Cost owner	String	User who incurs the cost of this allocated transaction amount.
Employee credit	String	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**.

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Outbound Cost Allocation staging table (continued)

Field	Data type	Description
ERP integration status	String	Current status of the ERP integration.
ERP line number	String	Purchase order line number from the ERP system.
ERP source	String	ERP source from which data is imported. For purchase order, receipt, and invoice integrations, the ERP source is determined through the legal entity associated with these records.
Number of payments selected	String	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**.
Order line	String	Order line associated with the cost allocation.
Processing message	String	A message that describes the current processing status.
Purchase line	String	Purchase line associated with the cost allocation.
Terms accepted on	String	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**.

Outbound Order staging table

The Outbound Order [sn_spend_intg_outbound_purchase_order] staging table stores important data about the purchase orders created so that an ERP integrator can export this data to a third-party ERP system.

The following table lists the key fields for the Outbound Order [sn_spend_intg_outbound_purchase_order] staging table.

Note:
There are no mandatory fields for this table.

Outbound Order staging table

Field	Data type	Description
Blanket order end date	Date	Date on which the blanket order is expected to end. If you're unsure of the delivery date of the product, you can provide an estimated time frame, which then creates a blanket order.
Blanket order start date	Date	Date on which the blanket order is expected to start. If you're unsure of the delivery date of the product, you can provide an estimated time frame, which then creates a blanket order.

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Outbound Order staging table (continued)

Field	Data type	Description
Business owner	String	The user who placed the order.
Catalog ID	String	Unique identifier for each catalog of the purchase order.
Customer ID		Unique identifier for each customer of the purchase order.
ERP number	String	Unique number generated within the ERP system for the purchase order.
ERP source	String	ERP source from which the purchase order is imported.
Integration status	String	Current status of the purchase order integration.
Legal entity	String	Name of the legal entity making this purchase.
Order date	String	Date and time of the order placed in YYYY-MM-DD HH: MM: SS format.
Order type	String	Type of the purchase order, which can be Standard or Blanket.
Payment term	String	The agreed time and conditions of payment for the purchase order.
PO amount	String	Total amount of the purchase order.
PO amount currency	String	Currency of the purchase order.
Processing message	String	A message that describes the current processing status of the purchase order.
Purchase order number	String	Unique number for the purchase order.
Purchase order status	String	Current status of the purchase order.
Purchasing group	String	The group of employees making the purchase order.
Purchasing organization	String	The organization making the purchase order.
Supplier company name	String	Supplier company name for which the purchase order is generated.
Supplier ID	String	Supplier ID for which the purchase order is generated.

Outbound Order Line staging table

The Outbound Order Line [sn_spend_intg_outbound_purchase_order_line] staging table stores important data about the purchase order lines created so that an ERP integrator can export this data to a third-party ERP system.

The following table lists the key fields for the Outbound Order Line [sn_spend_intg_outbound_purchase_order_line] staging table.

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Note:
There are no mandatory fields for this table.

Outbound Order Line staging table

Field	Data type	Description
Account assignment category	String	Account assignment category of the purchase order line.
Asset category	String	Asset category of the purchase order line.
City	String	City of the purchase order line.
Contract number	String	Contract number of the purchase order line.
Cost center	String	Cost center that incurs the cost of the purchase order line.
Country	String	Name of the country of the purchase order line.
Enroll in ABM	String	Option to enroll the purchase order line for an Apple Business Manager (ABM) account.
ERP line number	String	Purchase order line number from the ERP system.
Expected delivery date	String	Expected delivery date of the purchased product.
GL account	String	General Ledger (GL) account associated with the purchase order line.
Integration status	String	Current status of the purchase order line integration.
Location name	String	Location of the purchase order line.
Manufacturer part number (MPN)	String	Manufacturer or publisher's unique identifier for the product, which the customer desires to purchase.
Model number	String	Unique model number of the product.
Organization ID	String	Organization ID of the purchase order line.
Processing message	String	A message that describes the current processing status of the purchase order line.
Product category	String	Product category that the purchase order line belongs to.
Product name	String	Name of the product associated with the purchase order line.
Product type	String	Type of the product associated with the purchase order line.
Purchase order	String	Purchase order associated with the purchase order line.
Purchase order line number	String	Line number of the purchase order line.
Purchase order line status	String	Current status of the purchase order line.
Purchased quantity	String	Quantity purchased as part of the purchase order line.
Recipient	String	Recipient of the purchase order line.
Service end date	String	Date on which service is expected to end. This is applicable only if the Product type is Service.

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Outbound Order Line staging table (continued)

Field	Data type	Description
Service start date	String	Date on which service is expected to be rendered. This is applicable only if the Product type is Service.
Ship to	String	Shipping location of the purchase order line.
Short text	String	Brief description about the purchase order line.
State	String	State or province of the purchase order line.
Street	String	Street address of the purchase order line.
Supplier part number	String	The supplier's unique identifier for the product, which the customer desires to purchase.
Unit	String	Unit of rate at which the customer purchases the product.
Unit price	String	The price of each individual unit is purchased.
Unit price currency	String	The currency in which the order is placed.
Zip code	String	Zip code of the purchase order line.

Outbound Receipt staging table

The Outbound Receipt [sn_spend_intg_outbound_receipt] staging table stores important data about the receipts created so that an ERP integrator can export this data to a third-party ERP system.

The following table lists the key fields for the Outbound Receipt [sn_spend_intg_outbound_receipt] staging table.

Note:
There are no mandatory fields for this table.

Outbound Receipt staging table

Field	Data type	Description
ERP number	String	Unique number generated within the ERP system for the receipt.
ERP source	String	ERP source from which the receipt is imported. The ERP source is determined through the legal entity associated with these records.
Integration status	String	Current status of the receipt integration.
Milestone	String	Milestone associated with the receipt.
Percentage received	String	Percentage of the service received. This field is visible only for a service receipt.
Processing message	String	A message that describes the current processing status of the receipt.

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Outbound Receipt staging table (continued)

Field	Data type	Description
Purchase order line number	String	Purchase order line number against which the receipt of the product is acknowledged.
Purchase order line sys ID	String	Purchase order line **Sys_id** of the receipt.
Quantity received	String	Quantity of product received as part of the receipt.
Receipt number	String	Unique number for the receipt.
Receipt status	String	Current status of the receipt. The status field is visible only when the ERP integration plugin is installed.
Receipt type	String	Type of the receipt based on the product type. For example, Goods Receipt or Services Receipt.
Supplier product	String	Supplier product for which the receipt is generated.

Third-party Registration outbound staging table

The Third-party Registration [sn_spend_intg_third_party_registration] outbound staging table stores important data about the third-party registrations created so that an ERP integrator can export this data to a third-party ERP system.

Third-party Registration outbound staging table

The following table lists the key fields for the Third-party Registration [sn_spend_intg_third_party_registration] outbound staging table.

Third-party Registration outbound staging table

Field	Data type	Description
Allow multi location order	Boolean	Supplier allows orders to be split for multi-location shipping.
Allow purchase order revision	Boolean	Supplier allows purchase orders to be revised after confirmation.
Customer id	String	Unique identifier for the customer.
Import availability update	Boolean	Supplier is allowed to import availability updates.

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Third-party Registration outbound staging table (continued)

Field	Data type	Description
Import catalog	Boolean	Supplier is allowed to import catalog, which includes price and availability.
Import invoice	Boolean	Supplier is allowed to import invoices.
Import price update	Boolean	Supplier is allowed to import price updates.
Import shipment	Boolean	Supplier is allowed to import shipments.
Post order	Boolean	Supplier is allowed to post orders.
Provider name	String	Unique identifier for the supplier.
Punchout connection type	String	Punchout connection type: • Start URL: Outbound URL to start punchout purchases. • Order request URL: Outbound URL to request orders. • Order confirmation URL: Inbound URL for order confirmation data from the third-party site. • Shipping confirmation URL: Inbound URL for shipping confirmation data from the third-party site.
Punchout connection url	URL	Unique URLs for the punchout group members with punchout credentials, specifically for Start URL and Order request URL connection types.
Punchout credentials	Reference	Unique set of credentials for punchout group members.
Punchout group	Reference	Users or members involved with this punchout supplier group, including shoppers, procurement specialists, and approvers.
Supplier	Reference	Name of the supplier in the ServiceNow records.

Third-party Model Mapping outbound staging table

The Third-party Model Mapping [sn_spend_intg_third_party_category_map] outbound staging table stores important data about the Third-party Model Mapping created so that an ERP integrator can export this data to a third-party ERP system.

Third-party Model Mapping outbound staging table

The following table lists the key fields for the Third-party Model Mapping [sn_spend_intg_third_party_category_map] outbound staging table.

Third-party Model Mapping outbound staging table

Field	Data type	Description
Product model	Reference	Name of the product model. This is required for catalog items.
Third-party category	Reference	Name of the category that the third-party belongs to.

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Outbound staging tables for Supplier Lifecycle Operations

The outbound staging tables for Supplier Lifecycle Operations store supplier data before it is exported to a third-party ERP system.

Supplier contact outbound staging table

The Supplier contact outbound [sn_spend_intg_supplier_contact_outbound] staging table temporarily stores important data about a supplier contact so that an ERP integrator can export this data to a third-party ERP system.

Supplier contact outbound staging table

The following table lists the mandatory fields for the Supplier contact outbound [sn_spend_intg_supplier_contact_outbound] staging table.

Supplier contact outbound staging table

Field	Data type	Description
Active	String	Indicates if the supplier contact is active or not.
Avatar	String	Display avatar of the supplier contact.
Building	String	Name of the building of the supplier contact.
Business phone	String	Business phone number of the supplier contact.
City	String	Name of the city of the supplier contact.
Company	String	Name of the company that the supplier contact is linked to.
Cost center	String	Cost center that incurs the cost of the supplier contact.
Country	String	Name of the country of the supplier contact.
Country code	String	Country code of the supplier contact.
Date format	String	Date format of the supplier contact, which is YYYY-MM-DD.
Department	String	Department of the supplier contact.
Division	String	Division of the supplier contact.
Email	String	Email address of the supplier contact.
Employee number	String	Employee number of the supplier contact.
Fax	String	Fax number of the supplier contact.
First name	String	First name of the supplier contact.
Gender	String	Gender of the supplier contact.
Home phone	String	Home phone number of the supplier contact
Integration status	String	Current status of the supplier contact integration.
Job code	String	Job code of the supplier contact.
Last name	String	Last name of the supplier contact.
Location	String	Location of the supplier contact.
Manager	String	Name of the Manager of the supplier contact.
Middle name	String	Middle name of the supplier contact.

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Supplier contact outbound staging table (continued)

Field	Data type	Description
Mobile phone	String	Mobile phone number of the supplier contact.
Name	String	Name of the supplier contact.
Notes	String	Notes about the supplier contact.
Organization	String	Name of the organization of the supplier contact.
Other phone	String	Other phone number of the supplier contact.
Photo	String	Photo of the supplier contact.
Prefix	String	Prefix of the supplier contact.
Primary contact	String	Primary contact person of the supplier contact.
Registration status	String	Current registration status of the supplier contact.
Time format	String	Time format of the supplier contact, which is HH: MM: SS.
Time zone	String	Time zone of the supplier contact.
Title	String	Designated title of the supplier contact.
User ID	String	User ID to identify the supplier contact.
Zip/Postal Code	String	ZIP code of the supplier contact.

Supplier legal entity mapping outbound staging table

The Supplier legal entity mapping outbound [sn_fcms_intg_supplier_legal_entity_outbound] staging table temporarily stores important data about the legal entities of a supplier so that an ERP integrator can export this data to a third-party ERP system.

Supplier legal entity mapping outbound staging table

The following table lists the mandatory fields for the Supplier legal entity mapping outbound [sn_fcms_intg_supplier_legal_entity_outbound] staging table.

Supplier legal entity mapping outbound staging table

Field	Data type	Description
Active	String	Indicates if the supplier legal entity is active or not.
Bank details	String	Bank details of the supplier legal entity.
Domain	String	Domain name of the supplier legal entity.
ERP company code	String	Company code of the entity in the ERP system.
ERP source	String	ERP source used by the organization.
General ledger account	String	The account to which capital or operational expenses will be posted.
Hold payment	String	Indicates that the invoice payment is put on hold for the supplier.
Hold posting	String	Indicates that the invoice posting is put on hold for the supplier.

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Supplier legal entity mapping outbound staging table (continued)

Field	Data type	Description
Integration status	String	Current status of the supplier legal entity integration.
Legal entity	String	Name of the legal entity of the supplier.
Onboarded	String	Indicates if a user has completed the onboarding process.
Payment method	String	Payment method preferred by the supplier legal entity.
Payment term	String	Agreed time and conditions for payment to the supplier legal entity.
Processing message	String	A message that describes the current processing status.
Remit to city	String	City to which the payment is made.
Remit to country	String	Country to which the payment is made.
Remit to state	String	State to which the payment is made.
Remit to street address	String	Street address to which the payment is made.
Remit to zipcode	String	Zip code to which the payment is made.
Supplier	String	Name of the supplier.

Supplier location outbound staging table

The Supplier location outbound [sn_spend_intg_supplier_location_outbound] staging table stores important data about the geographical location of a supplier so that an ERP integrator can export this data to a third-party ERP system.

Supplier location outbound staging table

The following table lists the mandatory fields for the Supplier location outbound [sn_spend_intg_supplier_location_outbound] staging table.

Supplier location outbound staging table

Field	Data type	Description
Category	String	Category of the supplier location.
City	String	Name of the city of the supplier.
Company	String	Name of the company that the supplier is linked to.
Contact	String	Contact details of the supplier location.
Coordinates retrieved on	String	Coordinates of the supplier location.
Country	String	Name of the country of the supplier.
Duplicate	String	Indicates if the supplier location is a duplicate.
ERP company code	String	Company code of the supplier location in the ERP system.
ERP source	String	ERP source from which data is imported.

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Supplier location outbound staging table (continued)

Field	Data type	Description
External unique ID	String	Unique external ID number generated for the supplier location.
Fax phone	String	Fax number of the supplier location.
Full name	String	Full name of the supplier location.
Integration status	String	Current status of the supplier location integration.
Lat long error	String	Indicates if there's a latitude or longitude error in the supplier location.
Latitude	String	Latitude of the supplier location.
Location source	String	Source of the supplier location.
Location type	String	Type of supplier location.
Longitude	String	Longitude of the supplier location.
Managed by group	String	The name of the group that manages the supplier location.
Name	String	Name of the supplier location.
Parent	String	Parent organization of the supplier location.
Phone	String	Phone number of the supplier location.
Phone territory	String	Name of the phone territory of the location.
Primary	String	Name of the primary contact of the supplier location.
Primary location	String	Name of the supplier's primary location.
Processing message	String	A message that describes the current processing status.
State/Province	String	Name of the State/Province of the supplier location.
Stock room	String	Stock room details of the supplier location.
Street address	String	Street address of the supplier location.
Time zone	String	Time zone of the supplier location.
Zip/Postal code	String	ZIP or postal code of the supplier location.

Supplier outbound staging table

The Supplier outbound [sn_spend_intg_outbound_supplier] staging table stores important data about the supplier so that an ERP integrator can export this data to a third-party ERP system.

Supplier outbound staging table

The following table lists the fields for the Supplier outbound [sn_spend_intg_outbound_supplier] staging table.

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Supplier outbound staging table

Field	Data type	Description
ABA routing number	string	Unique, nine-digit number used to identify banks and financial institutions.
Account number	string	Account number of the supplier.
Active	string	Indicates whether the supplier payment record is active.
Beneficiary name on account	string	Name of the beneficiary on the supplier's account.
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.
City	string	City where the supplier is located.
Country	string	Country where the supplier is located.
ERP company code	string	Company code of the supplier in the ERP system.
ERP Source	string	ERP source used by the organization.
Fax number	ph_number	Fax number of the supplier that can be used for sending documents.
General ledger account	string	Accounts payable reconciliation account for the supplier.
IFSC code	string	IFSC code of supplier's account number.
Integration status	String	Status of the integration process. The outbound integration is considered successful only when the integrating status is **New**. This is a mandatory field.
Legal entity	string	Name of the legal entity of the supplier.
Legal Name	String	Legal name of the supplier. This is a mandatory field.
Off-boarded date	glide_date	Date of the supplier's termination from the organization.
On-boarded	string	Indicates whether the supplier is on-boarded into the ERP system.
Payment term	string	Agreed time and conditions for payment to the supplier.
Phone number	String	Phone number of the supplier. This is a mandatory field.
Primary phone number	ph_number	Phone number of the primary contact at the supplier organization.

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Supplier outbound staging table (continued)

Field	Data type	Description
Processing message	string	A message that describes the current processing status.
State / Province	string	State or province where the supplier is located.
Street address	string	Street where the supplier is located.
Zip / Postal code	string	Zip code or postal code where the supplier is located.

Supplier payment outbound staging table

The Supplier payment outbound [sn_spend_intg_supplier_payment_outbound_stage] staging table temporarily stores important data about the payment information of a supplier so that an ERP integrator can export this data to a third-party ERP system.

Supplier payment outbound staging table

The following table lists the mandatory fields for the Supplier payment outbound [sn_spend_intg_supplier_payment_outbound_stage] staging table.

Supplier payment outbound staging table

Field	Data type	Description
ABA routing number	String	Unique, nine-digit number used to identify banks and financial institutions.
Account number	String	Account number of the beneficiary for the supplier payment.
Active	String	Indicates whether the supplier is active or not.
Bank identification number	String	Bank identification number for the supplier payment.
Bank name	String	Name of the bank for the supplier payment.
Beneficiary name on account	String	Beneficiary name on the account for the supplier payment.
Branch code	String	Branch code for the supplier payment.
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.
Country	String	Name of the country of the supplier.
Currency	String	Three-digit ISO currency code used for a given country.
Domain	String	Domain name of the supplier.
ERP company code	String	Company code of the entity in the ERP system.
ERP source	String	ERP source used by the organization.

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Supplier payment outbound staging table (continued)

Field	Data type	Description
IBAN	String	International Bank Account Number used for international payments.
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.
Integration status	String	Current status of the supplier payment integration.
Primary	String	Indicates whether this account is the primary account.
Processing message	String	A message that describes the current processing status.
Sort code or transit code	String	Sort code or transit code of the supplier's bank.
Supplier	String	Name of the supplier that the payment information is for.
SWIFT code	String	Bank Identifier Code (also known as SWIFT code) of the bank of the supplier.

Outbound staging tables for Accounts Payable Operations

The outbound staging tables for Accounts Payable Operations stores invoice data before it is exported to a third-party ERP system.

Organization tax details outbound staging table

The Organization tax details outbound [sn_spend_intg_outbound_tax_detail] staging table stores important data about an organization's tax information so that an ERP integrator can export this data to a third-party ERP system.

Organization tax details outbound staging table

The following table lists fields for the Organization tax details outbound [sn_spend_intg_outbound_tax_detail] staging table.

Organization tax details outbound staging table

Field	Data type	Description
Active	String	Tax registration status of the organization or supplier.
Country	String	Name of the country.
Integration status	String	Status of the integration process.
Organization	String	Name of the organization. This is a mandatory field.
Process message	String	Describes fields that stores information related to a specific process.
State/ Province	String	Name of the state or province where the supplier or organization details are registered.

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Organization tax details outbound staging table (continued)

Field	Data type	Description
Tax ID	String	Tax ID of the organization. This is a mandatory field.

Outbound invoice staging table

The outbound invoice [sn_spend_intg_outbound_invoice] staging table stores important data about invoices so that an ERP integrator can export this data to a third-party ERP system.

Outbound invoice staging table

The following table lists both the mandatory and optional fields for the outbound invoice [sn_spend_intg_outbound_invoice] staging table.

Outbound invoice staging table

Field	Data type	Description
Amount invoiced	String	Total amount for the invoice.
Business owner	String	An individual or group who owns the invoice.
Currency	String	Currency format associated with the invoice.
Default tax code	Reference	Default tax code levied on the total invoice amount.
Default tax code - deprecated	String	Indicates whether the Tax code on the invoice is deprecated or not.
Default tax jurisdiction code	String	Tax code jurisdiction to which the tax must be paid.
Discounts	String	Discounts applied on the invoice amount.
ERP number	String	Unique number generated within the ERP system for the purchase order.
ERP posting date	String	Date on which the invoice is posted in the ERP system.
ERP source	String	Target ERP where the invoice will be posted.
Final tax	String	Final tax on the invoice amount.
Integration status	String	Current status of the outbound invoice integration process.
Invoice date	String	Date on which this invoice is created.
Invoice status	String	Current status of this invoice.
Invoice type	String	Type of invoice for processing. **Note:** Accounts Payable Operations supports invoices of type **PO invoice** and **Non-PO invoice**.
Legal entity	Reference	Internal legal entity which incurs the cost of this invoice.

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Outbound invoice staging table (continued)

Field	Data type	Description
Number	String	An auto-generated number that uniquely identifies the invoice.
Original invoice	String	A unique invoice number created by the Supplier.
Other charges	String	Other charges applied on the invoice amount.
Payment terms	Reference	How and when to make payment for the products and services.
Processing message	String	A message that describes the current processing status.
Purchase order	Reference	Purchase order associated with this invoice.
Remit to city	String	City to which the payment is made.
Remit to country	Reference	Country to which the payment is made.
Remit to state/ province	String	State or province to which the payment is made.
Remit to street	String	Street address to which the payment is made.
Remit to zip/postal code	String	ZIP or postal code to which the payment is made.
Ship from city	String	City from which the items on the purchase order is shipped.
Ship from country	Reference	Country from which the items on the purchase order is shipped.
Ship from state/ province	String	State or province from which the items on the purchase order is shipped.
Ship from street	String	Street address from which the items on the purchase order is shipped.
Ship from zip/ postal code	String	ZIP or postal code from which the items on the purchase order is shipped.
Ship to city	String	City to which the items on the purchase order should be shipped.
Ship to country	String	Country to which the items on the purchase order should be shipped.
Ship to state/ province	String	State or province to which the items on the purchase order should be shipped.
Ship to street	String	Street address to which the items on the purchase order should be shipped.
Ship to zip/postal code	String	ZIP or postal code to which the items on the purchase order should be shipped.
Shipping amount	String	Shipping charges incurred for the invoice.
Subtotal	String	Total amount of money to be paid to the supplier excluding tax and shipping charges.
Supplier	Reference	Supplier who delivers the product or service.

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Outbound invoice staging table (continued)

Field	Data type	Description
Supplier invoice number	String	Invoice number of the supplier invoice.
Tax amount	String	Tax rate applied on the invoice amount.

Invoice error staging table

The Invoice error [sn_spend_intg_import_error] staging table temporarily stores important data on errors before this data is sent to the primary table.

Invoice error staging table

Field	Data type	Description
Supplier invoice number	String	Unique invoice number created by the supplier.
Supplier invoice line number	String	Unique identifier for each line item on a supplier invoice.
Sales order number	String	Unique identifier for a customer's purchase.
Sales order line number	String	Unique identifier for each item on a sales order.

Outbound invoice line staging table

The Outbound invoice line [sn_spend_intg_outbound_invoice_line] staging table stores important invoice line data so that an ERP integrator can export this data to a third-party ERP system.

Outbound invoice line staging table

The following table lists both the mandatory and optional fields for the Outbound invoice line [sn_spend_intg_outbound_invoice_line] staging table.

Outbound invoice line staging table

Field	Data type	Description
Cost center	Reference	Cost center for which the invoice is generated.
ERP line number	String	A unique identifier generated within an ERP system for the purchase order line.
ERP source	String	Target ERP where the invoice will be posted.
Final tax	String	Final tax on the invoice amount.
GL account	Reference	Account used to generate the invoice.
Integration status	String	Current status of the outbound invoice line integration process.
Invoice	Reference	Transaction record used to track purchase between shopper and supplier.

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Outbound invoice line staging table (continued)

Field	Data type	Description
Invoice line status	String	Current status of this invoice line.
Line amount invoiced	String	Total amount for the invoice line.
Line description	String	Description of the line item in the invoice.
Line quantity	String	Number of items that have been invoiced.
Line unit price	String	Unit price of the line item in the invoice.
Number	String	An auto-generated number that uniquely identifies the invoice.
Processing message	String	A message that describes the current processing status.
Purchase order line	Reference	Purchase line related to this invoiced amount.
Ship to city	String	City to which the items on the purchase order should be shipped.
Ship to country	Reference	Country to which the items on the purchase order should be shipped.
Ship to state/ province	String	State or province to which the items on the purchase order should be shipped.
Ship to street	String	Street address to which the items on the purchase order should be shipped.
Ship to zip/ postal code	String	ZIP or postal code to which the items on the purchase order should be shipped.
Subtotal	String	Total amount of money to be paid to the supplier excluding tax and shipping charges.
Supplier part number	String	Supplier part number of the supplier product.
Tax amount	String	Tax rate applied on the invoice amount.
Tax code	Reference	Tax code of the invoice.
Tax code - deprecated	String	Indicates whether the Tax code on the invoice is deprecated or not.
Tax jurisdiction code	String	Tax code jurisdiction to which the tax must be paid.
Unit	Reference	Unit or rate in which this product is sold by the supplier.

Outbound invoice tax line staging table

The Outbound invoice tax line [sn_spend_intg_outbound_invoice_tax_line] staging table stores important invoice line data so that an ERP integrator can export this data to a third-party ERP system.

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Outbound invoice tax line staging table

The following table lists both the mandatory and optional fields for the outbound invoice tax line [sn_spend_intg_outbound_invoice_tax_line] staging table.

Outbound invoice tax line staging table

Field	Data type	Description
Final tax	String	Final tax amount paid for this invoice.
Integration status	String	Current status of the outbound invoice tax line integration process.
Invoice	Reference	Invoice for which this tax is applicable.
Invoice line	Reference	Invoice line for which the tax is applicable.
Number	String	A unique system-generated number, which identifies the tax line.
Processing message	String	A message that describes the current processing status.
Supplier tax	String	Amount of tax charged by the supplier.
Supplier tax rate	String	Tax rate charged by the supplier.
Tax type	Reference	Type of the tax applicable on the invoice.
Taxable amount	String	Amount of tax applicable on an invoice.

Source-to-Pay integration framework transform maps and subflows

The transform maps transform the source-to-pay data from the inbound staging tables to the Source-to-Pay primary data tables. The subflows move the source-to-pay data from the outbound staging tables to a third-party ERP system.

Transform maps

The following transform maps transform the source-to-pay data from the inbound staging tables to the Source-to-Pay primary data tables.

- Load product model:

  Transforms product model data from the sn_fcms_intg_cmdb_model_stage staging table to the cmdb_model primary table.

- Load service model:

  Transforms service model data from the sn_fcms_intg_cmdb_service_model_stage staging table to the cmdb_service_product_model primary table.

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- Transform CMN location:

  Transforms CMN location data from the sn_fcms_intg_cmn_location_stage staging table to the cmn_location primary table.

- Master data cost center:

  Transforms cost center data from the sn_fcms_intg_imp_cost_center staging table to the cmn_cost_center primary table.

- Load department:

  Transforms department data from the sn_fcms_intg_department_stage staging table to the cmn_department primary table.

- Transform ERP Plant Address:

  Transforms ERP plant address data from the sn_fcms_intg_erp_plant_address_mapping_stage staging table to the sn_fcms_intg_erp_plant_address_mapping primary table.

- Load FX currency:

  Transforms FX currency data from the sn_fcms_intg_fx_currency_stage staging table to the sn_fin_fx_currency primary table.

- Load FX rate:

  Transforms FX rate data from the sn_fcms_intg_fx_rate_stage staging table to the sn_fin_fx_rate primary table.

- GL account load data:

  Transforms GL account data from the sn_fcms_intg_gl_account_stage staging table to the sn_fin_gl_account primary table.

- Import availability updates:

  Transforms Import availability updates from the sn_spend_intg_imp_availability staging table to the sn_shop_supplier_product primary table.

- Cost allocation stage:

  Transforms cost allocation data from the sn_spend_intg_imp_cost_allocation staging table to the sn_shop_cost_allocation primary table.

- Order stage:

  Transforms purchase order data from the sn_fcms_intg_imp_order staging table to the sn_shop_purchase_order primary table.

- Order line stage:

  Transforms purchase order line data from the sn_fcms_intg_imp_order_line staging table to the sn_shop_purchase_order_line primary table.

- Receipt stage:

  Transforms receipts data from the sn_fcms_intg_imp_receipt staging table to the sn_shop_receipt primary table.

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- Transform legal entities:

  Transforms legal entity data from the sn_fcms_intg_legal_entity_stage staging table to the sn_fin_legal_entity primary table.

- Transform office location:

  Transforms office location data from the sn_fcms_intg_office_location_stage staging table to the sn_shop_office_location primary table.

- Load payment terms:

  Transforms payment terms data from the sn_fcms_intg_payment_term_stage staging table to the sn_shop_payment_term primary table.

- Load product category:

  Transforms product category data from the sn_fcms_intg_cmdb_model_category_stage staging table to the cmdb_model_category primary table.

- Master data purchase entity:

  Transforms purchase entity data from the sn_fcms_intg_imp_purchase_entity staging table to the sn_fin_purchasing_entity primary table.

- Load supplier product:

  Transforms supplier product data from the sn_spend_intg_supplier_product_stage staging table to the sn_shop_supplier_product primary table.

- Transform supplier contact details:

  Transforms supplier contact details data from the sn_fcms_intg_supplier_contact_inbound staging table to the vm_vdr_contact primary table.

- Master data supplier:

  Transforms supplier data from the sn_fcms_intg_imp_supplier staging table to the sn_fin_supplier primary table.

- Load legal entity mapping data:

  Transforms supplier legal entity data from the sn_fcms_intg_supplier_legal_entity_inbound staging table to the sn_fin_supplier_detail primary table.

- Load supplier address information:

  Transforms supplier location data from the sn_fcms_intg_supplier_location_inbound staging table to the sn_slm_m2m_location primary table.

- Transform supplier payment:

  Transforms supplier payment data from the sn_fcms_intg_supplier_payment_inbound_stage staging table to the sn_fin_supplier_payment primary table.

- Invoice import:

  Transforms invoice details from the sn_spend_intg_imp_invoice staging table to the sn_shop_invoice primary table.

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- Invoice line import:

  Transforms invoice line details from the sn_spend_intg_imp_invoice_line staging table to the sn_shop_invoice_line primary table.

- Invoice payment detail import:

  Transforms invoice payment details from the sn_spend_intg_imp_invoice_payment_detail staging table to the sn_shop_invoice_payment_detail primary table.

- Transform organization tax details:

  Transforms organization tax details data from the sn_fcms_intg_org_tax_detail_inbound staging table to the sn_fin_org_tax_detail primary table.

- Spend Shipment Import:

  Transforms spend shipment import details from the sn_spend_intg_imp_shipment staging table to the sn_shop_shipment_details primary table.

- Fixed asset details:

  Transforms fixed asset details from the sn_fcms_intg_imp_fixed_asset_details staging table to the sys_import_set_row primary table.

Subflows

The following subflows move the source-to-pay data from the outbound staging tables to a third-party ERP system.

- Create cost allocation on outbound table:

  Moves cost allocation data from the sn_shop_cost_allocation primary table to the sn_spend_intg_outbound_cost_allocation staging table.

- Create purchase order on outbound order table:

  Moves purchase order data from the sn_shop_purchase_order primary table to the sn_spend_intg_outbound_purchase_order staging table.

- Create purchase order line on outbound order line table:

  Moves purchase order line data from the sn_shop_purchase_order_line primary table to the sn_spend_intg_outbound_purchase_order_line staging table.

- Create/update receipt on outbound table:

  Moves receipt data from the sn_shop_receipt primary table to the sn_spend_intg_outbound_receipt staging table.

- Update Supplier Contact Outbound from trigger Supplier Contact:

  Moves supplier contact details data from the vm_vdr_contact primary table to the sn_spend_intg_supplier_contact_outbound staging table.

- Update Supplier Legal entity details from Legal entity mapping:

  Moves supplier legal entity data from the sn_fin_supplier_detail primary table to the sn_fcms_intg_supplier_legal_entity_outbound staging table.

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- Update Supplier Location outbound from M2M location:

  Moves supplier location data from the sn_slm_m2m_location primary table to the sn_spend_intg_supplier_location_outbound staging table.

- Update Supplier Outbound from trigger Supplier:

  Moves supplier data from the sn_fin_supplier primary table to the sn_spend_intg_outbound_supplier staging table.

- Update Supplier Payment Outbound from trigger Payment:

  Moves supplier payment data from the sn_fin_supplier_payment primary table to the sn_spend_intg_supplier_payment_outbound_stage staging table.

- Update tax details outbound from trigger tax details:

  Moves organization tax details data from the sn_fin_org_tax_detail primary table to the sn_spend_intg_outbound_tax_detail staging table.

Integration errors in staging tables

Integration errors caused by the target ERP sources are recorded in the form of system-generated integration error tasks (outbound integration error). You can view the integration tasks associated with Procurement and Sourcing Operations, Supplier Lifecycle Operations and Accounts Payable Operations in the **Tasks** area of the Source-to-Pay workspace.

The integration errors are categorized as:

- Outbound integration Error-occurs when the outbound staging record is run and the sub flows in the target ERP source fails due to an error. Example: Connection error. The sub flow auto-updates the error message in the **Processing message** field of the outbound staging table and sets the **Integration status** to error. The system auto-creates error task for erroneous record and auto-assigns to a specialist.
- Inbound integration error- Occurs when the inbound flow fails to fetch the primary data from the target ERP sources due to error in the master flow or ERP subflow. The **Error** field in the inbound staging table is auto-updated with the appropriate error message.

A specialist can reinitiate the integration activity after fixing the integration errors. Bulk records are integrated through scheduled jobs.

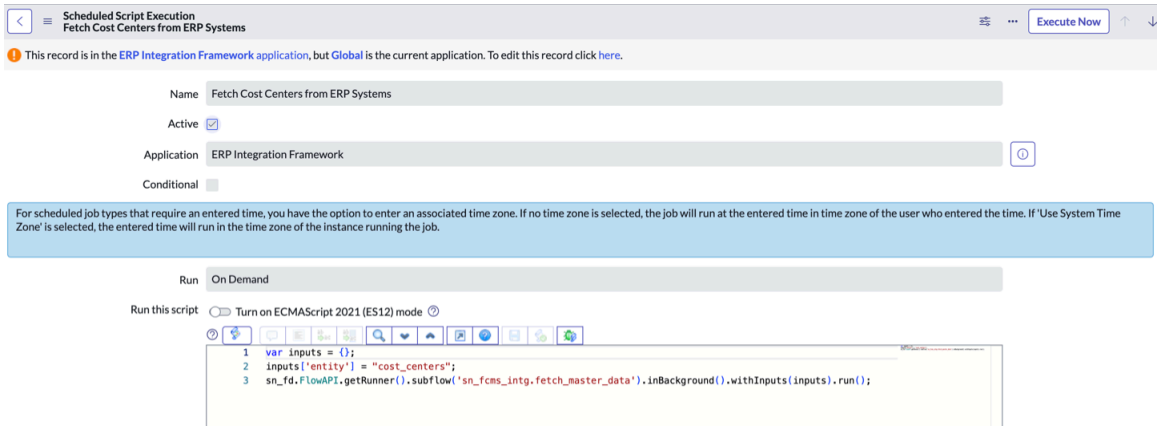
Scheduled jobs to fetch primary data

You can schedule on-demand jobs to be run at specific intervals of time to fetch primary data from different ERP sources into ServiceNow.

Before you start the ERP integration, you must configure the integration services record for target ERP source using the sn_fcms_intg_service table. The sn_fcms_intg_service table is a mapping table between sub flows and target ERP source. For more information on creating a integration service record, see Create Integration Service record.

Scheduled jobs are configured for entities using scripts. Example: Fetch cost center from ERP systems. For more information on configuring scheduled jobs using scripts, see Automatically run a script of your choosing. The script invokes subflow which is associated with an entity as shown in the figure below. The subflow queries the active entities or ERP source configuration (optional) listed in the integration service table.

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The scheduled jobs are run for the following entities:

- Cost center
- Payment terms
- Legal entity
- Plant/address
- GL account
- Purchasing org
- Product category/Product model (Material group/Material number)
- Currency
- Department
- Supplier
- FX currency rate

Create Integration Service record

Create Integration Service records for entities using the sn_fcms_intg_service table.

Before you begin

Role required: sn_fcms_intg.integration_user

Procedure

1. Navigate to **Integration Services**.
2. Select **New**.
3. On the integration service record, fill in the fields.

Integration service record

Field	Description
Entity	The type of entity for which you want to configure scheduled job.
ERP Source configuration	The ERP source mapped to the entity.
Subflow	The subflow used to fetch primary data.
Properties	The filter condition used to fetch data from ERP sub flows. Example: Full-pull creates

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Field	Description
	JSON in the integration service record which is passed to the ERP sub flows to fetch data.
Active	The status of the interaction service. By default, the check box is inactive.

4. Select **Submit**.

What to do next
In the ERP Source configuration, Run jobs for active entities.

Run scheduled jobs

Run adhoc scheduled jobs to fetch entity primary data from the target ERP source.

Before you begin
Role required: sn_fcms_intg.integration_user

About this task
Executes on-demand scheduled jobs on true entities of an ERP source target and fetches primary data. Auto-populates the entity inbound tables.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Select the ERP source for which you would like to run scheduled jobs.
3. Select **Integration Services** >**Run job**.
   The fetch services run automatically as scheduled.
   Entity inbound tables are populated with primary data.

Primary data integration

All primary data are synchronized based on the configurable scheduled job Fetch Spend Primary Data. For supplier primary data, if an update is made in the ERP, it is synchronized with Source-to-Pay (S2P) even if the scheduled job has not been triggered.

The asset category and material group mapping tables are also populated by the same scheduled job. However, the address mapping table has to be populated manually. A procurement administrator must manually populate the S2P model categories and capitalization policy in the respective mapping tables on initial load.

Fixed asset integration

Fixed assets are created automatically in Source-to-Pay (S2P) on creation of a purchase order, when capitalization policy criteria are satisfied, and synchronized to the ERP system asynchronously.

The following fields are added in the Fixed Asset table to integrate with the ERP systems:

- Depreciation lifecycle
- Depreciation term
- Salvage value

Whenever the **Depreciated amount**, **Remaining value**, and **Salvage value** fields are updated in the ERP system, depending on the depreciation term defined in the ERP, the values are synced

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back to S2P for the corresponding fixed asset. A configurable scheduled job Fetch Fixed Asset Details defined in S2P determines the frequency to retrieve this data from the ERP system.

For more information on automatic fixed asset creation, see Fixed asset creation.

Purchase order integration

Purchase orders are created in Source-to-Pay (S2P) and synchronized to the ERP system asynchronously.

As there are several key concepts that are specific to the ERP system but are not captured in S2P, the following configurations in S2P are prerequisites to ensure successful execution of the integration:

- ERP Address Mapping: This table stores the mapping between a delivery location in S2P and a plant in the ERP system. Additional address identifier columns are available in this table to allow customers map an address in S2P to other entities in the ERP system.
- ERP Asset Category Mapping: This table stores the mapping between a capitalization policy in S2P and an asset class in the ERP system. The asset class is populated based on the value that was mapped to the corresponding capitalization policy that triggered the creation of the fixed asset in S2P.
- ERP Material Group Mapping: This table stores the mapping between a model category in S2P and a material group in the ERP system. Depending on the model category associated to the supplier product in a purchase order line within S2P, the appropriate model category is populated in the ERP system.
- Account assignment category configuration: To accommodate prepayments and the ability to store multiple general ledger accounts on a purchase order line in the ERP system, configuration has to be done to either introduce a net new Account Assignment Category in the ERP system that has this feature enabled, or update an existing one.

Note:
The ERP integration mapping tables can be accessed through the primary data by a procurement administrator alone.

Process flow

- On final review of a purchase requisition, a purchase order and fixed assets, if applicable, are created in S2P, triggering the integration with the ERP system.
- Attachments, if any, with valid sys-ids, are copied from the Inbound Purchase Order staging table record to the Purchase Order primary table record. This is done through a transform script, which is part of the Order stage transform map, triggered onAfter.
- If there is an integration error, an integration error purchasing task is created on the purchase requisition. This contains the error message from the ERP system to inform the procurement specialist what must be updated.
- If a purchase order line is being inserted by the ERP system with no corresponding purchase order in S2P, your administrator gets an error message. They can run the 'Retrigger failed order line import set records' scheduled job to re-trigger the error purchase order line records that have not been imported due to the absence of the purchase order. For more information on integration error handling, see Integration errors in staging tables.
- Purchase orders are not created in the ERP system until the integration error is resolved in S2P. At this juncture, the status of the purchase order and purchase requisition in S2P is set to Pending Submission.
- Additional form sections, fields, and mapping tables are created in S2P for integration purposes.

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- On successful purchase order creation in the ERP system, a purchase order ERP number and purchase order line ERP number are returned and synchronized back to the appropriate record in S2P.
- If a capitalization policy is satisfied, fixed assets are created in the ERP system and the ERP number is synchronized back to S2P.
- Purchase order revisions in S2P do not result in a new purchase order creation in the ERP system. The existing purchase order is updated to reflect the revised information. The buttons to update a purchase order are turned off when the integration status in the Outbound Order [sn_spend_intg_outbound_purchase_order] staging table is New or In Process.
- Cancellation of a purchase order in S2P moves the status of the purchase order to Pending Submission. When the integration is successful in the ERP system, the purchase order is canceled.
- Blanket purchase orders are not created in the ERP system as it is a pre-approved list of users who do not have to go through the approval process when they purchase against the blanket purchase. Also, there are no financial documents associated with blanket purchase orders in S2P.
- Purchase order releases are created in the ERP system.
- Invoices and receipts are created against the standard purchase order releases in S2P, and as such, created as standard purchase orders in the ERP system as well.

Purchase order line split scenario

Multiple purchase order lines are created from a single purchase line if the following conditions are met:

- Purchase is integrated with the ERP system
- Purchased quantity is 100 or more
- Purchase is capitalized, for example, fixed assets created for the purchase

If multiple purchase order lines must be created, the first purchase order line can have a maximum purchased quantity of 99, and the remainder should go into the next purchase order line(s), none exceeding 99. You can create as many purchase order lines as required to cover the quantity of products purchased.

For example, if a purchase line purchased quantity is 250, which is capitalized and integrated with the ERP system, the purchase order lines are split as follows:

- POL1001: Purchased quantity = 99
- POL1002: Purchased quantity = 99
- POL1003: Purchased quantity = 52

Note:
Each purchase order line created here must reference the same purchase line, and the fixed assets created must reference the appropriate purchase order line.

Receipt integration

Receipts are created in Source-to-Pay (S2P) and synchronized to the ERP system asynchronously.

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Process flow

- When a receipt record is created in S2P, integration with the ERP system is triggered. This creates a goods receipt (GR) in the ERP system.
- If there is an integration error, an integration error purchasing task is created on the purchase order. This contains the error message from the ERP system to inform the procurement specialist what must be updated.
- Similar to purchase order integration, a goods receipt is not created in the ERP system until the integration error is resolved in S2P. At this juncture, the status of the receipt in S2P is set to Pending Review.
- On successful goods receipt creation in the ERP system, an ERP number is returned and synchronized back to the appropriate record in S2P.

Note:
No additional configurations are required for receipt integration to function.

Invoice integration

Invoices are created either manually in Source-to-Pay (S2P) or through an external supplier portal. Generic API synchronizes invoices created from a supplier portal into S2P.

Process flow

- When the matching and invoice approvals process, if applicable, is complete, an asynchronous call to the ERP system is triggered.
- If there is an integration error, an integration error purchasing task is created on the purchase order. This contains the error message from the ERP system to inform the procurement specialist what must be updated.
- Similar to purchase order integration, an invoice is not created in the ERP system until the integration error is resolved in S2P. At this juncture, the status of the invoice and invoice line in S2P is set to Pending Review.
- On successful invoice creation in the ERP system, an ERP number and ERP line number are returned and synchronized back to the appropriate record in S2P.
- In case of manual invoice creation, the user has to manually confirm the invoice to trigger the ERP system integration.

Note:
No additional configurations are required for invoice integration to function.

ERP source

An ERP Source [sn_fin_erp_source] table is available in Source-to-Pay (S2P) as part of the Finance Common Architecture application.

You can use the **ERP Source** field available in tables to directly identify the correct ERP source if you have integrations with multiple ERP systems.

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Note:

- In some scenarios, for purchase orders, receipts, and invoice integration, the ERP source for records is still determined through the legal entity on those records. This is achieved by adding an **ERP Source** reference field on the Legal Entity [sn_fin_legal_entity] table. Also, Legal Entity is added as a related list for the ERP Source table.
- The ERP source column in the global table should be deprecated and migrated to local tables. Run the data migration script manually to move data from the impacted tables to the new mapping table. For more information, see Migrate ERP source data from global tables to the mapping table [KB1733450].

  The Multi-ERP data will continue to function without migrating the ERP source column (for up to the next two family releases from Yokohama), but ensure migration to local tables is completed.

Tables containing the ERP Source column

The following tables contain the ERP Source column.

Application	Table
Global	CMDB Categories [cmdb_categories]
	Product Model [cmdb_model]
	Service Model [cmdb_service_product_model]
	Cost Center [cmn_cost_center]
	Department [cmn_department]
	Location [cmn_location]
Source-to-Pay Common Architecture	Negotiation [sn_shop_negotiation]
	Negotiation Event [sn_shop_negotiation_event]
	Office Location [sn_shop_office_location]
	Purchase Requisition [sn_shop_purchase_requisition]
	Sourcing Request [sn_shop_sourcing_activity]
	Supplier Product [sn_shop_supplier_product]
Finance Common Architecture	Fixed Asset [sn_fin_fixed_asset]
	Office Location [sn_fin_office_location]

ERP source configuration

ERP source configuration allows specific customer logic to be implemented to populate values specific to third-party ERP systems. It contains all the service mappings defined between Source-to-Pay (S2P) and the third-party ERP system.

If there are multiple ERP sources, these are stored as separate ERP source entries with their respective service mappings. You can update the service mapping logic to fulfill specific requirements by updating the appropriate service element map entry within the service map record.

For organizations with multiple ERP systems, an **ERP Source** field has been added in the tables to enable proper identification of the ERP system it is integrated with. For more information, see ERP source.

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Integration settings on Source-to-Pay side

Configure your Source-to-Pay (S2P) instance to support inbound and outbound integration with your ERP system. This integration configuration enables you to automatically post purchase order, receipt, invoice, and download primary data from the ERP.

Before you start the integration configuration, you must complete the following tasks.

- Add the following roles to the Integration user:
  - Import_transformer
  - Soap
- Get the following information from the ERP team:
  - ERP integration user credentials.
  - SOAP or REST API details based on your ERP system and the type of web services you are using for the integration.

Note:
If the application needs to support multiple ERP instances, configure S2P to integrate with each ERP instance separately.

1. Define an ERP source.

   Define the ERP source that you want to integrate with Procurement Service Management. This information is required for any primary data. For more information, see ERP source and Primary data integration.

2. Set up the authentication profile.

   Create a basic authentication profile that can be used for web service integration with ERP. Register the ERP integration username and password to create the authentication profile and associate it to service maps. For more information, see Set up the authentication profile.

3. Define source configuration for ERP.

   ERP source configuration determines the ERP source to which your ERP system connects. For more information, see ERP source configuration and Define ERP source configuration for Source-to-Pay.

4. Configure service maps for the following entities:
   - Post purchase order.

     Set up web services for the source configuration to post purchase orders to ERP.
   - Post receipt.

     Set up web services for the source configuration to post receipts to ERP.
   - Post invoice.

     Set up web services for the source configuration to post invoices to ERP.
   - Fetch supplier.

     Set up web services for the source configuration to fetch supplier updates from ERP.
   - Fetch cost center.

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Set up web services for the source configuration to fetch cost center updates from ERP.

- Fetch purchasing entity.

  Set up web services for the source configuration to fetch purchasing entity updates from ERP.

- Fetch general ledger account.

  Set up web services for the source configuration to fetch general ledger account updates from ERP.

- Fetch asset category.

  Set up web services for the source configuration to fetch asset category updates from ERP.

- Fetch material group.

  Set up web services for the source configuration to fetch material group updates from ERP.

Note:
For configuring each of these service maps, provide the connection end point and the ERP credentials that you set up for your authentication profile. Also, create a separate web service record for each service request that you want to customize.

For more information, see Configure service maps for Source-to-Pay.

5. Configure scheduled job to synchronize primary data updates from ERP.

   Set up the interval in the Fetch Spend Primary Data scheduled job to periodically synchronize primary data updates from the ERP, for posting services to work.

6. Load data to ERP user mapping table.

   Set up S2P and ERP User ID mapping for the integration to work. The mapping is maintained for all active users who have the procurement buyer role in ERP. These users should be used in the requisition assignment rule. For more information, see Load data to ERP user mapping table for Source-to-Pay.

7. Map the following entities:

   - Purchasing entity.

     Map legal entity to the downloaded purchasing entity in the purchasing entity table.

   - Asset category.

     Map capitalization policy to the downloaded asset category in the asset category mapping table.

   - Material group.

     Map model category to the downloaded material group in the material group mapping table.

   - Delivery address.

     Map location reference in the delivery location table to ERP address code in the address mapping table.

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- ERP plant.

  Map ERP plant id to the corresponding ERP location in the address mapping table. Use the **ERP address identifier 1** field for this mapping.

Set up the authentication profile

Create a basic authentication profile that can be used for web service integration with ERP. Register the ERP integration user name and password to create the authentication profile and associate it to service maps.

Before you begin

- Verify that the application scope is set to Finance – ERP Integration.
- Credentials required: ERP integration user credentials provided by ERP.

Role required: sn_fcms_intg.integration_user

About this task

If the application needs to support multiple ERP instances, create a separate credential alias and authentication profile for each instance.

Procedure

1. Navigate to **Connections & Credentials** > **Connection & Credential Aliases**.
2. Click **New**.
3. Enter a unique name for the alias and set the **Type** value to **Credential**.
4. Click **Submit**.
   A new credential alias with a unique ID is created.
5. In the Credentials related list, click **New** and then select **Basic Auth Credentials**.
6. On the form, fill in the fields.

Basic Auth Configuration form

Field	Description
Name	Name of the authentication configuration.
Username	User name as provided by ERP.
Password	Password as provided by ERP. This username and password is used to authenticate the HTTP request when this basic authentication profile is enabled.
Credential alias	Credential alias created for the ERP configuration. This alias is auto-populated when you create an authentication profile from a credential alias.

7. Click **Submit**.

What to do next

Configure service maps for the source configuration and associate the basic authentication profile to these service maps.

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Define ERP source configuration for Source-to-Pay

ERP source configuration determines the ERP source to which your ERP system connects. Map the integration payload with the Source-to-Pay (S2P) tables.

Before you begin

Role required: sn_shop.procurement_administrator

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Click **New**.
3. On the form, fill in the fields.

ERP Source Configuration form

Field	Description
ERP	Name of the ERP system.
ERP Source	ERP source for which the integration is required.
Name	Name of the ERP.

4. Click **Submit**.

What to do next

For the defined source configuration:

- Define service mappings for each integration service by accessing the Service Mappings related list. You can define element level mapping between S2P table fields and payload elements.
- Map S2P users and corresponding ERP user ids by accessing the ERP User Mappings related list.

Configure service maps for Source-to-Pay

For configuring service maps, provide the connection end point and the ERP credentials that you set up for your authentication profile. Also, create a separate web service record for each service request that you want to customize.

Before you begin

- Verify that the application scope is set to Finance – ERP Integration.
- Ensure that the MID Server is installed and configured 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.

- For SOAP type service, SOAP API details (WSDL information – soap action and endpoint details), provided by ERP.
- For REST type service, REST API details, as provided by ERP.

Role required: sn_fcms_intg.integration_user

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About this task

If the application needs to support multiple ERP instances, create separate web services for each ERP instance.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Open the ERP source for which you need to configure service maps.
3. In the Service Mappings related list, click **New**.
4. On the form, fill in the fields.

Service Map form

Field	Description
Name	Name of the service map.
Service	Service to process the selected request.
Source	Name of the ERP source.
Type	Type of web service to connect with ERP. Select a type based on your ERP system. ○ **SOAP**: Select if you are using SOAP services with your integration. ○ **REST**: Select if you are using REST services with your integration.
Use MID	Option to use MID Server to connect with ERP. The field is required only when you select SOAP in the **Type** field.
Credential alias	Basic authentication profile associated with the service.
SOAP action	SOAP action provided by ERP. This field appears when SOAP is selected in the **Type** field.
SOAP endpoint	SOAP endpoint provided by ERP. This field appears when SOAP is selected in the **Type** field.
Envelope	Reference to generate the service element maps. This field appears when SOAP is selected in the **Type** field.
HTTP Method	Method for the web service. This field appears when REST is selected in the **Type** field.

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Field	Description
Base URL	Base URL of endpoint provided by ERP. This field appears when REST is selected in the **Type** field.
Resource Path	Path of the resource provided by ERP. This field appears when REST is selected in the **Type** field.

5. Click **Submit**.

Load data to ERP user mapping table for Source-to-Pay

Set up Source-to-Pay (S2P) and ERP User ID mapping for the integration to work. The mapping is maintained for all active users who have the procurement buyer role in ERP. These users should be used in the requisition assignment rule.

Before you begin
Role required: sn_shop.procurement_administrator

Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. Select **Create table** and enter a label for the new table in the **Label** field.
3. In the **Source of the import** field, select File, and then click **Choose File** to select the source Excel spreadsheet.
4. **Optional:** If appropriate, specify the Work sheet and Header row number.
5. Click **Submit**.
   The imported data is now available in the new Import Set table.
6. Create a transform map to define the field mapping between columns of the import set and columns of the target ERP User Mapping [sn_fcms_intg_erp_user_map] table.
   The ERP User Mapping table maintains mapping between ERP user IDs and ServiceNow user IDs.
7. Transform the data from the import set table to the target table.
   For more information, see Run an import.

Result
The data is imported into the ERP User Mapping table.

What to do next
Verify that the data records are imported into the target table. You can view the ERP user mappings by navigating to **Finance - ERP Integration** > **ERP Users**.

Note:
If an ERP user mapping is not required, you can deactivate it. To deactivate a mapping, in the ERP User Mapping form, select the **Inactive** check box.

Source-to-Pay integration with SAP ECC and SAP S4 HANA

The Source-to-Pay integration with SAP ECC and SAP S4 HANA enables you to send purchase orders, receipts, and invoices created on the SAP ECC and SAP S4 HANA from your ServiceNow

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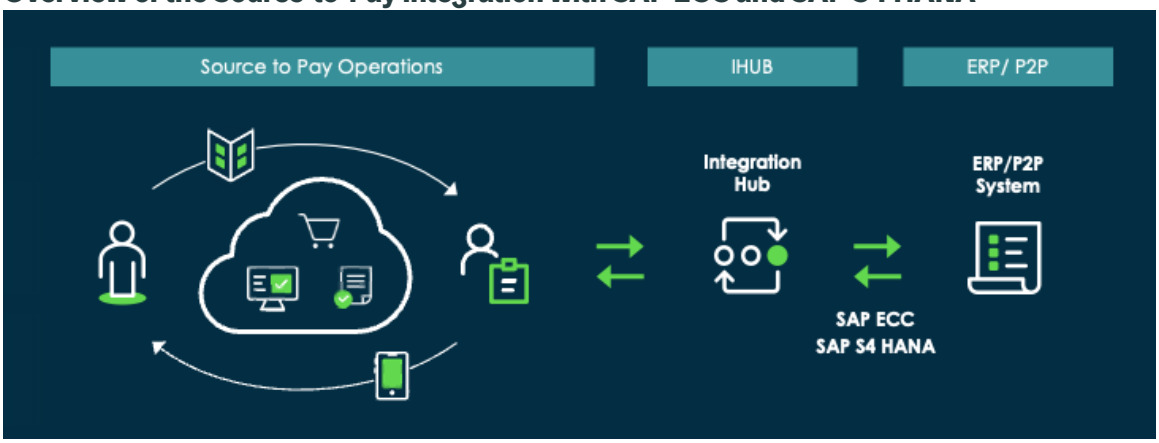
instance. This integration helps in looking up or extracting primary data objects from SAP into ServiceNow.

Key features

With this application, you can perform the following:

- Integration hub actions for purchase requisition, purchase order, receipt, and invoices.
- Create or update purchase orders in SAP ECC and SAP S4 HANA.
- Cancel purchase orders in SAP ECC and SAP S4 HANA.
- Create good receipts in SAP ECC and SAP S4 HANA.
- Create invoices in SAP ECC and SAP S4 HANA.

Overview of the Source-to-Pay integration with SAP ECC and SAP S4 HANA



Prerequisites

First, you must activate the Source-to-Pay integration with the SAP ECC and SAP S4 HANA application from the ServiceNow Store. This automatically activates the SAP ECC and SAP S4 HANA Spoke. Next you must set up the following SAP ECC or SAP S4 HANA based on your requirement:

- SAP ECC RFC Spoke
- SAP S4 HANA Public Cloud Spoke
- SAP S4 HANA OData spoke

The following are the ServiceNow Store app plugins:

- sn_sap_ecc_rfc_spo.SAP_ECC
- sn_s4_hana_cld_spk.SAP_S4_HANA_Cloud
- sn_hana_odata_spk.SAP_S4_HANA_OData

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.

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How it works

The subflows enable a plug-and-play experience for the integration scenarios. Integration Hub Actions provide the building blocks for Source-to-Pay subflows and connects to the SAP ECC and SAP S4 HANA system through REST APIs.

Exploring Source-to-Pay integration with SAP ECC and S4HANA

Learn more about the Source-to-Pay integration with SAP ECC and S4HANA

Establishing communication between the SAP and ServiceNow instances

The Source-to-Pay integration with SAP ECC and SAP S4 HANA supports the following APIs:

- 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.

You can establish a connection with an SAP system from the ServiceNow instance using the following methods:

- **SAP Java Connector** (SAP JCo): It is a middleware that allows Java applications to communicate with SAP systems using RFC/BAPI protocols. It supports both inbound and outbound Remote Function Calls. For more information, see SAP Documentation.
- **OData** (Open Data Protocol): It is used in web technologies by SAP to make data accessible across different platforms, enabling the development of web applications, websites, and mobile apps.

SAP supports the following protocols for transferring data:

- RFC/BAPI (sync typically)
- REST/OData (sync)
- SOAP (async typically)

SAP Implementations

- 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.

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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.

Execute RFC in the Source-to-Pay with SAP integration

Execute RFC from the available list.

Process flow:

Step 1 - Create a record for SAP system in Connection and Credential alias table.

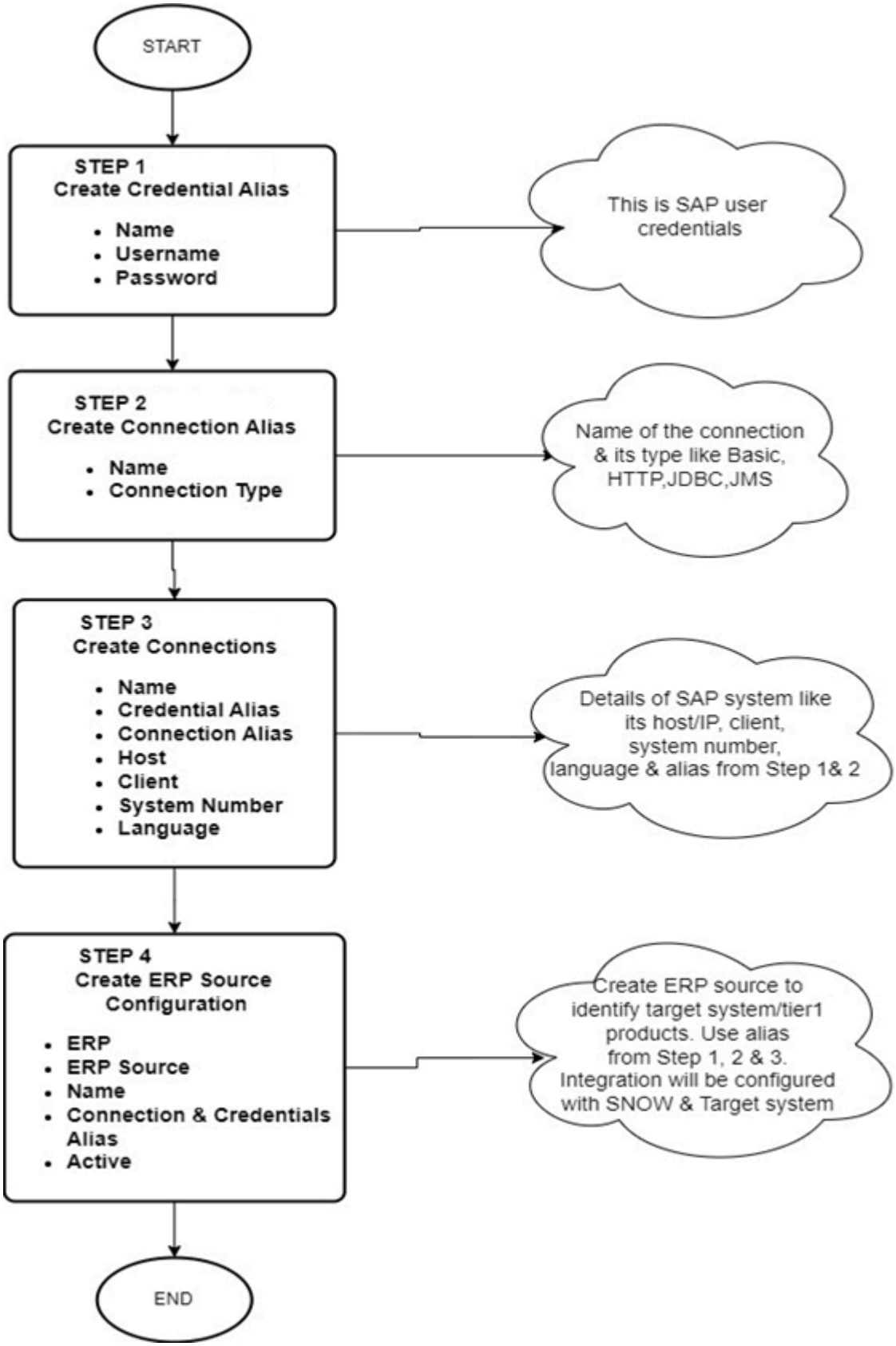
Step 2 - Create Credential for connecting to SAP system.

Step 3 - Add Mid server and credentials to the connection.

Step 4 - Create ERP Source is ERP source configuration table.

Step 5 - Create Service, add flow and give the necessary inputs in the fields.

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Name: ZSN_BAPI_GET_DATA

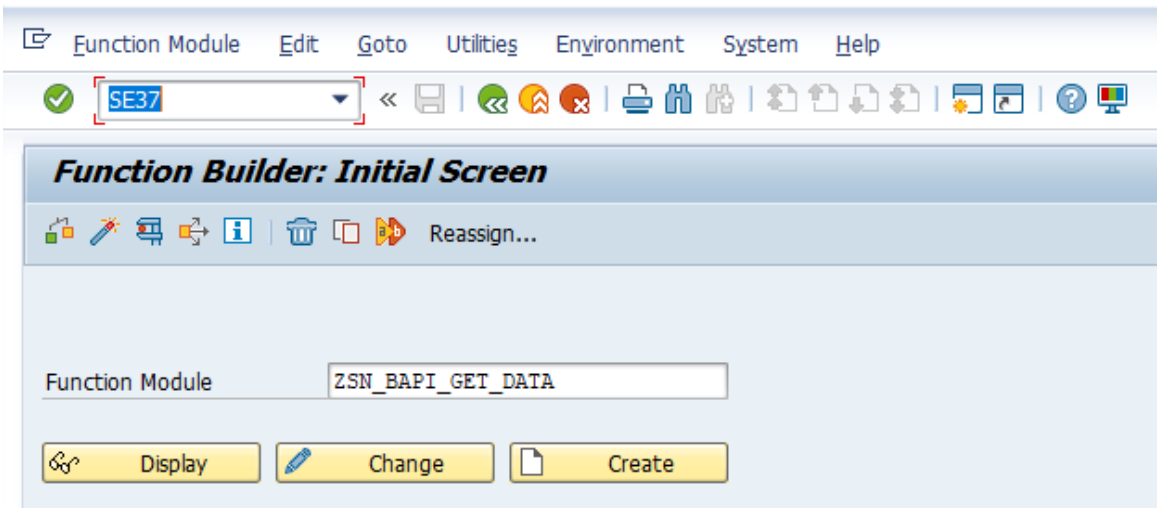
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Query parameters to execute RFC

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.

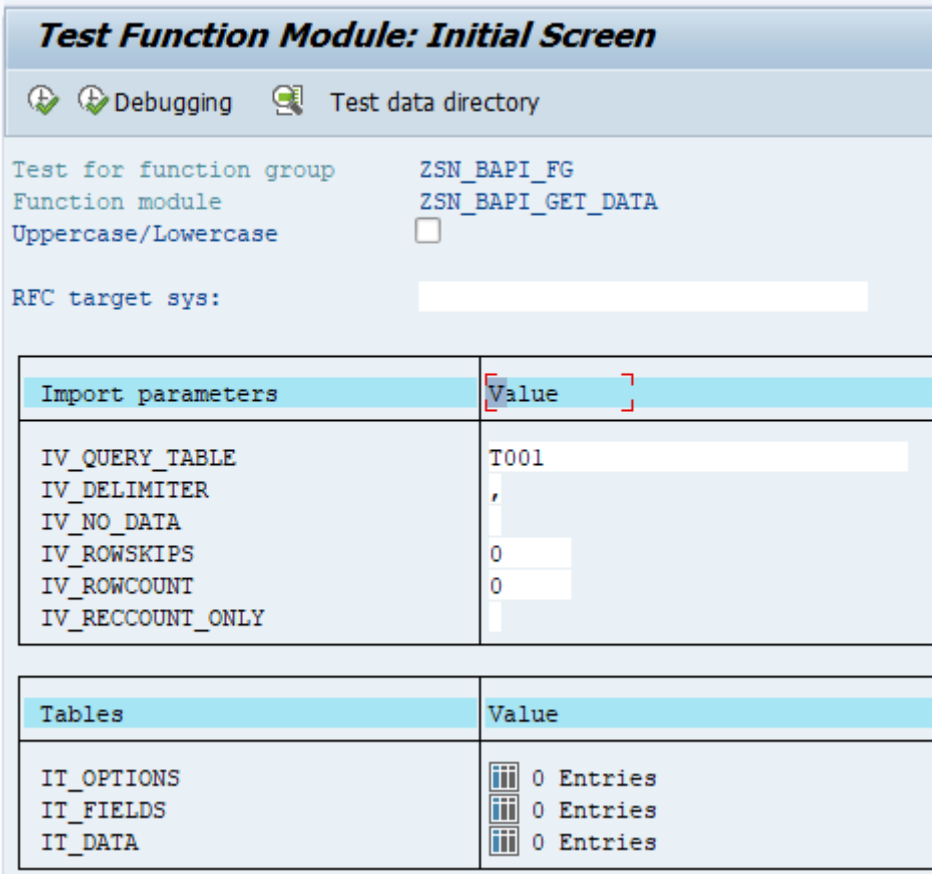
Function Builder Initial Screen



- Error! Reference source not found.Error! Reference source not found.

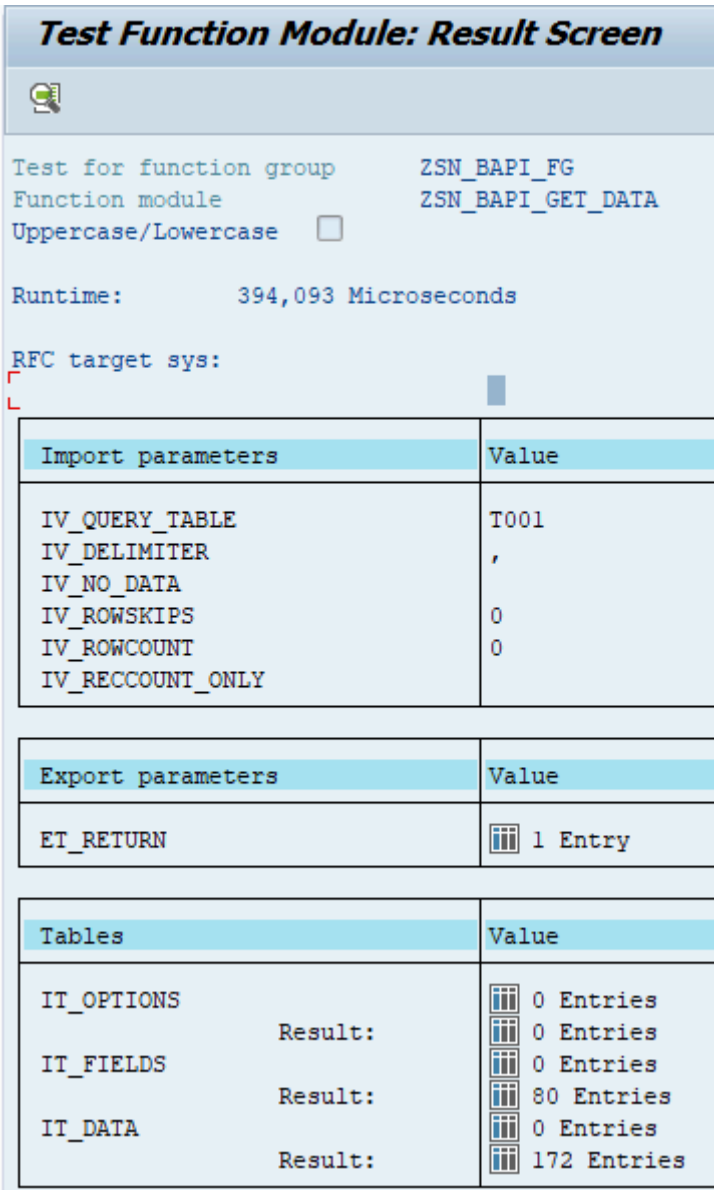
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Enter the IMPORT, CHANGING, and TABLES parameters



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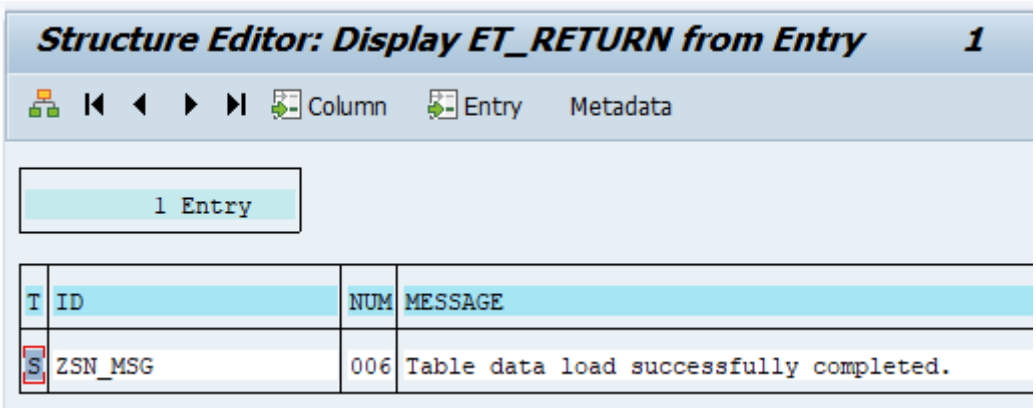
- **Results data**



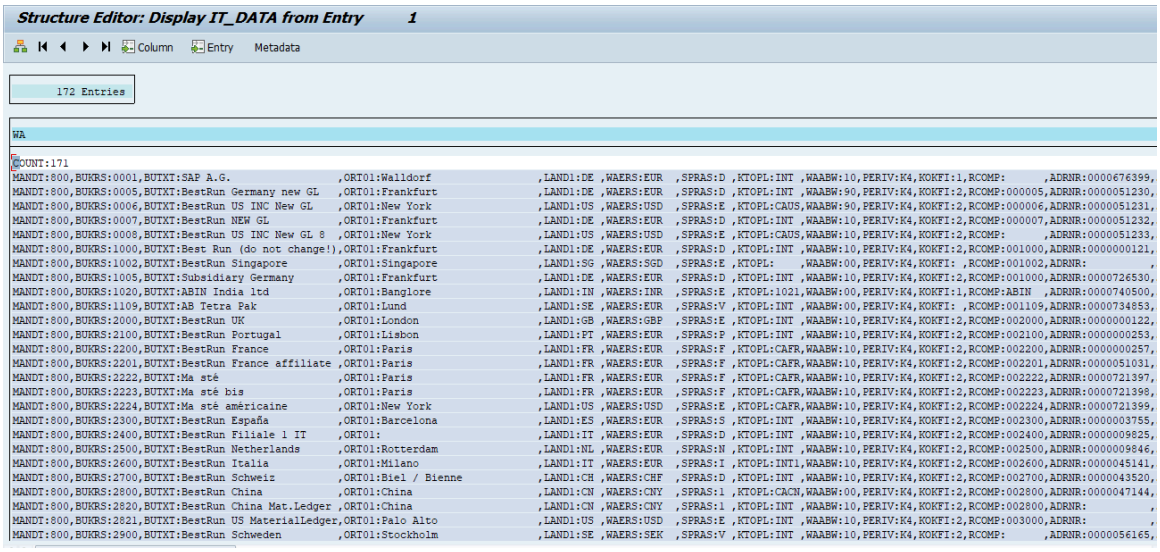
- Error! Reference source not found

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Results data



Results data



Configuring the Source-to-Pay integration with SAP ECC and SAP S4 HANA

Integrate the ServiceNow instance and SAP ECC and SAP S4 HANA by creating a custom OAuth application in SAP ECC and SAP S4 HANA to authenticate ServiceNow requests.

Application set up

Verify that you have performed the following:

- Activated the Source-to-Pay integration with the SAP ECC and SAP S4 HANA application from ServiceNow Store. This automatically activates the SAP ECC and SAP S4 HANA Spoke.
- Set up the Spoke:
  - Set up the SAP ECC RFC spoke
  - Setup the SAP S4 HANA Public Cloud spoke
  - Set up SAP S4 HANA OData spoke
- Activated the Source-to-Pay integration framework from ServiceNow Store. The Source-to-Pay integration with SAP ECC and SAP S4 HANA uses the Source-to-Pay integration framework to pull tasks from SAP ECC and SAP S4 HANA into ServiceNow. For more information on the Source-to-Pay integration framework, see Source-to-Pay integration framework.

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Primary Data Integration with SAP ECC and SAP S4 HANAs' Dependencies

Install the following dependencies of Primary Data integration with SAP ECC and SAP S4 HANA. When you install the plugin, all the dependencies get installed automatically. All primary data are synchronized based on the configurable scheduled job Fetch Spend Primary Data.

Run the Trigger SAP ECC and SAP S4 HANA Integration that pulls tasks into ServiceNow. For more information, see Use schedule flows in SAP ECC and SAP S4 HANA.

Primary Data Integration with SAP ECC and SAP S4 HANA

App name	Plugin ID
SAP ECC IDOC Spoke	sn_sap_ecc_idoc_sp
Source-to-pay Common Architecture	sn_shop
ERP Integration Framework	sn_fcms_intg
Utility Spoke	sn_utility_spoke
SAP ECC RFC Spoke	sn_sap_ecc_rfc_spo
Supplier Common Architecture	sn_slm
SAP S4 HANA Spoke	sn_hana_odata_spk

Supplier Lifecycle Operations Integration Dependencies with SAP ECC and SAP S4 HANA

Install the following dependencies of Supplier Lifecycle Operations integration with SAP ECC and SAP S4 HANA. When you install the plugin, all the dependencies get installed automatically.

Supplier Lifecycle Operations Integration with SAP ECC and SAP S4 HANA

App name	Plugin ID
Primary Data Integration with SAP ECC and SAP S4 HANA	sn_sap_data_int
ERP Integration Framework	sn_fcms_intg
Finance Common Architecture	sn_fin

Sourcing and Procurement Operations Integration Dependencies with SAP ECC and SAP S4 HANA

Install the following dependencies of Sourcing and Procurement Operations integration with SAP ECC and SAP S4 HANA. When you install the plugin, all the dependencies get installed automatically.

Sourcing and Procurement Operations Integration with SAP ECC and SAP S4 HANA

App name	Plugin ID
Primary Data Integration with SAP ECC and SAP S4 HANA	sn_sap_data_int
ERP Integration Framework	sn_fcms_intg

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Sourcing and Procurement Operations Integration with SAP ECC and SAP S4 HANA (continued)

App name	Plugin ID
Source-to-pay Common Architecture	sn_shop
SAP S4 HANA RFC Spoke	sn_sap_s4_hana_rfc
SAP ECC IDOC Spoke	sn_sap_ecc_idoc_sp

Accounts Payable Operations Integration Dependencies with SAP ECC and SAP S4 HANA

Install the following dependencies of Accounts Payable Operations integration with SAP ECC and SAP S4 HANA. When you install the plugin, all the dependencies get installed automatically.

Accounts Payable Operations Integration with SAP ECC and SAP S4 HANA

App name	Plugin ID
Primary Data Integration with SAP ECC and SAP S4 HANA	sn_sap_data_int
ERP Integration Framework	sn_fcms_intg
Source-to-pay Common Architecture	sn_shop
SAP S4 HANA RFC Spoke	sn_sap_s4_hana_rfc
SAP ECC IDOC Spoke	sn_sap_ecc_idoc_sp

ERP Source Configuration for SAP ECC and SAP S4 HANA

Configure your Source-to-Pay (S2P) instance to support inbound and outbound integration with your ERP system. This integration configuration enables you to automatically post purchase order, receipt, invoice, and download primary data from the ERP.

ERP source configuration enables the implementation of specific logic to populate values pertinent to third-party ERP systems. It includes all integration services defined between Source-to-Pay (S2P) and the third-party ERP system. In cases where multiple ERP sources exist, they're stored as distinct ERP source entries with their corresponding integration services.

To meet specific requirements, you can modify the service-mapping logic by updating the relevant service element map entry within the integration service record. For organizations using multiple ERP systems, an ERP Source field has been incorporated into the tables to ensure accurate identification of the respective integrated ERP system.

Prerequisites

Before you start the integration configuration, you must complete the following tasks.

- Add the following roles to the Integration user:
  - Import_transformer
  - SOAP
- Get the following details from the ERP team:

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- ERP integration user credentials.
- SOAP or REST API details based on your ERP system and the type of web services you are using for the integration.

Note:
If the application needs to support multiple ERP instances, configure Source-to-Pay to integrate with each ERP instance separately.

ERP Source Configuration

To perform the ERP Source configuration for SAP ECC and SAP S4 HANA, follow these steps:

1. Define the ERP source that you want to integrate with SAP ECC and SAP S4 HANA integration.
2. Create a basic authentication profile that can be used for web service integration with SAP ECC and SAP S4 HANA.
3. Define source configuration for ERP source. The ERP source configuration determines the ERP source to which your ERP system connects. For more information, see Define ERP source configuration for SAP ECC and SAP S4 HANA.
4. The integration services are preconfigured with the base system for the following entities:
   - **Currencies**

     Set up subflows for the source configuration to lookup currencies from SAP ECC and SAP S4 HANA.
   - **Legal Entities**

     Set up subflows for the source configuration to lookup legal entities or company code details from SAP ECC and SAP S4 HANA.
   - **FX Currency Rates**

     Set up subflows for the source configuration to lookup FX rates from SAP ECC and SAP S4 HANA.
   - **Cost Centers**

     Set up subflows for the source configuration to lookup cost centers from SAP ECC and SAP S4 HANA.
   - **Departments**

     Set up subflows for the source configuration to lookup departments from SAP ECC and SAP S4 HANA.
   - **Payment Terms**

     Set up subflows for the source configuration to lookup payment terms from SAP ECC and SAP S4 HANA.
   - **Purchasing Orgs**

     Set up subflows for the source configuration to lookup purchasing orgs from SAP ECC and SAP S4 HANA.
   - **GL Accounts**

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Set up subflows for the source configuration to lookup GL accounts from SAP ECC and SAP S4 HANA.

- **Plant Addresses**

  Set up subflows for the source configuration to lookup plant addresses from SAP ECC and SAP S4 HANA.

- **Suppliers**

  Set up subflows for the source configuration to lookup suppliers from SAP ECC and SAP S4 HANA.

- **Product Models**

  Set up subflows for the source configuration to lookup product models from SAP ECC and SAP S4 HANA.

- **Invoices**

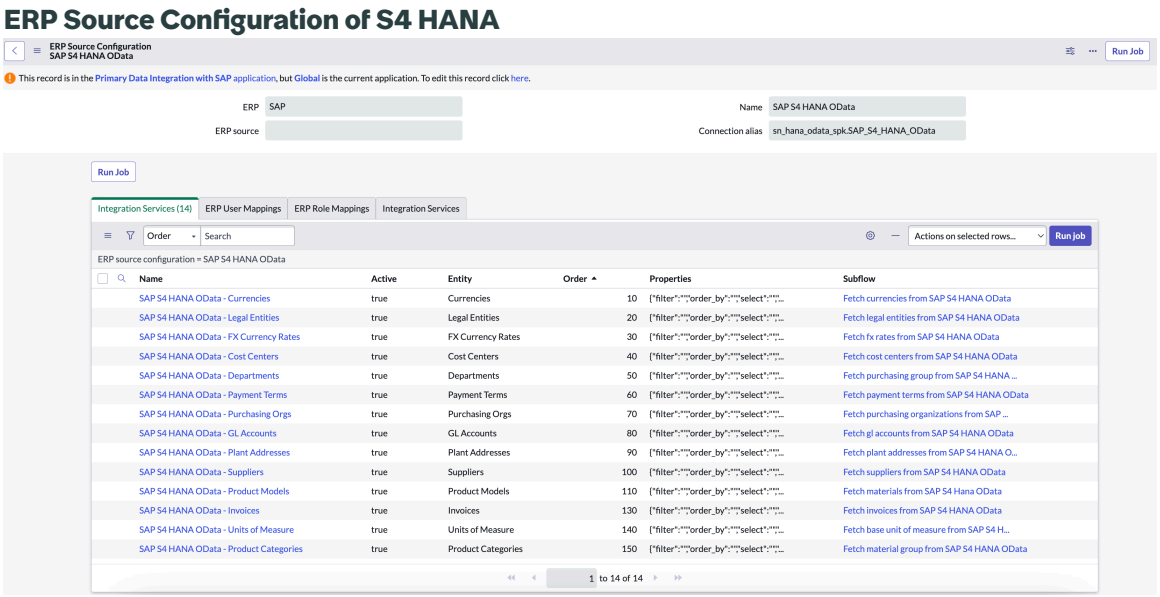
  Set up subflows for the source configuration to lookup invoices from SAP ECC and SAP S4 HANA.

- **Unit of Measure**

  Set up subflows for the source configuration to lookup the base unit of measure details from SAP ECC and SAP S4 HANA.

- **Product Categories**

  Set up subflows for the source configuration to lookup material group details from SAP ECC and SAP S4 HANA.



Note:
Similarly, you can select SAP ECC configuration to view the list of services.

5. Configure scheduled job to synchronize primary data updates from SAP ECC and SAP S4 HANA.

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6. Set up the interval in the lookup Cost Center scheduled job to periodically synchronize primary data updates from the ERP, for posting services to work.

Note:
Similarly, you can configure schedule jobs for the other integrations services.

Define ERP source configuration for SAP ECC and SAP S4 HANA

ERP source configuration determines the ERP source to which your ERP system connects. Map the integration payload with the SAP ECC and SAP S4 HANA tables.

https://player.vimeo.com/video/1092942658?h=96dd37817f&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: sn_fcms_intg.admin

About this task
By default, the base system includes one ERP source named SAP ECC and SAP S4 HANA, which refers to the parent connection for SAP ECC and SAP S4 HANA. If there are multiple SAP ECC and SAP S4 HANA instances, multiple ERP sources must be configured, and the child connections for these SAP ECC and SAP S4 HANA instances should be referenced.

Each ERP instance requires a unique ERP source configuration. Therefore, 10 ERP instances need 10 configurations.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. In the ERP Configurations view, select one of the following ERP source configuration based on your requirement:
   - **SAP ECC ERP**
   - **SAP S4 HANA Cloud**
   - **SAP S4 HANA OData**

   This configuration is available as a part of the base system.
3. To edit the ERP source, select **here**.
4. Select the required ERP source for the SAP ECC or SAP S4 HANA using the search option.
5. To create a new ERP source, perform the following steps:

   a. Select **New**.

   b. On the form, fill the fields.

Define a new ERP source configuration

Field	Description
ERP Source	ERP source for which the integration is required. For example, SAP ECC or SAP S4 HANA.
Short Description	Summary of the ERP source.
Active	Option to activate the ERP source.

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Field	Description
Amount Precisions	Amount precision of the ERP source. For example, 2.

Define a new ERP source configuration for S4 HANA OData

c. Select **Submit**.
A new ERP source is created. Verify that the connection alias is also unique for each ERP source.

Note:
SAP ECC and SAP S4 HANA integration can have multiple ERP sources. The Staging table displays the ERP source column, which you can use to distinguish which ERP the data belongs to.

What to do next
By default, the SAP ECC and SAP S4 HANA base system provides 14 integration services. For other SAP ECC and SAP S4 HANA instances, you need to perform the following:

- To modify each integration service, you can open the integration service and select **here** to. You can define element level mapping between SAP ECC and SAP S4 HANA table fields and payload elements.
- Map the users and corresponding ERP User IDs by accessing the ERP User Mappings related list.

Configure integration services for SAP ECC and SAP S4 HANA

For configuring integration services, provide the connection end point and the SAP ECC and SAP S4 HANA ERP credentials that you set up for your authentication profile. Also, create a separate integration service record for each service request that you want to customize.

Before you begin
- Verify that the application scope is set to SAP ECC and SAP S4 HANA spoke.
- Verify that the MID Server is installed and configured in your ServiceNow instance to connect to the ERP server. For more details, see Installing the MID Server.
- For REST type service, REST API details, as provided by ERP.

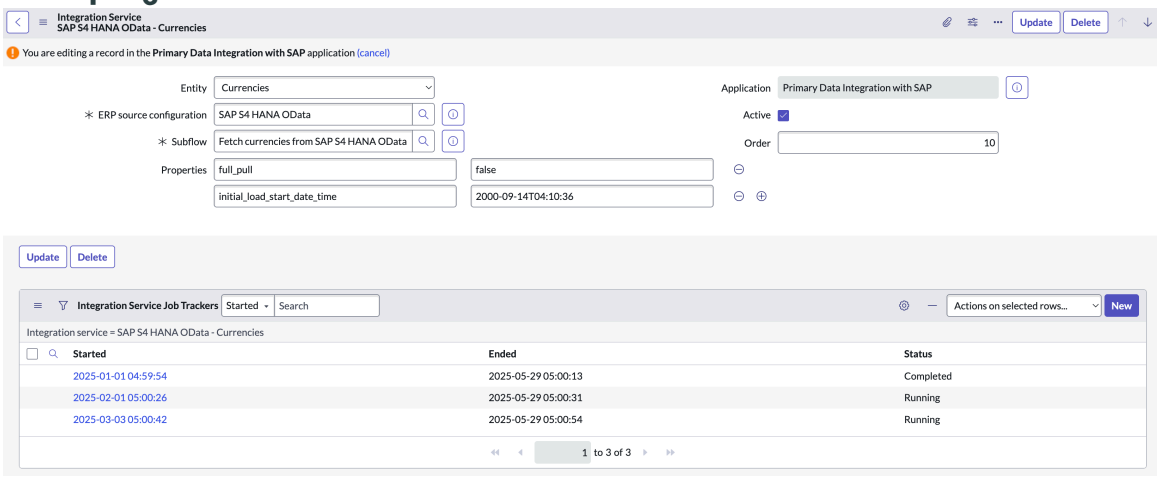
Role required: sn_fcms_intg.admin

About this task
If the application requires multiple SAP ECC and SAP S4 HANA ERP instances, create separate integration services for each ERP instance. You can create integration service records for entities using the `sn_fcms_intg_service` table.

Procedure
1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Open the ERP source for which you need to configure integration services.
For example, SAP ECC or SAP S4 HANA.
3. In the Integration Services list, select the service that you want to configure.

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Look up Legal Entities from SAP S4 HANA OData



4. On the integration service record, fill in the fields.

Integration service record

Field	Description
Entity	The type of entity for which you want to configure the integration service.
Application	Name of the application. For example, SAP ECC or SAP S4 HANA.
ERP Source configuration	The ERP source mapped to the entity. For example, SAP ECC or SAP S4 HANA.
Active	The status of the interaction service. By default, the check box is inactive.
Subflow	The subflow used to fetch primary data.
Properties	Creates a JSON record in the integration service, which is then passed to the ERP subflows to retrieve complete data. You can define the value for the properties based on your requirements. Here's an example: ○ `filter: currency eq 'USD'` ○ `order_by: currencies` ○ `select: currency` ○ `page_size: 100` ○ **Enabling Full Pull**: Use this property to fetch the complete data.

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Field	Description
	▪ Create a property named "`full_pull`" and set its value to `true`. ▪ Additionally, you can create another property like, "`initial_load_start_date_time`" and set its value to `2025-04-15T04:10:34`. ○ **Enabling Delta Pull**: Use this property to fetch the incremental data. Set the value of the "`full_pull`" property to `false`.
Order	Option to choose the order in which the entity should be displayed.

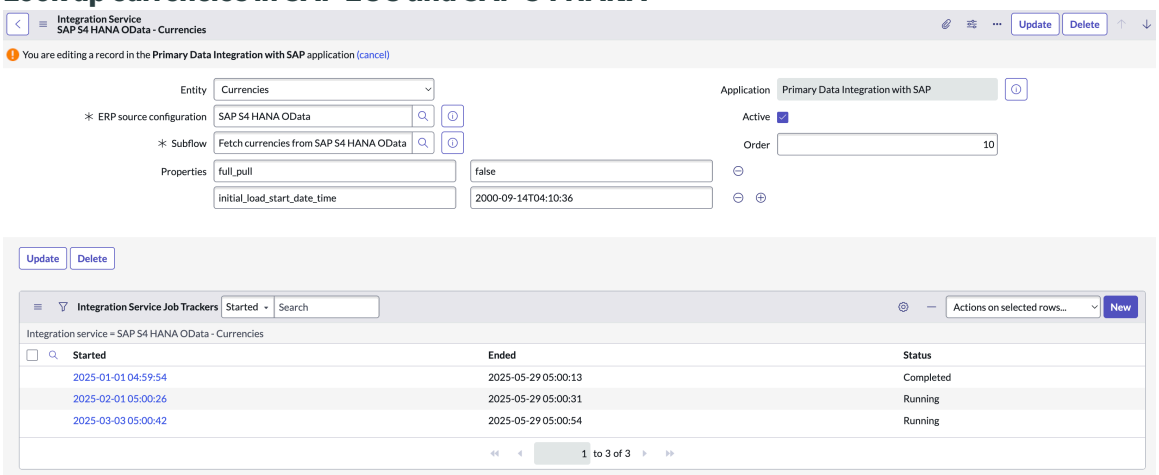
5. Select **Submit**.

Look up primary data in SAP ECC and SAP S4 HANA

You can run a job to look up primary data (for example, Currencies) from different ERP sources into ServiceNow.

Before you start the ERP integration, you must configure the integration services record for the target ERP source using the `sn_fcms_intg_service` table. The `sn_fcms_intg_service` table is a mapping table between sub flows and target ERP source. For more information on creating an integration service record, see Create Integration Service record.

Look up currencies in SAP ECC and SAP S4 HANA



You can manually run jobs for the following entities:

Integration services available as a part of the base system for SAP

Entity	Table name
Currencies	FX Currency Stage inbound staging table
Legal entities	Legal Entity Stage inbound staging table
FX Currency rates	FX Rate Stage inbound staging table

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Integration services available as a part of the base system for SAP (continued)

Entity	Table name
Cost Centers	Cost Center Stage inbound staging table
Departments	Department Stage inbound staging table
Payment Terms	Payment Terms Stage inbound staging table
Purchasing Organizations	Purchase Entity Stage inbound staging table
GL Accounts	GL Account Stage inbound staging table
Plant Addresses	CMN Location Stage inbound staging table
Suppliers	Supplier location inbound staging table
Product Models	Product Model Stage inbound staging table
Invoices	Invoice import inbound staging table
Unit of Measure	
Product Categories	Product Model Stage inbound staging table

Transformation maps and subflows

To learn more about the Transformation maps and subflows, see Source-to-Pay integration framework transform maps and subflows.

Manually trigger flows or subflows in SAP ECC and SAP S4 HANA (Inbound)

You can manually trigger flows or subflows in SAP ECC and SAP S4 HANA on demand. Follow these steps to manually trigger a flow or subflow.

Before you begin

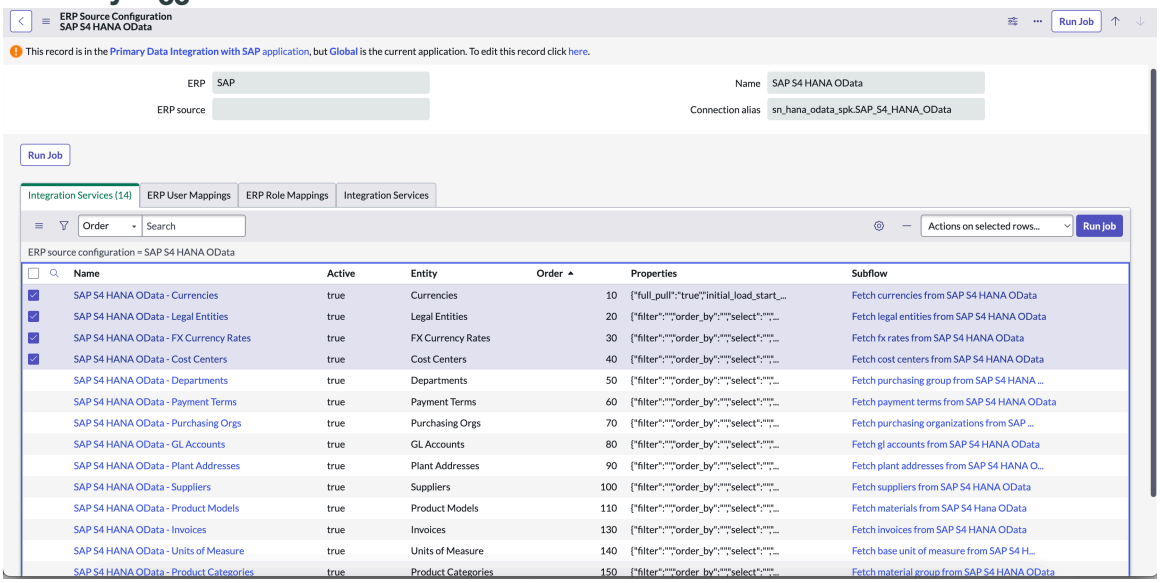
Role required: sn_fcms_intg.integration_user

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. In the ERP Configurations view, select the **SAP ECC and SAP S4 HANA** ERP source to manually trigger the flows or subflows.
3. In the Integration Services list, select the subflows that you want to manually trigger.

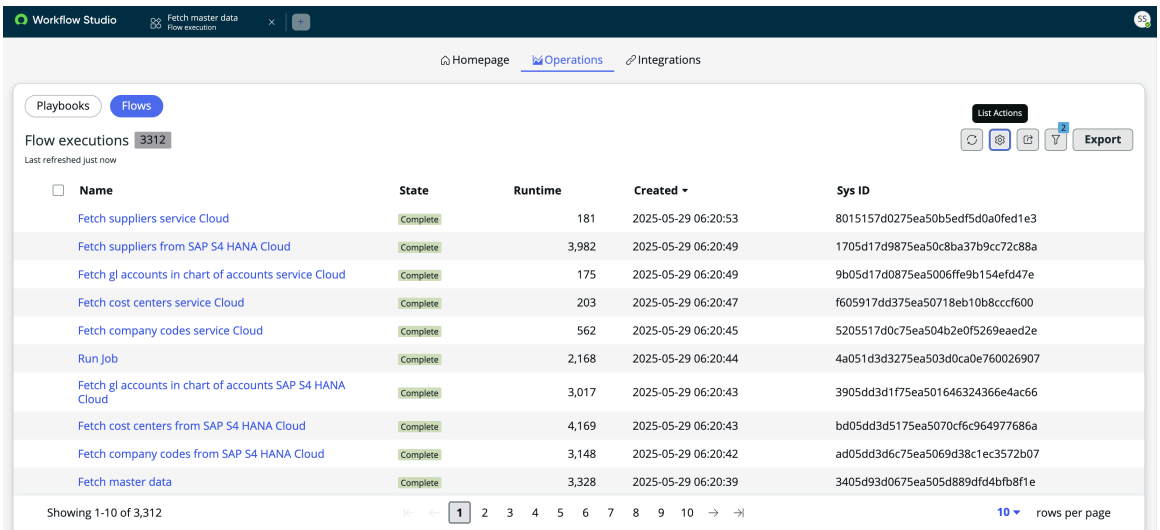
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Manually trigger flows or subflows in SAP ECC and SAP S4 HANA



4. Select **Run job** to trigger the flow or subflow.
5. Navigate to **All** > **Process Automation** > **Workflow Studio**.
6. From the Workflow Studio home page, select the **Operations** tab and then select **Flows** tab.
   The list of flow executions appear. You can look up the status of the flows or subflows that you triggered. If there were any errors during execution, you can view them under the processing message column.
7. Navigate back to the **Homepage** tab, and select **Flows** or **Subflows**.
8. Look up the **Flow** or **Subflow** name or **SAP ECC and SAP S4 HANA** application name using the filter icon, and select **Apply**.
   You can view the flows or subflows that you triggered.

Flows or subflows in Workflow Studio



9. You can use the trigger condition as a part of the base system to execute the flow or subflow.

> **Note:**
> Don't modify the trigger condition.

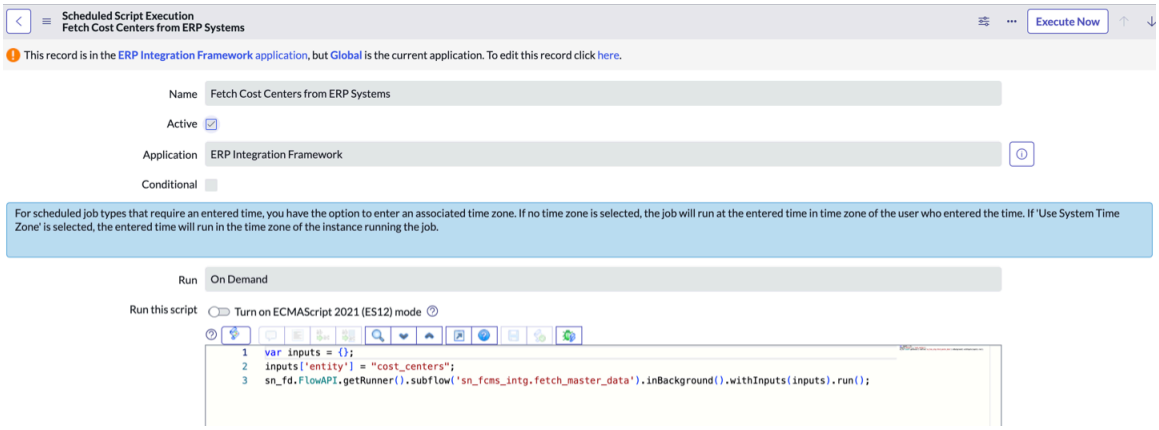
The flow or subflow gets executed.

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Scheduled jobs to look up primary data in SAP ECC and SAP S4 HANA

You can schedule on-demand jobs to be run at specific intervals of time to fetch primary data from different SAP ECC and SAP S4 HANA ERP sources into ServiceNow.

Before you start the SAP ECC and SAP S4 HANA ERP integration, you must configure the integration services record for target ERP source using the `sn_fcms_intg_service` table. The `sn_fcms_intg_service` table is a mapping table between sub flows and target ERP source. For more information on creating a integration service record, see Configure integration services for SAP ECC and SAP S4 HANA.



Run scheduled jobs in SAP ECC and SAP S4 HANA

Run adhoc scheduled jobs to look up entity primary data from the target SAP ECC and SAP S4 HANA ERP source.

Before you begin

Role required: sn_fcms_intg.admin

About this task

Executes on-demand scheduled jobs on true entities of an ERP source target and fetches primary data. Auto-populates the entity inbound tables.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Select the ERP source for which you would like to run scheduled jobs.
3. Select **Integration Services** >**Run job**.
   The fetch services run automatically as scheduled.
   Entity inbound tables are populated with primary data.

Using Source-to-Pay integration with SAP ECC and SAP S4 HANA

Understand how you can use Source-to-Pay integration with SAP ECC and SAP S4 HANA to handle sales orders, procurement, finance, and so on in SAP ECC and SAP S4 HANA from your ServiceNow instance.

Use schedule flows in SAP ECC and SAP S4 HANA

Use the schedule flows that interact with SAP ECC and SAP S4 HANA to pull information on purchase requisition, purchase order, receipt, invoice, and sourcing.

You can either use the subflows to perform the required tasks or you can create a copy of the subflows and then customize it according to your requirements. The Source-to-Pay with SAP ECC and SAP S4 HANA integration supports the following subflows:

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Primary Data Integration with SAP ECC and SAP S4 HANA

The Primary Data Integration with SAP ECC and SAP S4 HANA integration supports the following subflows:

Scheduled subflow details for Primary Data Integration with SAP ECC and SAP S4 HANA

Subflow	Description
Fetch GL Accounts	Use this subflow to fetch and sync all GL accounts from SAP S4 HANA OData system.
Fetch Legal Entities	Use this subflow to fetch and sync all legal entities from SAP S4 HANA OData system.
Fetch Invoices	Use this subflow to fetch and sync all Invoices from SAP S4 HANA OData system
Fetch Suppliers	Use this subflow to fetch and sync all supplier details from SAP S4 HANA OData system.
Fetch Plant Addresses	Use this subflow to Fetch Plant Addresses from SAP S4 HANA OData system.
Fetch Purchasing Group	Use this subflow to fetch and sync all Purchasing Group from SAP S4 HANA OData system.
Fetch Payment Terms	Use this subflow to fetch and sync all payment terms from SAP S4 HANA OData system.
Fetch Materials	Use this subflow to fetch and sync all Materials from SAP S4 HANA OData system.
Fetch FX Rates	Use this subflow to fetch and sync all FX rates from SAP S4 HANA OData system.
Fetch Currencies	Use this subflow to fetch and sync all Currencies from SAP S4 HANA OData system.
Fetch Purchasing Organizations	Use this subflow to fetch and sync all Purchasing Organizations from SAP S4 HANA OData system.
Fetch Cost Center	Use this subflow to fetch and sync all cost centers from SAP S4 HANA OData system.
Fetch Unit of Measure	Use this subflow to fetch base unit of measure from SAP S4 HANA OData system.
Fetch Material Group	Use this subflow to fetch and sync all Material Groups from SAP S4 HANA OData system.

Important:

These subflows are read only. To modify a flow or subflow, create a copy and then apply the required changes.

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Supplier Lifecycle Operations Integration with SAP ECC and SAP S4 HANA

The Supplier Lifecycle Operations Integration with SAP ECC and SAP S4 HANA supports the following subflows:

Scheduled subflow details for Supplier Lifecycle Operations Integration with SAP ECC and SAP S4 HANA

Flow	Description
Create or update supplier	Creates or updates or deactivates supplier in SAP ECC and SAP S4 HANA.
Deactivate supplier bank details	Deactivates the supplier bank details in SAP ECC and SAP S4 HANA.
Create or update supplier payment information	Creates or updates supplier payment information in SAP ECC and SAP S4 HANA.

Important:

These subflows are read-only. To modify a flow or subflow, create a copy and then apply the required changes.

Sourcing and Procurement Operations Integration with SAP ECC and SAP S4 HANA

The Sourcing and Procurement Operations Integration with SAP ECC and SAP S4 HANA supports the following subflows:

Scheduled subflow details for Sourcing and Procurement Operations integration with SAP ECC and SAP S4 HANA

Flow	Description
Create or update purchase order	Creates or updates purchase order in SAP ECC and SAP S4 HANA.
Create Goods Receipts	Creates Goods Receipts in SAP S4 HANA and SAP S4 HANA

Accounts Payable Operations Integration with SAP ECC and SAP S4 HANA

The Accounts Payable Operations Integration with SAP ECC and SAP S4 HANA supports the following subflows:

Scheduled subflow details for Accounts Payable Operations Integration with SAP ECC and SAP S4 HANA

Flow	Description
Create Invoice	Creates invoice in SAP ECC and SAP S4 HANA.
Create Non-Purchase Order Invoice	Create Non-Purchase Order Invoice in in SAP ECC and SAP S4 HANA.

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Use a flow or subflow in SAP ECC and SAP S4 HANA (Outbound)

A flow or subflow can be executed in SAP ECC and SAP S4 HANA using the Workflow Studio. Follow these steps to run a flow or subflow.

Before you begin

Role required: sn_fcms_intg.integration_user

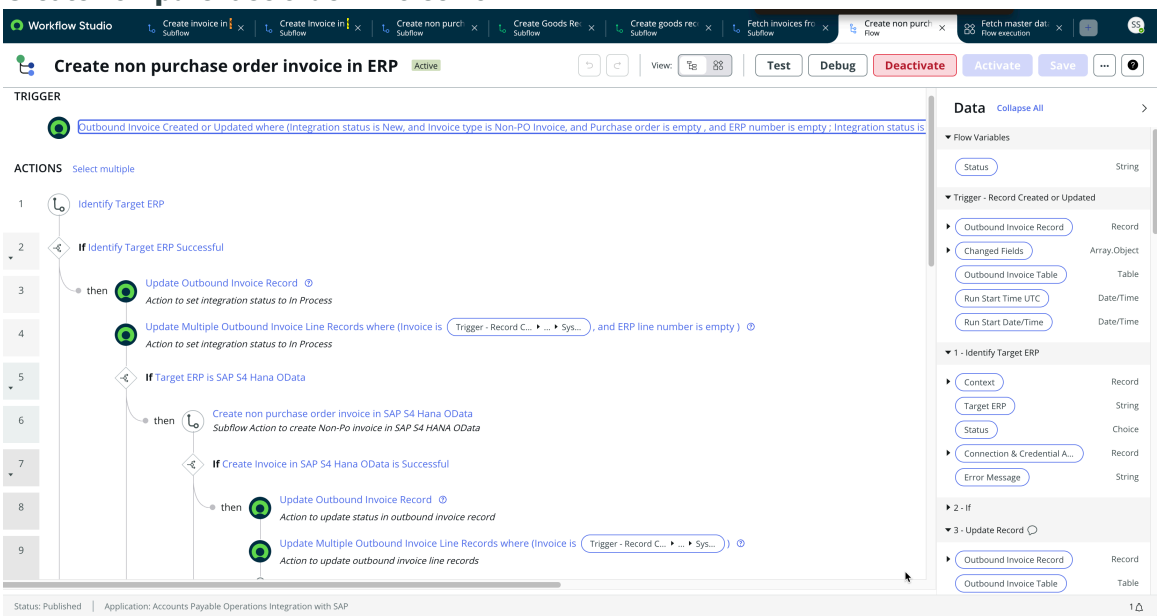
About this task

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the Workflow Studio home page, select **Flows**.
3. Look up the **Flow** name or **SAP ECC and SAP S4 HANA** application name using the filter icon, and select **Apply**.
4. Select the required flow from the list.

   For example, select **Create non-purchase order invoice** flow.

Create non-purchase order invoice flow



5. In the Trigger field, specify the time and interval at which you want to run the scheduled flow automatically.

   This flow subsequently triggers subflows to automate tasks. To customize the sample flow, copy it to the desired application scope.

   Note:
   Don't modify the trigger condition.

   The flow or subflow gets executed.

Copy a flow or subflow in SAP ECC and SAP S4 HANA

You can create a copy of the a flow or subflow and make the necessary modifications. Use the following steps to activate a flow or subflow.

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Before you begin

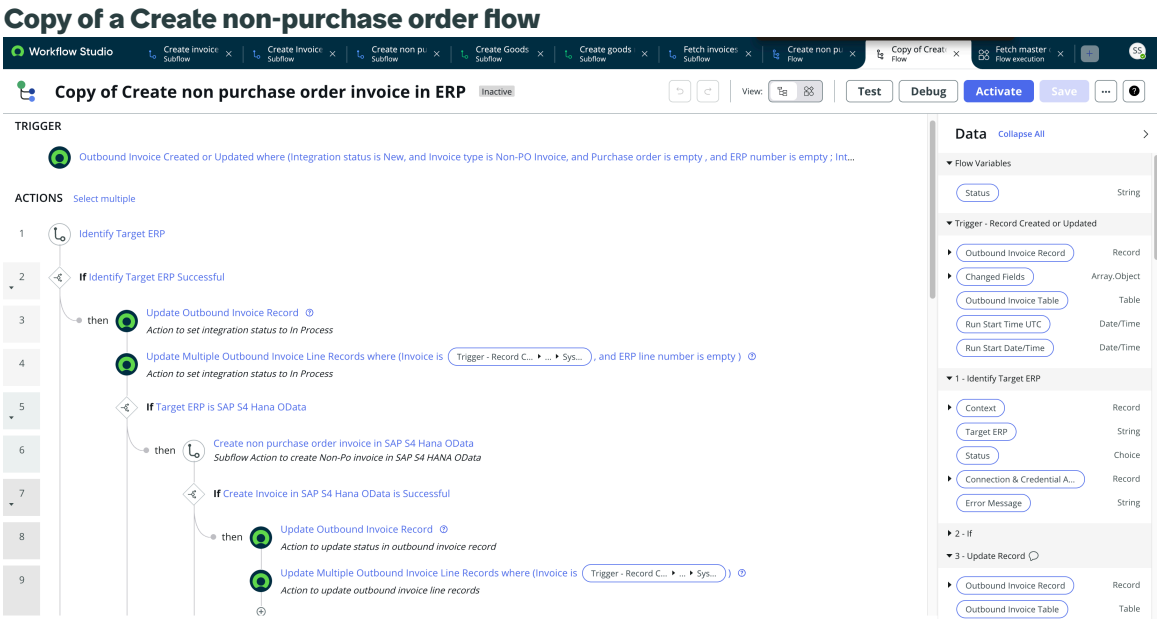
Role required: sn_fcms_intg.integration_user

About this task

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the Workflow Studio homepage, select **Flows**.
3. Open the flow that you want to copy.
4. Click the ... more actions icon, and select **Copy flow**.

> **Important:**
> Perform this step only if you plan to customize or make specific changes to the flow.

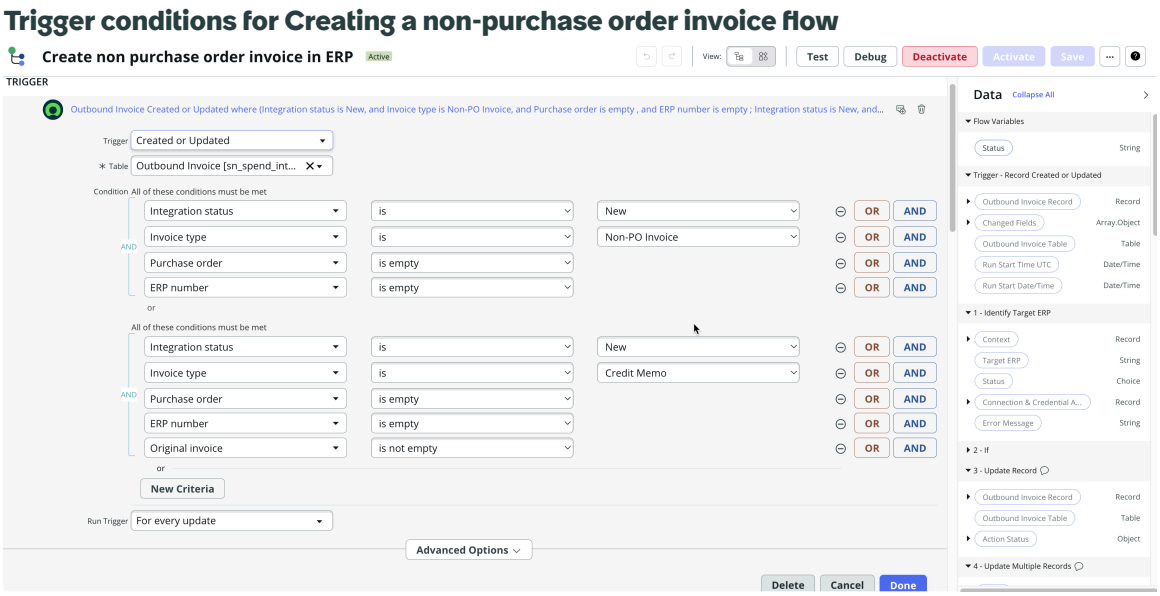


5. Activate the flow or subflow.
   - Make sure that the flow or subflow is available and activated on the base system.
   - Activate the copied flow after making the required changes.
6. Use the **Trigger Condition** for the flow or subflow.

   This flow or subflow is triggered and associated with the purchase order when the following conditions are met:
   - **Legal entity . ERP source . Active** is **true**.
   - **Legal entity . ERP source . ERP Source** is **not empty**.
   - **Status** is **Pending Submission**

   > **Note:**
   > Do not modify the trigger condition.

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Note:

Once data is pulled into staging tables, transform maps move data into target tables. For more details, refer to Source-to-Pay integration framework transform maps and subflows.

Source-to-Pay Integration with 3CLogic

Integrating Source-to-Pay Operations with 3CLogic provides omni-channel experience and self-service features.

The Source-to-Pay Integration with 3CLogic Cloud Contact Center solution provides the following benefits:

- Enhance the end-user experience with voice and SMS capabilities
- Provide omni-channel experience for end users to request and receive help
- Personalize end-user interactions while resolving inquiries quickly

For more information, see 3CLogic Cloud Call Center for ServiceNow Voice.

Source-to-Pay integration with Oracle EBS

The Source-to-Pay integration with Oracle EBS enables you to handle sales orders, procurement, finance, and so on, in Oracle EBS from your ServiceNow instance.

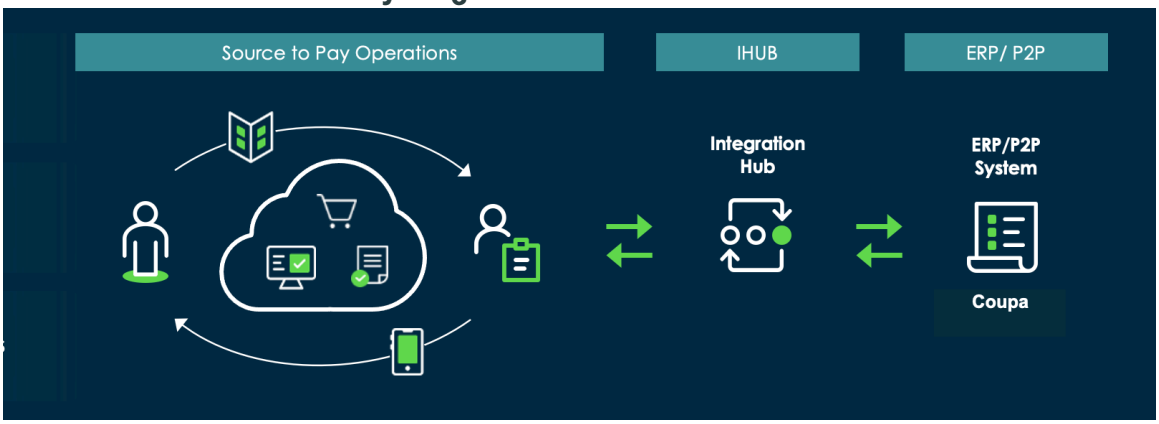
Key features

With this application, you can perform the following:

- Integration hub actions for invoices, cost centers, product models, payment terms, purchasing organizations, departments, GL accounts, currencies, FX rates, invoice payment details, suppliers, plant addresses, and legal entities.
- Create or update purchase orders in Oracle EBS.
- Cancel purchase orders in Oracle EBS.
- Create good receipts in Oracle EBS.
- Create invoices in Oracle EBS.

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Overview of the Source-to-Pay integration with Oracle EBS



Prerequisites

First, you must activate the Source-to-Pay integration with Oracle EBS application from the ServiceNow Store. This automatically activates the Oracle EBS Spoke. Next you must set up Oracle EBS Spoke.

ServiceNow Store app plugins: sn_Oracle EBS_spoke.

Note:
The Source-to-Pay integration with Oracle EBS depends on the Oracle EBS Spoke.

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.

How it works

The subflows enable a plug-and-play experience for the integration scenarios. Integration Hub Actions provide the building blocks for Source-to-Pay subflows and connects to the Oracle EBS system through REST APIs.

Configuring the Source-to-Pay integration with Oracle EBS

Integrate the ServiceNow instance and Oracle EBS by creating a custom OAuth application in Oracle EBS to authenticate ServiceNow requests.

Application set up

Verify that you have performed the following:

- Activated the Source-to-Pay integration with the Oracle EBS application from ServiceNow Store. This automatically activates the Oracle EBS Spoke.
- Set up Oracle EBS Spoke.
- Activated the Source-to-Pay integration framework from ServiceNow Store. Source-to-Pay integration with Oracle EBS uses the Source-to-Pay integration framework to pull tasks from Oracle EBS into ServiceNow. For more information on the Source-to-Pay integration framework, see Source-to-Pay integration framework.

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Primary Data Integration with Oracle EBS's Dependencies

Install the following dependencies of Primary Data integration with Oracle EBS. When you install the plugin, all the dependencies get installed automatically. All primary data are synchronized based on the configurable scheduled job Fetch Spend Primary Data.

Run the Trigger Oracle EBS Integration that pulls tasks into ServiceNow. For more information, see Use schedule flows in Oracle EBS.

Primary Data Integration with Oracle EBS

App name	Plugin ID
ERP Integration Framework	sn_fcms_intg
Source-to-pay Common Architecture	sn_shop
Supplier Common Architecture	sn_slm
EBS Spoke	sn_oracle_ebs_spk

Supplier Lifecycle Operations Integration Dependencies with Oracle EBS

Install the following dependencies of Supplier Lifecycle Operations integration with Oracle EBS. When you install the plugin, all the dependencies get installed automatically.

Supplier Lifecycle Operations Integration with Oracle EBS

App name	Plugin ID
Primary Data Integration with Oracle EBS	sn_orcl_data_int
Source-to-Pay Integration Framework	sn_spend_intg

Sourcing and Procurement Operations Integration Dependencies with Oracle EBS

Install the following dependencies of Sourcing and Procurement Operations integration with Oracle EBS. When you install the plugin, all the dependencies get installed automatically.

Sourcing and Procurement Operations Integration with Oracle EBS

App name	Plugin ID
Primary Data Integration with Oracle EBS	sn_orcl_data_int
Sourcing and Purchasing Automation	sn_pr
Source-to-Pay Integration Framework	sn_spend_intg

Accounts Payable Operations Integration Dependencies with Oracle EBS

Install the following dependencies of Accounts Payable Operations integration with Oracle EBS. When you install the plugin, all the dependencies get installed automatically.

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Accounts Payable Operations Integration with Oracle EBS

App name	Plugin ID
Primary Data Integration with Oracle EBS	sn_orcl_data_int
Accounts Payable Invoice Processing	sn_ap_apm
Source-to-Pay Integration Framework	sn_spend_intg

ERP Source Configuration for Oracle EBS

Configure your Source-to-Pay (S2P) instance to support inbound and outbound integration with your ERP system. This integration configuration enables you to automatically post purchase order, receipt, invoice, and download primary data from the ERP.

ERP source configuration enables the implementation of specific logic to populate values pertinent to third-party ERP systems. It includes all service mappings defined between Source-to-Pay (S2P) and the third-party ERP system. In cases where multiple ERP sources exist, they're stored as distinct ERP source entries with their corresponding service mappings.

To meet specific requirements, you can modify the service-mapping logic by updating the relevant service element map entry within the service map record. For organizations using multiple ERP systems, an ERP Source field has been incorporated into the tables to ensure accurate identification of the respective integrated ERP system.

The ERP source configuration for Oracle EBS enables customers to establish multiple Oracle instances. Each instance is identified by a distinct source, and the connection alias for each instance must be unique.

Prerequisites

Before you start the integration configuration, you must complete the following tasks.

- Add the following roles to the Integration user:
  - Import_transformer
  - SOAP
- Get the following details from the ERP team:
  - ERP integration user credentials.
  - SOAP or REST API details based on your ERP system and the type of web services you are using for the integration.

Note:
If the application needs to support multiple ERP instances, configure Source-to-Pay to integrate with each ERP instance separately.

ERP Source Configuration

To perform the ERP Source configuration for Oracle EBS, follow these steps:

1. Define the ERP source that you want to integrate with Oracle EBS integration.
2. Create a basic authentication profile that can be used for web service integration with Oracle EBS.
3. Register the Oracle EBS integration username and password to create the authentication profile and associate it to service maps.

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4. Define source configuration for ERP source. The ERP source configuration determines the ERP source to which your ERP system connects. For more information, see Define ERP source configuration for Oracle EBS.
5. Configure service maps for the following entities:
   - **Cost Centers**

     Set up subflows for the source configuration to lookup cost centers from Oracle EBS.
   - **Product Models**

     Set up subflows for the source configuration to lookup product models from Oracle EBS.
   - **Payment Terms**

     Set up subflows for the source configuration to lookup payment terms from Oracle EBS.
   - **Purchasing Orgs**

     Set up subflows for the source configuration to lookup purchasing orgs from Oracle EBS.
   - **Departments**

     Set up subflows for the source configuration to lookup departments from Oracle EBS.
   - **GL Accounts**

     Set up subflows for the source configuration to lookup GL accounts from Oracle EBS.
   - **Currencies**

     Set up subflows for the source configuration to lookup currencies from Oracle EBS.
   - **FX Currency Rates**

     Set up subflows for the source configuration to lookup FX rates from Oracle EBS.
   - **Invoice Payment Details**

     Set up subflows for the source configuration to lookup invoice payment details from Oracle EBS.
   - **Suppliers**

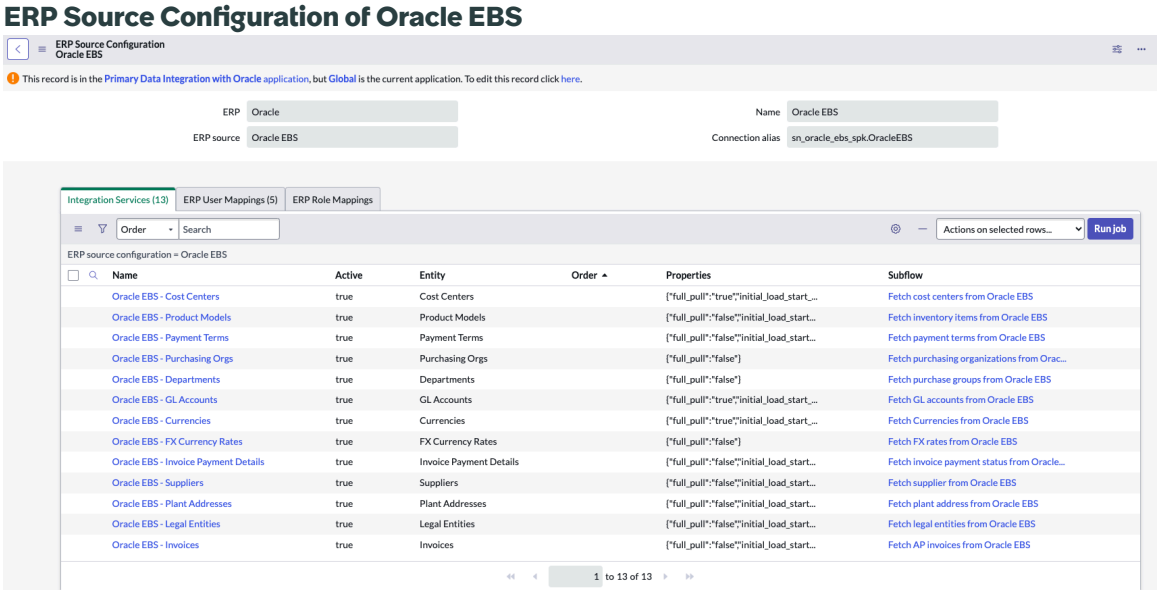
     Set up subflows for the source configuration to lookup suppliers from Oracle EBS.
   - **Plant Addresses**

     Set up subflows for the source configuration to lookup plant addresses from Oracle EBS.
   - **Legal Entities**

     Set up subflows for the source configuration to lookup legal entities or company code details from Oracle EBS.
   - **Invoices**

     Set up subflows for the source configuration to lookup invoices from Oracle EBS.

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6. Configure scheduled job to synchronize primary data updates from Oracle EBS.
7. Set up the interval in the lookup Cost Center scheduled job to periodically synchronize primary data updates from the ERP, for posting services to work.
8. Load data to Oracle EBS user mapping table.
9. Set up Source-to-Pay and ERP User ID mapping (`sn_fcms_intg_erp_user_map`) for the integration to work.

   The mapping is maintained for all active users who have the procurement buyer role in ERP. These users should be used in the requisition assignment rule.

Define ERP source configuration for Oracle EBS

ERP source configuration determines the ERP source to which your ERP system connects. Map the integration payload with the Oracle EBS tables.

Before you begin

Role required: sn_shop.procurement_administrator

About this task

By default, the base system includes one ERP source named Oracle EBS, which refers to the parent connection for Oracle EBS. If there are multiple Oracle EBS instances, multiple ERP sources must be configured, and the child connections for these Oracle EBS instances should be referenced.

Each ERP instance requires a unique ERP source configuration. Therefore, 10 ERP instances need 10 configurations.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. In the ERP Configurations view, select **Oracle EBS**.

   This configuration is available as a part of the base system.
3. To edit the ERP source, select **here**.
4. Select the required ERP source for the Oracle EBS using the search option.

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5. To create a new ERP source, perform the following steps:

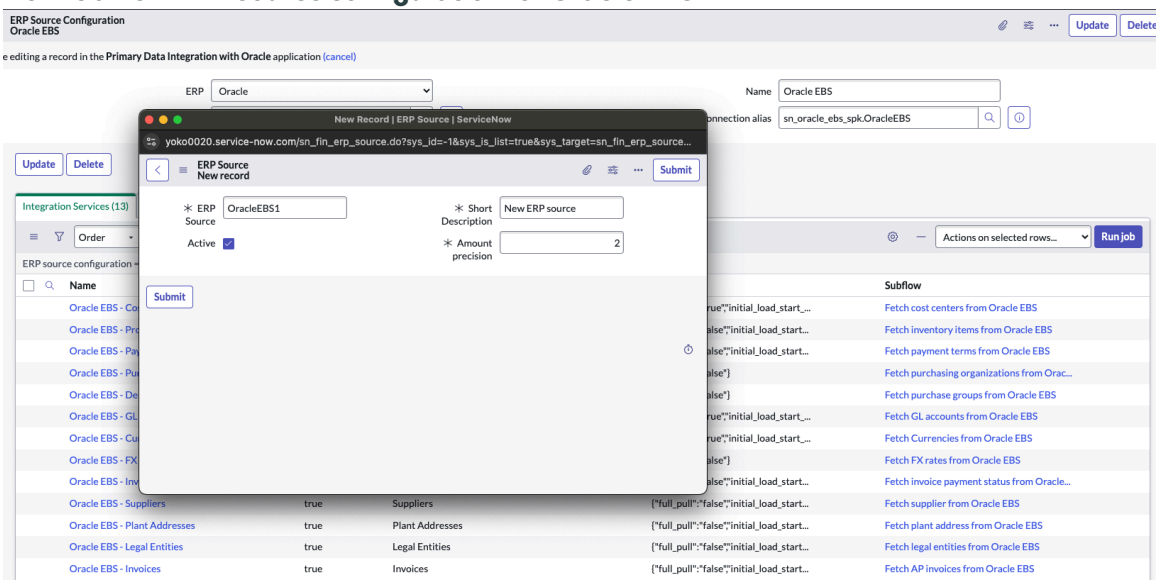
   a. Select **New**.

   b. On the form, fill the fields.

Define a new ERP source configuration

Field	Description
ERP Source	ERP source for which the integration is required. For example, Oracle EBS.
Short Description	Summary of the ERP source.
Active	Option to activate the ERP source.
Amount Precisions	Amount precision of the ERP source. For example, 2.

Define a new ERP source configuration for Oracle EBS



   c. Select **Submit**.
   A new ERP source is created. Verify that the connection alias is also unique for each ERP source.

> **Note:**
> Oracle EBS integration can have multiple ERP sources. The Staging table displays the ERP source column, which you can use to distinguish which ERP the data belongs to.

What to do next

By default, the Oracle EBS base system provides 13 services mapping. For other Oracle EBS instances, you need to perform the following:

- Define service mappings manually for each integration service by accessing the Service Mappings related list. You can define element level mapping between Oracle EBS table fields and payload elements.
- Map the users and corresponding ERP User IDs by accessing the ERP User Mappings related list.

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Configure service maps for Oracle EBS

For configuring service maps, provide the connection end point and the Oracle EBS ERP credentials that you set up for your authentication profile. Also, create a separate web service record for each service request that you want to customize.

https://player.vimeo.com/video/1100184497?h=f5b16fc19b&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

- Verify that the application scope is set to Oracle EBS spoke.
- Verify that the MID Server is installed and configured in your ServiceNow instance to connect to the ERP server. For more details, see Installing the MID Server.

> **Note:**
> The MID Server integration is required only for an Oracle EBS ERP integration using SOAP services.

- For REST type service, REST API details, as provided by ERP.

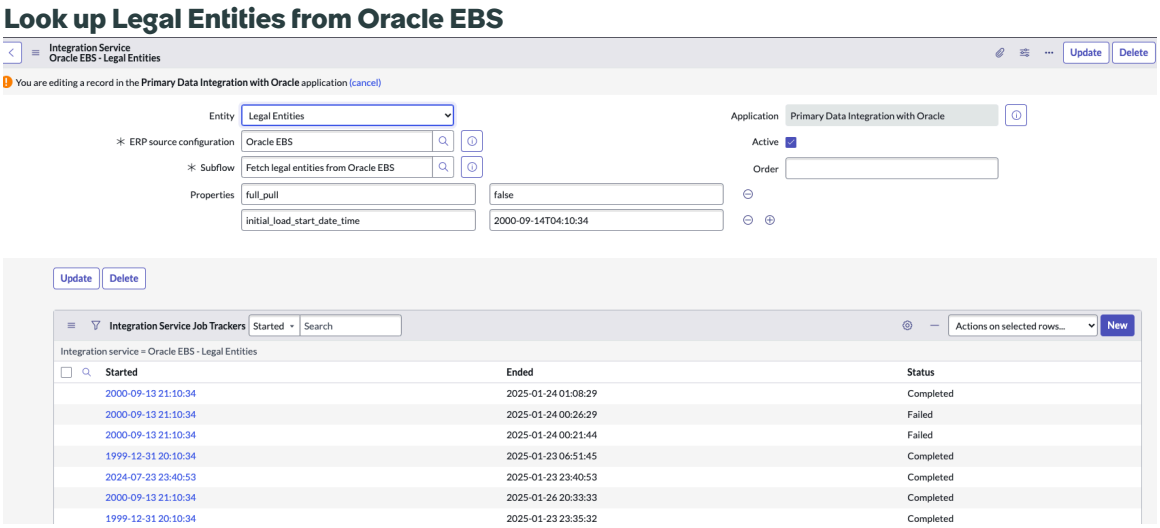
Role required: sn_fcms_intg.integration_user

About this task

If the application requires multiple Oracle EBS ERP instances, create separate web services for each ERP instance. You can create Integration Service records for entities using the `sn_fcms_intg_service` table.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Open the ERP source for which you need to configure service maps.
   For example, Oracle EBS.
3. In the Integration Services list, select the service that you want to configure.



4. On the integration service record, fill in the fields.

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Integration service record

Field	Description
Entity	The type of entity for which you want to configure the service mapping.
Application	Name of the application. For example, Oracle EBS.
ERP Source configuration	The ERP source mapped to the entity. For example, Oracle EBS.
Active	The status of the interaction service. By default, the check box is inactive.
Subflow	The subflow used to fetch primary data.
Properties	Creates a JSON record in the integration service, which is then passed to the ERP subflows to retrieve complete data. To pass JSON into the subflow, create a property named "query" and assign it a JSON query as its value, like this: `[ { "parameter": "LEGAL_ENTITY_NAME", "operator": "=", "value": "Vision ADB", "operand": "NONE" } ]` ○ **Enabling Full Pull**: Use this property to fetch the complete data. ▪ Create a property named "`full_pull`" and set its value to `true`. ▪ Additionally, you can create another property like, "`initial_load_start_date_time`" and set its value to `2025-02-15T04:10:34`. ○ **Enabling Delta Pull**: Use this property to fetch the incremental data. Set the value of the "`full_pull`" property to `false`.
Order	Option to choose the order in which the entity should be displayed.

5. Select **Update**.
   This updates the entity details.

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Load data to ERP user mapping table for Oracle EBS

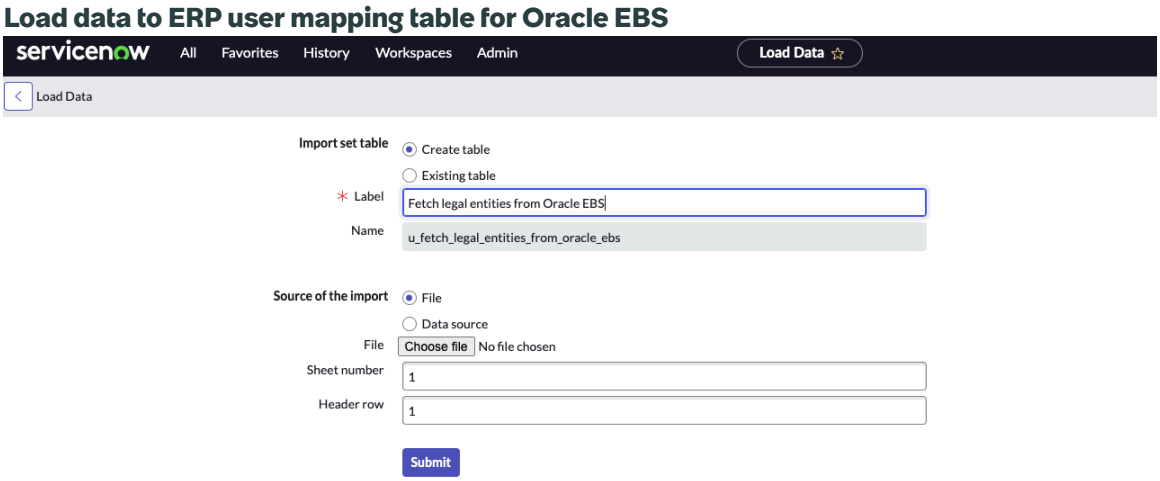
Set up Oracle EBS and ERP User ID mapping for the integration to work. The mapping is maintained for all active users who have the procurement buyer role in ERP. These users should be used in the requisition assignment rule.

Before you begin

Role required: sn_shop.procurement_administrator

Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. Select **Create table** and enter a label for the new table in the **Label** field.
3. In the **Source of the import** field, select File, and then click **Choose File** to select the source Excel spreadsheet.



4. **Optional:** If appropriate, specify the Work sheet and Header row number.
5. Click **Submit**.
   The imported data is now available in the new Import Set table.
6. Create a transform map to define the field mapping between columns of the import set and columns of the target ERP User Mapping [sn_fcms_intg_erp_user_map] table.
   The ERP User Mapping table maintains mapping between ERP user IDs and ServiceNow user IDs.
7. Transform the data from the import set table to the target table.
   For more information, see Run an import.

Result

The data is imported into the Oracle EBS ERP User Mapping (`sn_fcms_intg_erp_user_map`) table.

What to do next

Verify that the data records are imported into the target table. You can view the Oracle EBS ERP user mappings by navigating to **Finance - ERP Integration** > **ERP Users**.

Note:
If an ERP user mapping is not required, you can deactivate it. To deactivate a mapping, in the ERP User Mapping form, select the **Inactive** check box.

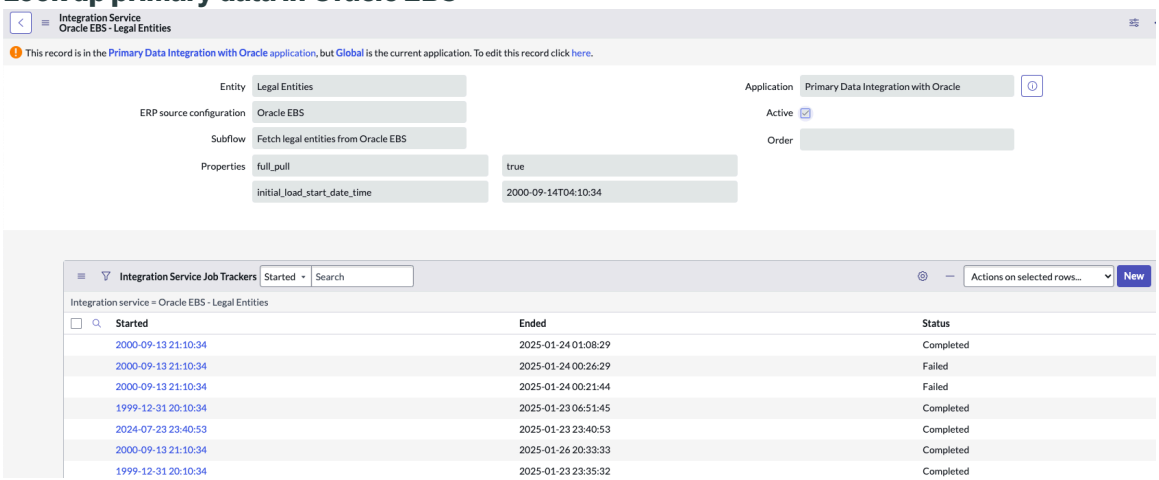
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Look up primary data in Oracle EBS

You can run a job to look up primary data from different ERP sources into ServiceNow.

Before you start the ERP integration, you must configure the integration services record for the target ERP source using the `sn_fcms_intg_service` table. The `sn_fcms_intg_service` table is a mapping table between sub flows and target ERP source. For more information on creating an integration service record, see Create Integration Service record.

Look up primary data in Oracle EBS



You can manually run jobs for the following entities:

Look up primary data in Oracle EBS

Entity	Description	Table name
Cost Centers	Lookup cost centers from Oracle EBS	Cost Center Stage inbound staging table
Product Models	Lookup product models from Oracle EBS.	Product Model Stage inbound staging table
Payment Terms	Lookup payment terms from Oracle EBS.	Payment Terms Stage inbound staging table
Purchasing Orgs	Lookup purchasing orgs from Oracle EBS.	Purchase Entity Stage inbound staging table
Departments	Lookup departments from Oracle EBS.	Department Stage inbound staging table
GL Accounts	Lookup GL accounts from Oracle EBS.	GL Account Stage inbound staging table
Currencies	Lookup currencies from Oracle EBS.	FX Currency Stage inbound staging table
FX Currency rates	Lookup FX rates from Oracle EBS.	FX Rate Stage inbound staging table
Invoice Payment Details	Lookup invoice payment details from Oracle EBS.	Invoice payment detail import inbound table
Suppliers	Lookup suppliers from Oracle EBS.	Supplier location inbound staging table

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Look up primary data in Oracle EBS (continued)

Entity	Description	Table name
Plant addresses	Lookup plant addresses from Oracle EBS.	CMN Location Stage inbound staging table
Legal entities	Lookup legal entities from Oracle EBS.	Legal Entity Stage inbound staging table
Invoices	Lookup invoices from Oracle EBS.	Invoice import inbound staging table

Transformation maps and subflows

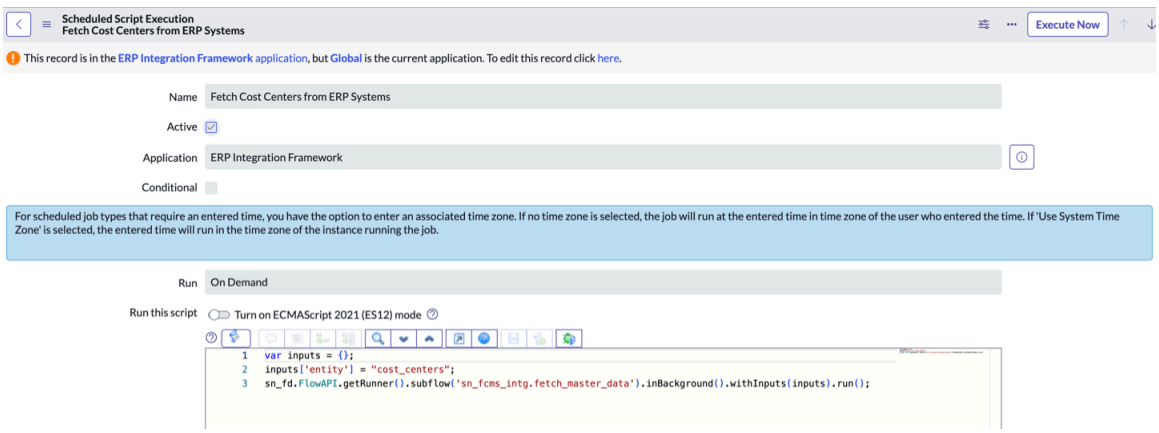
To learn more about the Transformation maps and subflows, see Source-to-Pay integration framework transform maps and subflows.

Scheduled jobs to look up primary data in Oracle EBS

You can schedule on-demand jobs to be run at specific intervals of time to fetch primary data from different Oracle EBS ERP sources into ServiceNow.

Before you start the Oracle EBS ERP integration, you must configure the integration services record for target ERP source using the `sn_fcms_intg_service` table. The `sn_fcms_intg_service` table is a mapping table between sub flows and target ERP source. For more information on creating a integration service record, see Create Integration Service record.

Scheduled jobs are configured for entities using scripts. Example: Fetch cost center from ERP systems. For more information on configuring scheduled jobs using scripts, see Automatically run a script of your choosing. The script invokes subflow which is associated with an entity as shown in the figure below. The subflow queries the active entities or ERP source configuration (optional) listed in the integration service table.



Run scheduled jobs in Oracle EBS

Run adhoc scheduled jobs to look up entity primary data from the target Oracle EBS ERP source.

Before you begin

Role required: sn_fcms_intg.integration_user

About this task

Executes on-demand scheduled jobs on true entities of an ERP source target and fetches primary data. Auto-populates the entity inbound tables.

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Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Select the ERP source for which you would like to run scheduled jobs.
3. Select **Integration Services** >**Run job**.
   The fetch services run automatically as scheduled.
   Entity inbound tables are populated with primary data.

Using Source-to-Pay integration with Oracle EBS

Understand how you can use Source-to-Pay integration with Oracle EBS to handle sales orders, procurement, finance, and so on in Oracle EBS from your ServiceNow instance.

Use schedule flows in Oracle EBS

Use the schedule flows to retrieve information from Oracle EBS, including invoices, cost centers, product models, payment terms, purchasing organizations, departments, GL accounts, currencies, FX rates, invoice payment details, suppliers, plant addresses, and legal entities.

You can either use the subflows to perform the required tasks or you can create a copy of the subflows and then customize it according to your requirements. The Source-to-Pay with Oracle EBS integration supports the following subflows:

Source-to-Pay Integration with Oracle EBS

The Source-to-Pay with Oracle EBS integration supports the following subflows:

Scheduled subflow details for Source-to-Pay Integration with Oracle EBS

Subflow	Description
Create or update or cancel purchase order	Creates or updates or cancels purchase order in Oracle EBS.
Create goods receipt	Creates goods receipts in Oracle EBS.

Important:

These subflows are read only. To modify a flow or subflow, create a copy and then apply the required changes.

Supplier Lifecycle Operations Integration with Oracle EBS

The Supplier Lifecycle Operations Integration with Oracle EBS supports the following subflows:

Scheduled subflow details for Supplier Lifecycle Operations Integration with Oracle EBS

Flow	Description
Create or update or deactivate supplier	Creates or updates or deactivates supplier in Oracle EBS.
Create or update supplier location	Creates or updates supplier location in Oracle EBS.
Create or update supplier payment information	Creates or updates supplier payment information in Oracle EBS.

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Important:

These subflows are read-only. To modify a flow or subflow, create a copy and then apply the required changes.

Sourcing and Procurement Operations Integration with Oracle EBS

The Sourcing and Procurement Operations Integration with Oracle EBS supports the following subflows:

Scheduled subflow details for Sourcing and Procurement Operations integration with Oracle EBS

Flow	Description
Create or updates or cancels purchase order	Creates or updates or cancels purchase order in Oracle EBS.

Accounts Payable Operations Integration with Oracle EBS

The Accounts Payable Operations Integration with Oracle EBS supports the following subflows:

Scheduled subflow details for Accounts Payable Operations Integration with Oracle EBS

Flow	Description
Create AP invoice	Creates AP invoice in Oracle EBS.

Manually trigger flows or subflows in Oracle EBS (Inbound)

You can manually trigger flows or subflows in Oracle EBS on demand. Follow these steps to manually trigger a flow or subflow.

Before you begin

Role required: sn_fcms_intg.integration_user

About this task

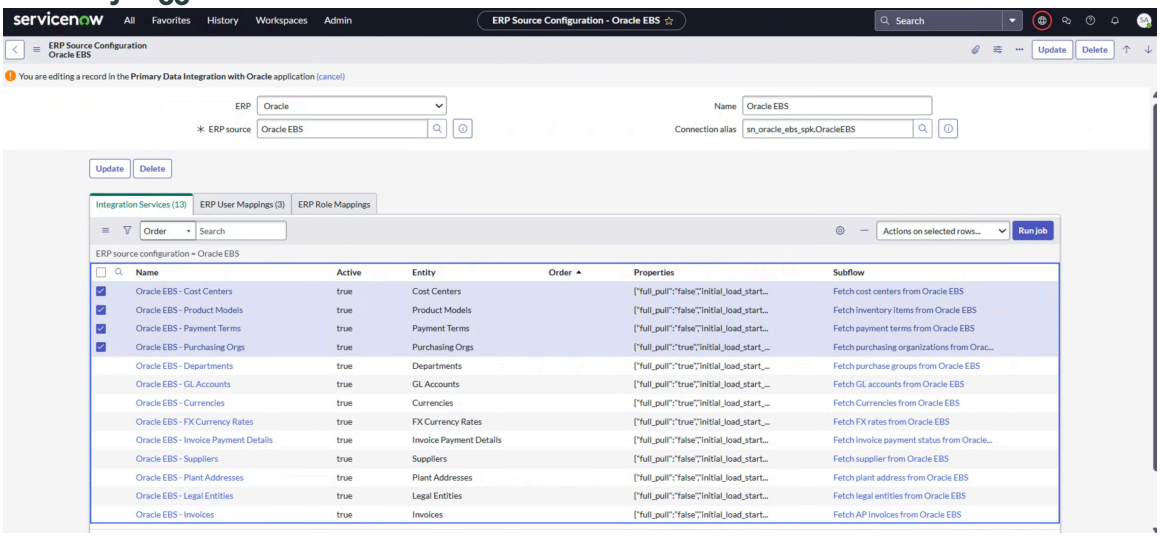
https://player.vimeo.com/video/1104414703?h=6b62c2639f&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. In the ERP Configurations view, select the **Oracle EBS** ERP source to manually trigger the flows or subflows.
3. In the Integration Services list, select the subflows that you want to manually trigger.

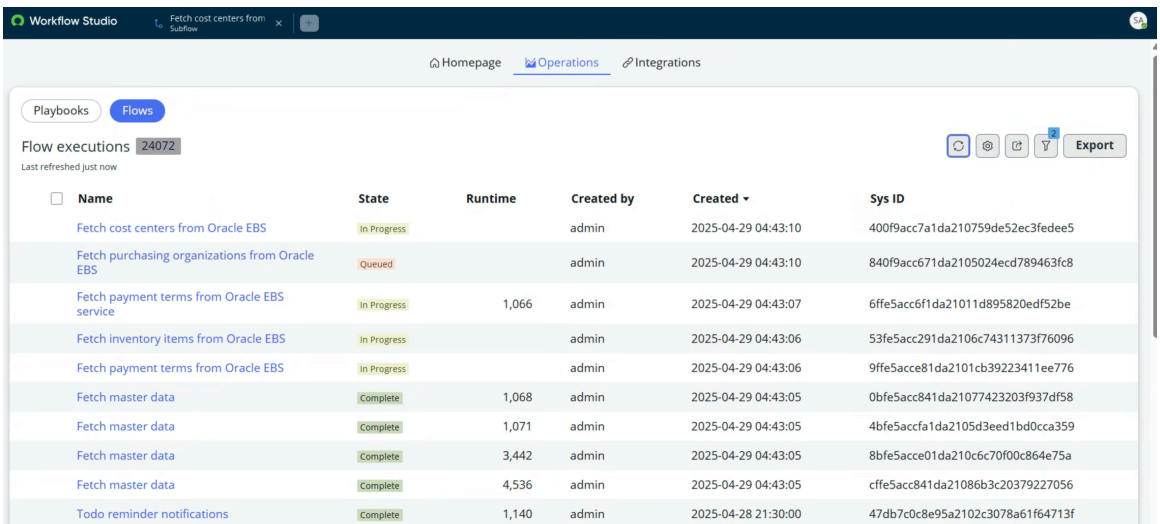
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Manually trigger flows or subflows in Oracle EBS



4. Select **Run job** to trigger the flow or subflow.
5. Navigate to **All** > **Process Automation** > **Workflow Studio**.
6. From the Workflow Studio home page, select the **Operations** tab and then select **Flows** tab.
   The list of flow executions appear. You can look up the status of the flows or subflows that you triggered. If there were any errors during execution, you can view them under the processing message column.
7. Navigate back to the **Homepage** tab, and select **Flows** or **Subflows**.
8. Look up the **Flow** or **Subflow** name or **Oracle EBS** application name using the filter icon, and select **Apply**.
   You can view the flows or subflows that you triggered.

Flows or subflows in Workflow Studio



9. You can use the trigger condition as a part of the base system to execute the flow or subflow.

> **Note:**
> Don't modify the trigger condition.

The flow or subflow gets executed.

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Use a flow or subflow in Oracle EBS (Outbound)

A flow or subflow can be executed in Oracle EBS using the Workflow Studio. Follow these steps to run a flow or subflow.

Before you begin

Role required: sn_fcms_intg.integration_user

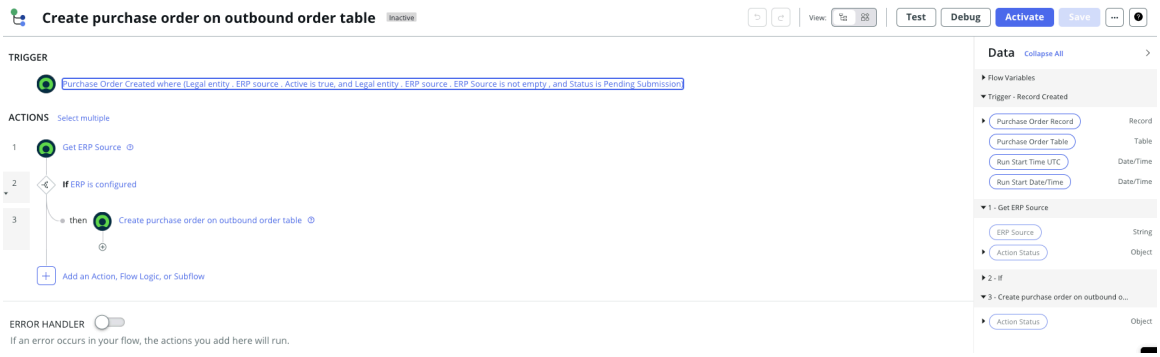
About this task

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the Workflow Studio home page, select **Flows**.
3. Look up the **Flow** name or **Oracle EBS** application name using the filter icon, and select **Apply**.
4. Select the required flow from the list.

   For example, select **Create or update or cancel purchase order** flow.

Create or update or cancel purchase order flow



5. In the Trigger field, specify the time and interval at which you want to run the scheduled flow automatically.

   This flow subsequently triggers subflows to automate tasks. To customize the sample flow, copy it to the desired application scope.

   Note:
   Don't modify the trigger condition.

   The flow or subflow gets executed.

Copy a flow or subflow in Oracle EBs

You can create a copy of the a flow or subflow and make the necessary modifications. Use the following steps to activate a flow or subflow.

Before you begin

Role required: sn_fcms_intg.integration_user

About this task

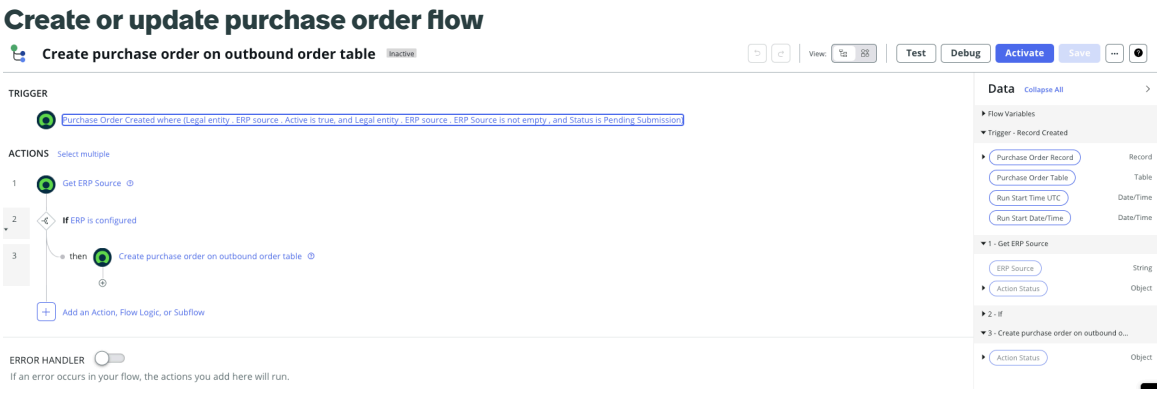
Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the Workflow Studio homepage, select **Flows**.

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3. Open the flow that you want to copy.
4. Click the ... more actions icon, and select **Copy flow**.

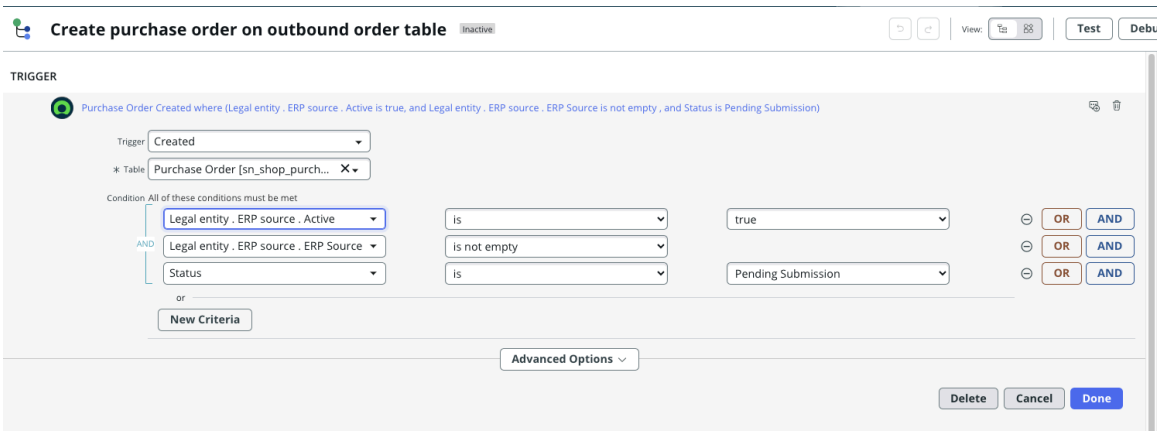
> **Important:**
> Perform this step only if you plan to customize or make specific changes to the flow.



5. Activate the flow or subflow.
   - Make sure that the flow or subflow is available and activated on the base system.
   - Activate the copied flow after making the required changes.
6. Use the **Trigger Condition** for the flow or subflow.

   This flow or subflow is triggered and associated with the purchase order when the following conditions are met:
   - **Legal entity . ERP source . Active** is **true**.
   - **Legal entity . ERP source . ERP Source** is **not empty**.
   - **Status** is **Pending Submission**

> **Note:**
> Do not modify the trigger condition.



> **Note:**
> Once data is pulled into staging tables, transform maps move data into target tables. For more details, refer to Source-to-Pay integration framework transform maps and subflows

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Source-to-Pay integration with SAP Ariba

The Source-to-Pay integration with SAP Ariba enables you to handle sales orders, procurement, finance, and so on, in SAP Ariba from your ServiceNow instance.

Key features

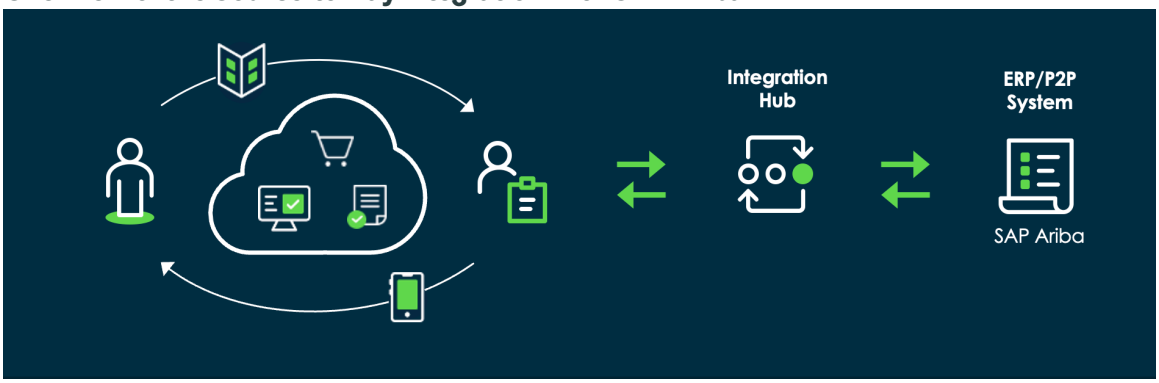
With this application, you can perform the following:

- Integration hub actions for invoices, cost centers, payment terms, purchasing organizations, departments, GL accounts, currencies, FX rates, invoice payment details, suppliers, and legal entities.
- Create goods receipts in SAP Ariba.

Prerequisites

- Activate the Source-to-Pay integration with the SAP Ariba application from the ServiceNow Store. This automatically activates the SAP Ariba Spoke.
- Set up SAP Ariba Spoke.

Overview of the Source-to-Pay integration with SAP Ariba



ServiceNow Store app plugins: sn_sap_ariba_spoke.

Note:
The Source-to-Pay integration with SAP Ariba depends on the SAP Ariba Spoke.

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.

How it works

The subflows enable a plug-and-play experience for the integration scenarios. Integration Hub Actions provide the building blocks for Source-to-Pay subflows and connects to the SAP Ariba system through REST APIs.

Configuring the Source-to-Pay integration with SAP Ariba

Integrate the ServiceNow instance and SAP Ariba using the SSH, Basic Auth, OAuth 2.0, and API Key credentials SAP Ariba to authenticate ServiceNow requests.

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Application set up

- Activate the Source-to-Pay integration with the SAP Ariba application from the ServiceNow Store. This automatically activates the SAP Ariba Spoke.
- Set up SAP Ariba Spoke.
- Activate the Source-to-Pay integration framework from the ServiceNow Store. Source-to-Pay integration with SAP Ariba uses the Source-to-Pay integration framework to pull tasks from SAP Ariba into ServiceNow. For more information on the Source-to-Pay integration framework, see Source-to-Pay integration framework.

Primary Data Integration with SAP Ariba Dependencies

Install the following dependencies of Primary Data integration with SAP Ariba. When you install the plugin (sn_ariba_data_int), the dependencies are installed automatically.

Primary Data Integration with SAP Ariba

App name	Plugin ID
ERP Integration Framework	sn_fcms_intg
Source-to-pay Common Architecture	sn_shop
Supplier Common Architecture	sn_slm
SAP Ariba Spoke	sn_sap_ariba_spoke

Sourcing and Procurement Operations Integration Dependencies with SAP Ariba

Install the following dependencies of Sourcing and Procurement Operations integration with SAP Ariba. When you install the plugin, all the dependencies get installed automatically.

Sourcing and Procurement Operations Integration with SAP Ariba

App name	Plugin ID
Primary Data Integration with SAP Ariba	sn_ariba_data_int
Sourcing and Purchasing Automation	sn_pr
Source-to-Pay Integration Framework	sn_spend_intg

Accounts Payable Operations Integration Dependencies with SAP Ariba

Install the following dependencies of Accounts Payable Operations integration with SAP Ariba. When you install the plugin, all the dependencies get installed automatically.

Accounts Payable Operations Integration with SAP Ariba

App name	Plugin ID
Primary Data Integration with SAP Ariba	sn_ariba_data_int
Accounts Payable Invoice Processing	sn_ap_apm
Source-to-Pay Integration Framework	sn_spend_intg

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ERP source configuration for SAP Ariba

Configure your Source-to-Pay (S2P) instance to support inbound and outbound integration with your ERP system. This integration configuration enables you to post purchase order, receipt, invoice, and download primary data automatically from the ERP system.

ERP source configuration enables the implementation of specific logic to populate values pertinent to third-party ERP systems. It includes all service mappings defined between Source-to-Pay (S2P) and the third-party ERP system. If multiple ERP sources exist, they're stored as distinct ERP source entries with their corresponding service mappings.

To meet specific requirements, you can customize the service-mapping logic by modifying the relevant service element map entry within the service map record. For organizations using multiple ERP systems, an ERP Source field has been incorporated into the tables to accurately identify the respective integrated ERP system.

The ERP source configuration for SAP Ariba enables customers to establish multiple SAP Ariba instances. Each instance is identified by a distinct source, and the connection alias for each instance must be unique.

Prerequisites

Before you start the integration configuration, complete the following tasks.

- Add the following roles to the Integration user:
  - sn_fcms_intg.admin
  - sn_spend_intg.admin
- Get the following details from the ERP team:
  - ERP integration user credentials.
  - REST API details based on your ERP system you're using for the integration.

Note:
If the application must support multiple ERP instances, configure Source-to-Pay to integrate with each ERP instance separately.

ERP Source Configuration

To configure the ERP Source for SAP Ariba, perform the following steps:

1. Define the ERP source that you want to integrate with the SAP Ariba integration.
2. Create a basic authentication profile that can be used for the web service integration with SAP Ariba
3. Register the SAP Ariba integration username and password to create the authentication profile and associate it to service maps.
4. Define the source configuration for ERP source. The ERP source configuration determines the ERP source to which your ERP system connects. For more information, see Define ERP source configuration for SAP Ariba.
5. Configure service maps for the following entities:
   - **Legal Entities**

     Set up subflows for the source configuration to lookup legal entities or company code details from SAP Ariba.

   - **FX Currency Rates**

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Set up subflows for the source configuration to lookup FX rates from SAP Ariba.

- **Purchasing Orgs**

  Set up subflows for the source configuration to lookup purchasing organizations from SAP Ariba.

- **Currencies**

  Set up subflows for the source configuration to lookup currencies from SAP Ariba.

- **Payment Terms**

  Set up subflows for the source configuration to lookup payment terms from SAP Ariba.

- **GL Accounts**

  Set up subflows for the source configuration to lookup GL accounts from SAP Ariba.

- **Cost Centers**

  Set up subflows for the source configuration to lookup cost centers from SAP Ariba.

- **Departments**

  Set up subflows for the source configuration to lookup departments from SAP Ariba.

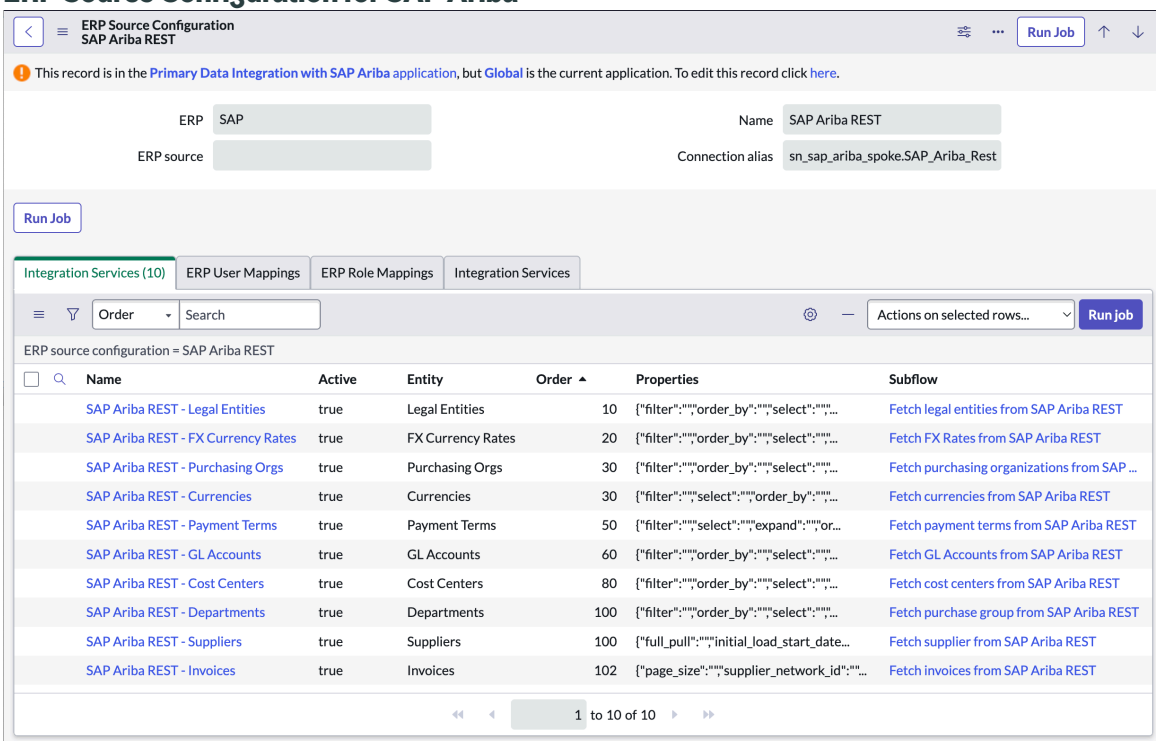
- **Suppliers**

  Set up subflows for the source configuration to lookup suppliers from SAP Ariba

- **Invoices**

  Set up subflows for the source configuration to lookup invoices from SAP Ariba.

ERP Source Configuration for SAP Ariba



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Define ERP source configuration for SAP Ariba

ERP source configuration determines the ERP source to which your ERP system connects. Map the integration payload with the SAP Ariba tables.

Before you begin

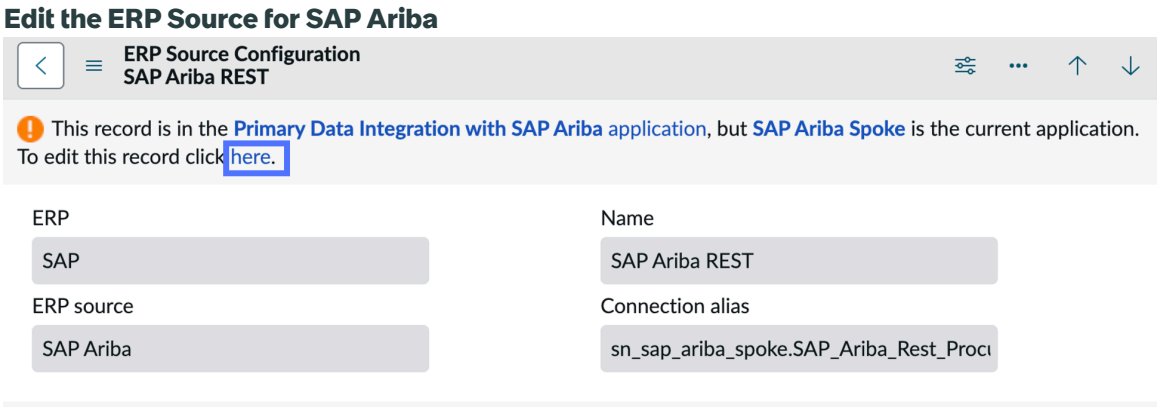
Role required: sn_fcms_intg.admin

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. In the ERP Configurations view, select **SAP Ariba REST**.

   This configuration is available as a part of the base system.

3. To edit the ERP source, select **here** from the label **To edit this record click here**.



   a. Select the list search icon ( ) to look up the required ERP source for SAP Ariba.

   b. In the ERP Sources dialog, use the search option to select the ERP Source for SAP Ariba.

   c. Select **Update**.

4. To create an ERP source, do the following:

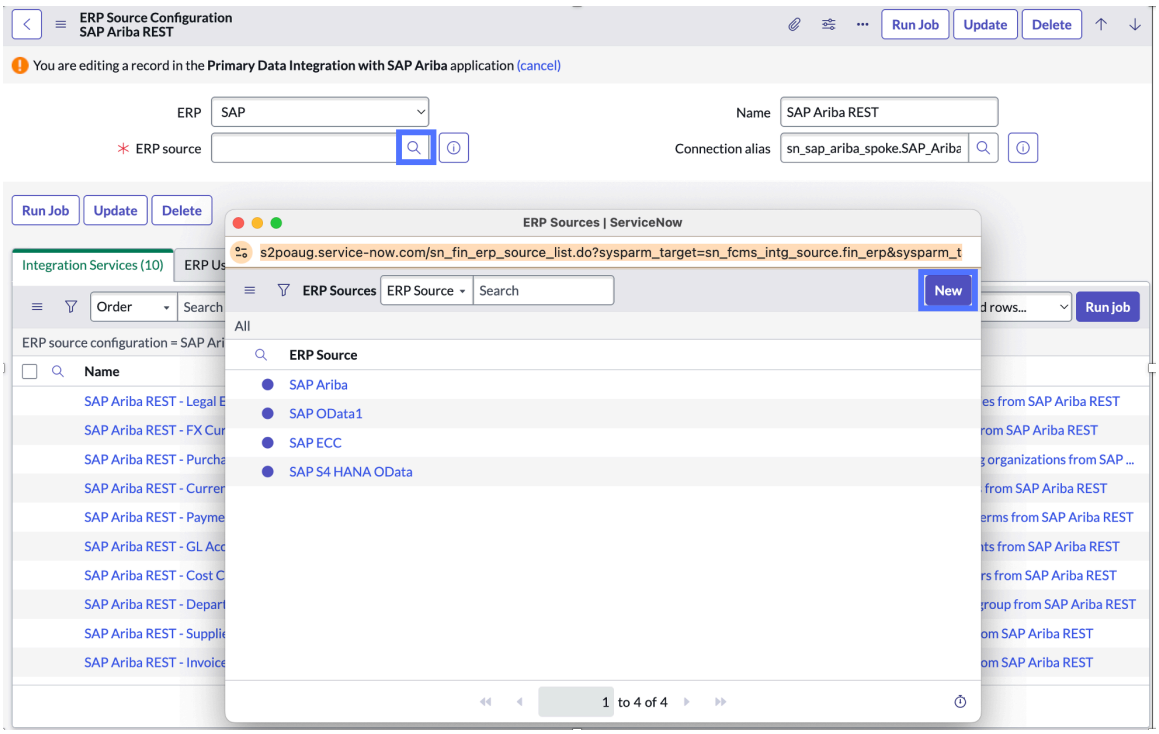
   a. Select **here**.

   b. Select the list search icon ( ) to look up the required ERP source for SAP Ariba.

   c. In the ERP Source dialog, select **New**.

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Create an ERP Source for SAP Ariba



d. On the form, fill the fields.

Define a new ERP source configuration

Field	Description
ERP Source	ERP source for which the integration is required. For example, SAP Ariba.
Short Description	Summary of the ERP source.
Active	Option to activate the ERP source.
Amount Precisions	Amount precision of the ERP source. For example, 2.

e. Select **Submit**.
A new ERP source is created. Verify whether the connection alias is unique for each ERP source.

> **Note:**
> SAP Ariba integration can have multiple ERP sources. The Staging table displays the ERP source column, which helps identify the ERP system associated with the data.

Configure service maps for SAP Ariba

For configuring service maps, provide the connection end point and the SAP Ariba credentials that you set up for your authentication profile. Also, create a integration service record for each entity you want to customize.

Before you begin
Role required: sn_fcms_intg.admin

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About this task

If the application requires multiple SAP Ariba instances, create separate entities for each ERP instance. You can create integration service records for entities using the `sn_fcms_intg_service` table.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Open the ERP source for which you must configure service maps.
   For example, select SAP Ariba REST.
3. In the Integration Services list, select the service that you want to configure.
   For example, select **Invoices**.
4. To edit the ERP source, select **here** from the label **To edit this record click here**.
5. On the integration service record, update the fields to modify the configurations.

Integration service record fields

Field	Description
Entity	The type of entity for which you want to configure the service mapping.
Application	Name of the application. For example, Primary Data Integration with SAP Ariba.
ERP Source configuration	The ERP source mapped to the entity. For example, SAP Ariba.
Active	The status of the interaction service. By default, the check box is inactive.
Subflow	The subflow used to fetch primary data.
Properties	Creates a JSON record in the integration service, which is then passed to the ERP subflows to retrieve complete data. To pass JSON into the subflow, create a property named "query" and assign it a JSON query as its value, like this: `[ { "page_size”: “5”, "supplier_network_id": "AN01000000001", "system_Id": "ServiceNow3", "source_system": "SAP Ariba Network" } ]`
Order	The order in which the entity should be displayed.

6. Select **Submit**.
   The service mapping is configured for the selected entity.

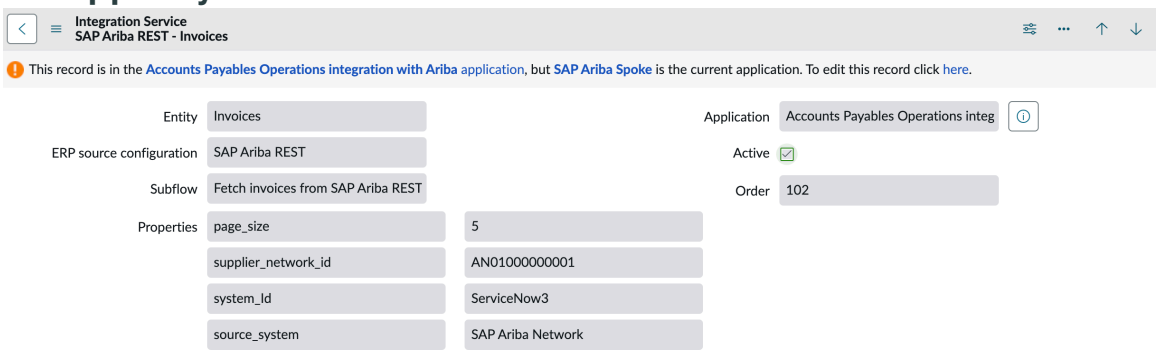
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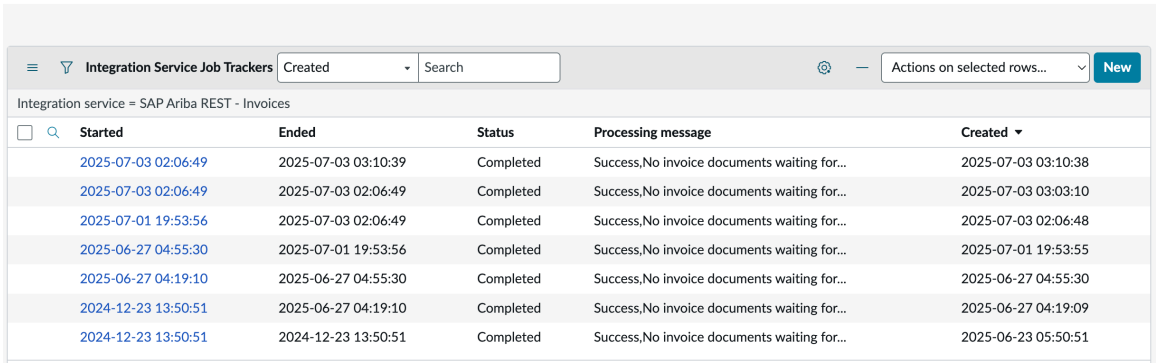
Look up primary data in SAP Ariba

You can run a job to look up primary data from different ERP sources into ServiceNow.

Before the ERP integration, configure the integration services record for the target ERP source using the `sn_fcms_intg_service` table. The `sn_fcms_intg_service` table is a mapping table between the subflows and targets the ERP source. For more information on creating an integration service record, see Create Integration Service record.

Look up primary data in SAP Ariba





You can manually run jobs for the following entities:

Look up primary data in SAP Ariba

Entity	Description	Table name
Legal entities	Lookup legal entities from SAP Ariba.	Legal Entity Stage inbound staging table
FX Currency rates	Lookup FX rates from SAP Ariba.	FX Rate Stage inbound staging table
Purchasing Orgs	Lookup purchasing orgs from SAP Ariba.	Purchase Entity Stage inbound staging table
Currencies	Lookup currencies from SAP Ariba.	FX Currency Stage inbound staging table
Payment Terms	Lookup payment terms from SAP Ariba.	Payment Terms Stage inbound staging table
GL Accounts	Lookup GL accounts from SAP Ariba.	GL Account Stage inbound staging table
Cost Centers	Lookup cost centers from SAP Ariba.	Cost Center Stage inbound staging table

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Look up primary data in SAP Ariba (continued)

Entity	Description	Table name
Departments	Lookup departments from SAP Ariba.	Department Stage inbound staging table
Suppliers	Lookup suppliers from SAP Ariba.	Supplier location inbound staging table
Invoices	Lookup invoices from SAP Ariba.	Invoice import inbound staging table

Using Source-to-Pay integration with SAP Ariba

Use Source-to-Pay integration with SAP Ariba to handle sales orders, procurement, finance, and so on in SAP Ariba from your ServiceNow instance.

Use flows in SAP Ariba

Use flows to retrieve information from SAP Ariba, including invoices, cost centers, product models, payment terms, purchasing organizations, departments, GL accounts, currencies, FX rates, invoice payment details, suppliers, supplier bids, and legal entities.

You can either use the subflows to perform the required tasks or you can create a copy of the subflows and then customize it according to your requirements. The Source-to-Pay with SAP Ariba integration supports the following subflows.

Sourcing and Procurement Operations Integration with SAP Ariba

The Sourcing and Procurement Operations Integration with SAP Ariba supports the following subflows:

Flow and subflow details for Sourcing and Procurement Operations integration with SAP Ariba

Flow/Subflow	Description
Flow	
Create or Update Sourcing Event in SAP Ariba	Creates or updates sourcing event in SAP Ariba
Create Receipt in ERP	Creates receipts in ERP
Fetch Supplier Bids for Sourcing Event from SAP Ariba REST	Fetches supplier bids for sourcing event from SAP Ariba REST
Subflow	
Create Receipt in SAP Ariba	Creates receipts in SAP Ariba
Creating or Updating of Sourcing Event in SAP Ariba	Creates or updates sourcing event in SAP Ariba
Fetch Supplier Bids for Sourcing Event for SAP Ariba	Fetches supplier bids for sourcing event from SAP Ariba
Fetch Supplier Bids for Sourcing Event Service Ariba	Fetches supplier bids for sourcing event service

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Accounts Payable Operations Integration with SAP Ariba

The Accounts Payable Operations Integration with SAP Ariba supports the following subflows:

Subflow details for Accounts Payable Operations Integration with SAP Ariba

Flow	Description
Fetches invoices from SAP Ariba REST	Fetches accounts payable invoices inSAP Ariba.
Update invoice statuses as Rejected in SAP Ariba REST	Updates invoice statuses as rejected in SAP Ariba
Fetch invoices from SAP Ariba REST service	Fetches invoices from SAP Ariba REST service

Manually trigger flows or subflows in SAP Ariba (Inbound)

You can manually trigger flows or subflows in SAP Ariba on demand.

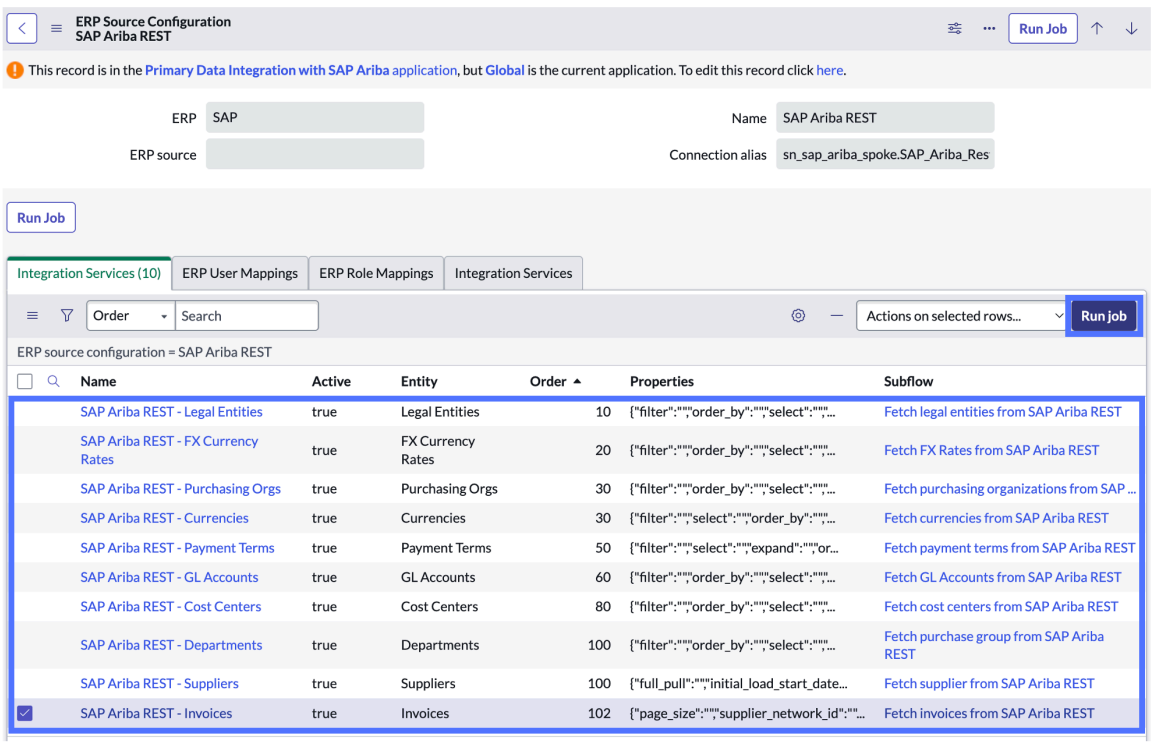
Before you begin

Role required: sn_fcms_intg.admin

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. In the ERP Configurations view, select the **SAP Ariba REST** ERP source to manually trigger the flows or subflows.
3. In the Integration Services list, select the subflows that you want to manually trigger.
4. Select **Run job** to trigger the flow or subflow.

Run subflows in SAP Ariba

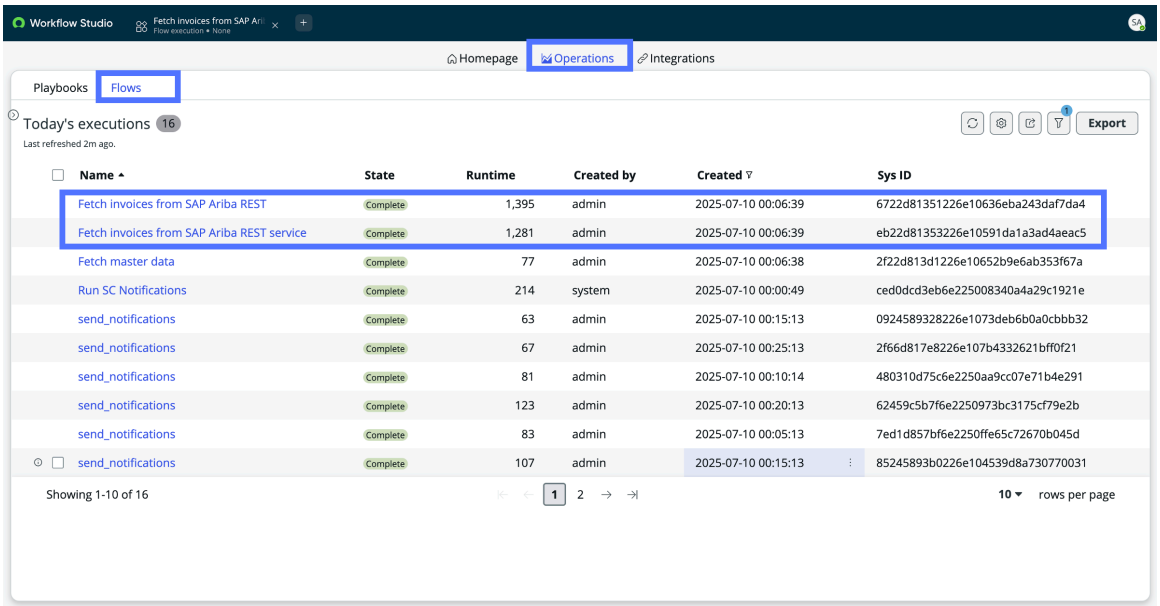


5. Navigate to **All** > **Process Automation** > **Workflow Studio**.

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6. From the Workflow Studio home page, select the **Operations** tab and then select **Flows** tab.

Flow execution in SAP Ariba

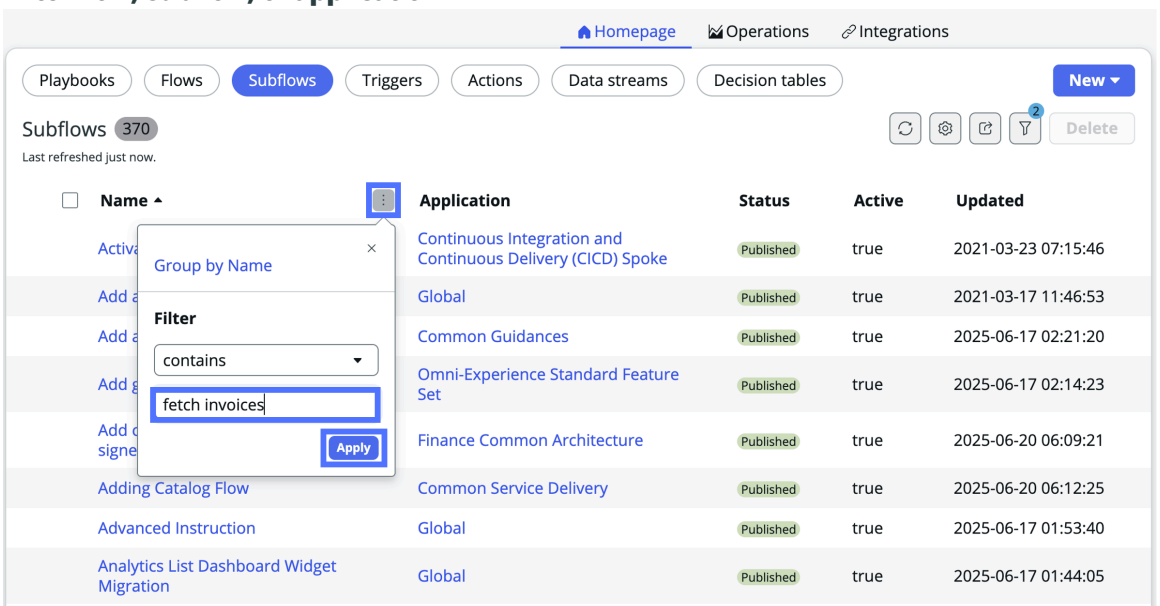


The list of flow executions appear. You can look up the status of the flows or subflows that you triggered. If there were any errors during execution, you can view them under the processing message column.

7. Navigate back to the **Homepage** tab, and select **Flows** or **Subflows**.

8. Select the More icon ⋮ corresponding to the flow, subflow, or application name, use the filter condition, and select **Apply**.

Filter flow, subflow, or application



You can view the flows or subflows that you triggered.

9. Use the trigger condition defined in the base system, to execute the flow or subflow.

Note:
Don't modify the trigger condition.

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Use a flow or subflow in SAP Ariba (Outbound)

Execute a flow or subflow in SAP Ariba using the Workflow Studio.

Before you begin

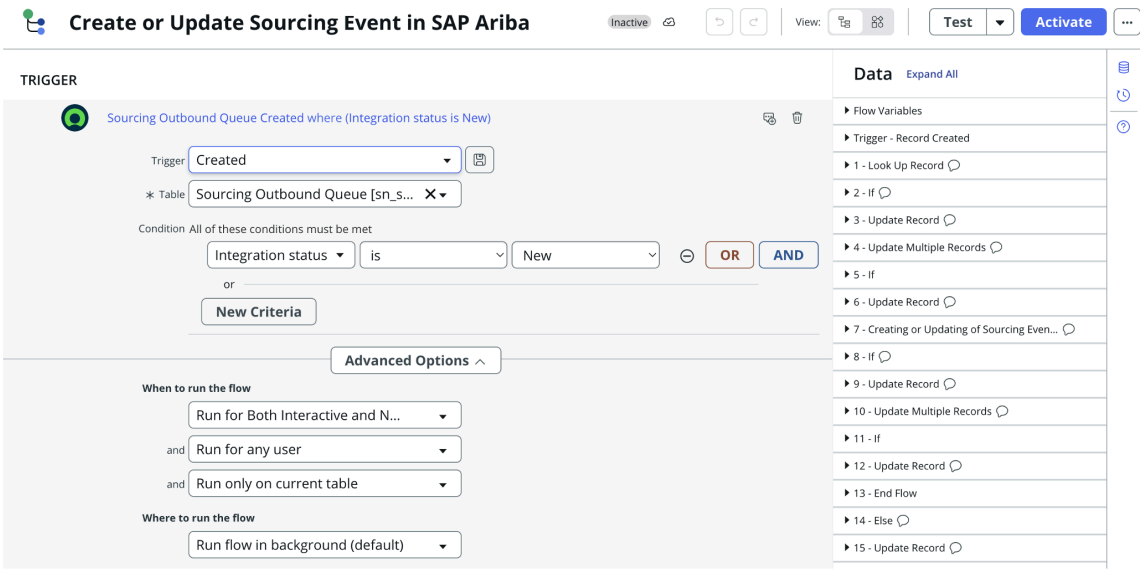
Role required: sn_fcms_intg.admin, sn_shop.procurement_specialist, connection_admin

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the Workflow Studio home page, select **Flows**.
3. Select the More icon ⋮ corresponding to the flow, subflow, or application name, use the filter condition, and select **Apply**.
4. Select the required flow from the list.

   For example, select the **Create or Update Sourcing Event in SAP Ariba** flow.

Create or Update Sourcing Event in SAP Ariba



5. In the Trigger field, specify the condition for the flow to run.

   This flow subsequently triggers subflows. To customize the sample flow, copy it to the desired application scope.

> **Note:**
> Don't modify the trigger condition.

Copy a flow or subflow in SAP Ariba

You can create a copy of the a flow or subflow, and modify based on your requirements.

Before you begin

Role required: sn_fcms_intg.admin, sn_shop.procurement_specialist, connection_admin

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the Workflow Studio homepage, select **Flows**.

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3. Open the flow that you want to copy.
   For example, Update or Create Sourcing Event in SAP Ariba.
4. Select the More actions icon ··· and select **Copy flow**.

> **Important:**
> Perform this step only if you plan to customize or make specific changes to the flow.

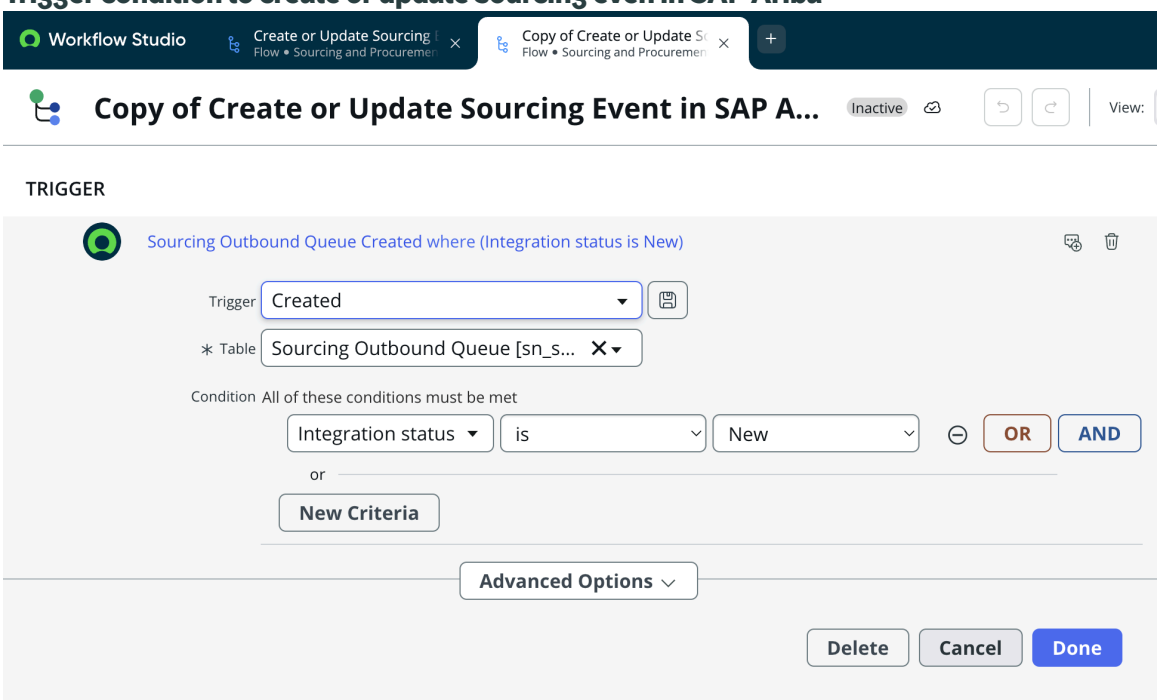
   a. In the Create a copy of this flow dialog, provide a name for the new flow.
   The Application is SAP Ariba Spoke, by default.

5. Activate the flow or subflow.
   - Make sure that the flow or subflow is available and activated in the base system.
   - Activate the copied flow after making the required changes.
6. Use the **Trigger Condition** for the flow or subflow.

   This flow or subflow is triggered when the condition **Integration status** is **New** is met.

> **Note:**
> Do not modify the trigger condition.

Trigger condition to create or update sourcing even in SAP Ariba



> **Note:**
>
> Once data is pulled into staging tables, transform maps move data into target tables. For more details, refer to Source-to-Pay integration framework transform maps and subflows.

Source-to-Pay integration with Coupa

The Source-to-Pay integration with Coupa enables you to handle business spend and automate approvals, contracts, inventory, purchase orders, requisitions, suppliers, and user management in Coupa from your ServiceNow instance.

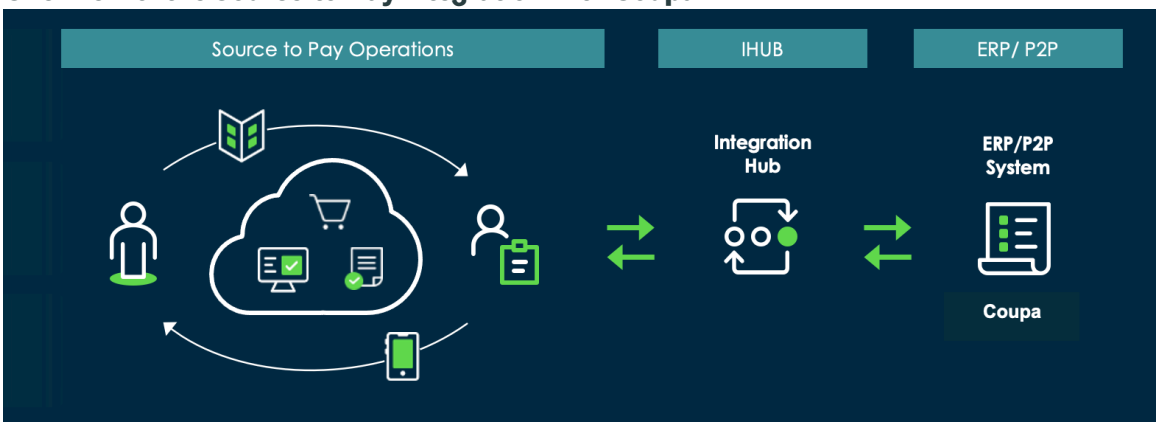
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Key Features

With this application, you can perform the following:

- Perform Integration hub actions for loading primary data, supplier management, PR, PO, receipt, invoice, and sourcing.
- Look up Legal Entity details from Coupa to Source-to-Pay integration framework
- Look up Currency details from Coupa to Source-to-Pay integration framework
- Look up Supplier details from Coupa to Source-to-Pay integration framework

Overview of the Source-to-Pay integration with Coupa



Prerequisites

Activate the Source-to-Pay integration with the Coupa application from the ServiceNow Store to activate the Coupa Spoke automatically. Next you must set up Coupa Spoke.

ServiceNow Store app plugins: sn_coupa_spoke.

Note:
The Source-to-Pay integration with Coupa depends on the Coupa Spoke.

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.

How it works

The subflows enable a plug-and-play experience for the integration scenarios. Integration Hub Actions provide the building blocks for Source-to-Pay subflows and connects to the Coupa system through REST APIs.

Configuring Source-to-Pay integration with Coupa

Integrate your ServiceNow instance and Coupa by creating a custom OAuth application in Coupa to authenticate ServiceNow requests.

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Application set up

- Activate the Source-to-Pay integration with Coupa application from the ServiceNow Store to activate the Coupa Spoke automatically.
- Set up Coupa Spoke.

- Activate the Source-to-Pay integration framework from ServiceNow Store. Source-to-Pay integration with Coupa uses the Source-to-Pay integration framework to pull tasks from Coupa into your ServiceNow instance.For more information on Source-to-Pay integration framework, see Source-to-Pay integration framework.

Primary Data Integration Dependencies with Coupa

Install the following dependencies of Primary Data integration with Coupa. When you install the plugin, all the dependencies get installed automatically. All primary data are synchronized based on the configurable scheduled job Fetch Spend Primary Data.

Run the Trigger Coupa Integration that pulls tasks into your ServiceNow instance. For more information, see Use schedule flows in Oracle EBS.

Primary Data Integration with Coupa

App name	Plugin ID
ERP Integration Framework	sn_fcms_intg
Coupa Spoke	sn_coupa_spoke

Supplier lifecycle Operations Integration Dependencies with Coupa

Install the following dependencies of Supplier Lifecycle Operations integration with Coupa. When you install the plugin, all the dependencies get installed automatically.

Supplier Lifecycle Operations Integration with Coupa

App name	Plugin ID
ERP Integration Framework	sn_fcms_intg
Source-to-Pay Integration Framework	sn_spend_intg
Source-to-pay Common Architecture	sn_shop
Supplier Common Architecture	sn_slm
Coupa Spoke	sn_coupa_spoke

Sourcing and Procurement Operations Integration Dependencies with Coupa

Install the following dependencies of Sourcing and Procurement Operations integration with Coupa. When you install the plugin, all the dependencies get installed automatically.

Sourcing and Procurement Operations Integration with Coupa

App name	Plugin ID
ERP Integration Framework	sn_fcms_intg

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Sourcing and Procurement Operations Integration with Coupa (continued)

App name	Plugin ID
Source-to-pay Common Architecture	sn_shop
Sourcing and Purchasing Automation	sn_pr
Source-to-Pay Integration Framework	sn_spend_intg
Coupa Spoke	sn_coupa_spoke

Accounts Payable Operations Integration Dependencies with Coupa

Install the following dependencies of Accounts Payable Operations integration with Coupa. When you install the plugin, all the dependencies get installed automatically.

Accounts Payable Operations Integration with Coupa

App name	Plugin ID
ERP Integration Framework	sn_fcms_intg
Coupa Spoke	sn_coupa_spoke
Accounts Payable Invoice Processing	sn_ap_apm
Source-to-Pay Integration Framework	sn_spend_intg

Schedule flow activation

Activate and run the Trigger Coupa Integration that pulls tasks into your ServiceNow instance. For more information, see Activate the schedule flows.

ERP Source Configuration for Coupa

Configure your Source-to-Pay (S2P) instance to support inbound and outbound integration with your ERP system. This integration configuration enables you to post purchase order, receipt, invoice, and download primary data from the ERP automatically.

ERP source configuration enables the implementation of a specific logic to populate values relevant to third-party ERP systems. The configuration includes all service mappings defined between Source-to-Pay (S2P) and the third-party ERP system. In cases where multiple ERP sources exist, they're stored as distinct ERP source entries with their corresponding service mappings.

To meet specific requirements, you can modify the service-mapping logic by updating the relevant service element map entry within the service map record. For organizations using multiple ERP systems, an ERP Source field has been incorporated into the tables to ensure accurate identification of the respective integrated ERP system.

The ERP source configuration for Coupa enables customers to establish multiple Coupa instances. Each instance is identified by a distinct source, and the connection alias for each instance must be unique.

Prerequisites

Before you start the integration configuration, you must get the following details from the ERP team:

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- ERP integration user credentials.
- SOAP or REST API details based on your ERP system and the type of web services you're using for the integration.
- Roles to be added for the Integration users.

ERP Source Configuration

To perform the ERP Source configuration for Coupa, perform the following steps:

1. Define the ERP source that you want to integrate with Coupa integration.
2. Create a basic authentication profile that can be used for web service integration with Coupa.
3. Register the Coupa integration username and password to create the authentication profile and associate it to service maps.
4. Define source configuration for ERP source.

   The ERP source configuration determines the ERP source to which your ERP system connects. For more information, see Define an ERP source configuration for Coupa.

5. Configure service maps for the following entities:
   - Currencies: Set up subflows for the source configuration to lookup currencies from Coupa.
   - **FX Currency Rates**

     Set up subflows for the source configuration to lookup FX rates from Coupa.
   - **Legal Entities**

     Set up subflows for the source configuration to lookup legal entities or company code details from Coupa.
   - **Purchase Line Shipment Details**

     Set up subflows for the source configuration to lookup purchase line shipments from Coupa.
   - **Shipment Notices**

     Set up subflows for the source configuration to lookup shipment notices from Coupa.
   - **Suppliers**

     Set up subflows for the source configuration to lookup suppliers from Coupa.
   - **Cost Centers**

     Set up subflows for the source configuration to lookup cost centers from Coupa.
   - **Supplier Payment Informations**

     Set up subflows for the source configuration to lookup supplier payment information from Coupa.
   - **Product Models**

     Set up subflows for the source configuration to lookup product models from Coupa.
   - **Receipts**

     Set up subflows for the source configuration to lookup product models from Coupa.

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- **Purchase Orders**

  Set up subflows for the source configuration to lookup product models from Coupa.

Define an ERP source configuration for Coupa

Define an ERP source configuration that specifies the Coupa ERP source to which the ERP system connects. Map the integration payload with the Coupa tables.

Before you begin

Role required: admin

About this task

By default, the base system includes one ERP source named Coupa, which refers to the parent connection for Coupa. If there are multiple Coupa instances, multiple ERP sources must be configured, and the child connections for these Coupa instances should be referenced.

Each ERP instance requires a unique ERP source configuration. For example, 10 ERP instances need 10 configurations.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. In the ERP Configurations view, select **Coupa**.

   This configuration is available as a part of the base system.
3. To edit the ERP source, select **here**.
4. Select the required ERP source for Coupa using the search option.
5. To create a new ERP source, perform the following steps:

   a. Select **here**.

   b. Select the list search icon ().

   c. Look up the required ERP source for Coupa.

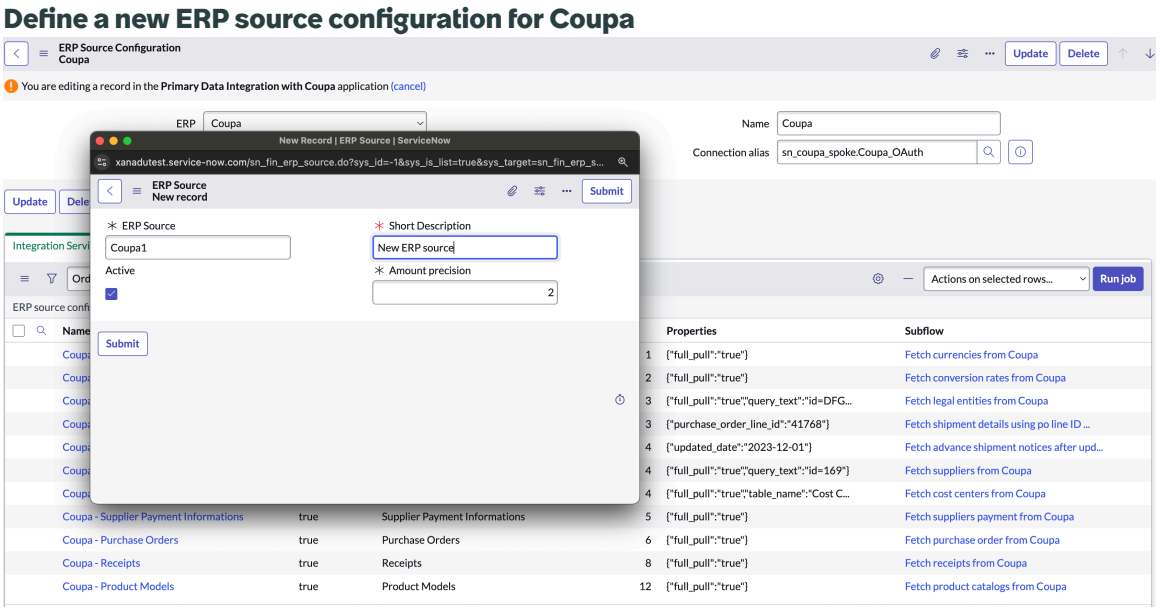
   d. In the ERP Source dialog, select **New**.

   e. On the form, fill the fields.

Define a new ERP source configuration form

Field	Description
ERP Source	ERP source for which the integration is required. For example, Coupa.
Short Description	Summary of the ERP source.
Active	Option to activate the ERP source.
Amount Precisions	Amount precision of the ERP source. For example, 2.

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f. Select **Submit**.

A new ERP source is created. Verify that the connection alias is also unique for each ERP source.

> **Note:**
> Coupa integration can have multiple ERP sources. The Staging table displays the ERP source column, which you can use to distinguish which ERP the data belongs to.

What to do next

By default, services mapping are provided for the Coupa base system. For other Coupa instances, you must perform the following steps:

- Define service mappings manually for each integration service by accessing the Service Mappings related list. You can define element level mapping between Coupa table fields and payload elements.
- Map the users and corresponding ERP User IDs by accessing the ERP User Mappings related list.

Configure service maps for Coupa

Configure service maps for Coupa. Provide the connection end point and the Coupa ERP credentials that you set up for your authentication profile. Also, create a separate web service record for each service request that you want to customize.

Before you begin

- Verify that the application scope is set to Coupa spoke.
- Verify that the MID Server is installed and configured in your ServiceNow instance to connect to the ERP server. For more details, see Installing the MID Server.

> **Note:**
> The MID Server integration is required only for a Coupa integration using SOAP services.

- For REST type service, REST API details, as provided by ERP.

Role required: admin

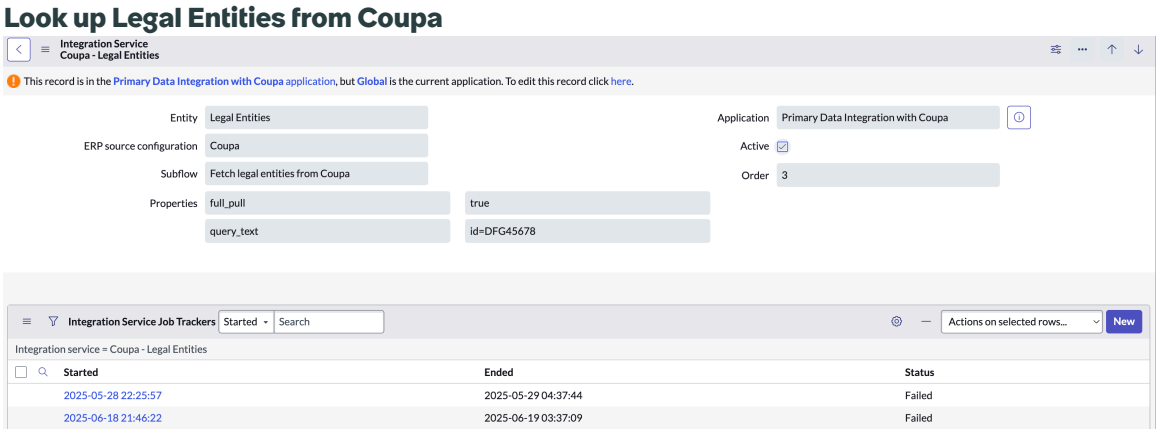
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About this task

If the application requires multiple Coupa ERP instances, create separate web services for each ERP instance. You can create Integration Service records for entities using the `sn_fcms_intg_service` table.

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. Open the ERP source for which you need to configure service maps.
   For example, Coupa.
3. In the Integration Services list, select the service that you want to configure.



4. On the integration service record, fill in the fields.

Integration service record

Field	Description
Entity	Type of entity for which you want to configure the service mapping.
Application	Name of the application. For example, Coupa.
ERP Source configuration	The ERP source mapped to the entity. For example, Coupa.
Active	Option to activate the interaction service. By default, the service is inactive.
Subflow	Subflow used to fetch primary data.

Properties	Properties of the service.
	
	The property creates a JSON record in the integration service, which is then passed to the ERP subflows to retrieve complete data.
	
	To pass JSON into the subflow, create a property named "query" and assign it a JSON query as its value, like this:
	
	`[`
	`  {`

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Field	Description
	<pre>"parameter": "LEGAL_ENTITY_NAME", "operator": "=", "value": "Vision ADB", "operand": "NONE" }]</pre> ○ **Enabling Full Pull**: Create a property named "`full_pull`" and set its value to `true` ○ **Enabling Delta Pull**: Use this property to fetch the incremental data. Set the value of the "`full_pull`" property to `false`.
Order	Order in which the entity should be displayed.

5. Select **Update**.

Activate the schedule flows

Activate the schedule flow that interacts with Coupa to pull information into your ServiceNow instance. You can pull information on primary data, supplier management, sourcing, invoice, and so on.

Before you begin

Role required: sn_coupa_spoke.Coupa Admin

Procedure

1. Open **Run Trigger Coupa Integration**.
2. Navigate to **Flow Designer** > **Flow**.
3. Select **Activate**.
4. In the **Trigger** field, specify the time and interval at which you want to automatically run the scheduled flow.

   This flow in turn triggers the subflows to automate tasks. To customize the sample flow, copy it to the required application scope.

   The available subflows include:

Activate scheduled flow details

Subflow	Description
Look up legal entities from Coupa	Retrieves details of the legal entities in Coupa.
Look up currencies from Coupa	Retrieves details of the currencies in Coupa.

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Subflow	Description
Look up conversion rates from Coupa	Retrieves details of the conversion rates in Coupa.
Look up shipment notice using PO line id in Coupa	Retrieves details of the shipment notice using PO line ID in Coupa.
Look up advance shipment notice after updated date in Coupa	Retrieves details of the advance shipment notice after updated date in Coupa.
Create, update, and deactivate supplier in Coupa	Manage suppliers by creating, updating, and deactivating supplier in Coupa.
Look up suppliers from Coupa	Retrieves details of the suppliers in Coupa.
Create, update, and cancel purchase order in Coupa	Manage purchase orders by creating, updating, and canceling purchase order in Coupa.
Look up purchase orders from Coupa	Retrieves details of the purchase orders in Coupa.
Create and void goods receipt in Coupa	Manage goods receipt by creating and voiding goods receipt in Coupa.
Look up receipts from Coupa	Retrieves details of the receipts in Coupa.
Look up product catalogs from Coupa	Retrieves details of the product catalogs in Coupa.
Create, update, and cancel invoice in Coupa	Manage invoices by creating, updating, and canceling invoice in Coupa.
Look up invoices details from Coupa	Retrieves details of the invoices in Coupa.
Look up Invoice payment details	Retrieves details of the Invoice payment in Coupa.
Create sourcing event	Manage sourcing event by creating sourcing events in Coupa.
Look up sourcing events from Coupa	Retrieves details of the sourcing events in Coupa.
Award purchase	Retrieves details of the Award purchase in Coupa.

Note:

If you want to change the configurations that are shipped along with Source-to-Pay Integration with Coupa, you can edit the subflows.

Once data is pulled into staging tables, the transform maps move data into target tables. For more details, refer to Source-to-Pay integration framework transform maps and subflows.

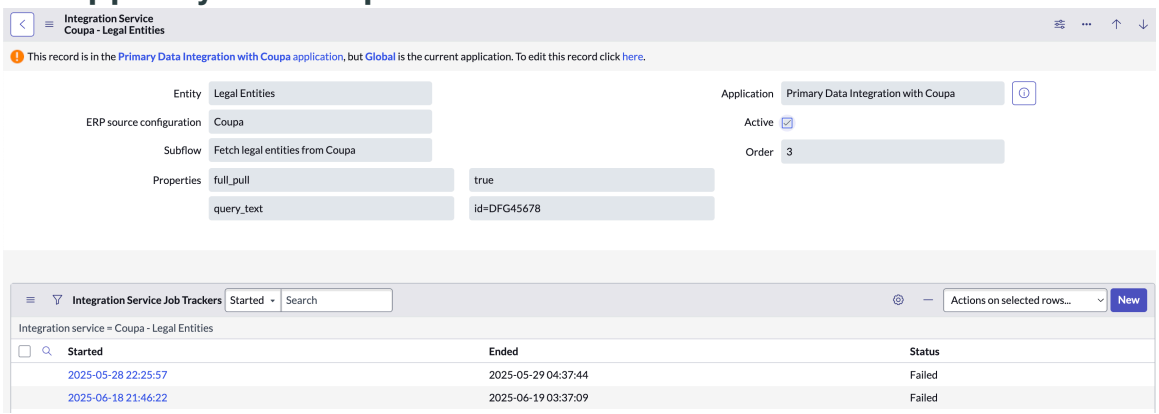
Looking up primary data in Coupa

You can run a job to look up primary data from different ERP sources into ServiceNow

Before you start the ERP integration, you must configure the integration services record for the target ERP source using the [sn_fcms_intg_service] table. The [sn_fcms_intg_service] table is a mapping table between sub flows and target ERP source. For more information on creating an integration service record, see Create Integration Service record.

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Look up primary data in Coupa



You can manually run jobs for the following entities:

Look up primary data in Coupa

Entity	Description	Table name
Currencies	Look up currencies from Coupa.	FX Currency Stage inbound staging table
FX Currency rates	Look up FX rates from Coupa.	FX Rate Stage inbound staging table
Legal entities	Look up legal entities from Coupa.	Legal Entity Stage inbound staging table
Purchase Line Shipment Details	Look up purchase line shipment details from Coupa.	Purchase Requisition staging table
Shipment Notices	Look up shipment notices from Coupa	-
Suppliers	Look up suppliers from Coupa.	Supplier location inbound staging table
Cost Centers	Look up cost centers from Coupa.	Cost Center Stage inbound staging table
Supplier Payment Information	Look up supplier payment information from Coupa.	Supplier payment inbound staging table
Invoices	Look up invoices from Coupa.	Invoice import inbound staging table
Purchase Orders	Look up purchase orders from Coupa	Inbound Purchase Order staging table
Invoice Payment Details	Look up invoice payment details from Coupa.	Invoice payment detail import inbound table
Receipts	Look up receipts from Coupa.	Inbound Receipt staging table
Product Models	Look up product models from Coupa.	Product Model Stage inbound staging table

Using Source-to-Pay integration with Coupa

Use the Source-to-Pay integration with Coupa to process employee information at ServiceNow.

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Trigger a flow or subflow in Coupa

Manually trigger a flow or subflow in Coupa.

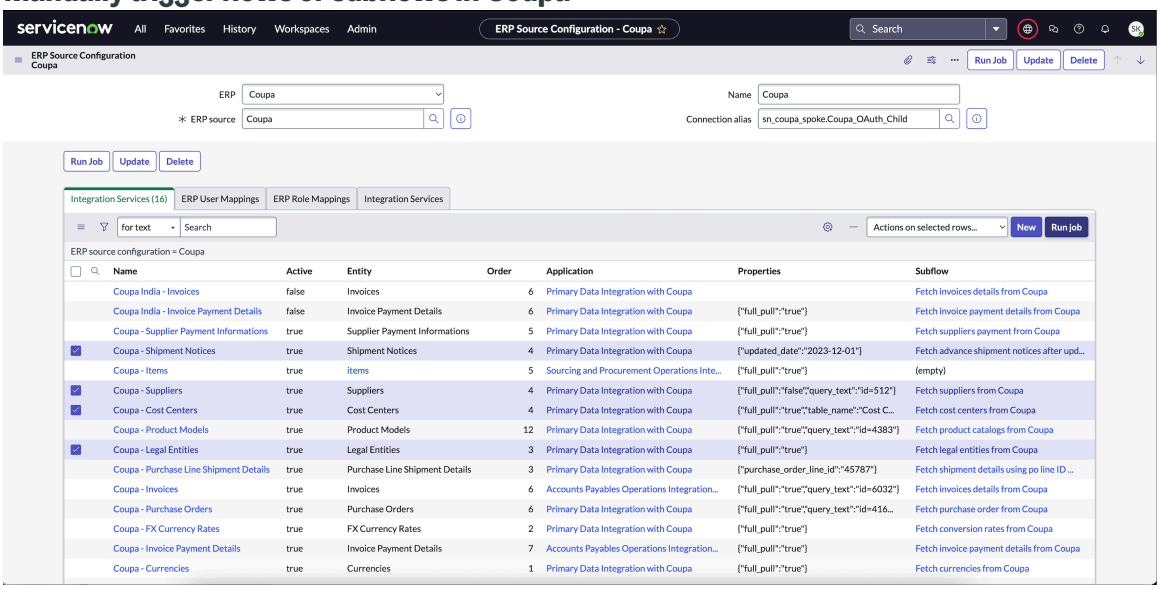
Before you begin

Role required: sn_fcms_intg.integration_user

Procedure

1. Navigate to **All** > **Finance – ERP Integration** > **ERP Source Configuration**.
2. In the ERP Configurations view, select the **Coupa** ERP source to trigger the flows or subflows manually.
3. In the Integration Services list, select the subflows that you want to trigger manually.

Manually trigger flows or subflows in Coupa



4. Trigger the flow or subflow by selecting **Run job**.

What to do next

To view the status of the executed flow and a list of errors (if any), see View the execution status of a flow

View the execution status of a flow

View the status of a flow that has been triggered. If there were any errors during execution, you can view them under the processing message column.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**
2. From the Workflow Studio home page, select the **Operations** tab and then select **Flows** tab.

Result

The list of flow executions appear. You can look up the status of the flows or subflows that you triggered. If there were any errors during execution, you can view them under the processing message column.

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Use a flow or subflow in Coupa (outbound)

A flow or subflow can be executed in Coupa using the Workflow Studio.

Before you begin

Role required: sn_fcms_intg.integration_user

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the Workflow Studio home page, select **Flows**.
3. Look up the **Flow** name or **Coupa** application name using the filter icon, and select **Apply**.
4. Select the required flow from the list.
5. In the **Trigger** field, specify the time and interval at which you want to run the scheduled flow automatically.

   This flow subsequently triggers subflows to automate tasks. To customize the sample flow, copy it to the desired application scope.

   Note:
   Don't modify the trigger condition.

Result

The flow or subflow gets executed.

Copy a flow or subflow in Coupa

Create a copy of a flow or subflow, make the necessary modifications, and then activate it.

Before you begin

Role required: sn_fcms_intg.integration_user

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the Workflow Studio home page, select **Flows**.
3. Open the flow that you want to copy.
4. Select the more actions icon ( ).
5. Select **Copy flow**.

   Important:
   Perform this step only if you plan to customize or make specific changes to the flow.

6. Activate the flow or subflow.
   - Make sure that the flow or subflow is available and activated on the base system.
   - Activate the copied flow after making the required changes.
7. Use the **Trigger Condition** for the flow or subflow.

   Note:
   After data is pulled into staging tables, the transform maps move data into target tables. For more details, refer to Source-to-Pay integration framework transform maps and subflows.

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Source-to-Pay integrations reference

Reference topics provide additional information on integrating Source-to-Pay Operations with third-party applications, including primary data, fixed assets, purchase orders, receipts, invoices, and tax integration between Source-to-Pay and ERP systems.

Source-to-Pay Integrations glossary

Learn about the terms and concepts used in Source-to-Pay (S2P) integrations.

Glossary terms are grouped alphabetically.

A | C | D | E | I | M | P | R | S | T | W

A

API (Application Programming Interface)

A set of rules that allows different software entities to communicate with each other.

Asynchronous Integration

A type of integration where the systems involved communicate without waiting for an immediate response.

C

Catalog Management

The process of managing product and service information in a structured way.

Cloud Contact Center

A cloud-based customer service solution that handles inbound and outbound communications.

Contract Management

The process of managing contract creation, execution, and analysis to maximize operational and financial performance.

D

Data Synchronization

The process of ensuring that data in two or more locations is updated consistently.

E

EDI (Electronic Data Interchange)

The electronic interchange of business information using a standardized format.

I

Integration

A process by which the ServiceNow platform can be made to work with a third-party application or web service.

Invoice

A document issued by a seller to a buyer, indicating the products, quantities, and agreed prices for products or services provided.

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M

Middleware

Software that acts as a bridge between different applications or services.

P

Procurement

The process of finding, acquiring, and buying goods, services, or works from an external source.

R

Receipt

A document acknowledging that a specified amount of money, goods, or services have been received.

Return

The process of sending back goods to the supplier due to various reasons such as defects or incorrect orders.

S

SAP ECC

An enterprise resource planning software developed by SAP SE, used for business process management.

SAP S/4HANA

A next-generation enterprise resource planning suite from SAP, designed to run on the SAP HANA database.

Source-to-Pay (S2P)

A process that encompasses all activities from sourcing goods and services to paying suppliers.

Supplier Lifecycle Management

The end-to-end process of managing a supplier's performance and relationship with the organization.

Supplier Portal

An online platform where suppliers can interact with the buying organization.

Synchronous Integration

A type of integration where the systems involved communicate in real-time.

T

Third-Party Applications

External software systems that can be integrated with ServiceNow to extend its capabilities.

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3CLogic

A ServiceNow partner that provides native voice and SMS capabilities to complement ServiceNow's digital channels.

W

Workflow

A sequence of activities to automate processes in applications.

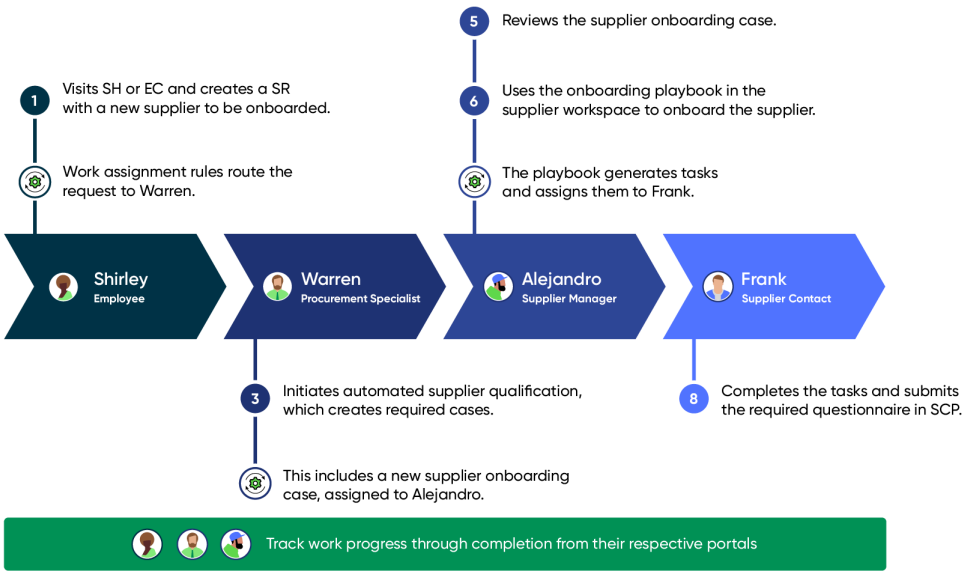
Improve sourcing experience when working with new suppliers

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



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.

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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 SPO list page.

   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.

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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.

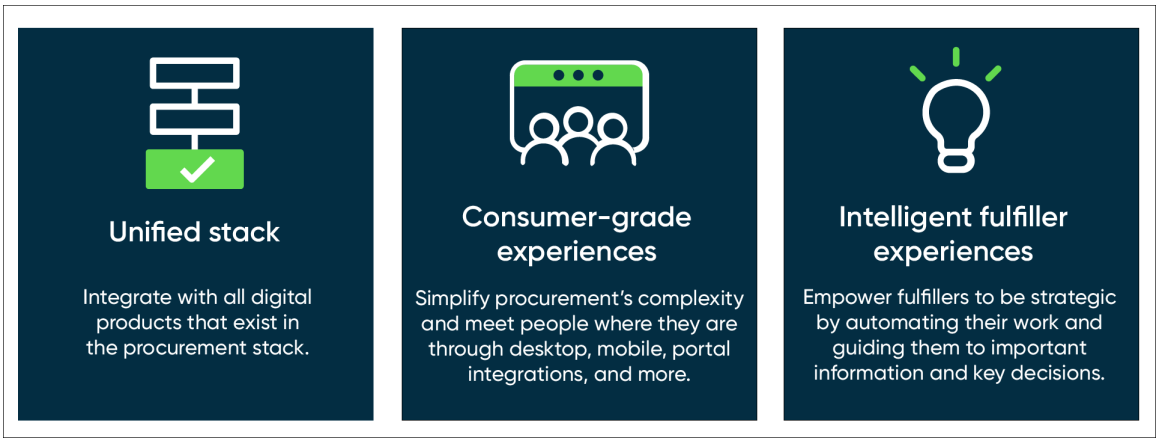
   Role: sn_slm.manager.

Sourcing and Procurement Operations

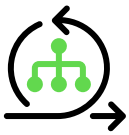
With ServiceNow Sourcing and Procurement Operations (SPO), you can provide your employees with a simple automated AI-assisted tool that they can use to shop for goods and services that they need at work.

SPO value proposition

Provide a seamless procurement experience with:



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Explore  Learn how SPO can help you with its key features and benefits.	Configure  Plan and configure SPO to meet your specific needs.	Integrate  Extend SPO capabilities by integrating with other applications.
Use  See how employees can use SPO to self-service requests, and source or purchase products and services. Also learn how procurement specialists can use SPO to work on various procurement objects.	Reference  Get additional information about SPO, including lists, forms, rules, components, parameters, roles, and personas.	

Helpful resources

Here are some additional ServiceNow resources that can help you:

Release Notes

Learn more about what's new and changed. See the Sourcing and Procurement Operations release notes.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as SPO Implementation Essentials and more, from ServiceNow University.

Now Create

Log in to your ServiceNow account and find additional information about implementing and deploying Sourcing and Procurement Operations features at Now Create.

YouTube

Learn more about the value that you can add to your business with the Source-to-Pay suite. Watch Multiply the value of your ServiceNow platform with Source-to-Pay workflows on YouTube.

ServiceNow Community

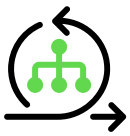
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Connect with other Sourcing and Procurement Operations users at ServiceNow Community.

Now Assist for Sourcing and Procurement Operations (SPO)

Use the ServiceNow® Now Assist for Sourcing and Procurement Operations (SPO) application to guide your requesters through a conversation-like experience for their procurement needs.

Get started

Explore	Configure	Use
		
Learn more about Now Assist for SPO	Configure the Now Assist for SPO application to get started	Use generative AI capabilities offered by Now Assist for SPO

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Further, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes.

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This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Now Assist for Sourcing and Procurement Operations (SPO)

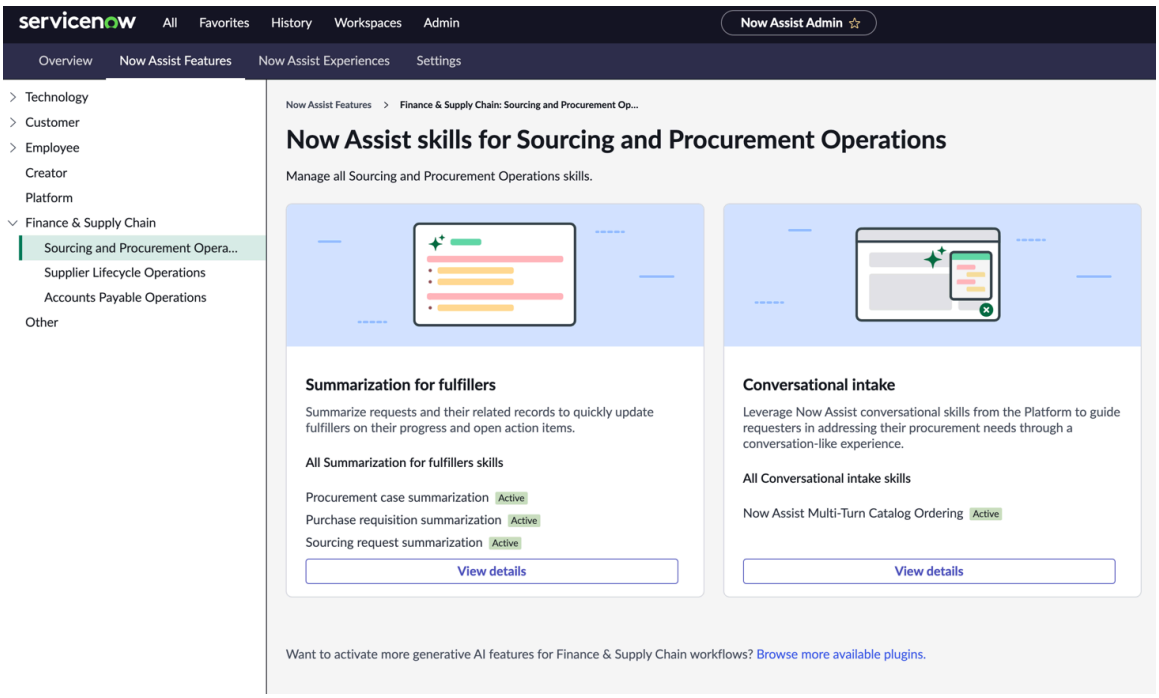
With the Now Assist for Sourcing and Procurement Operations (SPO) application, fulfillers can summarize the details of procurement-related records to keep them informed about their progress and action items.

Note:
You can install this application only if you're entitled to the Sourcing and Procurement Operations Pro Plus SKU, Source-to-Pay Operations Pro Plus SKU, or the Source-to-Pay and Contract Operations Pro Plus SKU.

Overview of Now Assist for SPO

Using the generative AI capabilities, a fulfiller can generate a summary of a record that includes an overview, actions completed so far, and next steps. This enables them to get the context by gathering information about a record and taking actions more quickly. It also enables them to refresh and post the summary to the work notes or activity stream.

Now Assist skills for SPO



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Now Assist for SPO features and skills in the Now Assist Admin console

Now Assist for SPO features	Skills
Summarization for fulfillers	• Sourcing request summarization • Purchase requisition summarization • Procurement case summarization
Conversational intake	• Now Assist Genius Results • Now Assist Multi-turn Catalog Ordering • Now Assist Topics

Now Assist for SPO Skills

The Now Assist for SPO application includes the generative AI skills and features that enable procurement specialists and fulfillers to view a summary of procurement-related records quickly within the Source-to-Pay Workspace.

Summarization for fulfillers

Provides a fulfiller with a summary of procurement-related records. This enables them to get visibility into the status of the record in the procurement process and consequently enables them to take the necessary actions quickly.

The fulfillers can get a summary of the following procurement records using the Source-to-Pay Workspace.

- Sourcing request summarization
- Purchase requisition summarization
- Procurement case summarization

For more information, see Summarize a record by using Now Assist for Sourcing and Procurement Operations (SPO) in Source-to-Pay Workspace.

Conversational intake

Now Assist for Sourcing and Procurement Operations (SPO) in Virtual Agent uses procurement-related topics to route requesters to the appropriate intake process, and then through conversation, helps to submit their requests. With this application, you don't need to rely on fulfillers, and your requesters can submit their procurement requests accurately with the help of an Artificial Intelligence (AI) companion. For more information, see Request the generative AI capabilities by using the Now Assist for SPO Virtual Agent.

For more information on configuring Now Assist for SPO, see Configuring Now Assist for Sourcing and Procurement Operations (SPO).

As requesters, you can use Now Assist for SPO to submit purchase requisitions, sourcing requests, and even request for products or services that aren't in the catalog. To learn more about how to use Now Assist for SPO, see Using Now Assist for Sourcing and Procurement Operations (SPO).

For detailed information on Now Assist in Virtual Agent and how to use generative AI skills in your conversational experiences, see Now Assist in Virtual Agent.

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Now Assist in Virtual Agent uses large language models (LLMs) and generative AI skills to help improve deflection rates and reduce the amount of time-consuming work that Natural Language Understanding (NLU) topic discovery requires. To understand how you can interact with the Virtual Agent when a Now Assist capability is active in your instance, and also the benefits of Now Assist in Virtual Agent, see Exploring Now Assist in Virtual Agent.

You can also look up LLM assistants for more information on the Now Assist in Virtual Agent assistant that is created during the Conversational Interfaces Assistants guided setup.

Domain separation is supported for Now Assist in Virtual Agent. For more information, see Now Assist in Virtual Agent domain separation.

Supporting information for Now Assist for Sourcing and Procurement Operations (SPO)

Get a quick overview of the important information that is related to the Now Assist for Sourcing and Procurement Operations (SPO) application.

Supported versions

Now Assist for SPO is supported starting with Xanadu.

Supported user interfaces

The Now Assist for SPO application includes the skills that are listed in the following table.

Now Assist for SPO supported interfaces

Interface	Skill
Virtual Agent	• Conversational catalog shopping experience in Now Assist in Virtual Agent. • Track request status
Source-to-Pay Workspace	• Sourcing request summarization • Purchase requisition summarization • Procurement case summarization
Core UI	• Sourcing request summarization • Purchase requisition summarization • Procurement case summarization

Application information

Activate the Now Assist for SPO store app (sn_spend_gen_ai) to use the Conversational intake experience and Record summarization skills.

This store app has the following dependencies:

- Now Assist for Platform (com.sn.now.platform)
- Sourcing and Purchasing Automation(com.snc.sn_pr)

Activate the applications in the following order:

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1. Now Assist for Platform (sn_genai_platform)
2. Sourcing and Purchasing Automation (com.snc.sn_pr)
3. Now Assist for Sourcing and Procurement Operations (SPO) (sn_spend_gen_ai)

For more information, see Configuring Now Assist for Sourcing and Procurement Operations (SPO).

Configuring Now Assist for Sourcing and Procurement Operations (SPO)

If you have the admin role, you can configure the Now Assist for Sourcing and Procurement Operations (SPO) application so that your requesters, procurement specialists, and sourcing managers can use the generative AI skills in Source-to-Pay Workspace Workspace and Core UI.

Before you begin

Role required: admin

About this task

Use the Now Assist Admin console to configure Now Assist for SPO. This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Now Assist Admin console.

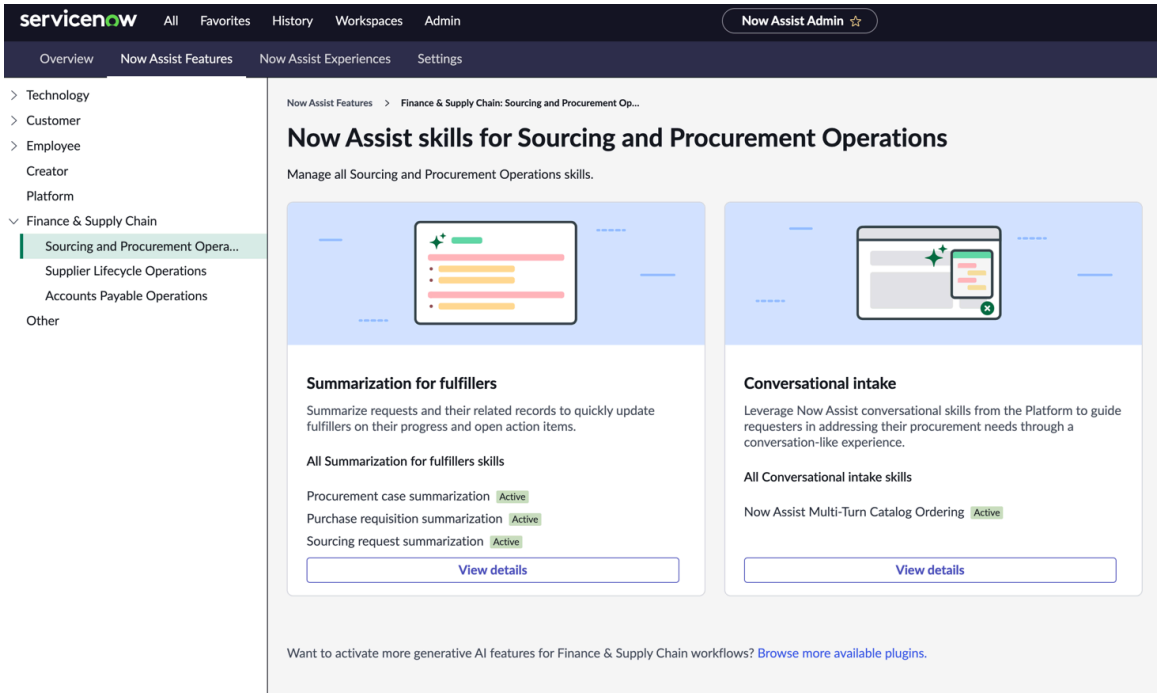
The following table lists the features and skills that you can access from the Now Assist Admin console.

Now Assist for SPO features and skills in the Now Assist Admin console

Now Assist for SPO features	Skills
Summarization for fulfillers	• Sourcing request summarization • Purchase requisition summarization • Procurement case summarization
Conversational intake	• Now Assist Genius Results • Now Assist Multi-turn Catalog Ordering • Now Assist Topics

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Now Assist skills for SPO



Procedure

1. Install the Now Assist for Sourcing and Procurement Operations (SPO) plugin (sn_spend_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Supporting information for Now Assist for Sourcing and Procurement Operations (SPO).
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
3. Expand the **Finance and Supply Chain** workflow group and select **SPO**.

   The SPO features are grouped under the Finance and Supply Chain workflow group. Each feature has its associated skills.
4. Activate and configure the skills for Now Assist for Sourcing and Procurement Operations (SPO).

Skills	Action
Conversational intake	On the Conversation intake skill card, verify that your AI conversational intake skills are active for SPO. **Note:** The Platform AI conversational experience skills are active by default. For more information, see Configuring Now Assist in Virtual Agent.
Summarization for fulfillers	**a.** On the Summarization for fulfillers skill card, select **View details**. **b.** In the All available Summarization for fulfillers skills section, select **Activate skill** for any the following skills that you would like to activate:

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Skills	Action
	▪ Sourcing request summarization ▪ Purchase requisition summarization ▪ Procurement case summarization

5. Select **General Details** and review the details about the skill and select **Save and continue** to go to the next step in the Guided Setup.
6. Follow the steps to configure and activate a skill using the Guided Setup.
7. Select **Choose input** and review the base input table and input fields, and then select **Save and continue** to go to the next step in the Guided Setup.
8. **Optional:** Select **Customize and test prompt** to test the prompt on a record.
9. Select **Save and continue** to go to the next step in the Guided Setup.
10. **Optional:** Select **Define Availability** and choose one of the following options.

11. Select **Save and continue** to go to the next step in the Guided Setup.
12. Choose **Select display** to determine where you'd like to display the skill.

13. Select **Save and continue** to go to the next step.
14. Review your choices and select **Activate** to complete the configuration for the skill.
15. Select **Return to Summarization for fulfillers**.
    The skill is displayed in the Active skills section.

Customize a Now Assist for Sourcing and Procurement Operations (SPO) skill

If you have the admin role, you can customize a Now Assist for Sourcing and Procurement Operations (SPO) skill so that fulfillers and requesters can use the generative AI skills in Source-to-Pay Workspace, Shopping Hub, and in Core UI.

Before you begin
Role required: admin

About this task
From the Now Assist Admin console, you can select the input table, related records, and fields for each input template of the Summarization for fulfillers skill, and then configure the prompt headers to include in the general summary.

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. In the **Finance and Supply Chain** workflow group, select **SPO** to view the skills for the Now Assist for SPO features.
3. Create a copy of a skill and customize the input fields.

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a. On the Summarization for fulfillers feature card, select **View details**.

b. In the Active skills section, locate the skill that you'd like to copy and select the More actions icon (⋮).

c. Select **Make copy**.

The copy that you make is listed in the Active skills section.

d. Select the copied skill from the Active skills section to open it.
A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the skill is activated.

4. In the General details step, fill in the fields.
For information about the inputs and triggers for each skill, see Skill inputs for Now Assist for Sourcing and Procurement Operations (SPO).

a. Enter a name and description for the skill.

b. Select **Save and continue** to go to the next step.

5. View the input data for each skill, such as the base input fields and related lists for the different input templates.

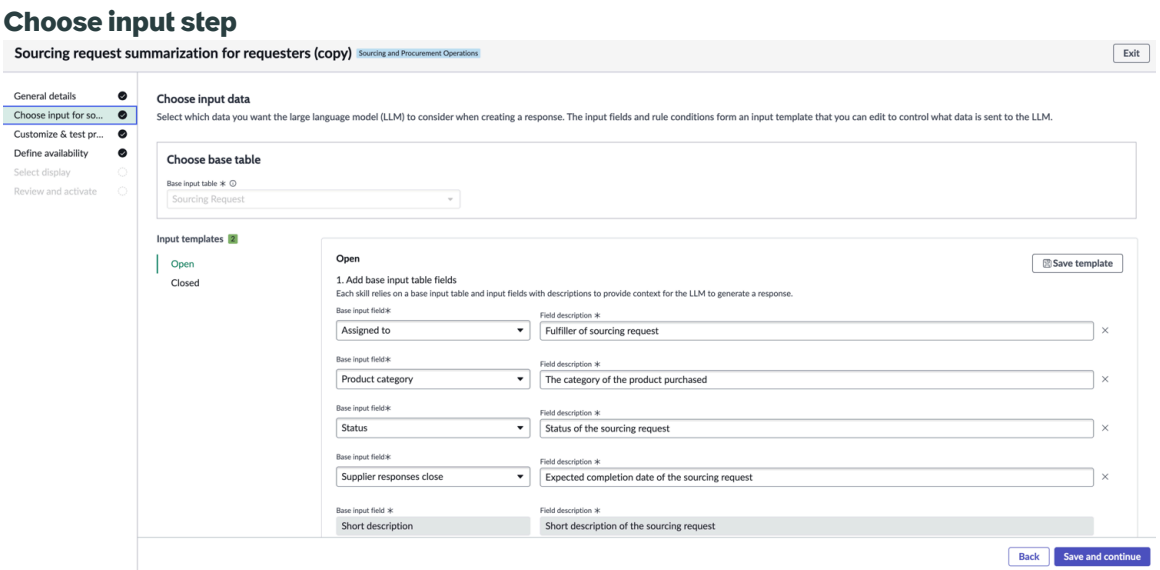
Configure the base input table fields and related lists for the different input templates for the skill.

Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

Select only those related tables that are offered as the base system, as part of the input data.

a. For each input template state, select **+New base input field** and configure the base input table fields.

Add multiple base input fields, as necessary.



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The following table lists the base input table fields and descriptions, including a relevant example.

Base input fields

Field	Description
Base input field	Field in the case table whose value this skill uses in its response. For example, `Short description`.
Field description	Description of the base input field value. For example, `Short description of case, provides quick info about the case.`

b. For each input template state, configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

c. For each input template state, select **+New data source** to configure the additional related table and activity stream data, as needed.

You can add input data sources like related tables, activity streams and relationships to provide more context to the Now LLM Service. You can also add rule conditions to these additional data sources.

You can also add the rule conditions to these additional data sources.

The selection of the related table fields may have a direct impact on the quality of the corresponding prompt header. For example, if a prompt header requires a specific field from the related table, but that field isn't selected as input, the summary for that prompt header will contain missing information. For example, as a base case, you see one related table, such as Service level agreement (SLA), that includes all the required fields and filtering conditions for the prompt header. The SLA prompt header is preselected to help you understand how the related table, its fields, and the prompt header work together to produce a summary. You can use the SLA as a reference to configure the other related tables to determine which fields to select and which description adds the requirements of their respective prompt headers. Apply any additional conditions to filter the data further.

d. Select **Save and continue** to go to the next step.

6. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by adding new predefined sections and reordering them, as needed.

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a. For each input template state, select the prompt sections from the list of available sections to include in the generated summary.

   To add a section, you must configure the relevant input data prior to this step.

   The available prompt sections that you can select:

   - **Overview**
   - **Actions completed**
   - **Next steps**

   The following table lists the mandatory prompt headers.

   Mandatory prompt headers

Input template state	Mandatory prompt header
Open	▪ Overview ▪ Actions completed ▪ Next steps
Closed	▪ Overview ▪ Actions completed

b. Select **Save** to continue to the test response.

c. Select a record in the Test response section, and test the prompt response output format by selecting **Run Test**.

d. Select **Save and continue** to go to the next step.

7. Define how the skill is available to your users.

   a. Configure the skill to be always available to users, or select conditions that must be met before the skill is available.
   Selecting **Customize skill availability** displays a condition builder to filter the data further.

   b. Select **Save and continue** to go to the next step.

8. Configure where to display the record summarization.

   a. Select either **In-product**, or **Now Assist panel**.

   - **In-product**: When selected, the Now Assist skills are displayed on the forms and workspaces.

     For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

   - **Now Assist panel**: When selected, the Now Assist skills are available in the Now Assist panel.

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If you don't see this option, you must activate the Now Assist panel. For more information, see Turn on the Now Assist panel.

For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

b. Select **Save and continue** to go to the next step.

9. Review and activate the skill.
Review your choices and select **Activate** to complete the skill customization.
You can now select **Summarize** in a record to generate the summary for the following records:

- Sourcing request
- Purchase requisition
- Procurement case

Skill inputs for Now Assist for Sourcing and Procurement Operations (SPO)

You can configure some of the inputs for a generative AI skill. Inputs permit you to determine how and when a skill is used.

Overview of skills

Inputs identify the data used for a skill. Inputs include the table and fields used to generate a record summary.

You can modify inputs, but you can't modify a skill's data source. The data source contains the tables and fields that the skill relies on.

Now Assist skills for Now Assist for SPO

The Now Assist for SPO includes the following skills

- Sourcing request summarization
- Purchase requisition summarization
- Procurement case summarization

Sourcing request summarization skill

Inputs for the Sourcing request summarization skill identify the table and fields used when the summary is generated for a sourcing request.

The following table lists the inputs for the Sourcing request summarization skill from the Choose input for sourcing request page in the Now Assist Admin console.

Input	Description
Base input table	Sourcing Request [sn_shop_sourcing_activity] table.
Base input fields	• Business owner • Short description • Request type

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Input	Description
	• Product category • Product name • Max budget • Purchased quantity • Supplier responses close • Sourcing request details • Product type • Status

Purchase requisition summarization skill

Inputs for the Purchase requisition summarization skill identify the table and fields that are used when the summary is generated for a purchase requisition.

The following table lists the inputs for the Purchase requisition summarization from the Choose input for purchase requisition page in the Now Assist Admin console.

Input	Description
Base input table	Purchase Requisition [sn_shop_purchase_requisition] table.
Base input fields	• Number • Short description • Description • State • Business owner • Order type • Requisition type • Supplier • Total amount • Work notes • Additional comments

Procurement case summarization skill

Inputs for the Procurement case summarization skill identify the table and fields that are used when the summary is generated for a procurement case.

The following table lists the inputs for the Procurement case summarization from the Choose input for procurement case page in the Now Assist Admin console.

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Input	Description
Base input table	Procurement Case [sn_spend_psd_procurement_request] table.
Base input fields	• State • Short description • Description • Due date • Case type • Related case • Requested by • Supplier • Assigned to • Work notes • Additional comments

Using Now Assist for Sourcing and Procurement Operations (SPO)

Using the Now Assist for Sourcing and Procurement Operations (SPO) application, fulfillers can generate procurement-related record summaries to get a quick overview of the records, completed actions, and pending tasks.

Summarize a record by using Now Assist for Sourcing and Procurement Operations (SPO) in Source-to-Pay Workspace

As a fulfiller, summarize procurement-related records to know about their status, progress, and action items by using the record summarization skills in the Now Assist for Sourcing and Procurement Operations (SPO) application.

Before you begin

Role required: agents, fulfillers, and sn_spend_psd.admin

About this task

You can use these record summarization skill in either Core UI or Source-to-Pay Workspace.

- In Core UI, the summary appears in a banner in the record record.
- In Source-to-Pay Workspace, the summary is generated in the **Details** tab.

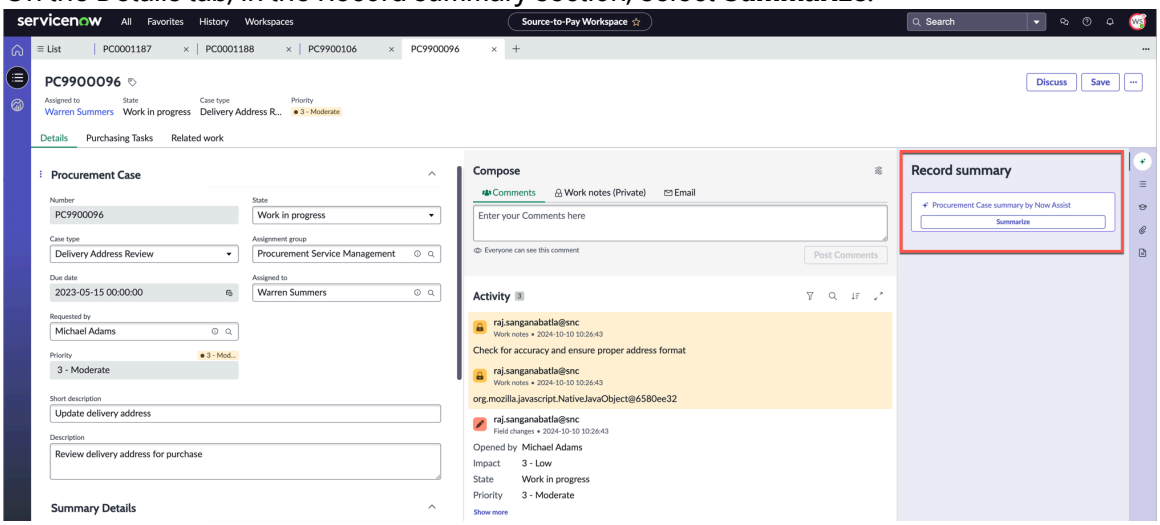
Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Do one of the following:

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To	Do this
To generate a summary for the following records: ○ Procurement case ○ Sourcing request ○ Purchase requisition	**a.** Navigate to **Lists** > **All work**. **b.** Select any of the following modules and select the link to the record under the Number column. ▪ Cases ▪ Sourcing requests ▪ Requisitions

4. On the Details tab, in the Record summary section, select **Summarize**.



When you opt to summarize a purchase requisition, you see the following message:

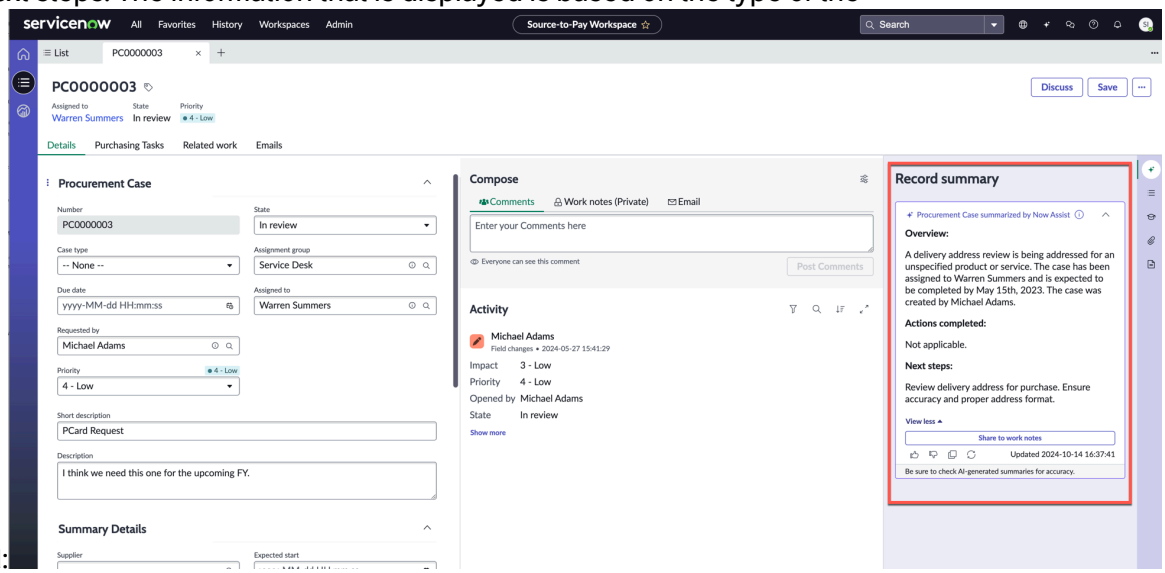
Now Assist is summarizing your purchase requisition.

Note:
Generating and displaying the summary may take several seconds.

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5. Review the summary details.

   A concise summary of a record, including the overview, actions completed, and next steps. The information that is displayed is based on the type of the record:



   - **Overview**: Provides information about the record.
   - **Actions Completed**: Lists all the actions that have been taken so far.
   - **Next steps**: Lists the actions that the fulfillers need to take next.

6. **Optional:** When you finish summarizing a record, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Request the generative AI capabilities by using the Now Assist for SPO Virtual Agent

Request the contextual generative AI capabilities by using the conversational interface in Now Assist for SPO Virtual Agent.

As a requester, you can use the predefined topics (chatbot conversations) designed to help you complete common self-service tasks, such as buying a product or knowing the current status of a purchase requisition, sourcing request, or procurement case.

As a requester, you can use the Now Assist for SPO Virtual Agent to search against the existing products in the product catalog and displays the available products. You can also use it to inquire about the status of the procurement records, such as sourcing requests, purchase requisitions, procurement cases, and purchase orders.

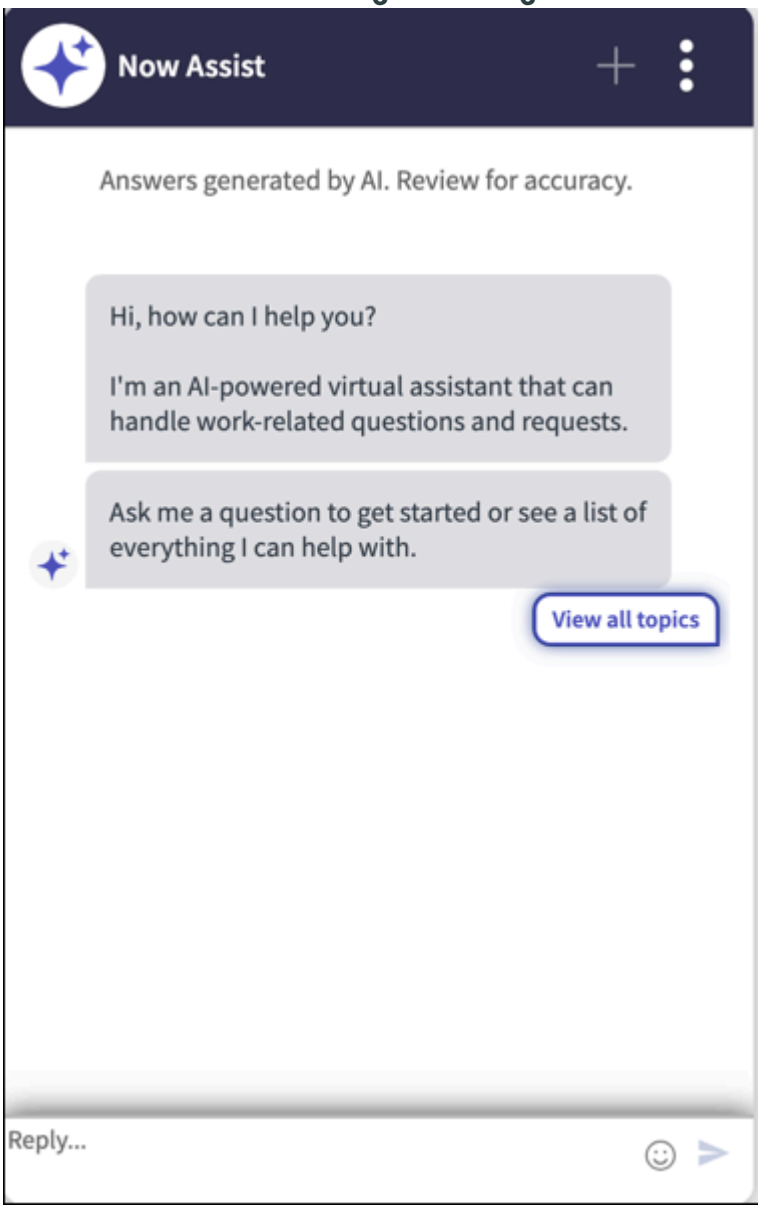
Navigate to **All** > **Self-Service** > **Employee Center** and select the Virtual Agent chat icon ( ) to start a conversation.

Using predefined topic to buy a product

As a requester, you can start by selecting **View all topics**.

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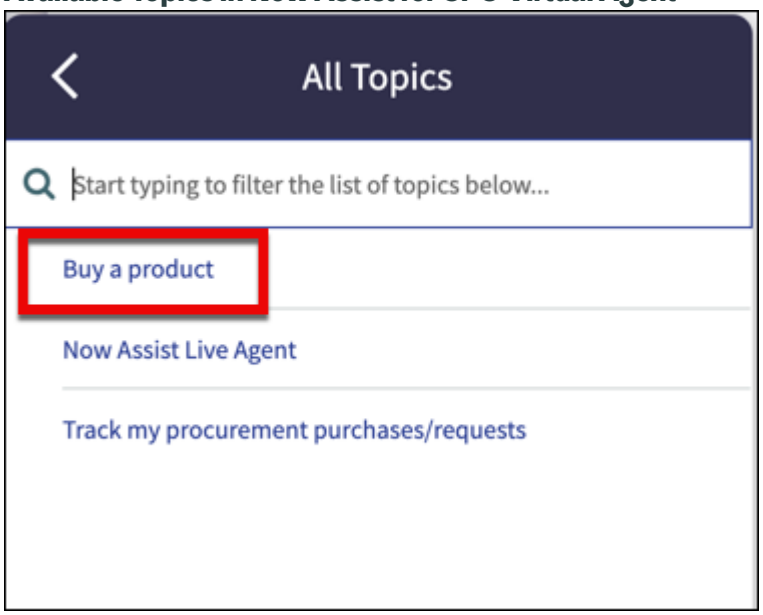
Now Assist for SPO Virtual Agent starting screen



Then, select the **Buy a product** topic.

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Available Topics in Now Assist for SPO Virtual Agent



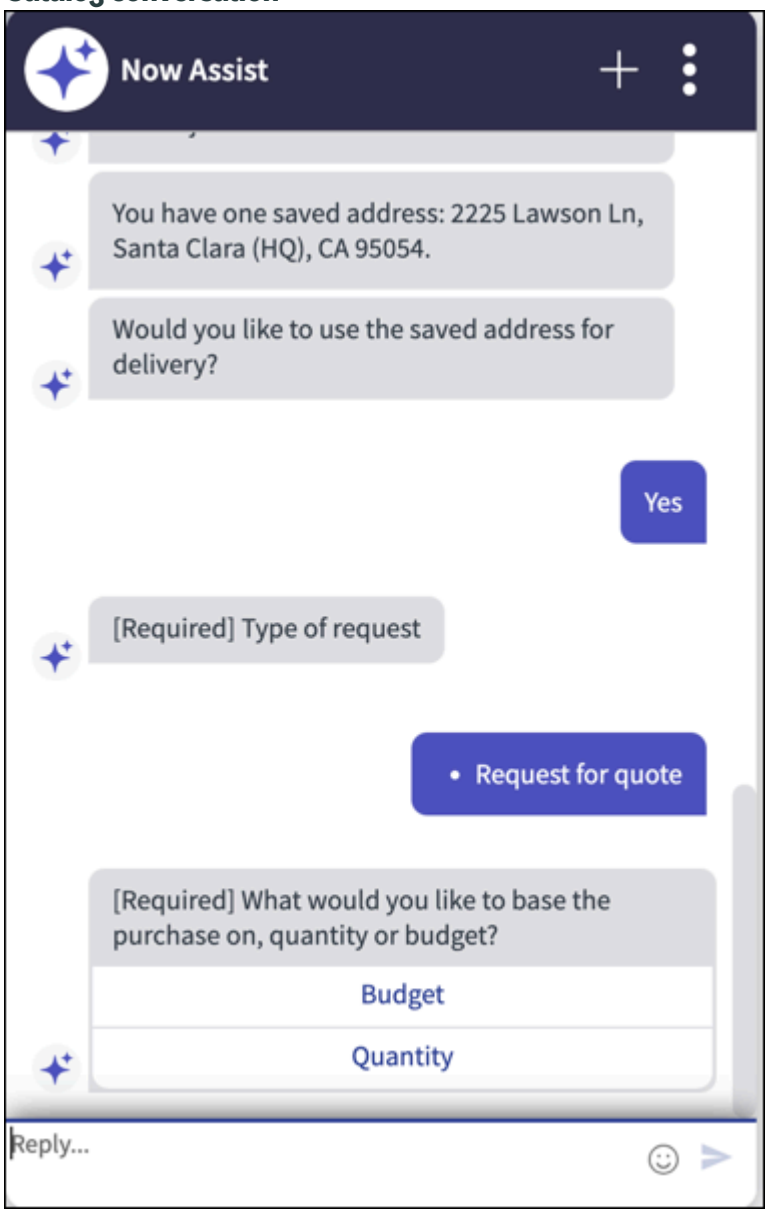
You could also directly start typing what you need, in which case the utterance detection mechanism uses Genius Results to retrieve Virtual Agent topics, catalog items, and Q&A results, and displays them to the requester within a card carousel. For details, see Using Now Assist in Virtual Agent.

The Virtual Agent engages you in a guided conversation, asking you relevant questions along the way to help you submit your purchase, sourcing, and off-catalog requests, as well as procurement cases, independently, without the need to reach out to fulfillers. You can then review and track these request records from Shopping Hub, Employee Center, or Platform.

If a product is found with or without a price in the catalog, the requester can then fill out the intake questions through a simple conversation, and then submit the purchase request after reviewing the summary of responses. They can also edit a response before submitting.

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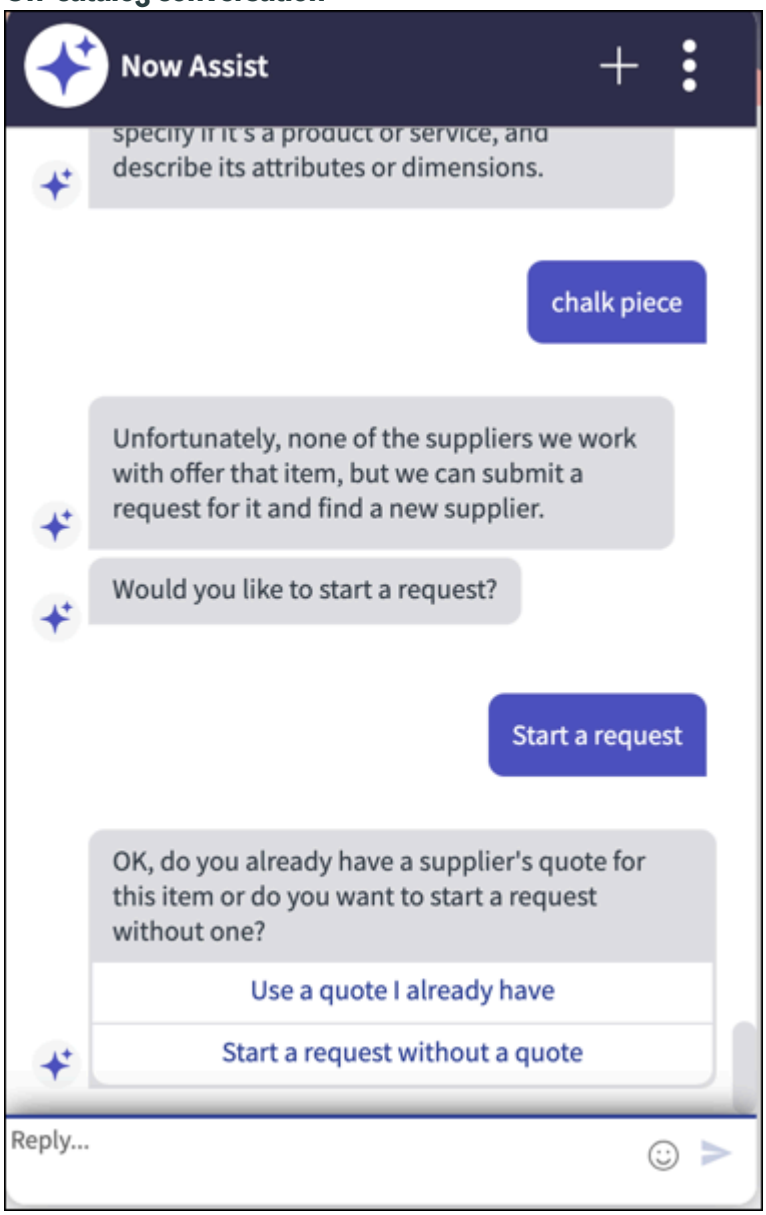
Catalog conversation



If a product or service isn't found in the catalog, the chatbot gathers more information, such as checking for availability of quotes, and routes the requester to the corresponding off-catalog intake form.

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Off-catalog conversation



It also provides the requester with the option to submit a question to the procurement team about the required product or service, with relevant attachments, if any, all through a conversation.

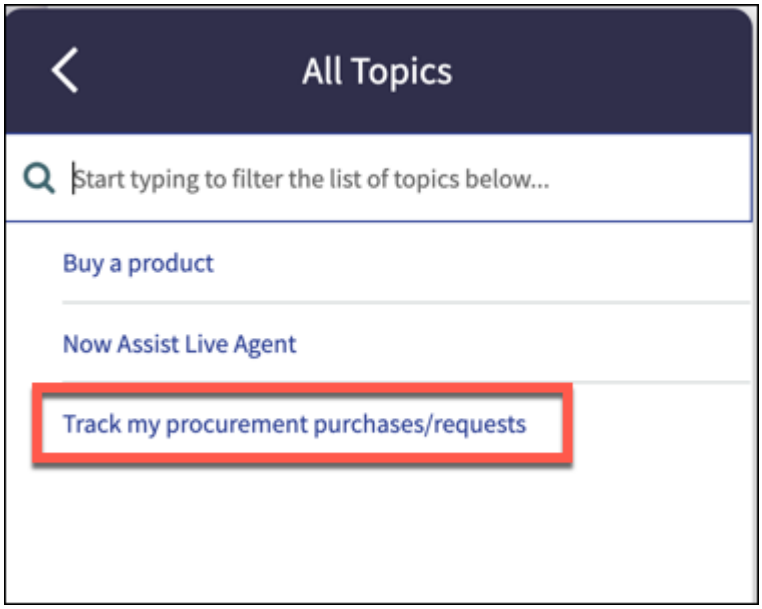
Note:
You can ask a question to the procurement team, and create a corresponding procurement case, only if you have the sn_spend_psd.requestor role. Ensure that you admin has assigned that role to you.

To learn more about quick checkout and sourcing checkout processes, see Order a product with quick checkout and Complete sourcing checkout respectively. For more information on off-catalog intake forms, see Requesting for products or services that you don't see on ShoppingHub.

Using predefined topic to track requests

As a requester, you can engage with the Now Assist for SPO Virtual Agent and inquire about the status of your recent purchase or request by selecting the **Track my procurement purchases/ requests** topic.

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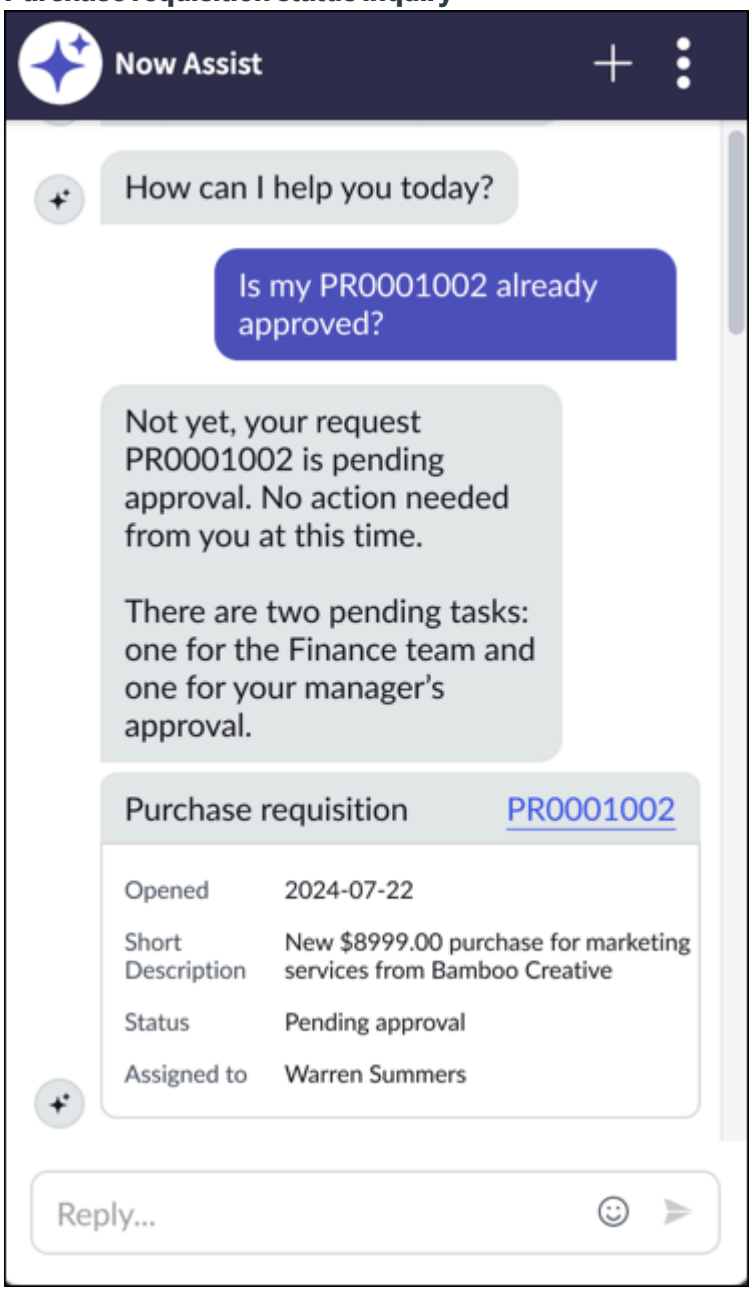
You can inquire about the following records to the virtual agents:

- Purchase requisition (PR)
- Sourcing request (SR)
- Purchase order (PO)
- Procurement Case (PC)

For example, You can ask whether the purchase requisition PR0001002 has already been approved.

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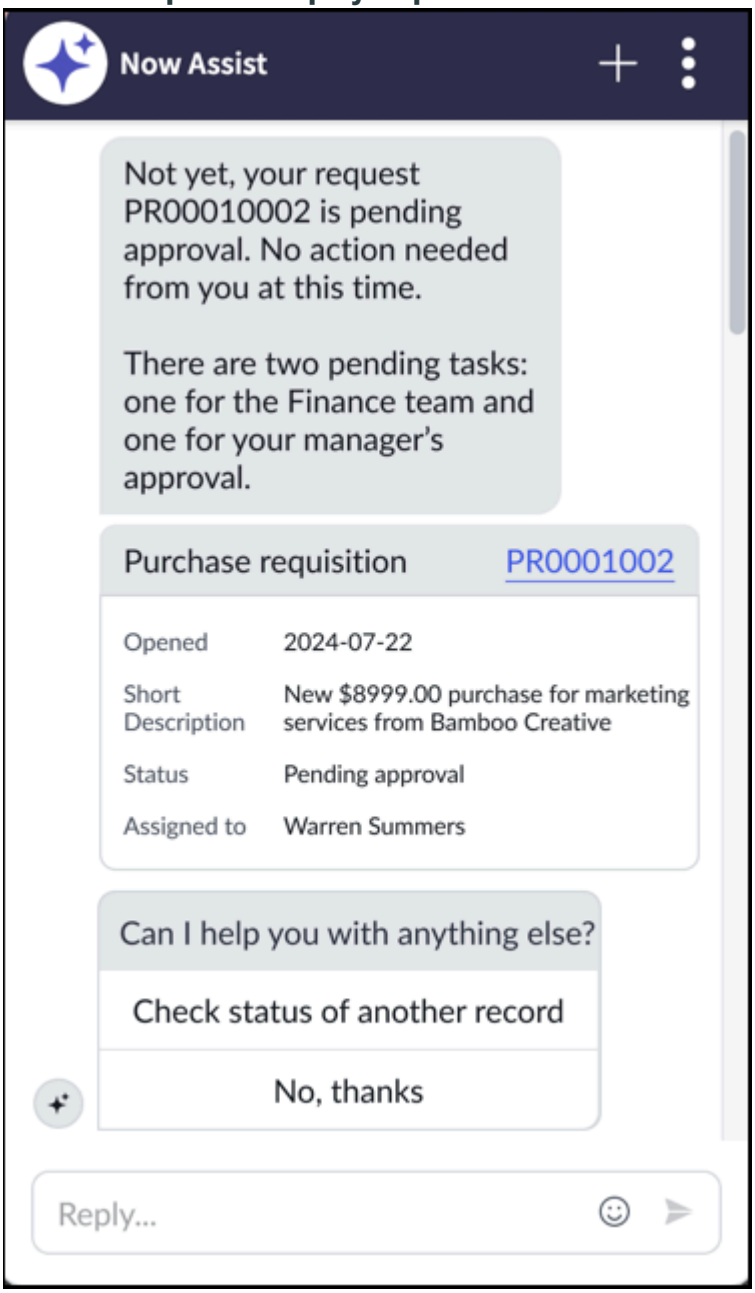
Purchase requisition status inquiry



The chatbot provides you the current status of the PR that you inquired about.

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Purchase requisition inquiry response



You can choose either to close the conversation or check the status of another record.

Searching for requests by specifying a time period

The Now Assist for SPO Virtual Agent also enables you to search for requests by specifying the time period when the request was opened. Here are a few examples:

- What's the status of the purchase I made last month
- Just send me the status of my purchases made 3 weeks ago
- Can I get an update on the purchase I requested in August 2024

NOW Assist for SPO can't find any result

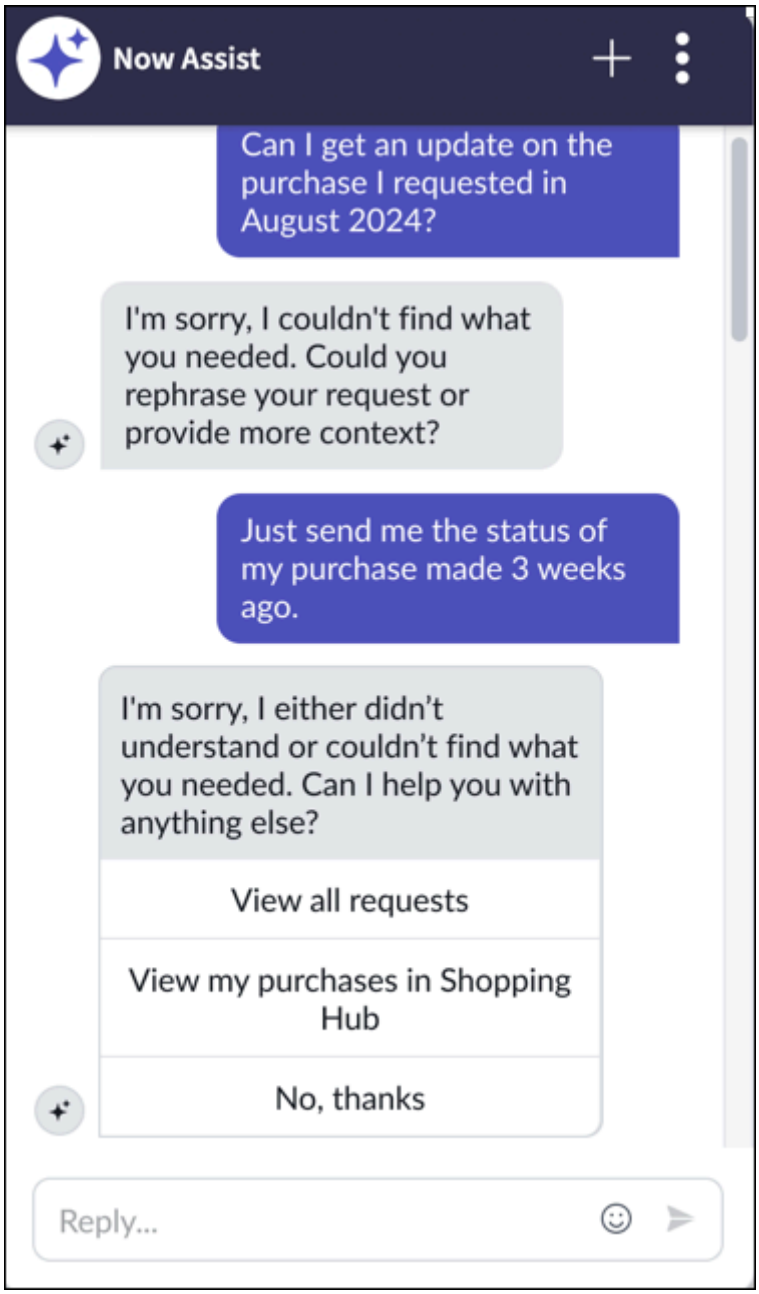
If the Now Assist for SPO Virtual Agent is unable to search for your specific request, the following occurs:

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- The Now Assist for SPO Virtual Agent prompts you, as follows, to provide more context if the results don't meet your needs.

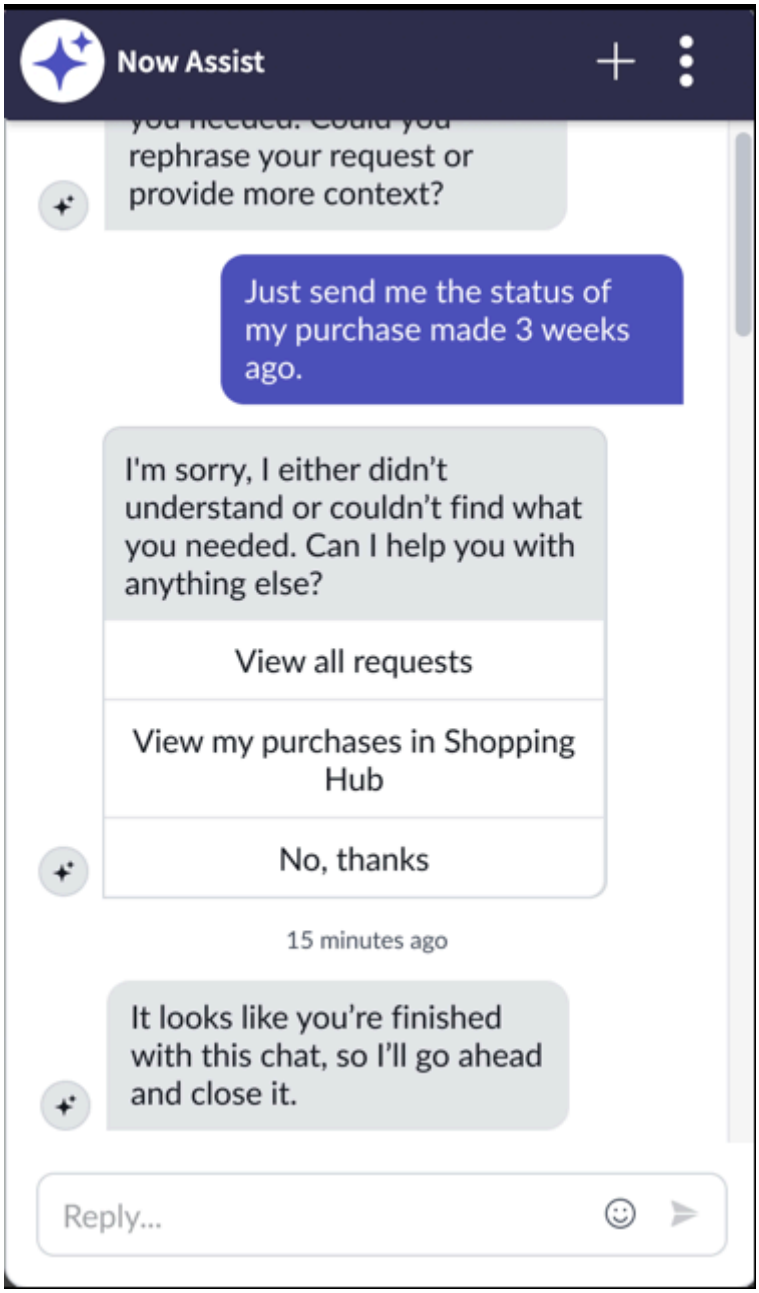
  ```
  I'm sorry, I couldn't find what you needed. Could you rephrase your request or provide more context?
  ```

- The Now Assist for SPO Virtual Agent prompt users up to two times to rephrase their request before displaying the following message:



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- If there's no chat activity for 900 seconds, the Now Assist for SPO Virtual Agent ends the chat.



Additional Information

Now Assist in Virtual Agent provides your users with an interactive generative Artificial Intelligence (AI) experience. A friendly, natural language conversation is easier to understand and makes requesters more comfortable with talking to a bot. To learn how a conversation powered by generative AI might look in Virtual Agent, see Using Now Assist in Virtual Agent.

As an administrator, you can use the Now Assist in Virtual Agent Analytics dashboard to monitor the performance of Now Assist in Virtual Agent as a self-service deflection tool. To learn more, see Analyzing Now Assist in Virtual Agent. Now Assist in Virtual Agent Analytics calculates the conversation deflection rate based on the resolution status associated with Now Assist query responses. For more information, see Understanding conversation deflection rate.

For detailed information on Now Assist in Virtual Agent in general, and Now Assist for SPO in particular, see Exploring Now Assist for Sourcing and Procurement Operations (SPO).

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For information on configuring Now Assist for SPO, see Configuring Now Assist for Sourcing and Procurement Operations (SPO)

Exploring Sourcing and Procurement Operations

Use ServiceNow® Sourcing and Procurement Operations to provide your employees, shoppers, or requesters with a simple automated tool that they can use to shop for goods and services that they need at work.

Sourcing and Procurement Operations applications

Sourcing and Procurement Operations (SPO) comprises the following applications:

Application	Description
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 Using Shopping Hub.
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.

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Application	Description
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. **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.

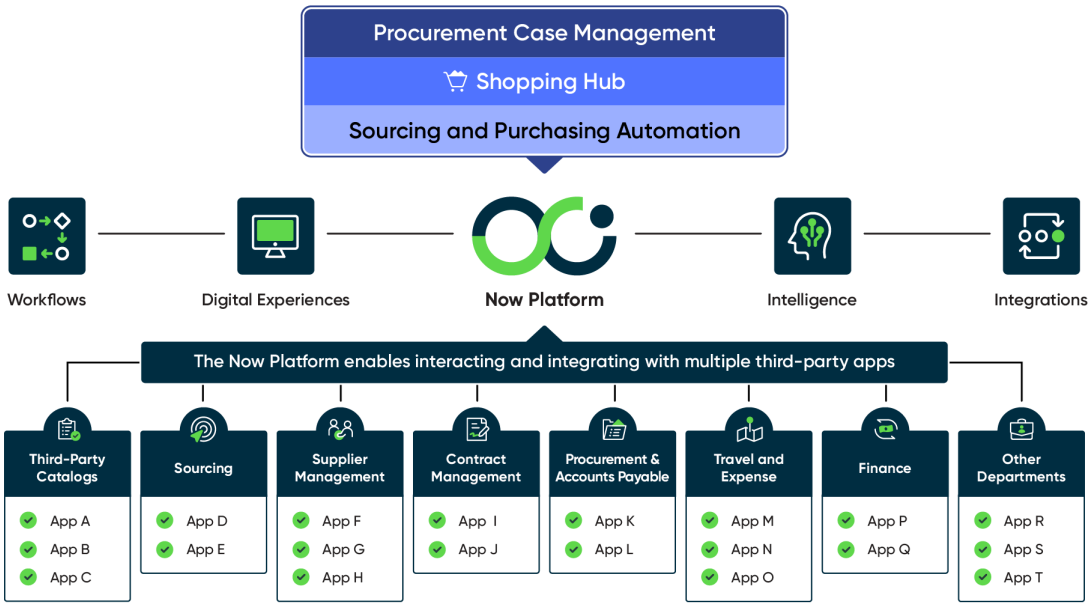
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Application	Description
Common Service Delivery	With this back-end application, store Service Task and Service Request tables, as well as other infrastructure that forms the basis of the Finance and Supply Chain Workflows products.
Finance Common Architecture	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.
Process Mining for Source-to-Pay Operations	With this application, provide your customers with the ability to use Platform's Process Mining capabilities on the Source-to-Pay workflows to which customers are entitled to analyze and improve source-to-pay processes. For more information on this, see Process Mining.

Optimize digital purchasing workflows

The platform for digital purchasing workflows

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



Helpful resources

Here are some additional ServiceNow resources that can help you:

Release Notes

Learn more about what's new and changed. See the Sourcing and Procurement Operations release notes.

ServiceNow University

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Access real-time courses, self-paced training, and career resources, such as SPO Implementation Essentials and more, from ServiceNow University.

Now Create

Log in to your ServiceNow account and find additional information about implementing and deploying Sourcing and Procurement Operations features at Now Create.

YouTube

Learn more about the value that you can add to your business with the Source-to-Pay suite. Watch Multiply the value of your ServiceNow platform with Source-to-Pay workflows on YouTube.

ServiceNow Community

Connect with other Sourcing and Procurement Operations users at ServiceNow Community.

My purchases on Shopping Hub

As a shopper, you can view all the purchases made from your shopping account by selecting My purchases from your Shopping Hub 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, add users to watchlist, 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.

Related topics

- Install Sourcing and Procurement Operations
- Application plugin installation sequence
- Setting up primary data for Shopping Hub
- Service portal configuration for Shopping Hub
- Configure punchout for third-party site purchases
- Customize your top suppliers on Shopping Hub
- Using Shopping Hub

Process visibility

You can track the complete procurement process post request submission. The process steps and work items can be configured to meet your business requirements.

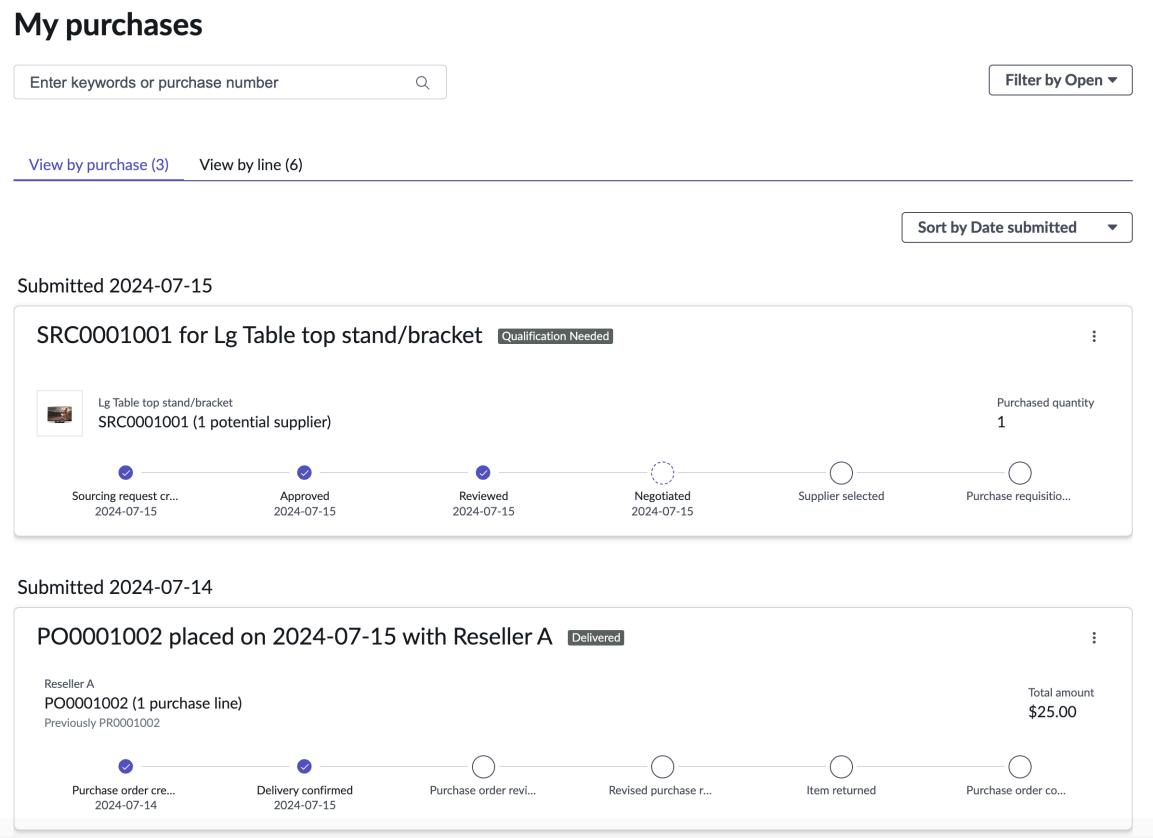
As a shopper, you can:

- Experience end-to-end visibility on sourcing requests, purchase requisitions, and purchase orders in Shopping Hub.
- Track the progress of the requests and expected completion timelines.
- View the sequencing of work, such as approvals, cases, and tasks.
- Send messages to the task assignees and task assigners directly within the platform.
- Navigate easily between My purchases list and detail views.

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My purchases list view

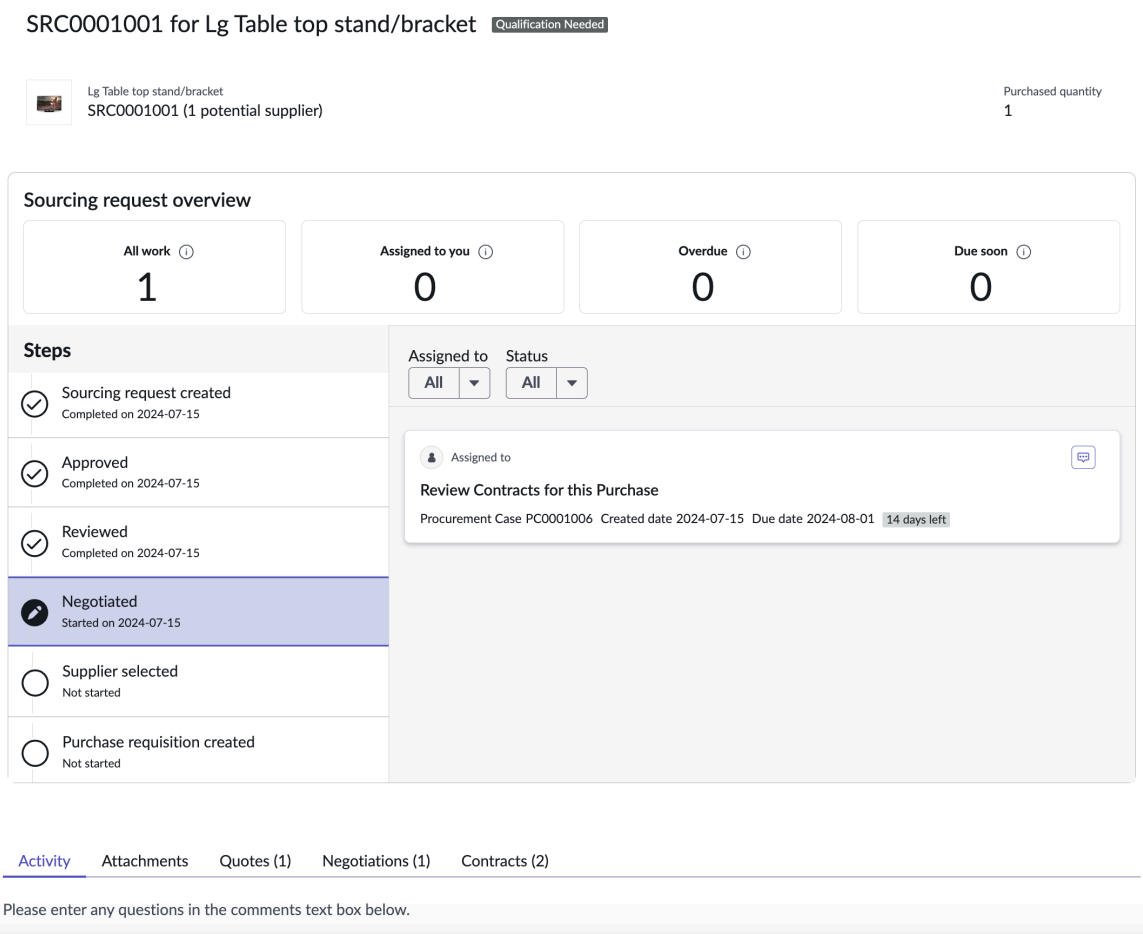
You can view the list of all the purchases made from your shopping account by selecting **My purchases** from your Shopping Hub profile.



Purchase requisitions, purchase orders, and sourcing requests detail view

In the detail view, you can track the step dependencies and progress of the sequential and concurrent steps.

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Process visibility configuration requirements

As a procurement administrator, you can use the configuration framework to modify and edit your own content to your business process. With this framework, you can easily define and modify steps and work items within each step, including sequencing and label changes.

For more information on how to configure process steps, work items, and link them together, see Shopping Hub process visibility configuration.

Process visibility customer adoption

For existing customers using sourcing requests, purchase requisitions, and purchase orders records, the default content is available in the new user experience. Use the configuration framework to modify your steps and processes and populate them on Shopping Hub.

For existing customers using custom tables (and not sourcing requests, purchase requisitions, and purchase orders records), the default content is not available in the new user experience. Use the configuration framework to build your steps and processes and populate them on Shopping Hub.

For new customers, use the configuration framework to modify your steps and processes and populate them on Shopping Hub.

Purchase refinement options

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

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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.

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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.

  Note:
  This option is not available for bundled products.

- **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.

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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 navigating to 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 also perform the following actions in the **Activity** tab.

- **Compose**:

  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

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to the user who is tagged such that they know when they have been mentioned in an activity stream post.

- **Watchlist**:

  Business owners can view and edit the watchlist users from the purchase requisition in **My purchases** while the purchase requisition is still in open state (not in complete, cancelled or rejected state). Alternatively, you can view and edit the **Watchlist** from the **Reason for purchase** page. For more information, see Add users to the watchlist of the purchase. By default, you can add up to 20 users in the watchlist. You can modify this value by configuring the system properties.

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.

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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 with this purchase. For each of these to-dos, the **State**, **Due date**, **Primary contact**, **Number**, and **Last updated** fields are displayed.

In the **Purchase detail view**, 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 item 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 Shopping Hub.

You can also track the progress of your request such as edit or cancel requests from your account or the Shopping Hub 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.

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.

For more information on installing Shopping Hub Mobile, see Install ShoppingHub Mobile.

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.

For more information on using Shopping Hub Mobile, see Using Shopping Hub Mobile.

Related topics

Application plugin installation sequence

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.

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As a Shopping Hub 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.

Related topics

View and revise your purchase from your mobile device

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.

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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**.

Related topics

Install Sourcing and Procurement Operations

Application plugin installation sequence

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

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- 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.

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Title	Type	Description
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 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	View the breakdown of your total year-to-date spend by addressable and non-addressable categories. 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

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Title	Type	Description
		state of the purchase order isn't closed canceled, and the spend categorization is either addressable or non-addressable.
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	View your year-to-date negotiation outcomes against the negotiation count, grouped by negotiation type. 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. This report shows negotiation outcomes where the corresponding negotiation state is either Closed Complete or Closed Canceled.
My Average Sourcing Request Cycle Time	Bar with line	View the average time from when a sourcing request is created to when its state is Closed Complete or Closed No Decision. 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.
My Average Purchase Requisition Cycle Time	Bar with line	View the average purchase requisition cycle time from when a purchase requisition is created to when its state

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Title	Type	Description
		is Closed Complete, Closed Rejected, or Closed Canceled. The report pulls all the purchase requisitions that 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	sn_shop.procurement_specialist_manager

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End user and goal	Required role
SLA-related details. This role has the same access as a procurement specialist, except that they have access to the manager dashboards.	
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

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- (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	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.
Spend Categorization - YTD	Pie chart	View the breakdown of the total year-to-date spend across the organization by addressable and non-addressable categories. 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.
Total Savings - YTD	Widget	View the year-to-date sum of the negotiated savings across the organization for

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Title	Type	Description
		all standard purchase orders, excluding blanket and closed canceled purchase orders. Only standard purchase orders and purchase order releases are considered.
Negotiation Outcomes - YTD	Stacked bar chart	View the year-to-date negotiation outcomes across the organization against the negotiation count, grouped by negotiation type. 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. This report shows negotiation outcomes where the corresponding negotiation state is either Closed Complete or Closed Canceled.
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		

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Title	Type	Description
Open Sourcing Requests	Widget	View the total number of sourcing requests across the organization that aren't in a closed state.
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	View the count and $ value of After-the-Fact (ATF) purchase requisitions. $ 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

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Title	Type	Description
		requisitions is 1 and the $ value is $10). Revised ATF purchase requisitions and their values aren't considered.
SLA		
Average time to complete record	Bar with line	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. 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.
Average time to complete by state	Stacked bar chart	View the breakup of the time taken in each state of the record. 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. 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. 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.
Breached SLA by record type	Stacked bar chart	View a comparison between the records that were processed within the SLA time

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Title	Type	Description
		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. 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. 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.
Average time vs SLA time of breached records	Time series column	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. 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.
Employee performance by record type	Stacked bar chart	View the count of records of types sourcing request, purchase requisition, negotiation, and cases that have been processed by your team. Data for this widget is derived from database views created from metric definitions that track active fields of PSM record types.
Employee performance breaches in durations	Stacked bar chart	View the time taken for the breached records of the team. The Procurement Specialist Manager can not only see the time taken for the breached records, but can also drill down to get the exact duration and the SLA time to get the

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Title	Type	Description
		details of time exceeded by SLA. 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.

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

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- 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	View the average time from when a sourcing request is created to when its state is Closed Complete or Closed No Decision. 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. 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.
Sourcing Request Cycle Time - Last Month	List	View the average cycle time for sourcing requests by buyer across the organization. You can also view the number of open sourcing requests that were assigned to the buyer as of last month, which were

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Title	Type	Description
		either closed last month or open throughout the duration of the month.
Average Purchase Requisition Cycle Time	Bar with line	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. 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. 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.
Purchase Requisition Cycle Time - Last Month	List	View the average cycle time for purchase requisitions by buyer across the organization. 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.
Negotiated Savings by Buyer - YTD	List	View the sum of the year-to-date negotiated savings across all closed complete purchase lines across the organization.
Negotiation Outcomes by Buyer - YTD	List	View the list of buyers across the organization along with their corresponding year-to-date negotiation outcomes, where the corresponding negotiation state is either

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Title	Type	Description
		Closed Complete or Closed Canceled. 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.

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.

Sourcing and Purchasing Automation

Sourcing and Purchasing Automation for Shopping Hub 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.

Related topics

Install Sourcing and Procurement Operations

Application plugin installation sequence

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 work** > **Sourcing Requests**.
- To view all sourcing requests from the Platform, navigate to **Sourcing and Purchasing Automation** > **All Work**, and select **All Sourcing Requests**.
- To view sourcing requests assigned to you from the Platform, navigate to **Sourcing and Purchasing Automation** > **My Work**, and select **My Sourcing Requests**.

After the shopper places a request for a catalog or non-catalog item from Shopping Hub, the information that the shopper provides is mapped to the fields of a sourcing request as follows:

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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.
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:

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Sourcing request related lists

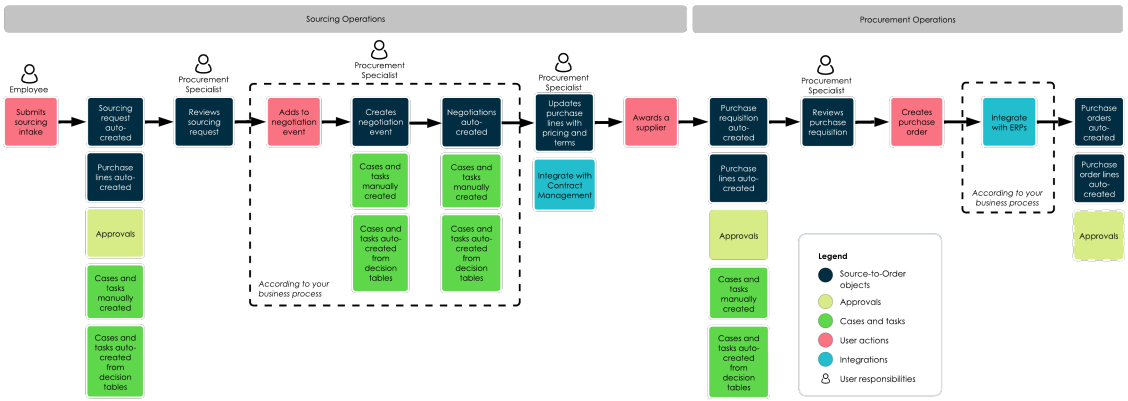
Related list	Description
Purchase Lines	Provides information of the individual lines under a sourcing request for the referenced supplier. The number of purchase lines for a sourcing request depends on the number of products or services with the same product model. For more details, see Purchase lines.
Purchasing Tasks	Provides information of all purchasing tasks that are related to the sourcing request. The tasks on the associated negotiation aren't displayed. For more details, see Purchasing tasks and procurement cases.
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	Represents the task of obtaining the pricing of or negotiating the terms for the product or service requested by the shopper. For more details, see Negotiations.
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.
Contract Requests	Displays all the associated contract requests against this sourcing request. **Note:** This field is displayed only if you have the Source-to-Pay Operations with Contract Management Pro plugin (com.snc.sn_spend_clm) installed.
Approval Plans	Displays all the approval plans created against this sourcing request.

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Sourcing request related lists (continued)

Related list	Description
Draft Emails	Associated email communication that is saved as drafts.
Sent Emails	Associated email communication that has been sent.

Sourcing and negotiation workflow



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 (NEGs) are considered in the sourcing flow, consider the following scenarios:

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- 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.

The default states that are available for a sourcing request are listed.

- Pending Approval
- Pending Review
- Information Needed
- Qualification Needed
- Qualified
- Pending Negotiation
- Negotiation in Progress
- Pending Resubmission
- Awaiting Supplier Response
- Awaiting Task Completion
- Requires Decision
- Closed Complete
- Closed No Decision
- Closed Canceled
- Closed Rejected

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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 Third-party 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. **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.
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:

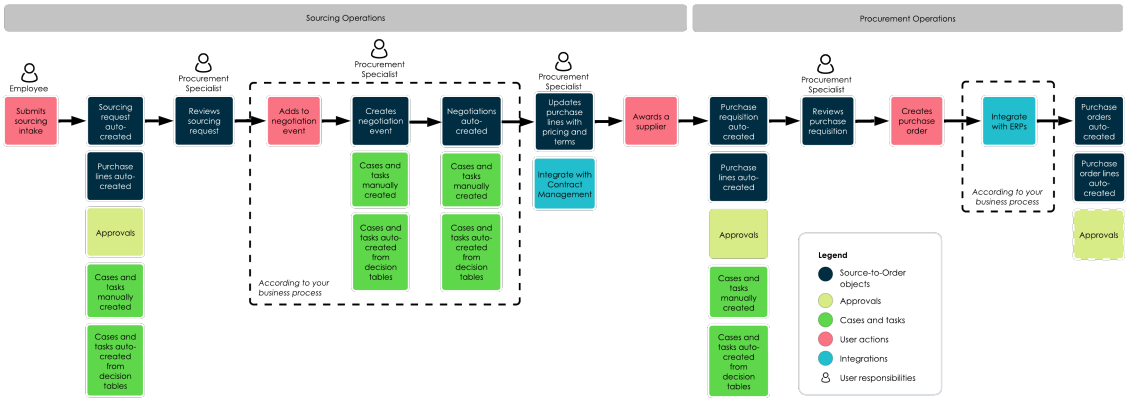
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Negotiation related lists

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.
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.
Contract Requests	Displays all the associated contract requests against this negotiation. **Note:** This field is displayed only if you have the Source-to-Pay Operations with Contract Management Pro plugin (com.snc.sn_spend_clm) installed.
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.
Draft Emails	Associated email communication that is saved as drafts.
Sent Emails	Associated email communication that has been sent.

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Sourcing and negotiation workflow



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.

The default states that are available for a negotiation are listed.

- Planned
- Qualification Needed
- Qualified
- Negotiation in Progress
- Awaiting Supplier Response
- Pricing Obtained
- Awaiting Task Completion
- Requires Decision
- Closed Decided
- Closed No Decision
- Closed Rejected
- Closed Canceled

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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. **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.

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Negotiation event fields (continued)

Field	Description
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

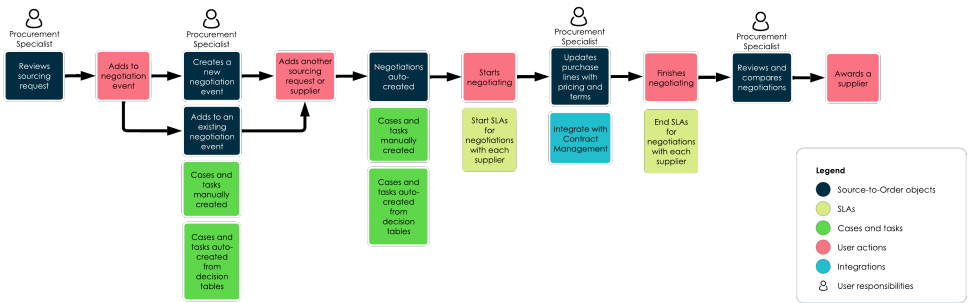
Related list	Description
Sourcing Requests	View all the sourcing requests that are mapped to this negotiation event. For details, see Sourcing request.
Negotiations	View all the negotiations with each supplier that are mapped to this negotiation event. For details, see Negotiations.
Purchase Lines	View and track all the purchase line records within the parent purchase for the suppliers referenced on the negotiation event. For details, see Purchase lines.
Purchasing Tasks	View information on all the purchasing tasks that are related to the negotiation event. 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 suppliers referenced on the negotiation event. For more details, see Contracts.
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.
Contract Requests	Displays all the associated contract requests against this negotiation event.

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Negotiation event related lists (continued)

Related list	Description
	Note: This field is displayed only if you have the Source-to-Pay Operations with Contract Management Pro plugin (com.snc.sn_spend_clm) installed.
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	View information on all the purchase requisitions that are related to the negotiation event. For more details, see Purchase requisition.
Draft Emails	Associated email communication that is saved as drafts.
Sent Emails	Associated email communication that has been sent.

Negotiation event workflow



The default states that are available for a negotiation event are listed.

- Draft
- Planned
- Work in Progress
- Pricing Obtained
- Awaiting Task Completion
- Requires Decision
- Closed Complete

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- Closed No Decision
- Closed Canceled

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 Shopping Hub.
- 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	Indicates if this requisition is net new or a revision. The shopper can revise the quantity of the product or delivery location for on order from Shopping Hub or the buyer can submit a revision from the Sourcing and Purchasing Automation module. To understand how revisions are handled, see Purchase revisions.
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. **Note:** This is a read-only field.
Purchase	Unique ID of the purchase.

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Purchase requisition fields (continued)

Field	Description
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. 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**. Otherwise, the order type is considered as **Standard**.
After the fact	Indicates if the purchase requisition is after the fact or not. 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.
Requested delivery	Requested delivery date. **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.
Shipping method	Details of the carrier, the applicable suppliers, and the valid delivery location countries for those suppliers. For more information on shipping methods and handling fees, see Handling fees.
Total estimated tax	The estimated sum of all taxes related to purchase lines within a purchase requisition.

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Purchase requisition fields (continued)

Field	Description
Total estimated shipping	Estimated sum of all shipping costs related to purchase lines within a purchase requisition.
Discount percentage	Discount provided if the minimum spend requirement is met. This field isn't displayed for a blanket order type.
Minimum spend	Minimum amount that must be spent to avail a discount. 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. **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.

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Purchase requisition related lists (continued)

Related list	Description
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.
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	This related list is conditionally displayed for purchase requisitions whose order type is **Blanket**. 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. 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.
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.
Contract Requests	Displays all the associated contract requests against this purchase requisition. **Note:** This field is displayed only if you have the Source-to-Pay Operations with Contract Management Pro plugin (com.snc.sn_spend_clm) installed.

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Purchase requisition related lists (continued)

Related list	Description
Draft Emails	Associated email communication that is saved as drafts.
Sent Emails	Associated email communication that has been sent.

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 **Sourcing and Purchasing Automation** > **Administration**.

The default states that are available for a purchase requisition are listed.

- Pending Review
- Pending Approval
- Awaiting Task Completion
- Final Review
- Pending Submission
- Closed Complete
- Closed Canceled
- Closed Rejected
- Pending Cancellation
- Pending Revision
- Pending Supplier Confirmation

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.

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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:

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Purchase line fields

Field	Description
Number	System-generated unique identifier of the purchase line.
Supplier	Supplier for which the shopper places the order. 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: • 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 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.
Product category	Product category that is sourced through this purchase line.
Supplier product	Supplier product for which the purchase line is created. This field isn't displayed if the product type is handling fees.
Product name	Name of the supplier product. For a non-catalog purchase, the information is taken from the **Describe the product** or **Describe the service** fields. This field isn't displayed if the product type is handling fees.
Product example	Reference URL that the shopper provides. For a non-catalog purchase, this information is obtained from the **Do you have an example of what you're looking for?** field on Shopping Hub.

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Purchase line fields (continued)

Field	Description
	This field isn't displayed if the product type is handling fees.
Supplier contacted?	Indicates if the shopper has already contacted the supplier. For a non-catalog purchase, this field is set to true if the shopper selects **I've contacted them already**. 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?	Indicates if a non-catalog intake workflow is initiated. The value is true when a shopper uses the **Don't see what you need?** option on Shopping Hub. This field isn't displayed if the product type is handling fees.
State	Current status of the purchase line. **Note:** This is a read-only field.
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.
Short description	Brief description that is visible to the shopper on Shopping Hub. This field isn't displayed if the product type is handling fees.
Purchase reason	Reason for the purchase that the shopper provides before checkout.

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Purchase line fields (continued)

Field	Description
	For a non-catalog purchase, this information is obtained from the **Why do you need this?** field on Shopping Hub. 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 Shopping Hub.
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**.
Expected delivery date	Expected date for the delivery that the shopper requests.

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Purchase line fields (continued)

Field	Description
	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.
Acknowledgment type	Indicates if receipt of confirmation is necessary and the type of receipt. The available options are **Milestones**, **Service Acknowledgment**, and **Two Way Match**. This field is displayed as **Invoice** if the product type is handling fees.
Milestone payout type	Indicates the type of milestone payout. The options available are **Amount** and **Percentage**. This field is visible only if the acknowledgment type is set to **Milestones**.
Start date	Expected start date of the service that the shopper provides. **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.
End date	Expected date to end providing the service to the shopper. **End date** is calculated as: **Start date**+[**Term length***Term value**]. **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.
Term length	Duration of the term. When the shopper selects a time frame, the order is considered a blanket type order.

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Purchase line fields (continued)

Field	Description
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.
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.	

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Purchase line fields (continued)

Field	Description
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. 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.

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Purchase line related lists (continued)

Related list	Description
	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.
Contract Requests	Displays all the associated contract requests against this purchase line. **Note:** This field is displayed only if you have the Source-to-Pay Operations with Contract Management Pro plugin (com.snc.sn_spend_clm) installed.

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
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

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Milestone fields (continued)

Field	Description
	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.
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.

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- 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.

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	Purchase line associated with this allocation.
Allocation type	Specifies how the cost is allocated. For example, **Cost center**, **Employee credit**, or **Payroll**.
Cost owner	User who incurs the cost of this allocated transaction amount.
Cost center	Cost center that incurs the cost of this allocated transaction amount.
Employee credit	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**.
Terms accepted on	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	Number of payments that the cost owner selected to pay back for a subsidized purchase.

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Cost allocation fields (continued)

Field	Description
	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 the Shopping Hub catalog, the cost allocation is created from the payment method that the employee selects during checkout. The employee can define the cost center to allocate to, and can split the allocation amongst multiple cost centers, as required. Employee credits and paycheck payments also result in the creation of a cost allocation.
- When an employee submits an off-catalog request from the I need to submit a quote flow, and selects a cost center that is not their default cost center, the selected cost center gets populated in the Cost Allocation table associated to the purchase requisition line. The employee can define the cost center to allocate to, but the allocation is 100% to that cost center, and can't be split.

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.

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Pre-payment fields (continued)

Field	Description
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.

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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 Shopping Hub, 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 Shopping Hub 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.

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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)

Note:
Purchase requisition merging and purchase line merging are not applicable for bundled products.

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

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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 Third-party 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.

Procurement case states

The default states that are available for a procurement case are listed.

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- Draft
- Processing Case
- In Review
- On Hold
- Work in Progress
- Closed Canceled
- Closed Rejected
- Closed Completed

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	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: • 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

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Purchasing task fields (continued)

Field	Description
	• 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.
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.
Sourcing decision dependent on task	Determines if completion of this task is required prior to a sourcing request being created. **Note:** This field is displayed only if a related sourcing request is entered.
Qualification dependent on task	Determines if completion of this task is required prior to a qualification request being created. **Note:** This field is displayed only if a related sourcing request is entered.
Order dependent on task	Determines if completion of this task is required prior to a purchase order being created.

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Purchasing task fields (continued)

Field	Description
	Note: This field is displayed only if a related purchase requisition is entered.
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 Third-party 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):

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- 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 that 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

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Purchase order fields (continued)

Field	Description
	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. 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 methods 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.

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Purchase order fields (continued)

Field	Description
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 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.

During purchase order integration, any attachments with valid sys-ids are copied from the Inbound Purchase Order staging table record to this Purchase Order primary table record. This is done through a transform script, which is part of the Order stage transform map, triggered onAfter. Go to the purchase order record on the Purchase Order table based on the ERP number and purchase order number, and verify that your attachments are present on the target record. You can delete or rename attachments as needed, without creating duplicates.

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 a 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 with 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:

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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 a 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 a two-way match: The received amount is populated with the line amount invoiced (editable field) when the status of the invoice line associated with 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.

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Purchase order related lists (continued)

Related list	Description
	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.

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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 Shopping Hub.

The shopper can revise an order from Shopping Hub or the procurement specialist can submit revision from the Sourcing and Purchasing 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.

Revisions 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.

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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 Shopping Hub. 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 Sourcing and Purchasing 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 Shopping Hub. 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 Shopping Hub 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:

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- 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 Shopping Hub.

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Use the purchasing view to view contract details in the Sourcing and Purchasing 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.

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Contract form (continued)

Field	Description
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**.
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.

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Contract form (continued)

Field	Description
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.
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.

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Contract related lists (continued)

Related list	Description
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 Sourcing and Purchasing 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 Shopping Hub 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.

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- 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.

    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.

    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.

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 Shopping Hub accordingly.

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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.

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 Shopping Hub.

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:

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- 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 Sourcing and Purchasing 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 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:

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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.

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 Sourcing and Purchasing 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	

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Receipt fields (continued)

Field	Description
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. 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 Shopping Hub 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 Sourcing and Purchasing 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.

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Shipment details fields (continued)

Field	Description
	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 Sourcing and Purchasing 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**.

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Invoice task fields (continued)

Field	Description
	If a line is acknowledged in Shopping Hub, 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.

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

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Invoice fields (continued)

Field	Description
	invoice is posted in the ERP system through the integration.
Status	Current status of the invoice.
Supplier invoice number	Invoice number of the supplier. **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. **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 date	Date on which this invoice is created. **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. **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.

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Invoice fields (continued)

Field	Description
	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. In the absence of a receipt and three-way matching, invoice approvals are used to avoid an automatic two-way match. Invoice approvals are sent to the recipient of the line and the shopper can act on them as a to-do in Shopping Hub. For details, see Shopper to-dos.

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 in 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.

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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 Sourcing and Purchasing Automation module.

Procedure

1. Navigate to **All** > **Sourcing and Purchasing Automation** > **Administration** > **Approval Rule**.
2. Select **New**.
3. On the form, fill in the fields.

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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: ○ Invoice ○ Purchase Order ○ Purchase Requisition ○ Sourcing Request 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. **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.
Approving line	Approving object line you're seeking approval for.
Approval rule type	Type of approval rule that determines how approval plans are generated and routed when conditions are met. The following options are available: ○ Dynamic Users or Groups ○ Managerial Job Code Hierarchy ○ Managerial Hierarchy ○ Specified Users or Groups ○ Cost Center Managers **Note:** This option is available only when the approving object is a purchase requisition. Depending on the rule type you select, the associated fields appear. For more information on these rules, see Approval rule types.
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.

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Field	Description
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.
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. **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**.

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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 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.	If approval is required from the purchasing user's cost 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.
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.	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. 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.
Managerial Hierarchy	Approvals are triggered based on the purchasing user's manager's hierarchy. The approval routing method can	If approval is required from all managers in hierarchy, then an approval is sent to

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Approval rule types (continued)

Approval rule type	Description	Example Scenario
	be parallel or sequential, and the approval decision method can be all approvers or any approver.	all users in the purchasing user's (business owner) management hierarchy up to the job code specified, when the approval trigger conditions are met. 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 owner) management hierarchy. 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.
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.	
Cost Center Managers	Approvals are triggered only for purchase requisitions, from multiple cost center managers. The approval routing method is restricted to just sending approvals in parallel.	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. 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. Cost center managers receive email notifications for their approval with details of the

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Approval rule types (continued)

Approval rule type	Description	Example Scenario
		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 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.

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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

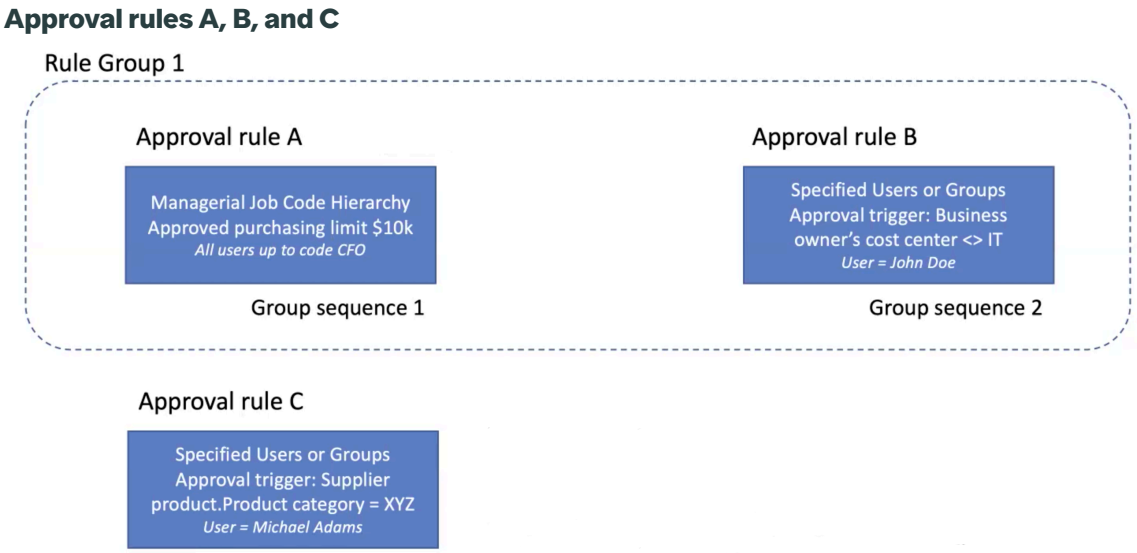


- Without rule group and group sequencing, approval rules A and B are triggered simultaneously.
- With rule group and group sequencing, approval rule A is triggered first, followed by approval rule B when A is complete.

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

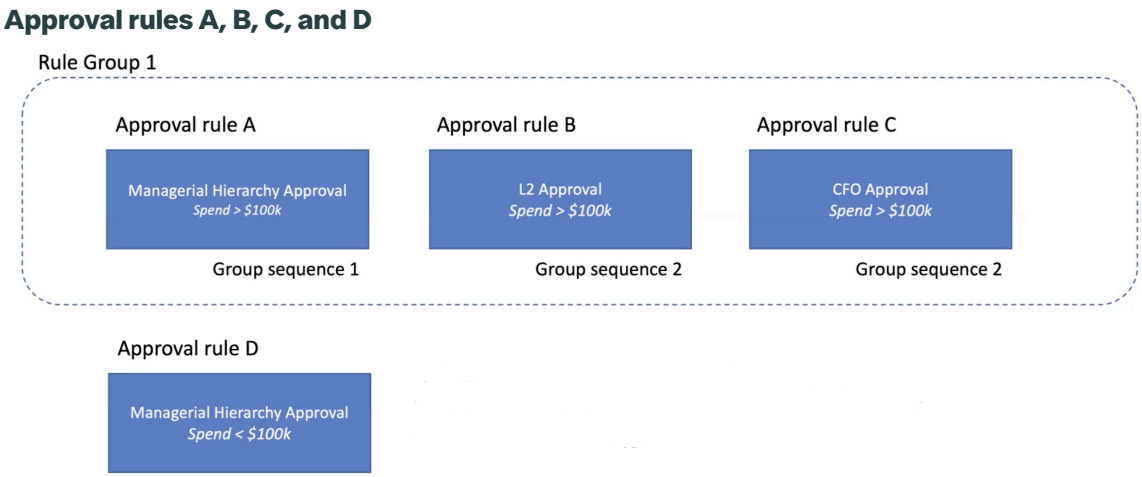
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- Without rule group and group sequencing, approval rules A, B, and C are triggered simultaneously.
- With rule group and group sequencing, approval rules A and C are triggered first, followed by approval rule B when A is complete.

Scenario 3

- One purchase made for $120k
- Another purchase made for $95k



- 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.

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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 Sourcing and Purchasing Automation module.

Procedure

1. Navigate to **All** > **Sourcing and Purchasing 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.

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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.

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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 Shopping Hub, 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

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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 Sourcing and Purchasing Automation module.

Procedure

1. Navigate to **All** > **Sourcing and Purchasing 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.

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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 Sourcing and Purchasing Automation module.

Procedure

1. Navigate to **All** > **Sourcing and Purchasing 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.

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Note:
Blanket purchase orders cannot result in the creation of a fixed asset.

You can navigate to **Sourcing and Purchasing 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.
Capitalize on	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:

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- 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 Shopping Hub administrator and the buyer.

Shipping estimates from Shopping Hub administrator

A Shopping Hub 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.

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A Shopping Hub 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.

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.

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].

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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 Shopping Hub administrator

A Shopping Hub 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.

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 in 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.

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:

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- 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.

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

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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.psd_admin: Configure and make changes to the system properties, such as creating request types and categories.

  Note:
  An application-specific admin role enables a user to access a specific application, but does not grant the user any other admin rights. Your system-level admin on the production instance must grant the application-specific admin role to the appropriate users, and then remove the application-specific admin role from all the users with the system-level admin role. For more information, see Application administration.

- 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.

Related topics

Procurement Case Management Dashboard

Using Procurement Case Management

Install Sourcing and Procurement Operations

Application plugin installation sequence

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.

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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.

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- Manage your category hierarchy.
- Associate the categories within your catalog.

Related topics

Service catalog categories

Record Producer

Source-to-Pay Workspace

As a Procurement Specialist, you can easily complete your actionable tasks within the premises of an enhanced user experience with Source-to-Pay Workspace.

The Source-to-Pay Workspace application provides experiences and tools for a Procurement Specialist to source, negotiate, and procure the goods and services that an organization requires. It also enables them to address and work on tasks related to procurement.

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

However, if you wish to install just the Source-to-Pay Workspace application, the dependent application Procurement Case Management is also installed along with.

For more information, see Source-to-Pay Workspace.

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.

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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 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. The **Supplier response close** field is auto-populated with the supplier response close date specified in the existing negotiation event that you're adding the sourcing request to.
   - 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. The **Expected start** field gets auto-populated with the current date. However, you can select your expected start date from the calendar icon if necessary.
     e. The supplier response close date specified in the sourcing request is auto-populated in the **Supplier response close** field. If the sourcing manager changes the supplier response deadline for a new negotiation event, the sourcing request also reflects this updated date.

     Note:
     When adding multiple sourcing requests to a new negotiation event, the furthest date among those requests is used to populate the **Supplier response close** field.
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.

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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 Third-party 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 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.

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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.

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.

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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 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.

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.

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Create a quick case

As a procurement specialist, quickly create a procurement case from the plus icon on Source-to-Pay Workspace. With an additional supplier role of sn_supplier.fulfiller, you can similarly create a supplier case.

https://player.vimeo.com/video/1025480397?h=4f7094fce3&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: sn_shop.procurement_specialist

Procedure

1. Navigate to **All** > **Procurement Case Management** > **Procurement Workspace**.
2. On the landing or list page, select the + icon at the tab level.
3. On the **Create new case** dialog box, select the case type from the **Case type** list.
4. Select **Submit**.
   A case form is displayed with pre-filled data based on the templates that you have configured.
5. On the form, fill in the required fields.
6. Select **Save**.

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.

https://player.vimeo.com/video/1038250055?h=9e71316df9&badge=0&autopause=0&player_id=0&app_id=58479

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 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.

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Field	Description
Case type	Type of case based on the requirement. The case type options are different for procurement cases and supplier cases.
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.
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.
Sourcing decision dependent on case	Whether any sourcing decision is dependent on the case. **Note:** This field is displayed only if a related sourcing request, negotiation, or negotiation event is entered.
Qualification dependent on case	Whether any qualification is dependent on the case. **Note:** This field is displayed only if a related sourcing request, negotiation, or negotiation event is entered.
Order dependent on case	Whether the order is dependent on the case. **Note:** This field is displayed only if a related purchase requisition is entered.

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Field	Description
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 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.

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Field	Description
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.

https://player.vimeo.com/video/1049740852?h=d0fc28e838&badge=0&autopause=0&player_id=0&app_id=58479

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 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.

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Field	Description
Select action type for task	Type of action that the shopper must complete for this task to progress. The options are: ○ Mark complete ○ View link ○ Play video ○ Upload documents ○ Complete a form ○ Sign document **Note:** ○ 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	Person within the assignment group to whom the task is assigned to. **Note:** You must assign the action type to the concerned shopper or employee for them to find it in their tasks list.
State	Current state the task is in. **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.
Due date	Expected date and time by when the task is expected to be resolved.
Short description	Brief description of the task.
Description	Detailed description of the task.
Summary Details	

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Field	Description
Related case	Case associated with the task.
Sourcing request	Sourcing request associated with the task.
Purchase requisition	Purchase requisition associated with the task.
Purchase order	Purchase order associated with the task.
Sourcing decision dependent on task	Whether any sourcing decision is dependent on the task. **Note:** This field is displayed only if a related sourcing request is entered.
Qualification dependent on task	Whether any qualification is dependent on the task. **Note:** This field is displayed only if a related sourcing request is entered.
Order dependent on task	Whether the order is dependent on the task. **Note:** This field is displayed only if a related purchase requisition is entered.
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.

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.

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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.

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- 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

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For information on how Agent assist is set up and configured on the Now Platform, see Set up Agent assist.

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.

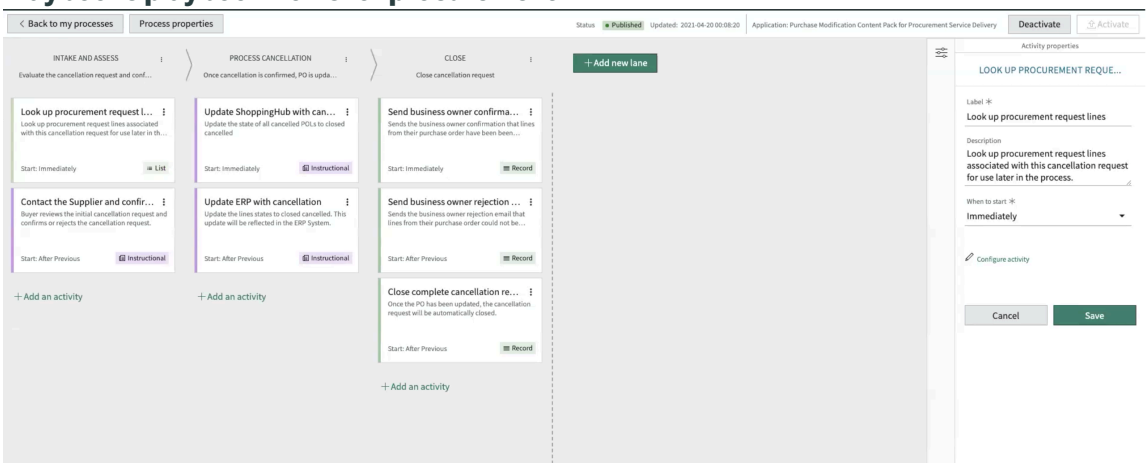
As a process owner or administrator, you can use Playbooks to enable cross-enterprise workflows and create a task-oriented view:

- 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

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.

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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.

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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. **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.

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.

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- 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.

Working with Sourcing and Procurement Operations playbooks in the Source-to-Pay Workspace

Playbooks provide a streamlined and consistent way of accomplishing various tasks, such as editing a purchase order, editing a purchase requisition, approving or rejecting cancellation requests, and so on.

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 work** > **Cases**.
3. Select the case of type Edit a purchase order.

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.

4. Complete the steps in the various stages and activities of the Edit a purchase order playbook.

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Stage	Activity	Activity Details
Review case	Assign case	Use this activity to assign the case to a different person or keep the case assigned to you. You can do the following: ○ 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: ▪ Select **Save** to save your changes. ▪ Select **Start work** to start working on the case.
Intake and Assess	Lookup procurement case line	This activity provides more information on the service request, purchase request, and purchase request line items. Select **Details about changes to this purchase** to review the changes.
	Buyer confirm or reject request to edit PO	Review this request to edit the purchase order and confirm or reject whether it can be processed. Select one of the following 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.
Process PO Edit	Update POLs to pending revision state	Updates the POLs state to pending revision until the PR of type revision is approved and the PO is updated.
	Create PR of type Revision	Creates a PR of type revision with the Shopper's changes to the PO.
Close case	Send business owner confirmation email	Sends the business owner confirmation that lines from their purchase order have been successfully edited using Shopping Hub email template.
	Complete case	Use this activity to add work notes and close the case. Do the following: ○ In the **Work notes** field, add any comments about the case. ○ In the **Close notes** field, add any closing comments. ○ Select **Complete case**.

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Stage	Activity	Activity Details
		Updates the case to Closed Completed.
	Update case to complete	After the PO has been updated, the request to edit the purchase order is automatically closed.

Result
The request updates the purchase order or line item with revised quantity, location, delivery dates, or service dates. 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 a purchase requisition 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 work** > **Cases**.
3. Select a case of type **Edit a purchase**.

   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. You can view all the associated information in the **Details** tab, and information on the procurement case lines, tasks, and original purchase in the **Procurement Case Lines**, **Purchasing Tasks**, **Related work**, and **Original purchase** tabs.

   The **Playbook** tab opens with the **Edit a purchase requisition** section.
4. Complete the steps in the various stages and activities of the Edit a purchase requisition playbook.

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Stage	Activity	Activity Details
Review case	Assign case	Use this activity to assign the case to a different person or keep the case assigned to you. You can do the following: ○ 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: ▪ Select **Save** to save your changes. ▪ Select **Start work** to start working on the case.
Intake and Assess	Modifications requested by shopper	This activity completes automatically.
	Confirm or reject request to edit PR	This activity enables you to review the initial request, confirm or reject the request to edit the PR. The available options are: ○ **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.
Process PR Edit	Update PR with new details	This activity updates the PR with new details and completes automatically.
Close case	Notify the requestor	Use this activity to email the business owner confirming that lines from their purchase requisition have been successfully edited. A draft email appears with pre-populated data in the **Subject** field. The email body is pre-populated with the relevant text. Select **Send Email** to send the email.
	Complete case	Use this activity to add work notes and close the case. Do the following: ○ In the **Work notes** field, add any comments about the case. ○ In the **Close notes** field, add any closing comments. ○ Select **Complete case**. Updates the case to Closed Completed.
	Update case to complete	After the PR has been updated, the request to edit a PR is automatically closed.

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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**.

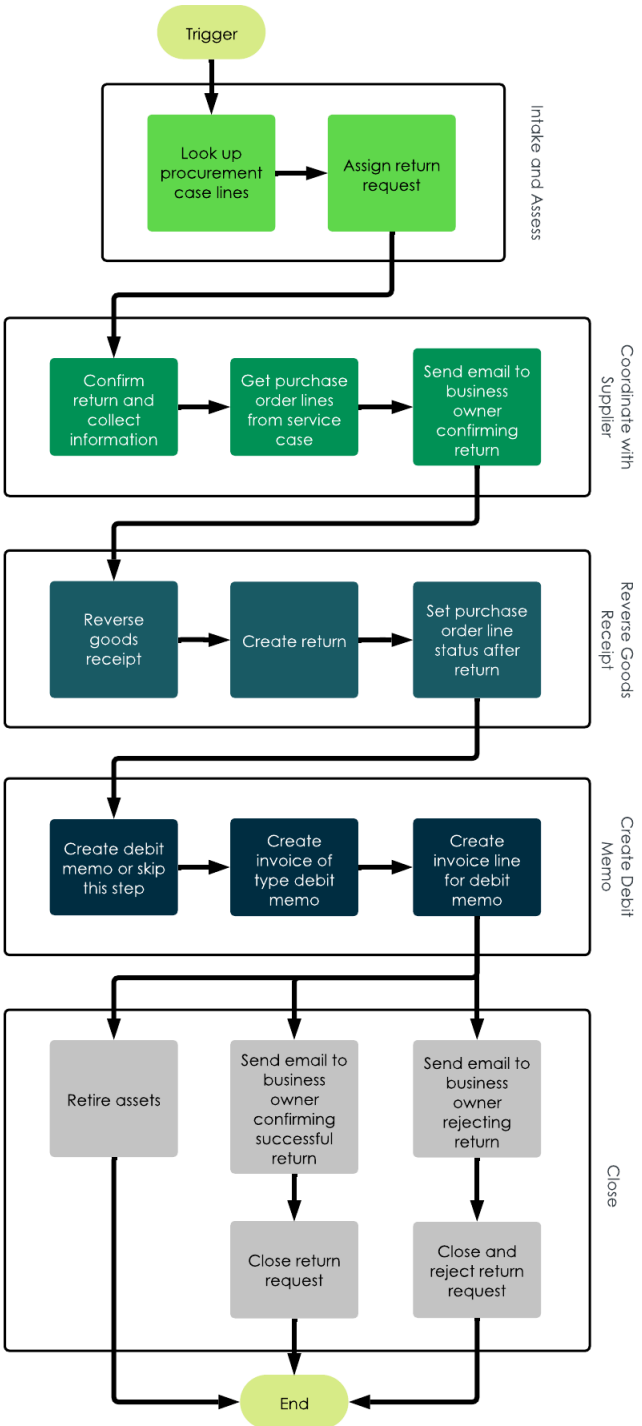
Related topics
- Purchase revision flows
- Purchase revision roles and responsibilities
- Playbooks

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.

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Procedure

1. Navigate to **All** > **Procurement Case Management** > **Procurement Workspace**.
2. Select the List icon ( ) and select **All work** > **Cases**.
3. Select the request number from the list for further processing.
4. Complete the steps in the various stages and activities of the Return a purchase playbook.

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Stage	Activity	Activity Details
Review case	Assign case	Use this activity to assign the case to a different person or keep the case assigned to you. In the **Assigned to** search field, select a procurement specialist to work on this case. Select one of the following actions: ○ Select **Save** to save your changes. ○ Select **Start work** to start working on the case.
Intake and Assess	Lookup procurement case lines	Look up procurement case line associated with this return request for use later in the process.
	Assign return request	Return request is automatically assigned to the buyer assigned to the original purchase.
Coordinate with Supplier	Confirm return and collect information	Contact the supplier, confirm the return, and collect the necessary information. Select to verify and process the information about the request. ○ **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.
	Get POLs from Service Case	Updates state of Purchase Order Lines to pending return.
	Send business owner email confirming return	Sends the business owner confirmation that after reviewing the return and coordinating with supplier, the return is feasible.
Reverse Goods Receipt	Reverse goods receipt	Creates 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.
	Create return	Creates a receipt of type return.
	Set POL status after return	Updates the POL status to appropriate state based on the Returned and Accepted quantities.

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Stage	Activity	Activity Details
Create Debit Memo	Create Debit Memo / Skip	Creates 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.
	Create invoice of type debit memo	Creates a debit memo.
	Create invoice line for debit memo	Creates an invoice line associated with debit memo in Shopping Hub.
Close case	Retire Assets	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.
	Send business owner email confirming successful return	Sends the business owner confirmation that their return has been processed successfully.
	Complete case	Use this activity to add work notes and close the case. Do the following: ○ In the **Work notes** field, add any comments about the case. ○ In the **Close notes** field, add any closing comments. ○ Select **Complete case**.
	Update case to complete	Updates the case to Closed Completed.

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.

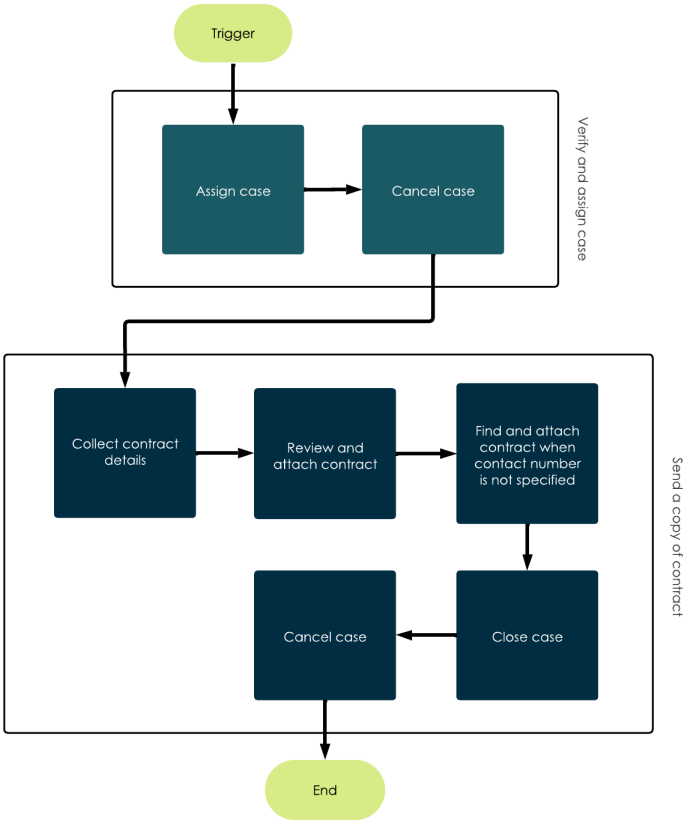
Fulfill request for copy of contract in playbook

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

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Procedure

1. Navigate to **All** > **Procurement Case Management** > **Procurement Workspace**.
2. Select the List icon ( ) and select **All work** > **Cases**.
3. Select the applicable Request a copy of contract case from the list for further processing.
4. Complete the steps in the various stages and activities of the Verify and approve delivery address playbook.

Stage	Activity	Activity Details
Review case	Assign case	Use this activity to assign the case to a different person or keep the case assigned to you. In the **Assigned to** search field, select a procurement specialist to work on this case. Select one of the following actions: ○ Select **Save** to save your changes. ○ Select **Start work** to start working on the case.
Send a copy of contract	Collect contract details properties	This is an automated step to get the contract details from submitted case.
	Review/attach contract properties	Find and review the contract as specified in request.

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Stage	Activity	Activity Details
		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.
	Find and attach contract when contract number is not specified	Find and attach contract when contract number is not specified. Select **Compose email** to draft the email for the employee. Select **Add File** to browse and attach the contract file to the email. 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. Select **Send Email** to send the email for the employee. Select **Done**.
Close case	Complete case	Use this activity to add work notes and close the case. Do the following: ○ In the **Work notes** field, add any comments about the case. ○ In the **Close notes** field, add any closing comments. ○ Select **Complete case**. Updates the case to Closed Completed.
	Update case to complete	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.

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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 eSignature Spoke.
3. Navigate to **All** > **Procurement Case Management** > **Procurement Workspace**.
4. Select the list icon and select **All 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 Send NDA to suppliers for signature.

   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 Send NDA to suppliers for signature.

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.

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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.

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.

   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**.

Send NDA to suppliers for signature

As a procurement specialist, you can use playbooks to prepare a Non-Disclosure Agreement (NDA) and send it for signing to the suppliers and third parties and review the signed and completed NDA.

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 work** > **Cases**.
3. Select the applicable Send NDA for Signature case from the list for further processing.
4. Complete the steps in the various stages and activities of the Send NDA for signature playbook.

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Stage	Activity	Activity Details
Review case	Assign case	Use this activity to assign the case to a different person or keep the case assigned to you. You can do the following: ○ 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: ▪ Select **Save** to save your changes. ▪ Select **Start work** to start working on the case.
	Update case to Work in progress	Updates the case state to Work in progress
Prepare NDA	Select document tamplte	In the **Document template** field, select **Supplier NDA draft**. Select **Continue**.
	Identify internal signer	In the **Internal Signer** field, select the name of the signer. Select **Continue**.
	Identify supplier's signer	Do the following: ○ In the **Supplier contact** field, enter the name of the supplier contact. ○ In the **Signatory email** field, enter a valid email ID of the supplier or third-party signer. ○ In the **Signatory title** field, enter a title for the supplier or third-party signer. ○ In the **Authorized signatory name** field, enter the name of the supplier or third-party signer. Select **Save**.
	Signer details are updated on procurement case	The details are added to the procurement case.
	Get signer details	The signer details are displayed.
	Review signers	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.

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Stage	Activity	Activity Details
	Create contract and update case	Creates a contract and updates the procurement case.
	Review document	Review the NDA and check that all details are correct before sending it for signing.
	Send document for signature	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.
Review completed NDA	Wait for the NDS to be signed and completed	Check if you have received the signed document. Open and verify the signed NDA attachment for completion and select **Continue**.
Close case	Notify the requestor	Email the requestor that the NDA has been signed. A draft email appears with pre-populated data in the **Subject** field. The email body is pre-populated with the relevant text. Select **Send Email** to send the email.
	Complete case	Use this activity to add work notes and close the case. Do the following: ○ In the **Work notes** field, add any comments about the case. ○ In the **Close notes** field, add any closing comments. ○ Select **Complete case**.
	Update case to complete	Updates the case to Closed Completed.

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.

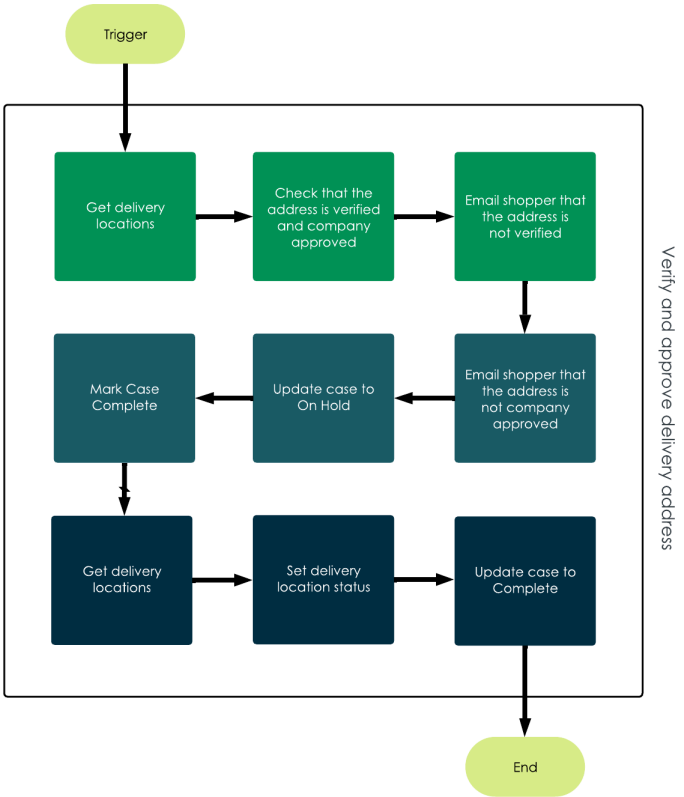
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Review delivery address in playbook

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 work** > **Cases**.
3. Open a procurement case with filter criteria set to **Delivery Address Review** and the **State** set to In review.
4. Complete the steps in the various stages and activities of the Verify and approve delivery address playbook.

Stage	Activity	Activity Details
Review case	Assign case	Use this activity to assign the case to a different person or keep the case assigned to you. You can do the following: ○ 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.

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Stage	Activity	Activity Details
		○ Select one of the following actions: ▪ Select **Save** to save your changes. ▪ Select **Start work** to start working on the case.
Verify and approve address	Check that the address is verified and company approved	This activity enables you to review the delivery address and indicate if it is verified and company approved. The options are: ○ **Not verified**:Select this option if the address provided by the shopper is invalid and can't be verified. ○ **Verified but not approved**: Select this option if the address provided by the shopper is valid but isn't approved by the supplier company. ○ **Verified and approved**: Select this option if the address provided by the shopper is valid and approved by the supplier company.
Close case	Notify the requestor	Use this activity to email the requestor about the status of the delivery address verification and approval. A draft email appears with pre-populated data in the **Subject** field. The email body is pre-populated with the relevant text. Select one of the following actions: ○ **Send Email**: Sends the email instantly. ○ **Skip**: Skips this activity and moves to the next activity.
	Complete case	Use this activity to add work notes and close the case. Do the following: ○ In the **Work notes** field, add any comments about the case. ○ In the **Close notes** field, add any closing comments. ○ Select **Complete case**. Updates the case to Closed Completed.

Result
The procurement case is updated with valid address and its state updates to Closed Completed.

Reviewing and updating general ledger details in playbook

As a fulfiller 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.

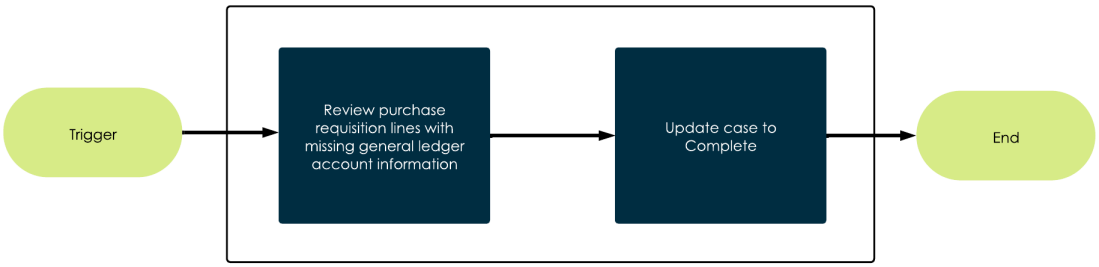
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Review and update missing general ledger details in playbook

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 work** > **Cases**.
3. Open a procurement case with filter criteria set to **GL Coding Review** and the **State** set to In review.
4. Complete the steps in the various stages and activities of the Verify and approve accounting fields on PRL playbook.

Stage	Activity	Activity Details
Review case	Assign case	Use this activity to assign the case to a different person or keep the case assigned to you. You can do the following: ○ 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: ▪ Select **Save** to save your changes. ▪ Select **Start work** to start working on the case.
Verify and approve accounting fields on PRL	Review PRLs with missing GL account informaiton	This activity enables you to review and update the PRLs. Select a PRL, review the missing GL accounting details, update them, and then select **Save**. Some examples of possible missing information include Capex, expense and pre-payment accounts.

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Stage	Activity	Activity Details
		The PRL is updated with GL accounting details. The options are: ○ **Continue**: Select this option to move to the next stage and activity. ○ **Open List**: Select this option to view a list of PRLs.
Close case	Notify the requestor	Use this activity to email the requestor that the accounting fields on PRL have been verified and approved. A draft email appears with pre-populated data in the **Subject** field. The email body is pre-populated with the relevant text. Select one of the following actions: ○ **Send Email**: Sends the email instantly. ○ **Skip**: Skips this activity and moves to the next activity.
	Complete case	Use this activity to add work notes and close the case. Do the following: ○ In the **Work notes** field, add any comments about the case. ○ In the **Close notes** field, add any closing comments. ○ Select **Complete case**. Updates the case to Closed Completed.

Result
The procurement case is updated with valid GL account details and the playbook is closed.

Sourcing intake guided experience with playbooks

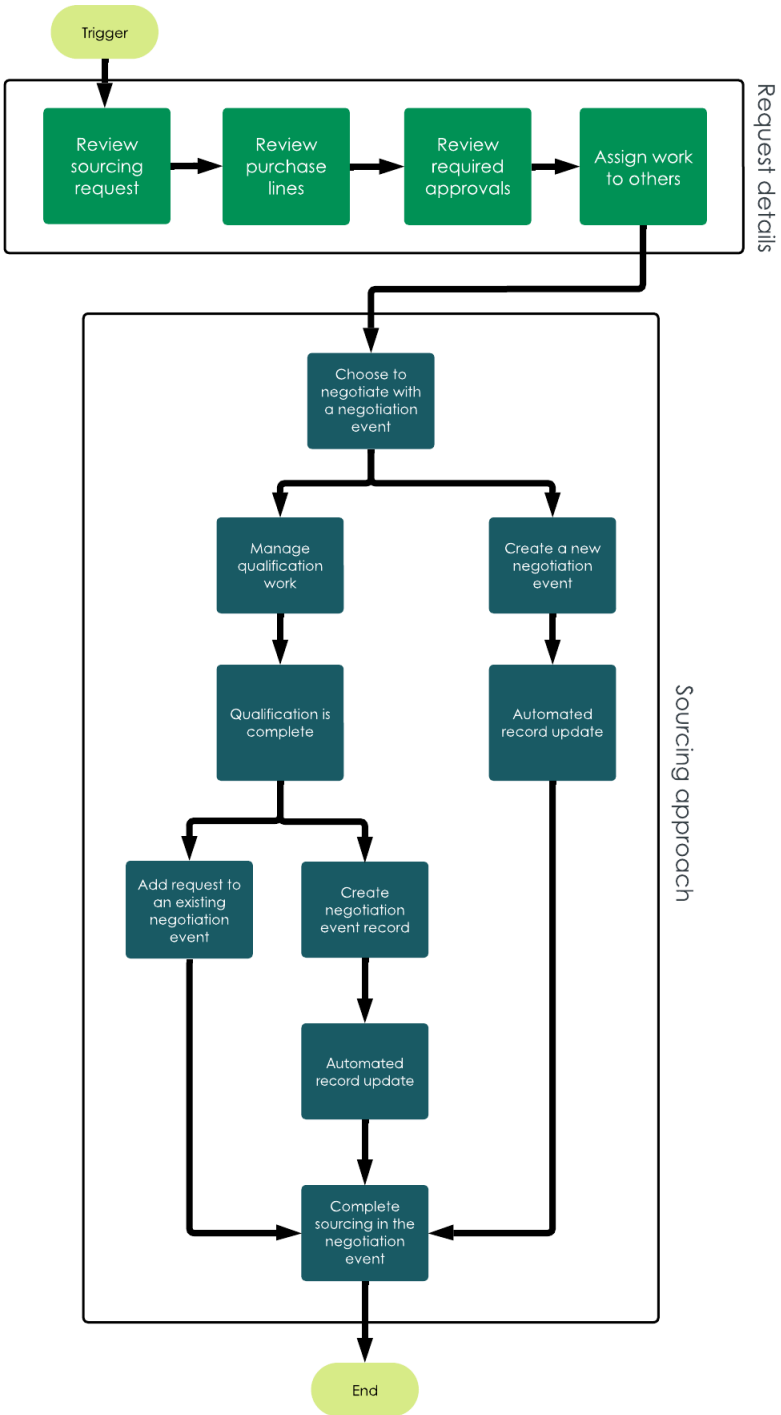
As sourcing managers, you can use the sourcing intake and negotiation setup playbooks to guide you through the complex request intake process so that you can focus on actual productive work such as negotiating savings from suppliers.

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 playbooks and their associated tasks.

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Sourcing intake playbook



The sourcing request playbook, also known as the sourcing intake playbook, 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.

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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.

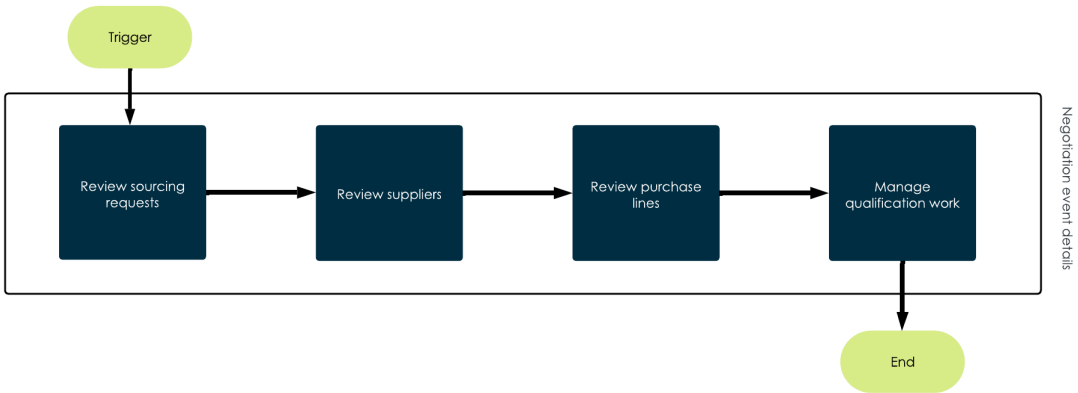
- Decide if you should negotiate in a negotiation event or not.

  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.

  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.

Negotiation setup playbook



The negotiation event playbook, also known as the negotiation setup playbook, 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.

  Note:
  This action in 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.

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For details on how administrators, agents, and fulfillers can configure playbooks, see Running 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 Workflow Studio.
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 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.

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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.

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 sourcing event.

Before you begin

Role required: Sourcing manager

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Ensure that you've selected the appropriate sourcing approach. For details, see Select a sourcing approach in playbook.

Procedure

1. Under Manage qualification work, review all the cases and tasks related to this negotiation event.
2. Do one of these actions.

3. 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.

4. If you've added the sourcing request to a new or existing negotiation event, select **Go to negotiation event**.
5. Review the details of the sourcing requests within this negotiation event.
6. **Optional:** Select **Add sourcing requests** if you want to add more similar sourcing requests to this negotiation event.
7. Select **Continue**.
8. Review the details of the suppliers within this negotiation event.
9. **Optional:** Select **Add suppliers** if you want to add more suppliers to this negotiation event.
10. 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.
11. 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.

Streamlining the supplier risk assessment workflow

As procurement specialists, track activity on the Third-Party Risk Management (TPRM) records, and update and make changes to the sourcing requests and purchase requests based on the final risk rating.

With the due diligence playbook for due diligence case types, procurement specialists no longer need multiple clicks to manually update any tasks that they need to complete during the different stages of the supplier risk assessment workflow. They no longer need to open the supplier tiering assessment and risk assessment cases that get auto-triggered whenever there's a need for supplier qualification. With the TRPM capabilities, when a sourcing request is added to a negotiation event, in the Qualification needed state, a supplier case of type due diligence is triggered to address risk assessments. The risk team is responsible for the workflow after the due diligence is triggered.

With this due diligence playbook, procurement specialists, sourcing managers, and procurement managers no longer need to handle these activities outside the system through emails, phone calls, or weekly zoom meetings with the risk team. There's no need to check for any updates from the tiering assessor and update them back to their own working records. They're also relieved from remembering or finding the appropriate records to update when the risk assessment is complete.

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The tiering assessor must complete the tiering questionnaire after the supply manager submits the tiering questionnaire. The state of the tiering assessment questionnaire changes to Awaiting response.

The supplier contact completes the risk assessment from the supplier collaboration portal. For more information on this, see Complete a risk assessment from the Supplier Collaboration Portal.

Note the following scenarios:

- When Supplier Lifecycle Operations is installed, and the supplier is new, the Due Diligence Request (DDR) is created in Supplier Lifecycle Operations as a supplier case, and the due diligence case is taken care of through the onboard a supplier case.
- When Supplier Lifecycle Operations is installed, but the supplier is old and already onboarded, the DDR is created as a procurement case.
- When Supplier Lifecycle Operations is not installed, irrespective of whether the supplier is old or new, the DDR is created in Sourcing and Procurement Operations as a procurement case.

For information on how Supplier Lifecycle Operations similarly assesses suppliers during the onboarding process, see Minimize risk by assessing suppliers during the onboarding process. For detailed information on the supplier onboarding playbook, see Using the supplier onboarding playbook to onboard suppliers.

For information on how to configure TPRM, see Configuring Third-party Risk Management. For detailed information on the due diligence workflow, see Due diligence workflow.

Track risk assessments from the due diligence playbook

As procurement specialists, use the due diligence playbook to track supplier risk assessments and complete the associated tasks.

Before you begin

Role required: Procurement specialist

About this task

When a sourcing request is added to a negotiation event, in the Qualification needed state, a supplier case of type due diligence is triggered to address risk assessments. You can choose to close the case through the playbook if there are duplicate requests. In case of no duplicates, a new due diligence is initiated through the playbook. The same Third-Party Risk Management (TPRM) record producer is used here. You are notified at each step in the TPRM workflow, such as inherent risk assessment, third-party risk assessment, and so on. You can review the risk rating after the due diligence is complete. Now, you can either accept or reject the risk rating, and take necessary actions based on this decision. Select **Mark Complete** to close the due diligence case.

Procedure

1. Navigate to **All** > **Procurement Case Management** > **Procurement Workspace**.
2. Select the List icon ( ) and select **All work** > **Cases**.
3. Select the Due Diligence procurement case from the list for further processing.
   The **Playbook** tab opens with the **Assign case** section.
4. Complete the steps in the various stages and activities of the Create a Due Diligence Request playbook.

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Stage	Activity	Activity Details
Review case	Assign case	Use this activity to assign the case to a different person or keep the case assigned to you. You can do the following: ○ 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: ▪ Select **Save** to save your changes. ▪ Select **Start work** to start working on the case.
	Update case to work in progress	This activity updates the case to Work in progress and completes automatically.
Create Request	Review the Supplier details	Review the supplier details and select **Continue**.
	Check for duplicate Due Diligence Requests	Checks for duplicate due diligence requests. If there aren't any duplicate requests, select **Create new request**.
	Create Due Diligence Request	Request third-party risk due diligence by selecting one of the following options: ○ Onboard a new engagement ○ Reassess an existing engagement ○ Reassess an existing engagement for contract renewal ○ Offboard an engagement with due diligence ○ Offboard an engagement with NO due diligence Add any relevant attachments, if required, and select **Submit**. The relevant third party, if available, is automatically populated. If the third party is not listed here or incomplete information is provided, enter the following details: ○ Third-party information ○ Engagement information ○ Third-party address ○ Engagement address ○ Third-party primary contact ○ Engagement primary contact

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Stage	Activity	Activity Details
	Update PC Record with the DDR case	Updates the procurement case record with the due diligence request case. A due diligence case is created for the supplier. After that, the created case record ID gets populated in the **Related DDR** field under the **Details** tab.
	Wait for risk process to start	Wait for the inherent risk assessment to complete. At this point, the TPRM team starts onboarding the supplier associated with the created DDR.
Assess Risk	Wait for the Inherent Risk Assessment	Wait for the inherent risk assessment to complete. Here, the assigned respondent completes and submits the inherent risk questionnaire, and the TPRM team updates the INA record and sets it to Closed state. Details of the INA record are provided in parallel in the playbook.
	Notify requestor on the Inherent Risk Assessment	A notification is sent to you with the information that the inherent risk assessment is now complete.
	Wait for the Third-Party Risk Assessments	Wait for the third-party risk assessments to complete. Here, the TPRM team starts the due diligence for the supplier associated with the created DDR. Details of the third-party risk assessments for the third party and the engagement are provided in parallel in the playbook.
	Notify requestor on the Third-Party Risk Assessment	A notification is sent to the requester when both these risk assessments are completed and in the Closed state.
	Check for the status of the Due Diligence approval process	Review the status of the entire due diligence approval process. At this point, the TPRM team moves the DDR to the TPRM approved state. A notification is sent to you with the information that the due diligence request has been approved by the TPRM team. The risk ratings from all the above assessments are now displayed in the playbook. **Note:** At any point during the above TPRM activities, if the record gets rejected, then a notification is sent to you regarding this rejection, and the case is moved to Closed rejected.
	Notify requester that the request	The requester is notified when the DD Request is approved by TPRM team.

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Stage	Activity	Activity Details
	has been approved.	
Review Risk Rating	Accept or reject risk rating	Do one of the following: ○ Select **Reject Risk Rating**, notify the requester that the request has been rejected, and mark the case as Rejected. ○ Select **Accept Risk Rating**, notify the supplier, and mark the case as Complete.
Close case	Get Supplier contact email from DDR record	Gets the email ID of the supplier contact from the due diligence request record.
	Notify Supplier	Use this activity to email the supplier about the status of the due diligence request. A draft email appears with pre-populated data in the **Subject** field. The email body is pre-populated with the relevant text. Select one of the following actions: ○ **Send Email**: Sends the email instantly. ○ **Skip**: Skips this activity and moves to the next activity.
	Complete case	Use this activity to add work notes and close the case. Do the following: ○ In the **Work notes** field, add any comments about the case. ○ In the **Close notes** field, add any closing comments. ○ Select **Complete case**.
	Update case to complete	Updates the case to Closed Completed.

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.

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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**.

  Note:
  You can find more information on reviewing and updating your search sources here.

- **Synonyms**
- **Stop Words**
- **Typo Handling**
- **Genius Results**
- **Result Improvement Rules**

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 faceting 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

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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.

Configuring Sourcing and Procurement Operations

Plan and configure your implementation for Sourcing and Procurement Operations.

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 [sn_fin]
2. ERP Integration Framework [sn_fcms_intg]
3. Common Service Delivery [sn_spend_sdc]
4. Procurement Case Management [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 [sn_spend_workspace]
6. Source-to-Pay Common Architecture [snc.sn_shop]
7. Sourcing and Purchasing Automation [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. Shopping Hub [snc.sn_spend_uib]
9. Shopping Hub Mobile [sn_shop_mobile]
10. Playbooks for Sourcing and Procurement Operations [sn_spend_cp]
11. Virtual Agent for Sourcing and Procurement Operations [sn_shop_va]
12. Natural Language Understanding Models for Sourcing and Procurement Operations [sn_spend_nlu]
13. Source-to-Pay Integration Framework [sn_spend_intg]
14. Procurement File Transfer Framework [sn_spend_ftp_intg]
15. Performance Analytics for Sourcing and Procurement Operations [sn_spend_pa]

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16. Risk Assessments Integration for Sourcing and Procurement Operations [sn_spend_vrm]
17. Project Costing for Sourcing and Procurement Operations [sn_spend_ppm]
18. Source-to-Pay Operations with Contract Management Pro [snc.sn_spend_clm]
19. Now Assist for Sourcing and Procurement Operations (SPO) [sn_spend_gen_ai]
20. Advanced Work Assignment for Source-to-Pay Operations [snc.sn_spend_awa]
21. Process Mining for Source-to-Pay Operations [sn_s2p_mining]
22. Primary Data Integration with SAP [sn_sap_data_int]
23. Sourcing and Procurement Operations Integration with SAP [sn_psm_sap_int]
24. Procurement for Field Service Management

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

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**.
   To uninstall an application, see Uninstall an application.

What to do next

Review the various components installed with these installations. For details, see:

- Components installed with Sourcing and Procurement Operations
- Components installed with ERP Integration Framework for Sourcing and Procurement Operations
- Components installed with Finance Common Architecture
- Properties installed with Finance Common Architecture

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Setting up primary data for Shopping Hub

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.

Related topics

- Install Sourcing and Procurement Operations
- Application plugin installation sequence
- Service portal configuration for Shopping Hub
- Configure punchout for third-party site purchases
- Customize your top suppliers on Shopping Hub
- Using Shopping Hub
- My purchases on Shopping Hub

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 Shopping Hub portal under Suppliers.

Procedure

1. Navigate to **All** > **ShoppingHub** > **Primary Data** > **Suppliers**.
   You can also navigate to **Sourcing and Purchasing 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.
Punchout	Whether the supplier is a third-party punchout. **Note:** This option is only available for Procurement Specialists using the Purchasing view.
Industry	Industry to which the supplier belongs.

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Field	Description
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**.
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.

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Field	Description
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	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: ○ **Carriage and Insurance Paid to (CIP)** ○ **Carriage Paid to (CPT)** ○ **Cost and Freight (CFR)** ○ **Cost, Insurance, and Freight (CIF)** ○ **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.

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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 Shopping Hub 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** > **Sourcing and Purchasing Automation** > **Primary Data**.
2. Select **Office Locations**.
3. Select **New**.
4. 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 Shopping Hub.
Legal Entity	Legal entity that is responsible for this office location.

5. Select **Submit**.

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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

1. Navigate to **All** > **Sourcing and Purchasing Automation** > **Primary Data** > **Suppliers**.
2. Alternatively, navigate to **All** > **Sourcing and Purchasing Automation** > **Primary Data** > **Supplier Product**.

   Valid values defined at the supplier product take precedence over the values defined at the supplier level.
3. Select countries by unlocking the **Supplier delivers to** field.
4. 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** > **Sourcing and Purchasing 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.

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Field	Description
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 Shopping Hub 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 Shopping Hub 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.

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Field	Description
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.**
Goods sourcing checkout	References the record producer used for sourcing requests of goods from this category.
Services sourcing checkout	References the record producer used for sourcing requests of services from this category.
Contract type	Contract types that are applicable to this product category. Related contracts, based on the specified contract models, are created for any purchase requisition of a product of this category.
Display pricing?	Determines if pricing is to be displayed in Shopping Hub for supplier products associated to this category.
Sourcing time in days	Number of days that are required to source a product of this category from the supplier. For details, see Lead time calculations.
Supplier onboarding time in days	Number of days that are required for a new supplier of a product in this category to onboard. For details, see Lead time calculations.
Purchasing time in days	Number of days that are required to complete a purchase order for products in this category.

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Field	Description
Enterprise Asset Configuration	
CI class	Configuration item (CI) class that represents any product of this category. You can't add the CI class to the model category later.
Asset class	Asset that represents any product of this category. Setting the asset class triggers the creation of assets depending on the model category selected. 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. If you don’t select an asset class, the product category doesn’t create any asset. You can select an asset class from these options: ○ **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.

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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. **Note:** The **Display name** field is auto-populated with the values of the **Manufacturer** and **Name** fields.

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Field	Description
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: ○ **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.
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: ○ **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	

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Field	Description
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.**
Sourcing time in days	Number of days that are required to source a product of this category from the supplier. This field is auto-populated based on the selected product category. For details, see Lead time calculations.
Purchasing time in days	Number of days that are required to complete a purchase order for products in this category. This field is auto-populated based on the selected product category. For details, see Lead time calculations.

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

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About this task

You can add a supplier product and choose to publish it on the Shopping Hub 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 **Sourcing and Purchasing 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.
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. **Note:** For creating a product bundle, enter the name of the product model of type bundle in this field.
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 Shopping Hub portal.

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.

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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: ○ **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**.
Acknowledgment type	Type of receipt confirmation, if any, required for services. You can select one of these options: ○ **None** ○ **Milestones** ○ **Service Acknowledgment** ○ **Two Way Match**
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.

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Field	Description
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.

Add a supplier product bundle

Add a supplier product bundle, which may include several products or services from the same supplier. You can also add sub-bundles to the main bundle.

Before you begin
A bundled model is a single model comprised of individual models. For example, a laptop, printer, keyboard, and mouse can be combined into a single bundled model. For this bundled model to appear in the Shopping Hub portal, you have to create a supplier product for the same. Once the supplier product is created and published, it will be available for purchase in Shopping Hub. For more information on how to create bundled models, see Bundled models.

Role required: sn_shop.shopping_hub_admin or sn_shop.procurement_administrator

About this task
A supplier product bundle is a supplier product created under any product model of type bundle.

You can add a supplier product bundle and choose to publish it on the Shopping Hub portal. The product bundles that you add appear on the portal under various categories. To a product bundle you can add multiple products, services, or sub-bundles that are available with the same supplier.

Procedure
1. Navigate to **All** > **ShoppingHub** > **Supplier Products** > **Published Products**.
   You can also navigate to **Sourcing and Purchasing Automation** > **Primary Data** > **Supplier Product**.
2. Select **New**.
3. On the form, fill in the fields.
   For more information, see Add a supplier product.

   Note:
   For creating a product bundle, enter the product model of type bundle in the **Product model** field.

4. Select **Check bundle setup** to check if the configurations for all the products and services included in the bundle are complete.
   For all missing configurations, a list of validation messages are displayed. You can select each message to correct the respective configuration. The following conditions must be fulfilled for publishing a bundle:
   - All model components must be associated with supplier products from the same supplier.
   - All supplier products must be published.

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- All supplier products other than type bundle must have a contract price associated with them.
- All supplier products of type bundle must not have a contract price associated with them.
- All supplier products must have a contract price listed in the same currency.

Note:
If **Check bundle setup** option is selected for an already published bundle and any of its configurations are found incomplete, the bundle gets unpublished.

5. 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 bundle.

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
• Supplier Task = Onboarding; Actual duration = 13 days • Purchase line 1: Product Category = Hardware • Purchase line 2: Product Category = Software	• Supplier Task = Onboarding; Actual duration = 15 days • Purchase line 3: Product Category = Hardware	• 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

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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.

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 • Purchase requisition line (PRL) State = Closed Rejected • Product Model = MacBook • Product Category = Hardware	Purchase Line 2 – Reseller B MacBook • PRL State = Pending Approval • Product Model = MacBook • Product Category = Hardware	Purchase Line 3 – Apple MacBook (assume current sourcing time is 11 days) • PRL State = Closed Canceled • Product Model = MacBook • Product Category = Hardware
Sourcing Request B for Lenovo Think Pads		
Actual duration = 22 days		

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Purchase line 4 – Reseller A Lenovo Think Pad • PRL State = Closed Rejected • Product Model = MacBook • Product Category = Hardware	Purchase Line 5 – Reseller B Think Pad • 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

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

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• Actual duration = 16 days
• Purchase line 1
  ○ Supplier product = Reseller A Apple MacBook
  ○ Product Model = MacBook
  ○ Product Category = Hardware
• Purchase line 2
  ○ Supplier Product = Reseller A Office 365
  ○ Product Model = Office 365
  ○ Product Category = Software
	• Actual duration = 13 days
	• Purchase line 3
	  ○ Supplier Product = Reseller B MacBook
	  ○ Product Model = MacBook
	  ○ Product Category = Hardware
		• Actual duration 21 days
		• Purchase line 4
		  ○ Supplier Product = Reseller B Office 365
		  ○ Product Model = Office 365
		  ○ Product Category = Software
			• Actual duration = 7 days
			• Purchase line 5
			  ○ Supplier Product = Reseller A Lenovo ThinkPad
			  ○ Product Model = Lenovo ThinkPad
			  ○ Product Category = Hardware

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

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.

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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,

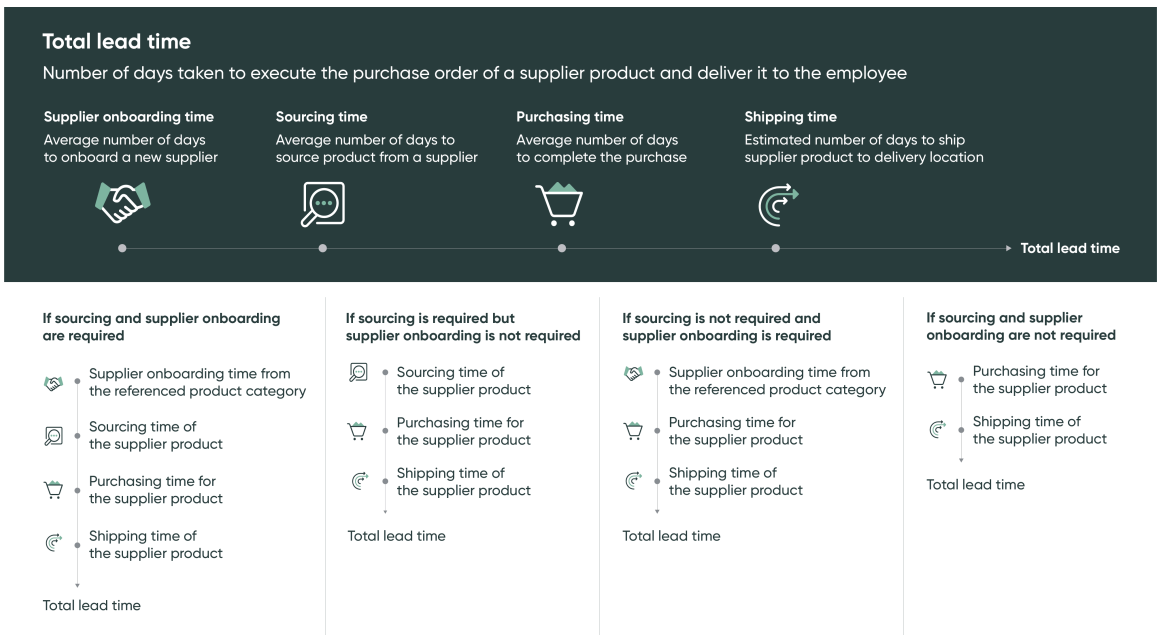
  Total lead time = [Sourcing time of the supplier product] + [Purchasing time for the supplier product] + [Shipping time of the supplier product].

- 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.

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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 Shopping Hub 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.

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Field	Description
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 Shopping Hub portal. Shopping Hub 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 Shopping Hub 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 Shopping Hub portal.

Also, these supplier products are not visible on the Shopping Hub 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.

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Field	Description
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**.

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 Shopping Hub homepage to shop as a delegate.

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Before you begin
Role required: 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 Shopping Hub 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 Shopping Hub 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.

Note:
You can configure delegates to shop on your behalf only from Shopping Hub, 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 Shopping Hub. 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.

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Shopping Hub configuration

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

To provide a better end-user experience, use the Shopping Hub 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 Shopping Hub.

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 Shopping Hub 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.

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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
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 Shopping Hub configuration

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Field	Description
Section	Section information for Shopping Hub 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
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 Shopping Hub 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 Shopping Hub.

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.

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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 **Sourcing and Purchasing Automation** tab on each record.

Procedure

1. Navigate to a supplier product, a product model, or a category section.
   For supplier model, **All** > **Sourcing and Purchasing 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.
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

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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 **Sourcing and Purchasing 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 Shopping Hub 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.

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- **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 **Sourcing and Purchasing 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

Shopping Hub process visibility configuration
As a procurement administrator, you can create and modify purchase process steps, work items involved in the process steps, and link the process steps and work items.

You can track your purchase requisitions, purchase orders, and sourcing requests using the process visibility tracker in the purchase detail view.

To configure the visibility tracker, you can define the process steps and work items involved in the purchase procedure. You can then link the work items to their respective process steps.

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You can also update the sequence and labels to ensure flexibility and alignment with business processes.

Add process steps

Create process steps involved in the product purchase cycle.

Before you begin
Role required: sn_shop.procurement_administrator

Procedure

1. Navigate to **All** > **ShoppingHub** > **Process visibility configurations** > **Configure process steps**.
2. Select **New**.
3. On the form, fill in the fields.

Step configuration

Field	Description
Name	Name of the process step.
Active	Option to mark the process step as available for use.
Application	Application for which the process step is being created.
Order	Order in which this step is displayed.
Table	Table that the process step belongs to.
Display conditions	Conditions that must be met for the step to be visible on the form.
Start conditions	Conditions that must be met for the step to start.
Empty state text	Text that is displayed if there are no work items in the selected step.

4. Select **Submit**.

Add work items

Create work items to be added to the process steps involved in the product purchase cycle.

Before you begin
Role required: sn_shop.procurement_administrator

Procedure

1. Navigate to **All** > **ShoppingHub** > **Process visibility configurations** > **Configure work items**.
2. Select **New**.
3. On the form, fill in the fields.

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Purchase work item

Field	Description
Name	Name of the work item.
Application	Application for which the work item is being created.
Table	Table to which the work item belongs to.
Filter conditions	Conditions to filter work items to be shown against the step.

4. Select **Submit**.

Link work items with process steps

Establish the relationship between the process steps and their work items.

Before you begin

Role required: sn_shop.procurement_administrator

Procedure

1. Navigate to **All** > **ShoppingHub** > **Process visibility configurations** > **Configure step and work item relationships**.
2. Select **New**.
3. On the form, fill in the fields.

Step to Work item Relationships

Field	Description
Step	Name of the process step.
Work item	Name of the work item.
Order	Order in which the work item is displayed.
Work item's table	Table that the work item belongs to.
Work item to procurement record path	Dot-walk path from the work item’s table to the procurement record.
Application	Application for which the work item is being created.
Active	Option to mark the work item relation as available for use.

4. Select **Submit**.

Configure punchout for third-party site purchases

Set up punchout configuration to allow shoppers or employees to make third-party site purchases.

Before you begin

Role required: admin or procurement administrator

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Procedure

1. Navigate to **All** > **ShoppingHub** > **Primary Data** > **Suppliers**.
   You can also navigate to **Sourcing and Purchasing Automation** > **Primary Data** > **Supplier**.
2. Ensure that the **Punchout** check box is selected for the designated third-party supplier.

   Note:
   This **Punchout** option is only available in the Purchasing view. For more information on adding suppliers, see Add a supplier.

3. Navigate to **All** > **Procurement Integrations** > **Catalog** > **Third-Party Categories**.
4. Do the following:
   - Add the required mapping records between SPO's model category and the punchout supplier's product category.
   - Add the required mapping records between SPO's predefined units and the punchout supplier's units of measure.

   For more information, see Mapping Product Categories and Units of Measure for seamless checkout in Shopping Hub
5. Navigate to **All** > **Procurement Integrations** > **Setup** > **Third-Party Registration**.
6. From the **Supplier** list, search for and select a supplier.
7. Do either or both of the following depending on your implementation requirements.
   - Select the **cXML punchout support** check box and fill in the fields in the **cXML punchout setup** tab.

     The suppliers that do not have Search API and Order API or do not want to use them can upload catalog index files containing product catalog data. The uploaded data is stored in the Third-party Catalog (sn_spend_intg_third_party_catalog) table.

Field	Description
Require catalog index file upload?	Option that enables you to upload the catalog index CSV file.
cXML domain	The domain name associated with your organization for the punchout transaction.
cXML identity	A unique identifier used to represent your organization in the punchout transaction.
Third-party cXML - connections	
Order request URL	The URL endpoint where the cXML order request is sent to the supplier.
Punchout group	The specific group for which this punchout configuration applies.
Punchout inbound credentials	The credentials that the supplier uses to authenticate when connecting to your system for punchout transactions.
Punchout outbound credentials	The credentials that you use to authenticate when connecting to the supplier system for punchout transactions.
Punchout start URL	The URL used to initiate the punchout session to the supplier system.

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- Select the **APIs exchange** check box and fill in the fields in the **APIs configuration** tab.

  This option is designed for punchout suppliers using the Search API, Order API, and Product Details API, enabling shoppers to search for products, place orders, and view product details seamlessly within the Shopping Hub experience.

Field	Description
Access token API	The URL/API used to authenticate and obtain an access token for API requests.
API Key/ Client ID	The unique identifier or key provided by the supplier to authenticate API requests.
Order detail API	The endpoint URL for retrieving detailed information about a specific product.
Place order request API	The endpoint URL for placing orders with the supplier.
Product details APO	The endpoint URL for retrieving detailed information about a specific product.
Product search API	The endpoint URL for searching products within the supplier's catalog. For more information, see Configure extension point for Product search API.
Punchout group	The specific group for which this punchout configuration applies.

Important:
If a supplier uses the Search API for product searches and cXML for order placement, you should select both the **cXML punchout support** and **APIs exchange** check boxes and fill in the required fields in each corresponding section.

8. Select **Submit**.

Related topics

Install Sourcing and Procurement Operations

Application plugin installation sequence

Setting up primary data for Shopping Hub

Service portal configuration for Shopping Hub

Customize your top suppliers on Shopping Hub

Using Shopping Hub

My purchases on Shopping Hub

Configure extension point for Product search API

The sn_spend_intg.ThirdPartySystemApiExtension scripted extension point provides the configuration that punchout suppliers can use to ensure that all details about their product, such as product's name, brand, manufacturer, price, availability, SKU, and so on, is displayed in Shopping Hub.

View the third-party system API extension point format

View the format of the sn_spend_intg.ThirdPartySystemApiExtension extension point.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** field, search for `sn_spend_intg.ThirdPartySystemApiExtension` and then select the link to open the extension point.
   View the format of the extension point script.

Create script include for punchout supplier products

Create script include that enables you to display all the products details for the punchout supplier in Shopping Hub.

Before you begin
Role required: admin

About this task
Ensure that the application scope is set to Shopping Hub.

Procedure

1. Navigate to **All** > **System Definitions** > **Script Includes**.
2. Select **New**.
3. On the Script Include form, fill in the fields.

Field	Description
Name	The name of the script include.
API Name	Read-only and auto-populated API name.
Application	The application where this script include resides. For example, Shopping Hub.
Accessible from	Sets which applications can access this script include.
Glide AJAX callable	Makes the script include available to client scripts, list/report filters, reference qualifiers, or if specified as part of the URL.
Mobile callable	Option to make the script include available on the mobile device.
Sandbox enabled	Option to let a client make changes to their script include without causing global affecting.
Active	Enables the script include when selected. Deselect the active field to disable the script include.
Description	Provides descriptive content regarding the script include.
Script	The server-side script to run when called from other scripts. The script must define a single JavaScript class or a global function. The class or function name must match the Name field.

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Field	Description
Protection policy	Protection policy for script includes published as part of a custom application.

4. Select **Submit**.

Create extension instance for the scripted extension point

Create an extension instance to associate the punchout supplier's script include with the sn_spend_intg.ThirdPartySystemApiExtension scripted extension point.

Before you begin
Role required: admin

About this task
An extension instance is a registered instance of a scripted extension point that links a script include with a scripted extension point.

Note:
Ensure that the application scope is set to Shopping Hub.

About this task

Procedure

1. Select All and in the search filter, enter **sys_extension_instance.LIST**, and then press enter or return on your keyboard.
2. Select **New**.
3. In the **Point** field, enter **sn_spend_intg.ThirdPartySystemApiExtension**.
4. In the **Class** field, select the script include that you created.
   For more information, see Create script include for punchout supplier products.
5. In the **Order** field, enter a number.
   When multiple extension instances are available, the one with the least order value takes precedence.
6. Select the **Active** check box.
7. Select **Submit**.

Mapping Product Categories and Units of Measure for seamless checkout in Shopping Hub

You can map the product categories and units of measure for third-party products to the corresponding model categories. This ensures that during checkout, Shopping Hub accurately considers and displays the product category for the purchase order lines (POL) and purchase requisition lines (PRL) based on your predefined mappings.

Note:
You can configure the product category and unit of measure mappings for the products either before or after uploading the catalog index CSV file. However, it's recommended to define these mappings in advance whenever possible and reupload the CSV file if new mappings are added.

Create third-party category mapping

Create a third-party product category mapping to map the punchout supplier's product category to SPO's model category.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Procurement integrations** > **Catalog** > **Third-Party Categories**.
2. Select **New**.
3. On the form, fill in the fields.

Field	Description
Name	Category defined by an external supplier for the products or services they provide.
Model category	Shopping Hub category that the third-party category should be mapped.
Provider	Supplier selling the product or service. **Note:** The supplier name must match the one provided in the third-party registration record.
Default	Option to set a third-party product category mapping as default. The default mapping is used when a third-party product does not match with any of the existing predefined model categories.

4. Select **Submit**.
5. Navigate to **All** > **Procurement integrations** > **Catalog** > **Third-Party Catalogs**.
6. Ensure that all product category mappings are accurate, and make any necessary updates.

Create third-party unit mapping

Create a third-party unit mapping to align the punchout supplier's unit of measure with the predefined units of measure.

Before you begin
Role required: admin

About this task
The Unit of Measure (UOM) in a product catalog and category refers to the standard measurement used to quantify products or services. It ensures consistency in how items are presented, sold, and tracked, maintaining uniformity across transactions and processes. By standardizing measurements, UOM allows for the proper categorization and comparability of products with similar attributes, even if they come from different suppliers or have varying specifications."

Procedure

1. Navigate to **All** > **Procurement integrations** > **Catalog** > **Third-Party Units**.
2. Select **New**.
3. On the form, fill in the fields.

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Field	Description
Third party unit	Standard of measurement defined by an external supplier for the products or services they provide.
Unit	Units defined within ServiceNow to which the third-party unit should be mapped. A unit defines specific ways the products or services are quantified, billed, or packaged.
Provider	Supplier selling the product or service. **Note:** The supplier name must match the one provided in the third-party registration record.
Default	Option to set a third-party unit mapping as default. The default mapping is used when a third-party unit does not match with any of the existing predefined units.

4. Select **Submit**.
5. Navigate to **All** > **Procurement integrations** > **Catalog** > **Third-Party Catalogs**.
6. Ensure that all unit of measure mappings are accurate, and make any necessary updates.

Customize your top suppliers on Shopping Hub

Personalize the list of suppliers to see on your Shopping Hub 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 Shopping Hub 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 Shopping Hub homepage. You can select up to 10 suppliers.
5. Select **Save**.

Related topics

Install Sourcing and Procurement Operations

Application plugin installation sequence

Setting up primary data for Shopping Hub

Service portal configuration for Shopping Hub

Configure punchout for third-party site purchases

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Using Shopping Hub

My purchases on Shopping Hub

Configure conditions for merging purchase requisitions

Configure the conditions under which the purchase requisitions (PR) should be merged.

Before you begin

Role required: sn_shop.shopping_hub_admin or sn_shop.procurement_administrator

About this task

The conditions that you set determine when to merge the purchase requisitions.

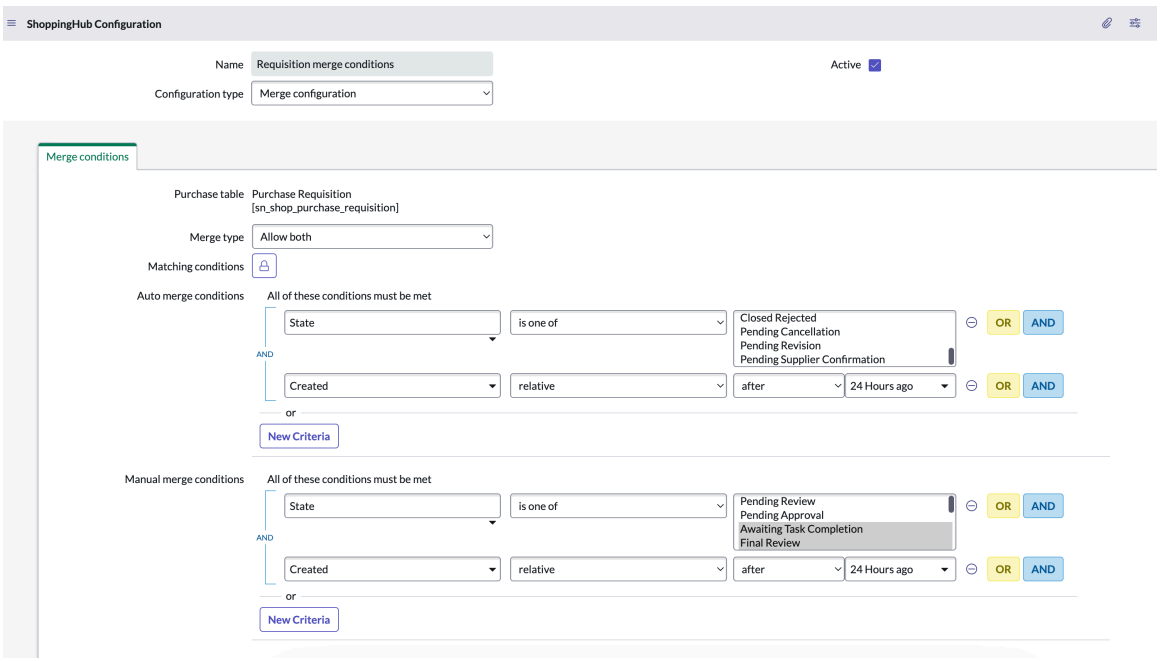
> **Note:**
> The existing default scenarios for merging purchase requisitions and purchase lines remain valid and function as they did previously. For more information, see Purchase requisition merging.

You cannot merge the PRs that are in any of the following states:

- Closed Complete
- Closed Canceled
- Closed Rejected
- Pending Submission
- Pending Cancellation
- Pending Revision
- Pending Supplier Confirmation

Procedure

1. Navigate to **All** > **ShoppingHub** > **Administration** > **ShoppingHub Configuration**.
2. In the Configuration type column, select **Merge configuration**.
   The **Configuration type** field is set to **Merge configuration** by default.



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3. The **Active** check box is selected by default.
   Deselect the **Active** check box if you want to deactivate the merge configuration.
4. On the **Merge conditions** tab, fill in the fields.

Field	Description
Purchase table	Read-only field that shows the Purchase Requisition [sn_shop_purchase_requisition] table.
Merge type	The type of merge that you want to allow. The options are: ○ **Allow both**: Enables you to configure both auto merge and manual conditions. Displays both the Auto merge conditions and Manual merge conditions sections. ○ **Allow only auto merge**: Enables you to configure only the auto-merge conditions. Displays the Auto merge conditions section. ○ **Allow only manual merge**: Enables you to configure only the manual-merge conditions. Displays the Manual merge conditions section.
Matching conditions	Include custom fields that you want as part of the condition builder. Move the required fields from the Available list to the Selected list. Let's consider a scenario with two PRs, PR1 and PR2. For these PRs to be merged, the values in the fields defined in the matching conditions must be identical in both PRs. For example, if the matching conditions contain the Cost center and Legal entity fields, PR1's cost center must match PR2's cost center, and the same goes for their legal entity values.
Auto merge conditions	Allows you to define conditions to automatically merge PRs, based on any of the fields available for a PR. This section becomes available after you select the **Allow only auto merge** option in the **Merge type** field.
Manual merge conditions	Allows you to define conditions to manually merge PRs, based on any of the fields available for a PR. This section becomes available after you select the **Allow only manual merge** option in the **Merge type** field.

5. Select **Update**.

Service portal configuration for Shopping Hub

As an admin, you can configure your service portal such that shoppers who are on the portal can quickly access Shopping Hub and even view purchasing and approval to-dos assigned to them.

You can perform these configurations:

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- Add a ShoppingHub Navbar link
- Add a ShoppingHub icon link
- Add a ShoppingHub widget
- Verify and update search sources

Related topics

Install Sourcing and Procurement Operations

Application plugin installation sequence

Setting up primary data for Shopping Hub

Configure punchout for third-party site purchases

Customize your top suppliers on Shopping Hub

Using Shopping Hub

My purchases on Shopping Hub

Add a Shopping Hub Navbar link to your service portal

You can add a Shopping Hub Navbar link to your service portal header menu so that shoppers can navigate from the service portal to the Shopping Hub 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**.

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Add a Shopping Hub icon link to your service portal

You can add a Shopping Hub icon link to your service portal icons menu so that shoppers can navigate from the service portal to the Shopping Hub 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**.

   Note:
   It is recommended that you use these settings. However, you can configure this otherwise as well.

7. Select **Save**.

Add a Shopping Hub widget to your service portal

You can add a Shopping Hub 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 Shopping Hub 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 Shopping Hub.

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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.

   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.

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.

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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**.

Related topics

Application plugin installation sequence

Shopping Hub Mobile

My purchases on your mobile

Using Shopping Hub Mobile

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

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.

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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)

Related topics

Install Sourcing and Procurement Operations

Application plugin installation sequence

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

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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.

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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**.

   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

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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 Setting 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 fulfiller. 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**.

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"

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Automatically create supplier case or procurement case from an inbound email

If you use the automatic case creation functionality in both Supplier Lifecycle Operations (SLO) and Sourcing and Procurement Operations (SPO), ensure that each instance is configured with a unique email address in the Automatic creation of cases from email property. This ensures the instance can correctly match incoming emails to the appropriate user and create the corresponding case.

For example:

- In SLO, set the email address to supplierhelp@acme.com for creating supplier cases. For more information, see Enable automatic creation of supplier cases from incoming emails.
- In Sourcing and Procurement Operations, set the email address to procurementhelp@acme.com for creating procurement cases.

This approach enables seamless case creation and accurate email-to-user mapping.

Integrating Sourcing and Procurement Operations with other applications

Extend the capabilities of Sourcing and Procurement Operations and connect with other departments by integrating with other applications.

Sourcing and Procurement Operations integrations

Sourcing and Procurement Operations (SPO) supports the following integrations:

Now Assist for Sourcing and Procurement Operations (SPO)

Use the Now Assist for Sourcing and Procurement Operations (SPO) application to guide your requesters through a conversation-like experience for their procurement needs. The application uses procurement-related topics to route requesters to the appropriate intake channels, and then through conversation, helps to submit their requests.

For more information on this, see Now Assist for Sourcing and Procurement Operations (SPO).

Source-to-Pay Operations with Contract Management Pro

With this application, provide streamlined cross-team collaboration and enable legal professionals to run their contracting work within the sourcing and purchasing process. With this integration, procurement specialists can initiate contract requests manually throughout the sourcing and purchasing process.

For more information on this, see Source-to-Pay Operations integration with Contract Management Pro.

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 Third-party Risk Management.

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For more information on this, see Sourcing and Procurement Operations integration with Third-party Risk Management.

ERP Integration Framework

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

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.

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

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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, third-party supplier sites, 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 go to the list of third-party supplier sites, or visit Shopping Hub.

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

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  - 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.

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 Shopping Hub, where you can work with them as required.

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

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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.

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 a purchase requisition edit request in playbook
- Process a return 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.
   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.

   Note:
   You can configure the above email notification based on your requirements. For details, see Approval email notification templates.

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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.

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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.

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.

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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.

> **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**.

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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.

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**.

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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**.

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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?	Based on your requirement, select one of these. ○ If your inquiry is about a pre-existing purchase, select **Yes**. **Note:** You can also raise this inquiry from **All** > **ShoppingHub Home** > **My purchases**, by selecting **Inquire** from the more actions icon on a purchase. ○ If your inquiry is about something else, select **No**.
Which purchase is this about?	If you have selected **Yes** above, select the purchase request number from the list. **Note:** This number is automatically populated if you raise this inquiry from **All** > **ShoppingHub Home** > **My purchases**.
How can the procurement team help?	Describe your query. Based on your input here, related search results are displayed with relevant knowledge base articles.

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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.

4. 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 Shopping Hub, 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

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- 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.

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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.

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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

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you 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 its 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.

For information on decision configuration, see Decision configuration for third-party sourcing.

To learn about the integration tables, see Integration tables for third-party sourcing.

Third-party sourcing 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 Shopping Hub meets the criteria, one or more sourcing requests within a single purchase are automatically grouped into a single negotiation event. These are systematically created in the Sourcing and Purchasing Automation application.
- When the negotiation setup playbook is complete, and the negotiation event is in the Work in Progress state, with the associated negotiations, sourcing requests, purchase lines, cases, and tasks in the Negotiation in Progress state, relevant data is populated in the Sourcing Outbound Queue, Sourcing Line Outbound Queue, and Negotiation Event Outbound Queue tables. This data 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 requests 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 within the negotiation event 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 table. 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.

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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 requests.

- 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 requests 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 Awarded Supplier Outbound Queue table. Awarding can also be done in the third-party tool, in which case the data is received by ServiceNow.

For information on sourcing request, negotiation, and negotiation event flows, see Sourcing request, Negotiations and Negotiation events, respectively. For more information, see Compare quotes and select a supplier.

Decision configuration for third-party sourcing

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 Shopping Hub, the following decision inputs are automatically evaluated in ServiceNow:

- Sourcing request
- Purchase line

To configure a decision:

1. Navigate to **Sourcing and Purchasing Automation** > **Administration** > **Decision Tables**.
2. Select the Sourcing Event Generation Rule decision table.

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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 with 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 send sourcing requests successfully to the applicable external third-party application, these conditions must be evaluated to be true.

Integration tables for third-party sourcing

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:

- Sourcing Outbound Queue, which stores the sourcing requests. It captures the items that must 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 must be sourced.
- Negotiation Event Outbound Queue, which stores the negotiation type, objectives, third party negotiation event record, negotiation event number, and supplier response closely associated with the sourcing requests.
- Sourcing Bid Stage, which is an inbound table used as part of the RFx process. It's 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	City where the sourced items are delivered.

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Sourcing Outbound Queue (continued)

Field	Field type	Description
Close supplier bids now	Boolean	Indicates if the bidding phase is closed.
Country	String	Country where the sourced items are delivered.
End date	Date	Expiration date for the sourced goods or services.
Expected delivery date	Date	Expected delivery date of the goods or services.
Grouped sourcing request number	String	ServiceNow's negotiation event record number.
Integration status	String	Status of the sourcing integration process.
Internal notes	String	
Manufacturer	String	Name of the manufacturer that processes the sourcing request.
Manufacturer part number	String	Unique identifier assigned by the supplier to a specific product.
Maximum budget	Decimal	Internal budget provided by the requester.
NE out queue header	Reference	
Preferred currency	String	Preferred currency of transaction.
Processing message	String	Integration processing message.
Product category	String	Category to which this product belongs.
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	Indicates if the product is classified as goods or services.
Purchase reason	String	Internal reason to purchase the item.
Quantity	Integer	Quantity of product requested.

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Sourcing Outbound Queue (continued)

Field	Field type	Description
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)
Start date	Other Date	Start date of the service
State	String	State where the sourced items are delivered.
Street	String	Street where the sourced items are delivered.
Submitted by	String	Name of the employee who created the sourcing request.
Supplier responses close	String	Due date for all suppliers to provide a response to an RFx. Formerly named Bids end date.
Third party tool name	String	Name of the third-party tool.
Third party tool RFx ID	String	Unique identifier assigned to a specific sourcing event or document.
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	United Nations Standard Products and Services Code (UNSPSC) - Use to standardize and simplify the process of identifying and categorizing goods and services.
Zip code	String	Zip code where the sourced items are delivered.

Sourcing Line Outbound Queue

Field	Field type	Description
Integration status	String	Current status of the Sourcing Line Outbound table integration.

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Sourcing Line Outbound Queue (continued)

Field	Field type	Description
Line status	String	Current status of the Sourcing line.
Processing message	String	A message that describes the current processing status.
Purchase line number	String	Purchase line record number associated with the Sourcing Line Outbound table.
Sourcing out queue header	Reference	Reference to the sourcing outbound table.
Sourcing request number	String	ServiceNow's sourcing request record number.
Supplier company name	String	Name of the supplier's company. 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 number.
Supplier part number	String	Unique part number of the supplier.
Third party tool name	String	Name of the tool used by the third party.

Negotiation Event Outbound Queue

Field	Field type	Description
Integration status	String	Current status of the Negotiation Event Outbound table integration.
Negotiation objectives	String	Objectives or outcome of the negotiation.
Negotiation type	String	Type of negotiation, such as quote for example.
Number	String	ServiceNow's negotiation event record number
Processing message	String	A message that describes the current processing status.
Supplier response close	Other Date	Formerly named Bids end date. This is the due date

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Negotiation Event Outbound Queue (continued)

Field	Field type	Description
		for all suppliers to provide a response to an RFx.
Third party negotiation event record	String	Third party's negotiation event record number.

Sourcing Bid Stage

Field	Field type	Description
Awarded	Boolean	Indicates who is the awarded supplier.
Grouped sourcing request number	String	ServiceNow's negotiation event record number
Integration status	String	Current status of the Sourcing Bid integration.
Manufacturer	String	Name of the manufacturer.
Manufacturer part number	String	Unique part number of the manufacturer.
Preferred currency	String	Preferred currency of transaction.
Processing message	String	A message that describes the current processing status.
Product category	String	Category to which this product belongs.
Product model	String	Product model name. Required for catalog items.
Product model short description	String	Short description of the product model.
Product name	String	Name of the product. Required for off-catalog items. This is a mandatory field.
Product type	String	Type of product. The options are Good or Service.
Purchase line number	String	Purchase line record number associated with the Sourcing Bid Stage table.
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.

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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	Address of the supplier.
Supplier city	String	Supplier city found on the quote.
Supplier company name	String	Name of the supplier's company. This is mandatory field.
Supplier country	String	Supplier country found on the quote.
Supplier County/District	String	Name of the supplier's county or district.
Supplier delivery date	Date/Time	Supplier delivery date of the goods.
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's lead time.
Supplier notes	String	Notes from the supplier, if any.
Supplier number	String	ServiceNow's supplier record number.
Supplier part number	String	Unique 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	Region of the supplier.

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Sourcing Bid Stage (continued)

Field	Field type	Description
Supplier start date	Date/Time	Supplier start date of the service.
Supplier State/Province	String	Supplier state or province found on the quote.
Supplier street address	String	Street address of the supplier.
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	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. This is mandatory field.
UNSPSC	String	UNSPSC code on the quote.

Awarded Supplier Outbound Queue

Field	Field type	Description
Integration status	String	Status of the integration process.
Processing message	String	Describes the current processing status.
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 of the goods or service awarded to the supplier.
Sourcing request number	String	Unique identifier of the sourcing request created inServiceNow's.
Supplier company name	String	Name of the supplier company that is awarded the quote.

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Awarded Supplier Outbound Queue (continued)

Field	Field type	Description
Supplier ERP number	String	Identification number for the supplier in the ERP system.
Supplier number	String	ServiceNow's supplier record.
Third party tool name	String	Name of the third-party tool.
Third party tool RFx URL	String	Event URL of the third-party tool.

Sourcing and Procurement Operations integration with Third-party Risk Management

Leverage relevant supplier risk assessment capabilities by integrating Sourcing and Procurement Operations with Third-party Risk Management.

The following capabilities can be leveraged by customers if they have both the Sourcing and Procurement Operations and Third-party 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 Risk Assessments Integration for Sourcing and Procurement Operations application and is not available if the customer has Sourcing and Procurement Operations alone.

Risk Assessments Integration for Sourcing and Procurement Operations application

Customers can use the Risk Assessments Integration for Sourcing and Procurement Operations application for leveraging certain capabilities if they have both the Sourcing and Procurement Operations and Third-party 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 Third-party 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 Third-party Risk Management and Sourcing and Procurement Operations applications are installed.

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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 Third-party 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:

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- 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 Risk Assessments Integration for Sourcing and Procurement Operations 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 Project Costing for Sourcing and Procurement Operations plugin (sn_spend_ppm) provides this integration. This plugin has dependency on the following applications that can be purchased separately:

- Sourcing and Purchasing Automation
- Source-to-Pay Common Architecture
- Finance Common Architecture
- Common Service Delivery
- Procurement Case Management
- Source-to-Pay Workspace
- Supplier Common Architecture
- Playbook Experience
- Document Templates
- Common Vendor Core

The plugin also has dependency on the following system plugins that need to be installed separately:

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- External User Self-Registration
- Finance Applications - Common Dependencies
- Fiscal Calendar
- GraphQL Plugin
- Insert Multiple Web Service
- PPM Standard
- Process Automation Designer Core
- Process Automation Designer for App Engine
- Scoped Application Restricted Caller Access
- Signature Pad
- User Criteria Scoped API
- Vendor Core

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. Also, as part of the Source-to-Pay pricing initiative, your administrator must manually assign the PPM user role to your procurement specialist.

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.

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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 Shopping Hub 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.

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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 ServiceNow AI 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 ServiceNow AI 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:

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- 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 (snc.fsm_psm_mobile) provides an integration between the Field Service Management and Sourcing and Procurement Operations applications.

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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

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.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Procurement for Field Service Management plugin (snc.fsm_psm_mobile).

   Note:
   To activate this plugin, there is a dependency on the Shopping Hub Mobile application. For more information on activating and setting up Field Service Management and additional plugins, see Activate Field Service Management.

3. Select **Activate**.

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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 Shopping Hub, such as shopping controls, are applied here as well.

   The quick checkout flow is triggered from Shopping Hub 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.

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Source-to-Pay Operations integration with Contract Management Pro

The Source-to-Pay Operations with Contract Management Pro plugin (com.snc.sn_spend_clm) provides an integration between the Contract Management Pro and Sourcing and Procurement Operations applications.

Contract Management Pro (CM Pro) is a contract life-cycle management solution used to set up contract document templates, clauses, clause variations, and initiate contract requests. It also supports e-signatures and external storage systems.

The integration of Sourcing and Procurement Operations with Contract Management Pro aims to streamline cross-team collaboration and enable legal professionals to run their contracting work within the sourcing and purchasing process. With this integration, procurement specialists can initiate contract requests (CRs) manually throughout the sourcing and purchasing process.

Note:
To use this application, a license is required for both Contract Management Pro and Sourcing and Procurement Operations.

Using this integration, procurement specialists can create contract requests for the following:

- Purchase lines
- Purchase requisitions
- Sourcing requests
- Negotiations
- Negotiation events

User roles required for the SPO-CM Pro better together feature

The following roles are required to initiate, view, and manage contract execution:

- **Sourcing and purchasing viewer**: This is a new role provided within the **Contract specialist** assignment group. This role can be assigned to the contracting and procurement professionals to have read-only access into the purchase lines, sourcing requests, negotiations, and purchase requisitions.
- **Contract fulfiller**: This is a licensed role for CM Pro. This role has to be explicitly assigned to the contracting and procurement professionals if they have to work on contract requests. Once assigned, they can work on the contract requests, leveraging all capabilities from CM Pro – obtaining contract signatures, authoring contracts, tracking revisions, and creating the contract documents to be stored in the contract repository.
- **Contract user**: This role is also provided within the **Contract specialist** assignment group and is required to initiate and track contract execution.

You can assign your procurement and contracting professionals to these roles as required.

Integrate with Contract Management Pro

Contract Management Pro provides an integration with the Sourcing and Procurement Operations application. With this integration, procurement specialists can initiate contract requests (CRs) manually throughout the sourcing and purchasing process.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Source-to-Pay Operations with Contract Management Pro plugin (com.snc.sn_spend_clm).

> **Note:**
> To activate this plugin, there is a dependency on the Sourcing and Purchasing Automation plugin (com.snc.sn_pr) and the Microsoft Word add-in for ServiceNow Contracts plugin (com.sn_cm_word_addin). These plugins must be installed to utilize the new better together feature for the contracting workflow.

3. Select **Activate**.
4. Complete the initial configuration steps to set up CM Pro.
   For more information on setting up Contract Management Pro, see Add and configure contract request functionality.

Initiate a contract request

Initiate a contract request from the Source-to-Pay workspace.

Before you begin

Role required: admin or fulfiller

To initiate a contract request, you must have already added a contract template and created template rules. For more information on how to add a contract template, see Configure contract templates for a contract request. For more information on how to create template rules, see Configure contract template rules.

You can initiate contract requests from the related work section, the Dynamic Related Records (DRR) contextual side panel, and the playbook.

Procedure

1. Navigate to the **Source-to-Pay Workspace**.
2. Open the entity for which you have to initiate a contract request.

> **Note:**
> Contract requests can be initiated for purchase lines, purchase requisitions, sourcing requests, negotiations, and negotiation events.

3. Initiate a contract request from the related work section, the DRR, or the playbook.
   - From Related work: Contract requests can be initiated for all types of entities. For more information on how to initiate a contract request from the related work section, see Initiate a contract request from the related work section.
   - From DRR: Contract requests can be initiated for all types of entities, except purchase lines. For more information on how to initiate a contract request from the DRR, see Initiate a contract request from Dynamic Related Records (DRR).
   - From Playbook: Contract requests can be initiated only for negotiation events and sourcing requests. For more information on how to initiate a contract request from the playbook, see Initiate a contract request from the playbook.

> **Note:**
> You can manually create a contract request for a given supplier throughout the S2P workflow, so that a signed contract can be created with that supplier.

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Initiate a contract request from the related work section

Initiate a contract request for purchase lines, purchase requisitions, sourcing requests, negotiations, or negotiation events from the related work section.

Before you begin
Role required: admin

Procedure

1. Navigate to the **Source-to-Pay Workspace**.
2. Open the entity for which you have to initiate a contract request.

   Note:
   From the related work section, contract requests can be initiated for purchase lines, purchase requisitions, sourcing requests, negotiations, and negotiation events.

3. Navigate to **Related work** > **Contract Requests**.
4. Select **New**.
5. Provide the details about the contract that you have to initiate.
6. Select **Initiate**.

Initiate a contract request from Dynamic Related Records (DRR)

Initiate a contract request for purchase requisitions, sourcing requests, negotiations, or sourcing events from the Dynamic Related Records (DRR) section.

Before you begin
Role required: admin

Procedure

1. Navigate to the **Source-to-Pay Workspace**.
2. Open the entity for which you have to initiate a contract request.

   Note:
   From DRR, contract requests can be initiated for purchase requisitions, sourcing requests, negotiations, and negotiation events.

3. Select the Related cases and tasks icon from the DRR.
4. Select the Add button to create a task.
5. Select **Contract request** from the list of available options.
6. Provide the details about the contract that you have to initiate.

   Note:
   Negotiation events and sourcing requests can be associated with multiple suppliers. Therefore, you must select a supplier to create a contract request for negotiation events and sourcing requests.

7. Select **Initiate**.

Initiate a contract request from the playbook

Initiate a contract request for sourcing requests or negotiation event from the playbook.

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Before you begin
Role required: admin

Procedure

1. Navigate to the **Source-to-Pay Workspace**.
2. Open the sourcing request or negotiation event for which you have to initiate a contract request.

   Note:
   From the playbook, you can initiate contract requests for sourcing requests and negotiation events only.

3. Select **Playbook** and navigate to the **Request details** step.
4. Select **Create a type of work** in the **Assign work to others** section.
5. Select **Contract request** from the list of available options.
6. Select a supplier from the list of available suppliers.
7. Select **Next**.
8. Provide the details about the contract that you have to initiate.
9. Select **Initiate**.

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.

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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.

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. For information, see Procurement File Transfer Framework.

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 **All** > **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.

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Third-Party Registration form (continued)

Field	Description
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.

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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 Shopping Hub 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 Shopping Hub 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=2
```

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	Support for asynchronous and synchronous modes for third-party integration. Data type: String Valid values:

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Query parameters (continued)

Name	Description
	• async: Asynchronous mode. • sync: Synchronous mode. Default: async

Request body parameters (XML or JSON)

Name	Description
customer_id	Identifier for the customer. Data type: String Maximum length: 100
catalog_id	Identifier for the catalog content that can be purchased by a customer. Data type: String Maximum length: 100
products	List of objects that define products to create or update. Each transaction has a limit of 1000 products. Data type: Array `"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",`

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Request body parameters (XML or JSON) (continued)

Name	Description
	<pre>"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 quantity of units that are available for this product. Data type: String Maximum length: 40
products.available_for_country	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. Data type: Array <pre>"available_for_country": ["US","IN","GB"]</pre>
products.bundled_components	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. **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. The child bundle components and their details (MPN and quantities) should be mapped to the same supplier. Data type: Array <pre>"bundled_components": [{ "mpn": "String",</pre>

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Request body parameters (XML or JSON) (continued)

Name	Description

	<pre>"quantity": "String"
	}
	]</pre>

products.contract_agreement	Details of the contract for a product.
	
	Note:
	This is not required for child bundle components.
	
	Data type: Object
	<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	Date on which the contract term ends. Data type: String Maximum length: 40 Format: YYYY-MM-DD
products.contract_agreement.contract_number	Required. Number of the active contract that is associated with the product. Data type: String Maximum length: 100
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

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Request body parameters (XML or JSON) (continued)

Name	Description
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.delivery_time	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. Data type: String Maximum length: 40
products.images	List of strings that specify the image URLs for the supplier product. Data type: Array
products.manufacturer	Required. Company that manufactures, publishes, or provides the product. This is not the supplier or reseller of the product. Data type: String Maximum length: 100
products.mpn	Required. Identifier for a product that is provided by the manufacturer, publisher, or provider. **Note:** This is not required for reseller parent bundles if the SKU value is available. Data type: String Maximum length: 100
products.parent_bundle	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. Data type: String

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Request body parameters (XML or JSON) (continued)

Name	Description
	Maximum length: 100
products.product_attributes	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 impact pricing or stock availability should be provided through the API. Data type: Object
products.product_category_name	Required. Name that you enter if you are not setting the *unspsc* 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. Data type: String Maximum length: 100
products.product_description	Full description of the product that appears to a shopper within a commerce experience. **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. Data type: String Maximum length: 65000
products.product_name	Required. Name of the product. Data type: String Maximum length: 1000
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

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Request body parameters (XML or JSON) (continued)

Name	Description
products.unit	Required. Unit or rate at which the product is sold by the supplier. For example, pieces, hours, and so on. Data type: String Maximum length: 40
products.unspsc	Required. Identifier that you enter if you are not setting the *product_category_name* 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. Data type: String Maximum length: 100
supplier_id	Required. Identifier for the reseller or supplier with whom the customer can place orders. 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: *application/json* or *application/xml*. Default: *application/json*

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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/ca
talog" \
--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": [
```

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```
    {
      "product_name": "Apple MacBook Pro 13 Core i7",
      "mpn": "ZOWQ-20004301931",
      "sku": "55788741",
      "manufacturer": "Apple",
      "product_category_name": "Computer",
      "parent_bundle": "920-0045362002",
      "bundled_components": {
        "mpn": "ZOWQ-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": [
                    {
```

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```
                        "sku": "55788741",
                        "mpn": "ZOWQ-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=2`

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	Support for asynchronous and synchronous modes for third-party integration. Data type: String Valid values: • async: Asynchronous mode. • sync: Synchronous mode.

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Query parameters (continued)

Name	Description
	Default: async

Request body parameters (XML or JSON)

Name	Description
catalog_id	Required. Identifier for the catalog content that can be purchased by a customer. Data type: String Maximum length: 100
customer_id	Required. Identifier for the customer. Data type: String Maximum length: 100
products	List of objects that define products to create or update. Each transaction has a limit of 1000 products. Data type: Array `"products": [ { "contract_agreement": {Array}, "sku": "String" } ]`
products.contract_agreement	Details of the contract for a product. Data type: Object `"contract_agreement": { "contract_end_date": "String", "contract_number": "String", "contract_start_date": "String", "negotiated_currency ": "String", "negotiated_price": "String" }`
products.contract_agreement.contract_end_date	Date on which the contract term ends. Data type: String

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Request body parameters (XML or JSON) (continued)

Name	Description
	Maximum length: 40 Format: YYYY-MM-DD
products.contract_agreement.contract_number	Required. Number of the active contract that is associated with the product. Data type: String Maximum length: 100
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

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Request body parameters (XML or JSON) (continued)

Name	Description
	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: *application/json* or *application/xml*. Default: *application/json*

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.

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Name	Description
	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/pr
ice" \
--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”,
```

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```
                        "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=2
```

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	Support for asynchronous and synchronous modes for third-party integration. Data type: String Valid values: • async: Asynchronous mode. • sync: Synchronous mode.

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Query parameters (continued)

Name	Description
	Default: async

Request body parameters (XML or JSON)

Name	Description
catalog_id	Required. Identifier for the catalog content that can be purchased by a customer. Data type: String Maximum length: 100
customer_id	Required. Identifier for the customer. Data type: String Maximum length: 100
products	List of objects that define the products to update. Each transaction has a limit of 1000 products. Data type: Array `"products": [ { "available_units": "String", "sku": "String", "unit": "String" } ]`
products.available_units	Required for products that are kept in stock. Number of units available for this product. Data type: String Maximum length: 40
products.sku	Required. Number that is generated by a supplier that uniquely identifies a product sold by that supplier. Data type: String Maximum length: 100
products.unit	Required. Unit or rate at which the product is sold by the supplier. For example, pieces, hours, and so on. Data type: String Maximum length: 100
supplier_id	Identifier for the reseller or supplier that the customer can place orders with.

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Request body parameters (XML or JSON) (continued)

Name	Description
	Data type: String Maximum length: 100
third_party_import_id	Allows 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: *application/json* or *application/xml*. Default: *application/json*

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.

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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/ava
ilability" \
--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": [
```

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```
                    {
                        "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 Workflow Studio 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.statu 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=2`

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.

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URL format

`/api/sn_spend_intg/spendint/orderack`

Supported request parameters

Path parameters

Name	Description
None	

Query parameters

Name	Description
mode	Support for asynchronous and synchronous modes for third-party integration. Data type: String Valid values: • async: Asynchronous mode. • sync: Synchronous mode. Default: async

Request body parameters (XML or JSON)

Name	Description
customer_id	Required. Identifier for the customer. Data type: String Maximum length: 100
order_number	Required. Purchase order number provided by the customer for this order. Data type: String Maximum length: 40
sales_order_lines	List of objects that define the sales order lines with unique updates for the purchases in this order. Data type: Array `"sales_order_lines":[ { "estimated_arrival_date": "String", "line_number": "String", "sales_order_line_number": "String"`

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Request body parameters (XML or JSON) (continued)

Name	Description
	}]
sales_order_lines.estimated_arrival_date	Estimated arrival date of the order. Data type: String Maximum length: 40 Format: YYYY-MM-DD
sales_order_lines.line_number	Required. Purchase order line number that was generated by the customer for a particular purchase. Data type: String Maximum length: 40
sales_order_lines.sales_order_line_number	Sales order line number that was generated by the supplier. This number is required only for revisions to this purchase. Data type: String Maximum length: 40
sales_order_number	Number or value that is generated by the supplier for this order. Data type: String Maximum length: 40
status_code	Required. Status of the submitted order that confirms if the order was successfully placed. Data type: String Valid values: • confirmed: Order placed successfully. • rejected: Order not placed.
status_message	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. Data type: String Maximum length: 1000
supplier_id	Required. Identifier for the reseller or supplier that the customer can place orders with. Data type: String

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Request body parameters (XML or JSON) (continued)

Name	Description
	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: *`application/json`* or *`application/xml`*. Default: *`application/json`*

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.

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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/or
derack" \
--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",
```

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```
                "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=2
```

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	

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Query parameters

Name	Description
mode	Support for asynchronous and synchronous modes for third-party integration. Data type: String Valid values: • async: Asynchronous mode. • sync: Synchronous mode. Default: async

Request body parameters (XML or JSON)

Name	Description
customer_id	Identifier for the customer. Data type: String Maximum length: 100
order_number	Required. Purchase order number that is provided by the customer for this order. Data type: String Maximum length: 40
sales_order_number	Required. Number or value that is generated by the supplier for this order. Data type: String Maximum length: 40
shipment_lines	List of shipment lines that can contain the serial number, IMEI number, and asset tag details of the assets. Data type: Array `"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",`

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Request body parameters (XML or JSON) (continued)

Name	Description

	<pre>"shipping_address": {Object},
	"shipping_carrier": "String",
	"shipment_quantity": "String",
	"ship_to": "String",
	"tracking_number": "String"
	}
	]</pre>

shipment_lines.actual_shipment_date	Date on which the shipment leaves the supplier's location. Data type: String Maximum length: 40 Format: YYYY-MM-DD
shipment_lines.estimated_arrival_date	Date on which the shipment is expected to arrive at the specified location. Data type: String Maximum length: 40 Format: YYYY-MM-DD
shipment_lines.line_number	Required. Purchase order line number that is generated by the customer for a particular purchase. Data type: String Maximum length: 40
shipment_lines.planned_shipment_date	Date on which the shipment is planned to leave the supplier's location. Data type: String Maximum length: 40 Format: YYYY-MM-DD

shipment_lines.product_details	List of objects that define the details about the products being shipped. Options include the serial number, IMEI number, and asset tag details.
	
	Data type: Array
	<pre>"product_details": [
	{</pre>

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Request body parameters (XML or JSON) (continued)

Name	Description

	<pre>"asset_tag": "String",
	"imei": "String",
	"serial_number": "String"
	}
	]</pre>

shipment_lines.product_details.asset_tag	Asset tag of the shipped product. Data type: String Maximum length: 100
shipment_lines.product_details.imei	IMEI number of the shipped product. Data type: String Maximum length: 100
shipment_lines.product_details.serial_number	Required. Serial number of the shipped product. Data type: String Maximum length: 100
shipment_lines.sales_order_line_number	Sales order line number that is generated by the supplier. This number is required only for revisions to this purchase. Data type: String Maximum length: 40

shipment_lines.shipping_address	Address where the products are being shipped to.
	
	Data type: Object
	
	<pre>"shipping_address":
	{
	"city": "String",
	"country": "String",
	"name": "String",
	"state": "String",
	"street": "String",
	"zip_code": "String"
	}</pre>

shipment_lines.shipping_address.city	Name of the city where the products are shipped to. Data type: String Maximum length: 1000

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Request body parameters (XML or JSON) (continued)

Name	Description
shipment_lines.shipping_address.country	Country where the products are shipped to. Data type: String Maximum length: 40
shipment_lines.shipping_address.name	Name of the customer that the products are being shipped to. Data type: String Maximum length: 1000
shipment_lines.shipping_address.state	State where the products are shipped to. Data type: String Maximum length: 1000
shipment_lines.shipping_address.street	Name of the street where the products are shipped to. Data type: String Maximum length: 1000
shipment_lines.shipping_address.zip_code	Zip code or pin code where the products are shipped to. Data type: String Maximum length: 40
shipment_lines.shipment_quantity	Required. Number of the products being shipped as physical goods. The number should contain the quantity of the products that are in the shipment. Data type: String Maximum length: 40
shipment_lines.shipping_carrier	Shipping carrier that is delivering the product to the specified location such as FedEx, UPS, USPS, and so on. Data type: String Maximum length: 100
shipment_lines.ship_to	Name of the recipient that the products are shipped to. Data type: String

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Request body parameters (XML or JSON) (continued)

Name	Description
	Maximum length: 100
shipment_lines.tracking_number	Tracking number that is provided by the shipping carrier for the whole or a portion of the purchase. 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: *application/json* or *application/xml*. Default: *application/json*

Note:
Only the *application/json* data format is supported for Procurement Integration Framework.

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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/sh
ipment" \
--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": [
    {
```

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```
      "line_number": "POL0001005",
      "sales_order_line_number": "SOL0231325",
      "shipment_quantity": "4",
      "shipping_carrier": "FedEx",
      "tracking_number": "E-901290092",
      "shipping_address":
        {
          "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",
```

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```
                        "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=2
```

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
```

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Supported request parameters

Path parameters

Name	Description
None	

Query parameters

Name	Description
mode	Support for asynchronous and synchronous modes for third-party integration. Data type: String Valid values: • async: Asynchronous mode. • sync: Synchronous mode. Default: async

Request body parameters (XML or JSON)

Name	Description
currency	Required. Currency for subtotal, tax, and shipping. The subtotal, tax, and shipping should be in the same currency. Data type: String Maximum length: 40
customer_id	Identifier for the customer. Data type: String Maximum length: 100
discounts	Discounts that are applied toward the invoice. This is an editable field. Data type: String Maximum length: 100
invoice_date	Required. Date on which the customer was invoiced. Data type: String Maximum length: 40 Format: YYYY-MM-DD

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Request body parameters (XML or JSON) (continued)

Name	Description
invoice_lines	List of objects that define the lines that are being invoiced for purchases within this order. Data type: Array `"invoice_lines": [ { "invoiced_line_amount": "String", "invoiced_quantity": "String", "line_number": "String", "supplier_invoice_line_number": "String", "sales_order_line_number": "String" } ]`
invoice_lines.invoiced_line_amount	Required. Total cost, excluding taxes and shipping, that a customer is being invoiced for a given purchase order line. Data type: String Maximum length: 40
invoice_lines.invoiced_quantity	Required. Quantity of goods or services that a customer is being invoiced for. Data type: String Maximum length: 40
invoice_lines.line_number	Required. Purchase order line number that is generated by the customer for a particular purchase. Data type: String Maximum length: 40
invoice_lines.sales_order_line_number	Required. Sales order line number that is generated by the supplier. Data type: String Maximum length: 40
invoice_lines.supplier_invoice_line_number	Required. Identification number that is generated by a supplier for this invoice line. Data type: String

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Request body parameters (XML or JSON) (continued)

Name	Description
	Maximum length: 100
other_charges	Other additional charges associated to the invoice. This is an editable field. Data type: String Maximum length: 100
order_number	Required. Purchase order number that is provided by the customer for this order. Data type: String Maximum length: 40
remit_to_address	Required. Location to which a payment is made. Data type: String Maximum length: 1000
sales_order_number	Required. Number or value that is generated by the supplier for this order. Data type: String Maximum length: 40
shipping	Required. Total shipping cost for the entire purchase. Data type: String Maximum length: 40
subtotal	Required. Total amount of money to be paid to the supplier excluding tax and shipping charges. Data type: String Maximum length: 40
supplier_id	Required. Identifier for the reseller or supplier that the customer can place orders with. Data type: String Maximum length: 100
supplier_invoice_number	Required. Identification number that is generated by a supplier for this invoice. Data type: String Maximum length: 100

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Request body parameters (XML or JSON) (continued)

Name	Description
supplier_tax_id	Tax identifier that is associated to the third party reseller. This is an editable field. Data type: String Maximum length: 100
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: *application/json* or *application/xml*. Default: *application/json*

Note:
Only the *application/json* data format is supported for Procurement Integration Framework.

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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/in
voice" \
--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": "TIN000000",
  "order_number": "POL7987633",
  "sales_order_number": "SO0000000081",
  "invoice_date": "YYYY-MM-DD",
```

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```
  "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": "SO0000000081",
                        "supplier_invoice_number":
 "QAAP89873220071",
                        "supplier_invoice_line_number":
 "QA789A867877ABN32251",
```

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```
                        "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.

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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**.
2. On the left navigation pane, enter `sys_data_source_list.do`.
   The entire list of available data sources is displayed.
3. In the **Name** search field, enter **spend** to find and select the spend data sources you want to configure.
4. 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 **SFTP** as format for data transfer.
File path	Specify the file path for querying.

5. 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.

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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

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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

MID Server

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.

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Related topics

MID Server

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.

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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": [
      {
```

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```
        "error_message": "Field Value empty/Formatting issue
 Negotiated currency \n",
        "mpn": "ZOWQ-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": "ZOWQ-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": "ZOWQ-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",
```

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```
        "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": "SUPINV000001 \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",
        "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",
```

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```
            "state": "CA \n",
            "zip_code": "95054 \n",
            "country": "Unites States of America \n"
          }
        }
      ]
    }
}
```

Using Sourcing and Procurement Operations

Employees, shoppers, or requesters can use Sourcing and Procurement Operations to self-service requests, and source or purchase products and services through the procurement organization. Procurement specialists and sourcing managers can use Sourcing and Procurement Operations to work on various procurement objects such as purchase requisitions, sourcing requests, negotiations, procurement requests, cases, and more.

Using Shopping Hub

Use the Shopping Hub 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.

Benefits of the UIB experience

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.

Related topics

- Install Sourcing and Procurement Operations
- Application plugin installation sequence
- Setting up primary data for Shopping Hub
- Service portal configuration for Shopping Hub
- Configure punchout for third-party site purchases
- Customize your top suppliers on Shopping Hub
- My purchases on Shopping Hub

Log in to Shopping Hub for the first time

Shoppers who log in to Shopping Hub for the very first time must set up a default delivery location before they can browse products and access the other pages.

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If the shopper navigates to a different page other than the Shopping Hub home page without setting up default delivery address, they are redirected to the home page to set the default delivery location.

Set work address as your delivery location

Set your work address as the default location when you log in to Shopping Hub for the first time.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. In the Welcome to Shopping Hub dialog box, select **Set a delivery location**.
3. In the Address type section, select **Work address (already approved)**.
4. Select **Next**.
5. In the Select a Work address dialog box, fill in the fields:

Field	Description
Recipient	The user who is the recipient of this address.
Work address	The address of the office location.

6. Select **Use this location**.

Select a delivery location other than the work address

Set your default location to an address other than your work address when you log in to Shopping Hub for the first time.

Before you begin

Role required: sn_shop.shopper

Procedure

1. Navigate to **All** > **ShoppingHub** > **ShoppingHub Home**.
2. In the Welcome to Shopping Hub dialog box, select **Set a delivery location**.
3. In the Address type section, select **Somewhere else**.
4. Select **Next**.
5. In the Add a delivery address dialog box, fill in the fields.

Field	Description
Recipient	The user who is the recipient of this address.
Country	The country of the delivery location.
Street	The street address of the delivery location.
Floor, unit, etc.	The floor number of the delivery location.
City	The city of the delivery location.
State / Province	The state of the delivery location.

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Field	Description
Zip / Postal code	The zip code of the delivery location.

6. Select **Submit for approval**.

Order a product with quick checkout

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

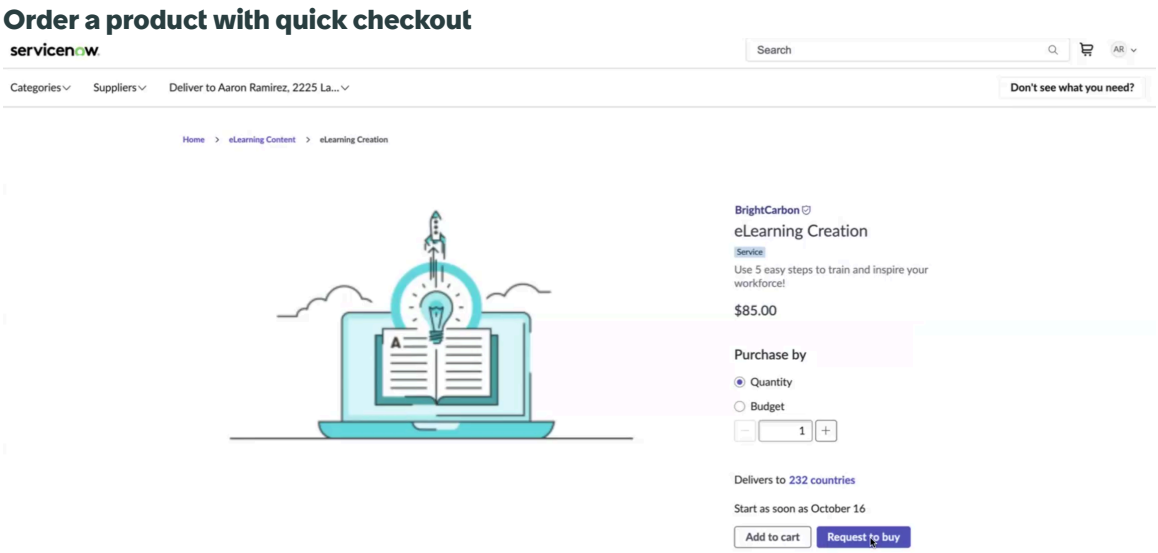
3. To place an order for a product or service that has pricing:
   a. Select **Quantity** or **Budget** as appropriate.
   b. Enter the quantity that you need or the budget at your disposal.

      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.

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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?	Location where you want your product to be delivered. The options are: ▪ To a saved location **Note:** The recipient is the logged-in user or the delegated user. ▪ 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: ▪ 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) **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.
Payment method	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. **Note:** Verify that the total percentage of all the cost centers doesn't exceed 100%.

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Field	Description
	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. If you have available credits, the same is displayed here as a mode of payment. For details, see Shop with employee credits.

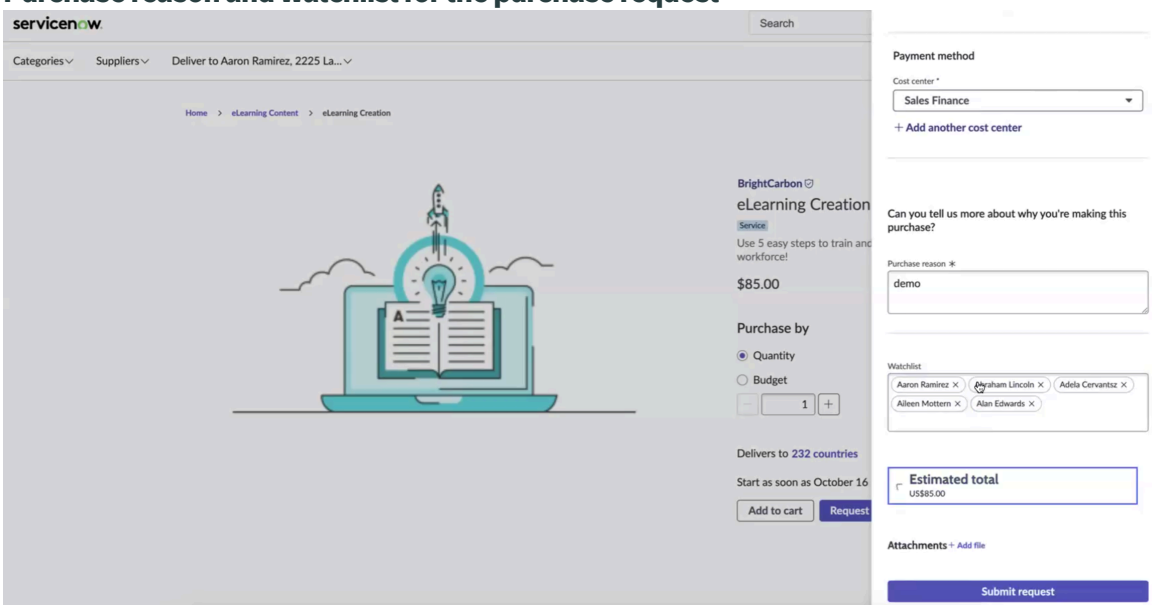
Note:
If you change the quantity or delivery location during checkout, the shipping and tax estimates are recalculated and updated accordingly. The cart line is also updated with the new estimates.

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. **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.

Purchase reason and watchlist for the purchase request



g. In the **Watchlist** field, select one or more users to be added to the watchlist of the purchase request.

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The users on the Watchlist receive email notifications when specific conditions are fulfilled and the purchase request status is updated. By default, you can add up to 20 users in the watchlist. You can modify this value by configuring the system properties. For more information, see Components installed with Sourcing and Procurement Operations.

Note:
This limit for the number of users on the watchlist is applicable only while making the purchase request. You can add more users to the watchlist after the purchase request is created. However, you can add more users only at the purchase requisitions page.

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

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

i. Select **Submit request**.

What to do next

- Review your purchase. After you complete your checkout, select **Review your purchase** to view the details or 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.

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 Shopping Hub 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.

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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?

     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

     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.

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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**

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 Shopping Hub.

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 Shopping Hub homepage.

   For more information, see Order a product
3. Select **Add to cart**.

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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. This option is not available for bundled products.

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

Note:
Purchase later option is not available for bundled products. Also, if the purchase quantity of a bundled product is updated, the quantities of the products within the bundle get updated automatically.

What to do next

When you're done reviewing your cart, you can proceed with the 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.

  Note:
  Cart line updates by budget are not supported for bundled products.

- 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.

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- 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 Shopping Hub 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 users to the watchlist of the purchase

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6. Add relevant attachments, if applicable.

   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.

7. Provide any additional information, if applicable.

   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.

8. 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.

   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.

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

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.

For each existing delivery location, its code and full address are displayed. While you can 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

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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 Shopping Hub 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.

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 Shopping Hub.

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.

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- 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.

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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.

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.
- For a bundled product, depending on whether the products within the bundle are goods or services, different delivery date options are displayed.

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.

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

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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.

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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.

> **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.

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Add users to the watchlist of the purchase

You can add one or more users to the watchlist of the purchase request. The users on the Watchlist receive email notifications when specific conditions are fulfilled and the purchase request status is updated.

Before you begin

Role required: sn_shop.shopper

About this task

You can view and edit the **Watchlist** either from the **Reason for purchase** page or on the Purchase requisition under **My Purchases** in the Shopping hub. For more information, see Activity stream. By default, you can add up to 20 users in the watchlist. You can modify this value by configuring the system properties. For more information, see Components installed with Sourcing and Procurement Operations.

Note:
This limit for the number of users on the watchlist is applicable only while making the purchase request. You can add more users to the watchlist after the purchase request is created. However, you can add more users only at the purchase requisitions page.

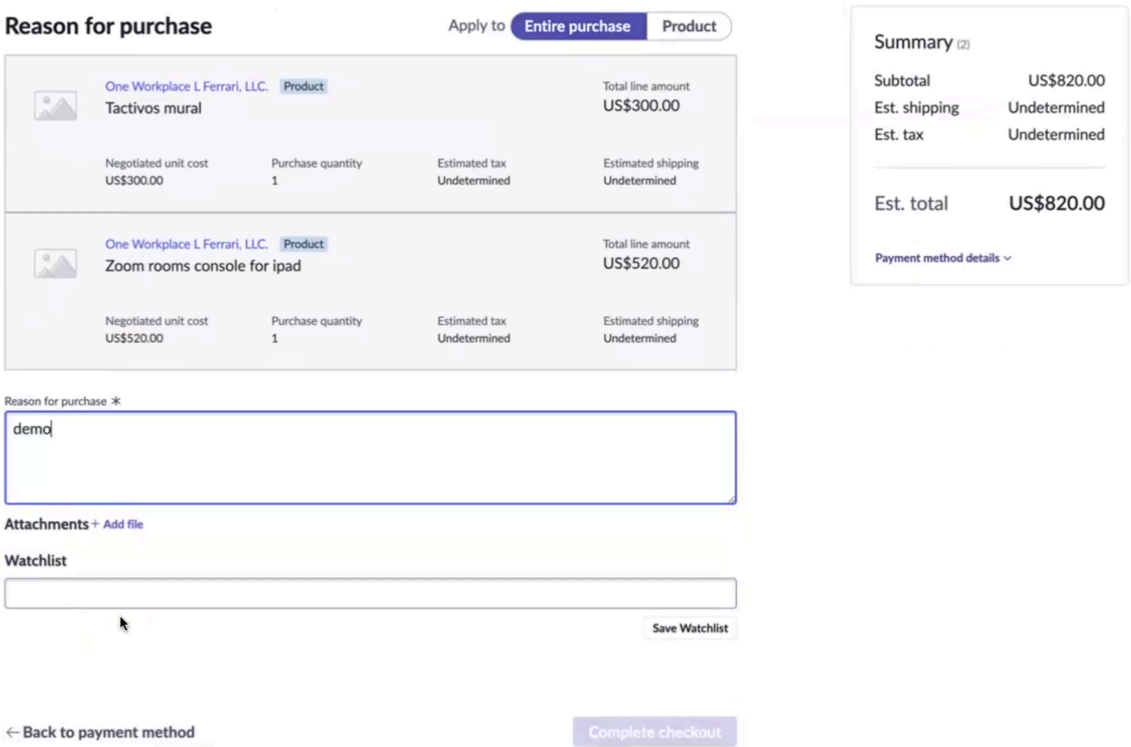
Procedure

1. In the Reason for purchase page, if you're on the Apply to **Entire purchase** view, perform the following steps:

   a. On the **Watchlist** field, select one or more users to the watchlist of the purchase request using the search option.

   b. Select **Save Watchlist**.
   This watchlist applies to the **Entire purchase**, and therefore the watchlist is also applicable to the entire purchase request.

Add users to the watchlist of the entire purchase



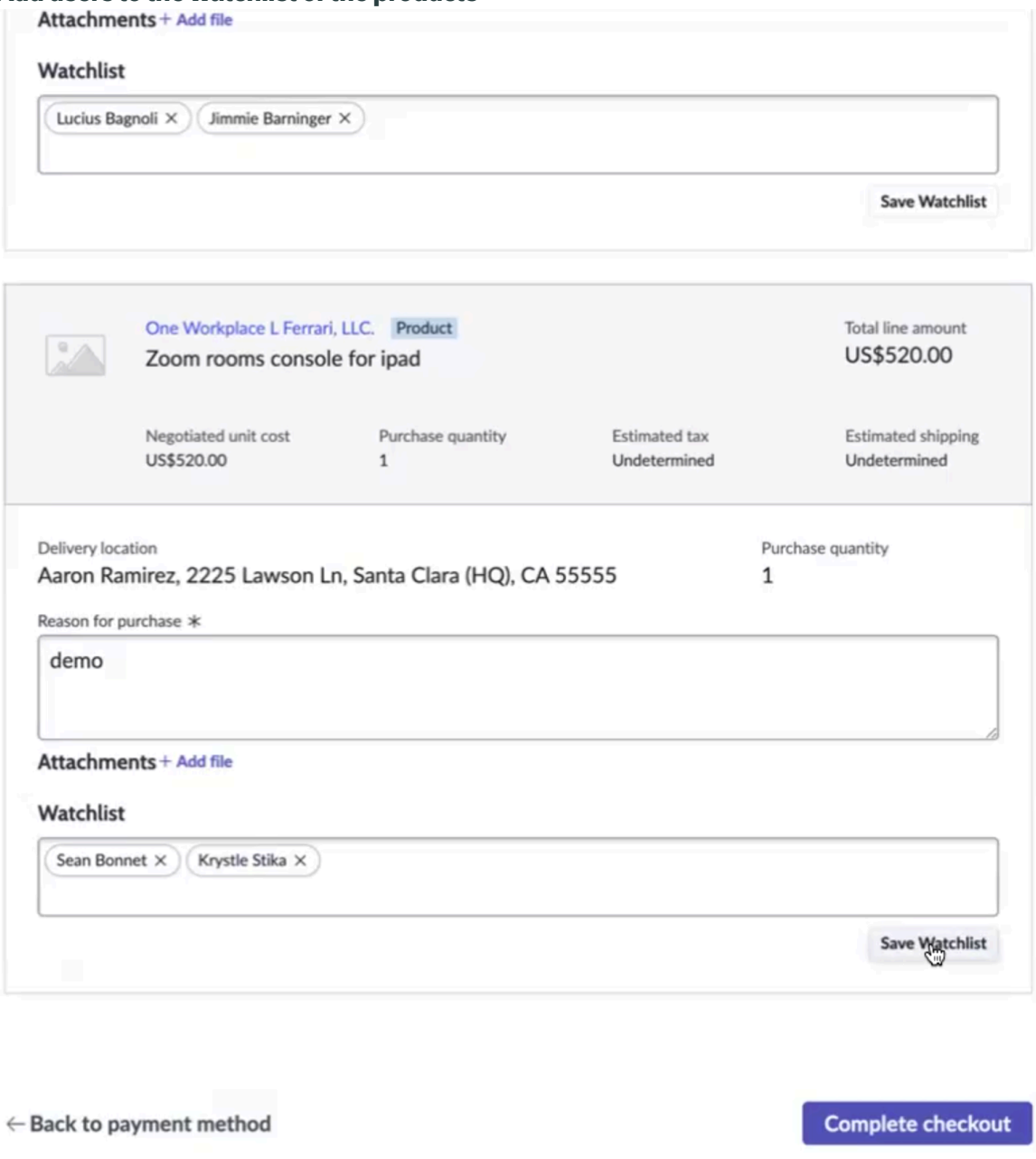
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2. In the Reason for purchase page, if you're on the Apply to **Product** view, perform the following steps:

   a. On the **Watchlist** field of each product or item, select one or more users to the watchlist of the purchase request using the search option.

   b. Select **Save Watchlist**.
   The users on the watchlist for each product or item will be combined into one purchase request and then cascaded to the header level. You can verify this by checking the My purchases page.

Add users to the watchlist of the products



   c. Similarly, you can add users to the watchlist of the purchase request of other products/items.

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Configure additional questions for checkout

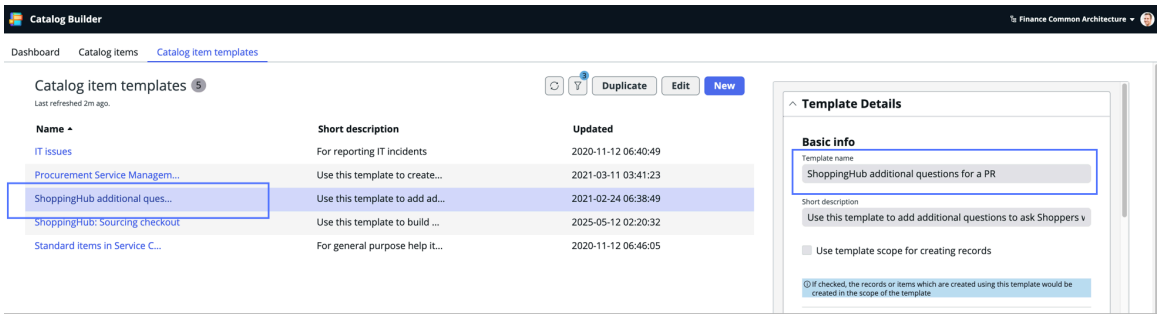
As an administrator, you can configure additional questions for full checkout to collect more information from a shopper specific to a purchase. This information is first stored in the Requisition Additional Info staging table against the purchase requisition ID that is created on checkout, and then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

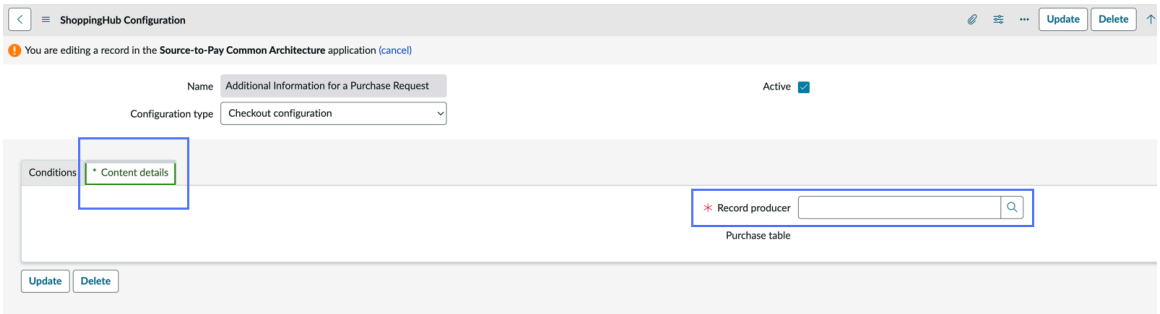
Procedure

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.

   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. Select the **Content details** tab.

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7. On the **Record producer** field, search for and select the **Shopping Hub Additional Questions** record producer.
   You must first create this record producer using the **ShoppingHub additional questions for a PR** template.
8. Select **Update**.
9. In Workflow Studio, map the fields from the Requisition Additional Info staging table to the Purchase Requisitions table.

> **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 Shopping Hub.
- 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.
- Different purchase lines are created for each product listed in a bundled product.

Purchasing from punchout or third-party suppliers

Shoppers who are part of the punchout group can navigate to punchout or external third-party supplier sites from Shopping Hub or Employee Center and make purchases. They can view the third-party purchases in the My purchases page on Shopping Hub, and also view the shipment records received from the third-party sites.

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External suppliers on Shopping Hub

Shoppers who are part of the punchout group can view punchout or external third-party supplier sites from the following tabs or widgets in Shopping Hub Home after navigating to **All** > **ShoppingHub** > **ShoppingHub Home**.

- **Suppliers** > **Supplier sites** tab: Shoppers can select the **Supplier site** check box to filter their search for external or punchout suppliers.
- **Purchase directly from the supplier site** widget: Shoppers can view up to four external supplier cards here. If there are more than four external suppliers, they can view all by going to the complete list.

For more information on punchout groups and how to configure them as an admin, see Configure punchout for third-party site purchases.

External suppliers on Employee Center

Shoppers who are part of the punchout group can also view punchout or external third-party supplier sites from the following tabs in Employee Center after navigating to **All** > **Employee Center**.

- **Purchase and Expense** > **Quick links** > **Purchase directly from supplier sites**.
- **Purchase and Expense** > **Browse all** > **Quick links** > **Purchase directly from supplier sites**.

For more information on Employee Center, see Sourcing and Procurement Operations integration with Employee Center.

Checkout from external supplier sites or Shopping Hub

The shoppers can search for all products, including the ones offered by external suppliers, from within Shopping Hub.

The configuration of the punchout supplier's Order API determines whether the shoppers can place orders for products within the Shopping Hub or on the supplier's external website.

All products from punchout or third-party suppliers are shown on the Products and Services page within Shopping Hub. If a supplier has configured the Order API, the shopper is no longer redirected to the supplier's external website to view products and add them to the cart. The shopper can do this directly within Shopping Hub and then proceed with the usual quick or full checkout process.

However, if a supplier hasn't configured the Order API, a notification message appears, informing shoppers that they are leaving the Shopping Hub application and are being redirected to the supplier's external website. After the shopper selects **Confirm**, they are navigated to the supplier's external website to add items to the cart and place the order. The shopper is subsequently redirected to Shopping Hub where they can continue with the checkout process.

For more information, see Configure punchout for third-party site purchases.

For more information see Order a product with quick checkout and Complete your checkout.

Post checkout from external supplier sites or Shopping Hub

After successfully completing a checkout from either an external third-party supplier site or from within Shopping Hub, a shopper can view the third-party purchase requisition in the My purchases page from Shopping Hub Home. The purchase requisition record contains details of the third-party supplier, purchase lines with product names, and the associated approvals, contracts, and cases.

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Once the necessary approvals are received and the associated cases are completed, a purchase order is created by the procurement specialist. The same purchase order can also be viewed by the procurement admin in the external site in their order logs. The order confirmation and shipment confirmation details are received from the external supplier site as and when the order is processed. Shipment details are captured in the Shipment Details table by purchase lines.

In case of an update to the order quantity or price at the external supplier end, the same is sent as a revision during order confirmation to SPO, which is then updated in SPO as a revision purchase requisition. For more information on purchase revision scenarios, see Purchase revision flows.

For information on emails triggered by the system, see Alerts and email notifications from Shopping Hub.

Troubleshooting errors

- In case of any failures in creating purchase requisitions, check the import logs or transform history records. Check the flow actions 'Send Punchout Setup request' and 'Send punchout order request' context executions for connection setup failures and order confirmation failures. Check the 'Punchout Edit/Cancel flow' context executions for punchout revision flow failures.
- An error code of 500 would indicate an invalid credential record or a missing punchout configuration in the third-party registration for supplier.
- If a purchase order or purchase requisition is stuck in the Pending Supplier Confirmation status, review the system logs for any potential errors and resolve them to allow further processing of the purchase order or purchase requisition.

Hide supplier pricing from Shopping Hub

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

The pricing that is displayed for supplier products on Shopping Hub 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 Shopping Hub 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 Shopping Hub catalog
- Product details or categories or suggestions based on your role landing page
- Supplier product card, on both Shopping Hub 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

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- **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 Shopping Hub, Service Portal, and EC

Note:
Even if supplier pricing is hidden, sort by price and filter by price range display search results in Shopping Hub. 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 Shopping Hub. 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.

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

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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 Shopping Hub

Place a request for one or more products that are currently not listed on the Shopping Hub portal. You can do this from Shopping Hub 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?	Name of the employee, shopper, or business owner who needs this product. **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.
What project is this request for?	Project for which this request is being raised. **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.
What do you need for this request?	Type of request. The options are: ○ 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?	Details of the suppliers you want to request from. The options are:

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Field	Description
	○ 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. **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. ○ 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. **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. ○ I don't have any suppliers in mind. 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.
Default delivery address	Address for delivery. The options are: ○ 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	Estimated date range for delivery. The options are: ○ 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. **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.

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Field	Description
Add the products you'd like to request	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. **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.
Why do you need these products?	Reason behind this product requirement.
Are there additional details or questions you'd like to include?	Additional details, if any. **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.

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 Shopping Hub.

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 Shopping Hub

Place a request for one or more services that are currently not listed on the Shopping Hub portal. You can do this from Shopping Hub 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**.

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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. **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.
What project is this request for?	Project for which this request is being raised. **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.
What do you need for this request?	Type of request. The options are: ○ 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?	Details of the suppliers you want to request from. The options are: ○ 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. **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. ○ 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. **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. ○ I don't have any suppliers in mind For more information on adding suppliers, see:

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Field	Description
	○ 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: ○ 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	Estimated date range for the service. The options are: ○ 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. **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.
Add the service you'd like to request	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. **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.
Why do you need these services?	Reason behind this service requirement.
Are there additional details or questions you'd like to include?	Additional details, if any. **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.

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.

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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 Shopping Hub.

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.

   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 Shopping Hub 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.

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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: ○ 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:

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Field	Description
	○ **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. **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.
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.

   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. In the **Watchlist** field, select one or more users to be added to the watchlist of the purchase request.

   The users on the Watchlist receive email notifications when specific conditions are fulfilled and the purchase request status is updated. By default, you can add up to 20 users in the watchlist. You can modify this value by configuring the system properties. For more information, see Add users to the watchlist of the purchase.

10. Add attachments of your quote for verification.
11. **Optional:** Select **Save as Draft** if you want to save a draft in your requests and plan to complete it later.
12. Select **Submit**.

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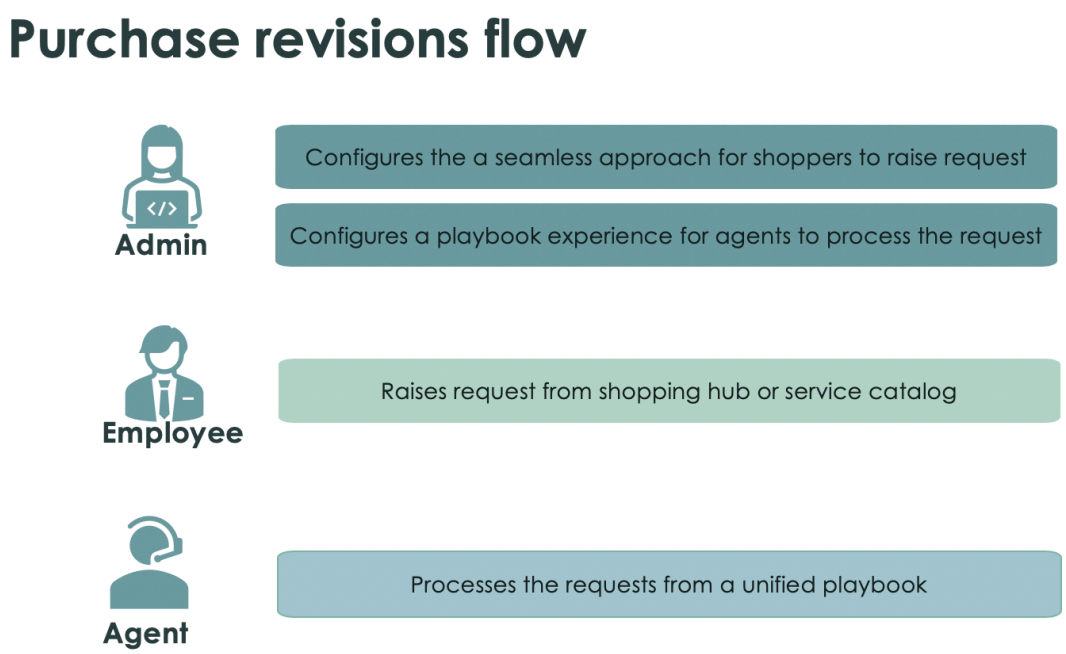
What to do next

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:



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 Shopping Hub. 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 Shopping Hub or Service Catalog:

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- **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

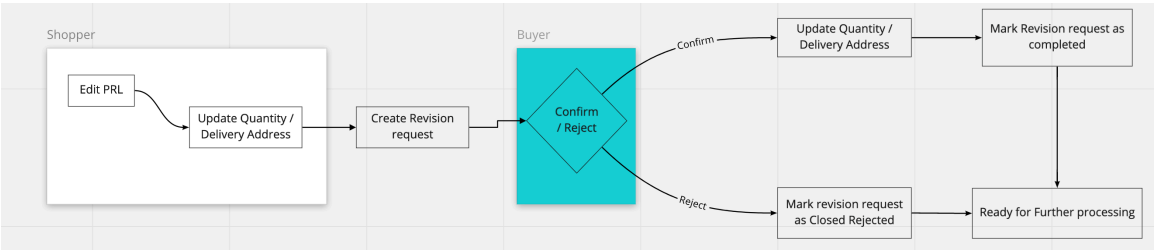
As an agent or fulfiller or buyer, you can process these requests from the procurement workspace playbook:

- 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.

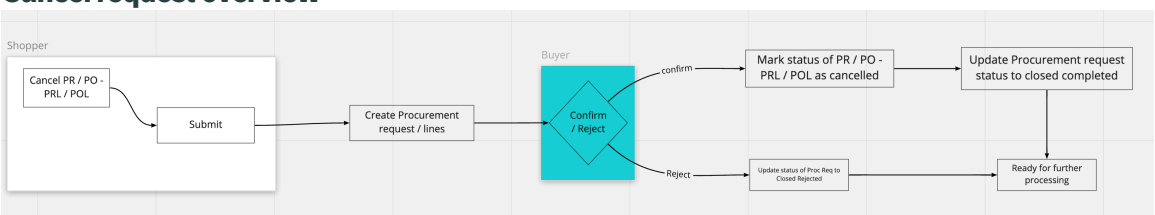
Edit request overview



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.

Cancel request overview



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

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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	**Important:** This field is applicable only for product. Select the date by when you want the product to be delivered.
Requested start date	**Important:** This field is applicable only for services. Select the date by when you want the service to start.
Requested end date	**Important:** This field is applicable only for services. Select the date by when you want the service to end.
Where do you think you will have this delivered?	Select one of the following delivery options: ▪ To a saved location ▪ To a work address (already approved) ▪ To somewhere else The delivery location available for selection is filtered based on the countries supplier can deliver to.

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Field	Description
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.
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	**Important:** This field is applicable only for product. Select the date by when you want the product to be delivered.
Requested start date	**Important:** This field is applicable only for services. Select the date by when you want the service to start.

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Field	Description
Requested end date	**Important:** This field is applicable only for services. Select the date by when you want the service to end.
Where do you think you will have this delivered?	Select one of the following delivery options: ▪ 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 isn't 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. You can also view the existing or current quantity or delivery date of the 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**. For more information, see Edit a purchase line from a purchase requisition or order using Employee Central (EC).
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 isn't available for purchases in the Closed 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.

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The delivery location available for selection is filtered based on the countries supplier can deliver to.

4. You can update the following details.

> **Note:**
> If it's a product, you will see Current delivery date and New delivery date fields, and if it's a service, you will see Current start date, New start date, Current end date, and New end date.
>
> For goods, we will show the fields related to delivery dates, for service lines, we show the fields related to service dates.

5. Select **Submit**.
The purchase line is updated with the changes.

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**. For more information, see Edit a purchase line from a purchase requisition or order using Employee Central (EC).
2. Select a purchase requisition and a purchase requisition line in it.

> **Note:**
> Remember that the **Edit** option is not available for purchases in the Closed 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:

> **Note:**
> If it's a product, you will see Current delivery date and New delivery date fields, and if it's a service, you will see Current start date, New start date, Current end date, and New end date.
>
> For goods, we will show the fields related to delivery dates, for service lines, we show the fields related to service dates.

Field	Description
Current Quantity	Displays the existing or current numerical quantity of the product to purchase.

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Field	Description
	The current quantity can be viewed but not edited.
New Quantity	Update the new numerical quantity of the product to purchase. You can view existing quantity by referring to the Current Quantity field.
Current delivery date	**Important:** This field is applicable only for products. Displays the existing or current delivery date of the product. The current delivery date can be viewed but not edited.
New delivery date	**Important:** This field is applicable only for products. Update the delivery date of the product according to your preference.
Current start date	**Important:** This field is applicable only for services. Displays the current start date of the service. The current start date can be viewed but not edited.
New start date	**Important:** This field is applicable only for services. Update the new start date of the service.
Current end date	**Important:** This field is applicable only for services. Displays the current start date of the service. The current start date can be viewed but not edited.
New end date	**Important:** This field is applicable only for services. Update the new end date of the service.
Where do you want this delivered?	The options are:

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Field	Description
	○ To one of my saved locations ○ To an office location ○ To a new address For example, you can select an office location. The delivery location available for selection is filtered based on the countries supplier can deliver to.
Would you like to edit something else?	○ Select **Yes** if you want to edit something on the purchase order. ○ Select **No** if you don't have anything to update on the purchase order.
Address	Select an address from the dropdown list.
Purchase Reason	Enter the reason for the purchase.

5. In the Why are you editing this purchase? field, provide the reason for editing the request.
6. 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.
7. Select **Submit Request** to complete the edit request.

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

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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**. For more information, see Edit a purchase line from a purchase requisition or order using Employee Central (EC).
2. Select a purchase order and a purchase order line in it.

   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:

   Note:
   If it's a product, you will see Current delivery date and New delivery date fields, and if it's a service, you will see Current start date, New start date, Current end date, and New end date.

   For goods, we will show the fields related to delivery dates, for service lines, we show the fields related to service dates.

Field	Description
Current Quantity	Displays the existing or current numerical quantity of the product to purchase. The current quantity can be viewed but not edited.
New Quantity	Update the new numerical quantity of the product to purchase. You can view existing quantity by referring to the Current Quantity field.
Current delivery date	**Important:** This field is applicable only for products. Displays the existing or current delivery date of the product. The current delivery date can be viewed but not edited.
New delivery date	**Important:** This field is applicable only for products. Update the delivery date of the product according to your preference.

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Field	Description
Current start date	**Important:** This field is applicable only for services. Displays the current start date of the service. The current start date can be viewed but not edited.
New start date	**Important:** This field is applicable only for services. Update the new start date of the service.
Current end date	**Important:** This field is applicable only for services. Displays the current start date of the service. The current start date can be viewed but not edited.
New end date	**Important:** This field is applicable only for services. Update the new end date of the service.
Where do you want this delivered?	The options are: ○ To one of my saved locations ○ To an office location ○ To a new address For example, you can select an office location. The delivery location available for selection is filtered based on the countries supplier can deliver to.
Would you like to edit something else?	○ Select **Yes** if you want to edit something on the purchase order. ○ Select **No** if you don't have anything to update on the purchase order.
Address	Select an address from the dropdown list.
Purchase Reason	Enter the reason for the purchase.

5. In the Why are you editing this purchase? field, provide the reason for editing the request.
6. Add an attachment to support your edit request, if applicable.

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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.

7. Select **Submit Request**.

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 line from a purchase requisition or order using Employee Central (EC)

You can edit and revise the quantity of a product or delivery location of a purchase line from Employee Center. You can also view the existing or current quantity or delivery date of the purchase requisition or order.

Before you begin

Role required: sn_spend_psd.requestor or shopper

Procedure

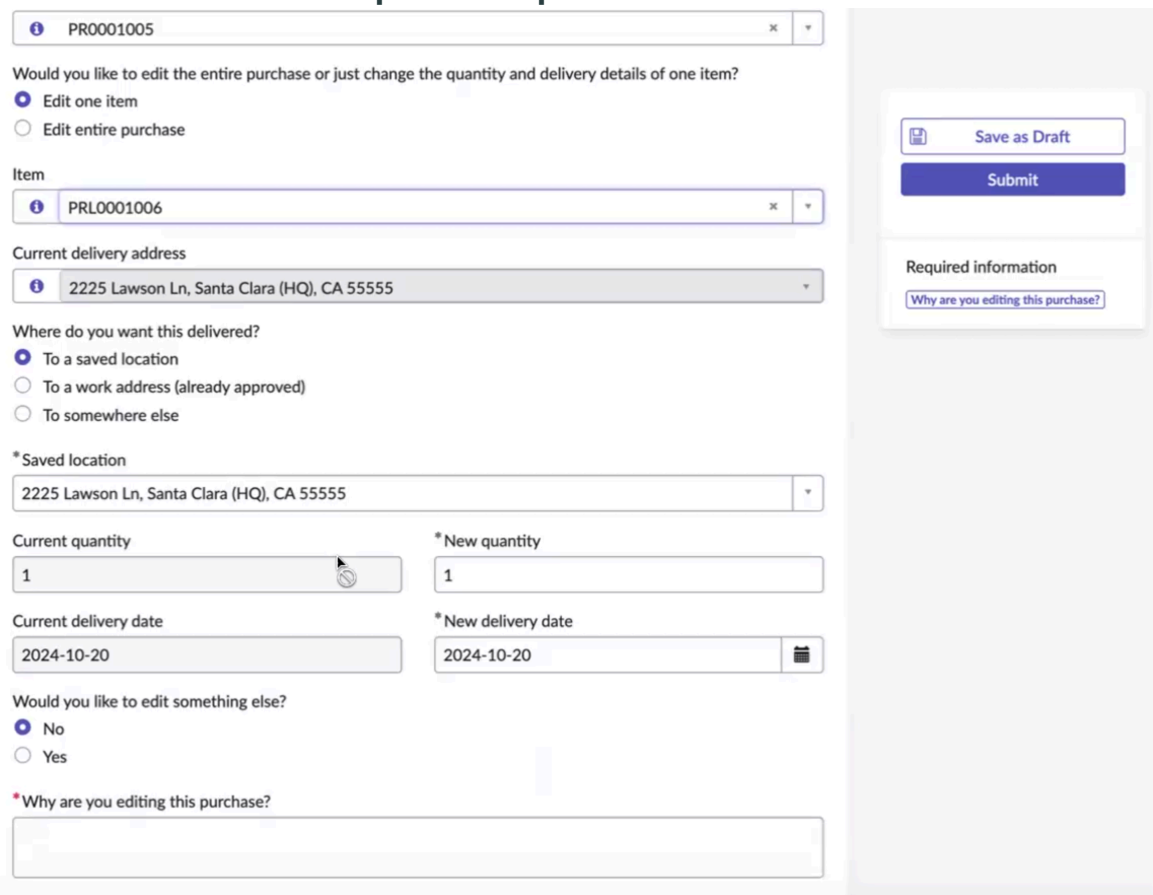
1. Navigate to **Employee Center** > **Purchase and Expense** > **Purchase Requests** > **Edit a purchase**.
   Alternatively, from ShoppingHub Home, select **Don't see what you need?** > **Edit a purchase**.
2. Look up the required purchase requisition or order using the search option.
   You can find the required purchase requisition or order using the purchase requisition number, short description, purchase order (PO) number, or ERP number.
3. Select a purchase requisition or order and select one of the following options:
   - **Edit one item**
   - **Edit entire purchase**
4. If you selected **Edit one item** of the purchase request, perform the following steps:

   a. Look up the required item using the search option.
   You can find the required purchase requisition or order using the purchase requisition number, short description, purchase order (PO) number, or ERP number.

   b. You can edit the following details depending on whether it's a product or service.

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Edit details of one item of the purchase request or order



Field	Description
Current Quantity	Displays the existing or current numerical quantity of the product or service to purchase. The current quantity can be viewed but not edited.
New Quantity	Update the new numerical quantity of the product or service to purchase.
Current delivery date	**Important:** This field is applicable only for products. Displays the existing or current delivery date of the product. The current delivery date can be viewed but not edited.
New delivery date	**Important:** This field is applicable only for products.

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Field	Description
	Update the delivery date of the product according to your preference.
Current start date	**Important:** This field is applicable only for services. Displays the current start date of the service. The current start date can be viewed but not edited.
New start date	**Important:** This field is applicable only for services. Update the new start date of the service.
Current end date	**Important:** This field is applicable only for services. Displays the current start date of the service. The current start date can be viewed but not edited.
New end date	**Important:** This field is applicable only for services. Update the new end date of the service.
Would you like to edit something else?	▪ Select **Yes** if you want to edit something on the purchase order. ▪ Select **No** if you don't have anything to update on the purchase order.
Why are you editing this purchase?	Enter the reason for editing the purchase requisition or order.

5. If you selected **Edit entire purchase** request, perform the following steps:

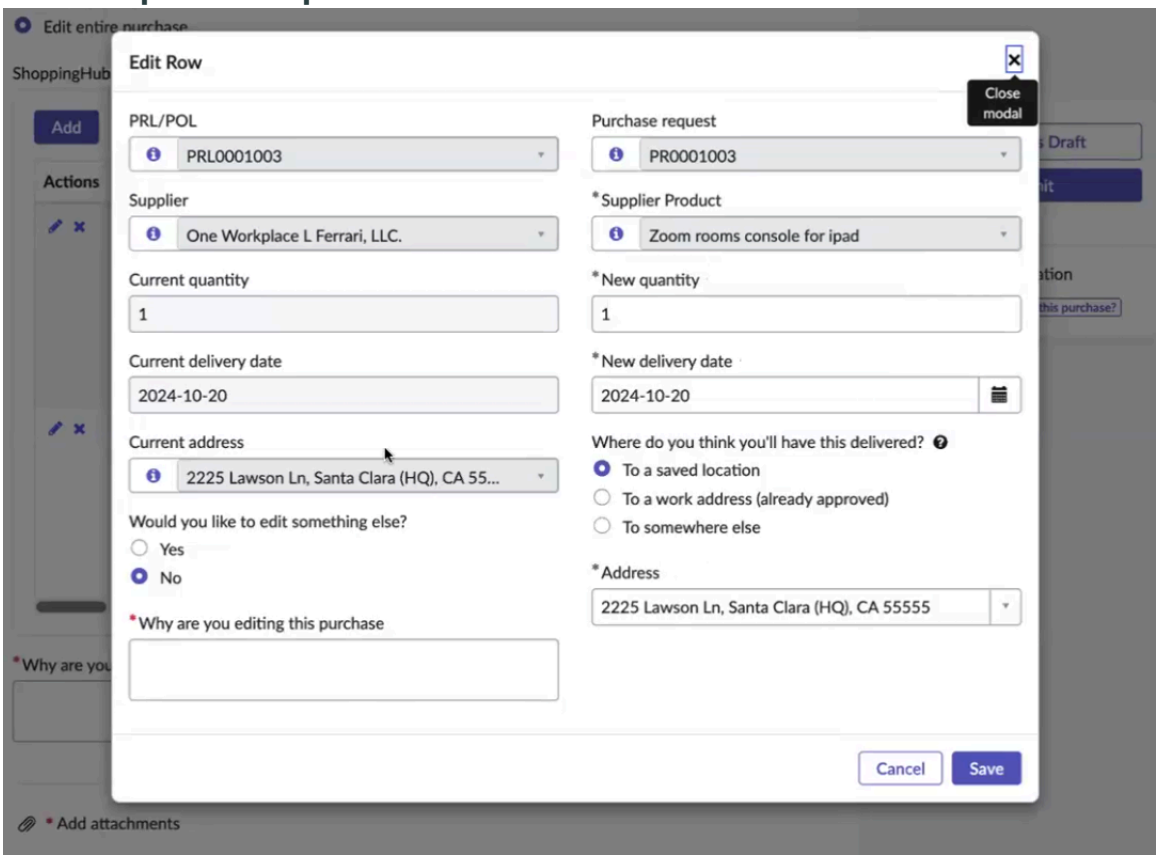
   a. Look up the required purchase request using the search option.
   You can find the required purchase requisition or order using the purchase requisition number, short description, purchase order (PO) number, or ERP number.

   b. Select the **Edit** icon next to the required purchase request line.

   c. You can update the following details.

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Edit entire purchase request



Field	Description
Current Quantity	Displays the existing or current numerical quantity of the product or service to purchase. The current quantity can be viewed but not edited.
New Quantity	Update the new numerical quantity of the product or service to purchase. You can view existing quantity by referring to the Current Quantity field.
Current delivery date	**Important:** This field is applicable only for products. Displays the existing or current delivery date of the product. The current delivery date can be viewed but not edited.

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Field	Description
New delivery date	**Important:** This field is applicable only for products. Update the delivery date of the product according to your preference.
Current start date	**Important:** This field is applicable only for services. Displays the current start date of the service. The current start date can be viewed but not edited.
New start date	**Important:** This field is applicable only for services. Update the new start date of the service.
Current end date	**Important:** This field is applicable only for services. Displays the current start date of the service. The current start date can be viewed but not edited.
New end date	**Important:** This field is applicable only for services. Update the new end date of the service.
Would you like to edit something else?	▪ Select **Yes** if you want to edit something on the purchase order. ▪ Select **No** if you don't have anything to update on the purchase order.
Why are you editing this purchase?	Enter the reason for editing the purchase requisition or order.

6. Select **Save**.
7. Add an attachment to support your edit request, if applicable.
8. Select **Submit**.

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The purchase line is updated with the changes.

9. To save the modified details of the purchase requisition or order as a draft, select **Save as Draft** option.

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.

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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. **Note:** This field is displayed only for multiple product returns initiated from Employee Center.
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. **Note:** This field is displayed only for multiple product returns initiated from My Purchases or Employee Center.
How many would you like to return?	Quantity of items to return. Remember that the quantity must always be lesser than or equal to the delivered quantity. **Note:** This field is displayed only for line-level returns.
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.

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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 Shopping Hub 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

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- 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:

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- **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 Shopping Hub 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 Shopping Hub 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 Shopping Hub 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.

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6. Select **Submit**.

Provide more details on your purchase from Shopping Hub Home

Provide additional information on your purchase from Shopping Hub 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 Shopping Hub 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 Shopping Hub 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 Shopping Hub Home.

An approver can also access the purchase details page on Shopping Hub 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.

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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 Shopping Hub 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 Shopping Hub 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.

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Compare quotes and select a supplier from Shopping Hub 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 Shopping Hub 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.

5. Select **Submit**.

Confirm receipt of your order from Shopping Hub Home

Provide confirmation of receipt of the items you ordered that are in pending receipt state from Shopping Hub 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.

6. Select **Submit**.

View shipment details of your order from Shopping Hub 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.

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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 Shopping Hub 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 Shopping Hub Home

Provide confirmation from Shopping Hub 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.

View a link or video from Shopping Hub Home

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

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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 Shopping Hub Home

Complete the task that your procurement specialist has assigned to you by uploading a document, directly from Shopping Hub 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 Shopping Hub Home

Provide your consent by signing a document using DocuSign, directly from Shopping Hub 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.

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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 Shopping Hub Home

Provide your consent by signing a document, directly from Shopping Hub 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 Shopping Hub Home

Fill in a form that your procurement specialist has sent to you, and submit it directly from Shopping Hub 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.

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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 Shopping Hub, by creating an employee credit. If a credit already exists, allocated to an employee, it shows up as a payment option in Shopping Hub, 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 Shopping Hub.

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.

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Field	Description
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.
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 Shopping Hub, 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 Shopping Hub.

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.

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Field	Description
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.
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 Shopping Hub 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 Shopping Hub.

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.

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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 Shopping Hub 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 Shopping Hub 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 Shopping Hub 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.

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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.
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: ○ 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: ○ 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.
11. Add any supporting documents for this purchase as attachments, if applicable.
12. Select **Submit request**.

> **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.

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Alerts and email notifications from Shopping Hub

Several alerts and email notifications are triggered from Shopping Hub. 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 Shopping Hub when:

- You switch the user that you're shopping as in Shopping Hub
- 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
- Shopping Hub has a global fail or fails to complete an action, due to server issue

Email notifications

Shopping Hub 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)
- You submit a new purchase request from a third-party site.
- 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.

  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

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- You initiate or submit a purchase revision, irrespective of approval requirement
- Your purchase revision is confirmed, approved, rejected, or canceled
- There are any price or quantity changes during purchase order confirmation
- There are any rejections for any purchase order lines that could not be fulfilled during purchase order confirmation
- 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.

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Prioritize Shopping Hub email notifications

To ensure that your customers receive the focused Shopping Hub 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.

Using Shopping Hub Mobile

The ServiceNow Shopping Hub Mobile app enables you to engage with procurement organizations from a mobile device.

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

Related topics

Install ShoppingHub Mobile

Application plugin installation sequence

Shopping Hub Mobile

My purchases on your mobile

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.

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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 Shopping Hub 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.
   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.

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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 Shopping Hub 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 Shopping Hub 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**.

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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 Shopping Hub 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.

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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.
   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.

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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.
   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 Shopping Hub 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**.

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5. Do any of these actions.

Display My Purchases on your mobile instance

As a Shopping Hub 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**.

Related topics
- Shopping Hub Mobile
- My purchases on your mobile
- View and revise your purchase from your mobile device

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.

Related topics
- Shopping Hub Mobile
- My purchases on Shopping Hub
- Display My Purchases on your mobile instance

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Using 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.

Related topics

- Procurement Case Management
- Procurement Case Management Dashboard
- Install Sourcing and Procurement Operations
- Application plugin installation sequence

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 its fulfillment.

Before you begin

Role required: sn_spend_psd.requestor

Procedure

1. Navigate to **All** > **Procurement Case Management**.
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.

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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 task from a procurement case

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.

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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.

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**.

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- 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**.

Sourcing and Procurement Operations reference

Reference topics provide additional information about Sourcing and Procurement Operations, including lists, forms, rules, components, parameters, roles, and personas.

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_intg]	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_psd]	Enables all employees to request services from the procurement team, and the procurement team to manage those requests.	Common Service Delivery Source-to-Pay Workspace
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.	None

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Application plugin list (continued)

Plugin name	Description	Dependencies
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
Virtual Agent for Sourcing and Procurement Operations [com.sn_shop_va]	Provides preconfigured 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

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Application plugin list (continued)

Plugin name	Description	Dependencies
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 preconfigured 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 Third-party Risk Management.	Source-to-Pay Common Architecture Vendor Risk Management
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
Source-to-Pay Operations with Contract Management Pro	Provides streamlined cross-team collaboration and enables legal professionals	com.snc.sn_pr

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Application plugin list (continued)

Plugin name	Description	Dependencies
[com.snc.sn_spend_clm]	to run their contracting work within the sourcing and purchasing process. With this integration, procurement specialists can initiate contract requests manually throughout the sourcing and purchasing process.	com.sn_cm_word_addin
Now Assist for Sourcing and Procurement Operations (SPO) [com.sn_spend_gen_ai]	Uses procurement-related topics to route requesters to the appropriate intake channels, and then through conversation, helps to submit their requests.	Now Assist for Platform Sourcing and Purchasing Automation
Process Mining for Source-to-Pay Operations [com.sn_s2p_mining]	Provides the ability to use Platform's Process Mining capabilities on the Source-to-Pay workflows to which customers are entitled to analyze and improve source-to-pay processes.	Source-to-Pay Common Architecture
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

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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_intg]
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. Shopping Hub [com.snc.sn_spend_uib]
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. Source-to-Pay Operations with Contract Management Pro [com.snc.sn_spend_clm]
19. Now Assist for Sourcing and Procurement Operations (SPO) [com.sn_spend_gen_ai]
20. Advanced Work Assignment for Source-to-Pay Operations [com.snc.sn_spend_awa]
21. Process Mining for Source-to-Pay Operations [com.sn_s2p_mining]
22. Primary Data Integration with SAP [com.sn_sap_data_int]
23. Sourcing and Procurement Operations Integration with SAP [com.sn_psm_sap_int]
24. Procurement for Field Service Management

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

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Related topics

- Install Sourcing and Procurement Operations
- Components installed with Sourcing and Procurement Operations
- Components installed with ERP Integration Framework for Sourcing and Procurement Operations
- Components installed with Finance Common Architecture
- Properties installed with Finance Common Architecture

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
Shopping Hub Administrator [sn_shop.shopping_hub_admin]	Access to all modules of the Source-to-Pay Common Architecture application.	• decision_table_admin • sn_fin.procurement_user • model_manager • category_manager
Shopper [sn_shop.shopper]	Access to the Shopping Hub 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.	• sn_fin.procurement_primary_data_admin • sn_shop.procurement_specialist
Procurement Specialist [sn_shop.procurement_specialist]	Access to all the data of the Sourcing and Purchasing Automation module, except the primary data.	• sn_fin.procurement_user • contract_manager
Accounts Payable Viewer	Read access to purchase orders,	None

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Role title [name]	Description	Contains roles
[sn_shop.accounts_payable_viewer]	invoices, and other task-related objects that arise from purchase order creation.	
Purchasing Task Owner [sn_shop.purchasing_task_owner]	Access to all purchase orders, requisitions, negotiations, sourcing requests, and purchasing tasks.	None
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-	sn_shop.procurement_common_reader

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Role title [name]	Description	Contains roles
	Pay Common Architecture application.	

Note:
An application-specific admin role enables a user to access a specific application, but does not grant the user any other admin rights. Your system-level admin on the production instance must grant the application-specific admin role to the appropriate users, and then remove the application-specific admin role from all the users with the system-level admin role. For more information, see Application administration.

Roles installed with Procurement Case Management (sn_spend_psd)

Role title [name]	Contains roles
Procurement Team Agent [sn_spend_psd.agent]	• sn_spend_sdc.agent • sn_slm.fulfiller • sn_shop.shopper • canvas_user
Procurement Team Manager [sn_spend_psd.manager]	• sn_spend_sdc.manager • sn_spend_psd.agent
Procurement Task Owner [sn_spend_psd.procurement_task_owner]	sn_slm.fulfiller
Procurement Service Delivery Admin [sn_spend_psd.psd_admin]	• sla_admin • sn_spend_sdc.admin
Employee Requestor [sn_spend_psd.requestor]	sn_spend_sdc.requestor

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.

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Scheduled job	Description
[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 [sn_shop_attribute_set]	Stores a group of attribute types that can later be associated with a supplier product. For example, Memory, Graphic card, and CPU can be an attribute set that can be associated with a product group.
Attribute Type [sn_shop_attribute_type]	Stores the various types of attributes that are used when creating a product attribute.
Delivery Location	Stores the delivery location for a given shop line or cart line.

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Table	Description
[sn_shop_delivery_location]	
ERP Address Mapping [sn_shop_erp_address_map]	Stores the mapping between the ERP address and the location.
ERP Asset Category Mapping [sn_shop_erp_asset_category_map]	Stores the mapping between the ERP source and the capitalization policy.
ERP Material Group Mapping [sn_shop_erp_material_group_map]	Stores the mapping between the ERP source, model category, and material group.
Integration Error [sn_shop_erp_error_task]	Stores integration errors that might occur when communicating or processing a request with ERP.
Invoice [sn_shop_invoice]	Stores the invoice that is associated with a purchase order.
Invoice Line [sn_shop_invoice_line]	Stores the invoice lines for each corresponding purchase order line.
Job Code [sn_shop_job_code]	Stores the job codes that are associated with business owners that primarily drive the approval hierarchy.
Milestone [sn_shop_milestone]	Extends the Acknowledgment Task table and stores the acknowledgment of services received.
Office Location [sn_shop_office_location]	Stores delivery locations marked as office.
Order Line Template [sn_shop_order_line]	Extends the Shop Line table and stores the purchase order line for any purchase order.
Order Template [sn_shop_order]	Stores all purchase orders. This is a base table.
Order to Contract Relationships	Stores the mapping between the purchase order and contract.

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

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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.
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.

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Table	Description
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 [sn_shop_percent_complete_config]	Stores the configurations to determine the percentage of payment that is completed for an order.
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	Extends the Import Set Row table. This staging table is used to import supplier products.

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Table	Description
[sn_shop_imp_product]	
Properties [sn_shop_properties]	Stores the Shopping Hub 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 [sn_shop_task]	Stores the various tasks that are associated with a purchase such as finance and contract 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	Stores the mapping between the purchasing permission and purchase requisition.

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Table	Description
[sn_shop_m2m_purchasing_users_covered]	
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 CachedCagetoryMap.
ShoppingHub Configuration [sn_shop_shopnow_content]	Stores configurations that determine certain aspects of the application appearance 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	Stages the sourcing request for the third-party providers.

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Table	Description
[sn_shop_sourcing_out_queue]	
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 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 [sn_shop_third_party_category]	Stores an external category that is provided by a supplier that maps to an existing model.
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.

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Property	Description
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.
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.

Watchlist properties

Set the `sn_shop.watchlist.user.limit` system property to restrict the maximum number of users in the watchlist to 20.

Role required:

- sn_shop.procurement_administrator, sn_shop.shopping_hub_admin - Edit and view.
- sn_shop.procurement_administrator, sn_shop.shopping_hub_admin, sn_shop.shopper, sn_shop.procurement_specialist, sn_spend_psd.agent - View (read-only).

To modify the user limit, you can perform the following steps:

1. Navigate to **All**.
2. On the left navigation pane, enter `sys_properties_list.do`.

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The entire list of properties in the System Properties [sys_properties] table appears.

3. In the Name search field, look for **sn_shop.watchlist.user.limit** and open the system property.

   The system property **sn_shop.watchlist.user.limit** opens as a record. The Value field displays the default value as 20. You can edit the record in editing mode.

4. In the Value field, you can modify the value as per your requirement.

   For example, 5.

5. Select **Update**.

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.

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Table	Description
Park Post Response [sn_fcms_intg_parkpostresponse]	Stores the park and post response from ERP.
Reverse Response [sn_fcms_intg_reverse_response]	Stores the reverse response from ERP.
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]	Defines the access control for general ledger (GL) accounts, specifying who can view or modify particular GL records.
Account Access Rule [sn_fin_gl_access_rule]	Defines rules that govern access control to the general ledger, ensuring proper segregation of duties and user permissions.

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Table	Description
Account Group Mapping [sn_fin_gl_group_mapping]	Maps general ledger accounts to specific groups for reporting purposes, ensuring proper categorization and alignment with business functions.
Accounting Periods [sn_fin_accounting_period]	Defines accounting periods for financial reporting, such as fiscal year, quarters, and months.
Balance [sn_fin_balance]	Tracks balances for different financial entities, which could include balances for accounts, departments, or cost centers.
Base Invoice [sn_fin_base_invoice]	Stores high-level details about invoices, such as invoice number, date, supplier, customer, and total amount.
Base Tax Line [sn_fin_base_tax_line]	Contains detailed tax line items associated with invoices, including tax rates, tax amounts, and tax classifications.
Currency Conversion Setting [sn_fin_gl_currency_setting]	Contains settings and preferences for handling multiple currencies in the general ledger, including conversion rates and currency codes.
Due Date Rule [sn_fin_gl_due_rule]	Defines rules for determining when accounts payable or receivable amounts are due, including due dates, grace periods, and interest rates.
ERP Source [sn_fin_erp_source]	Maps and stores information regarding source systems from which financial data is imported or integrated into the financial system.
ERP source mapping [sn_fin_erp_source_mapping]	Maps external ERP system data to the internal financial schema, facilitating data integration and synchronization.
Excel Data Import [sn_fin_excel_data_import]	Supports the asynchronous excel data import for a journal entry.
Period [sn_fin_period]	Maps external ERP system data to the internal financial schema, facilitating data integration and synchronization.
Finance Exchange Rates [sn_fin_fx_rate]	Maintains foreign exchange rates used for currency conversions in financial transactions, tracking historical and current rates.
Fixed Asset [sn_fin_fixed_asset]	Stores information about fixed assets owned by the organization, including asset type, value, depreciation, and location.
Fixed Asset to Asset [sn_fin_m2m_fixed_asset]	Represents a many-to-many relationship between fixed assets and various attributes, such as locations, departments, or asset classifications.

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Table	Description
GL Rule [sn_fin_gl_rule]	Defines rules and policies for general ledger account management, including rules for automated journal entries and account mappings.
GL Support [sn_fin_gl_support]	Provides supporting data for general ledger accounts, such as supplementary details or documents linked to specific transactions.
Import Error [sn_fin_import_error]	Tracks errors encountered during the import process, typically for financial data, to aid in troubleshooting and data validation.
Industry [sn_fin_industry]	Holds industry classifications or categories relevant to the suppliers, customers, or financial entities in the system.
Ledger [sn_fin_ledger]	The main table for storing general ledger (GL) entries, summarizing financial transactions by account, period, and other dimensions.
Ledger Account [sn_fin_gl_account]	Stores balances for subledgers, such as accounts payable or receivable, tracking amounts owed or due by customers and suppliers.
Ledger Account Group [sn_fin_gl_group]	Organizes general ledger accounts into groups for reporting and analysis purposes, such as by department or business segment.
Ledger Balance [sn_fin_gl_balance]	Holds the balance of general ledger accounts, tracking current balances, debits, credits, and running totals.
Legal Entity [sn_fin_legal_entity]	Contains information about legal entities within the organization, such as corporations or limited liability companies, along with their legal statuses.
Office Location [sn_fin_office_location]	Contains information about office locations, including address, contact details, and organizational unit associated with each location.
Organization [sn_fin_organization]	Contains details about the organizations within the financial system, including business units, departments, and organizational hierarchies.
Organization Tax Details [sn_fin_org_tax_detail]	Contains tax-related information for different organizations, including tax registration numbers, rates, and jurisdictions.
Purchasing Entity [sn_fin_purchasing_entity]	Stores information about entities involved in purchasing transactions, such as divisions or business units within an organization.
Properties [sn_fin_properties]	Stores various configuration properties related to financial data management, such as thresholds, settings, or flags used throughout the system.

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Table	Description
Profit Center [sn_fin_profit_center]	Defines profit centers within the organization, enabling financial reporting and analysis by business units or operational segments.
Signer [sn_fin_signer]	Stores information about individuals or entities authorized to sign financial documents or approve transactions.
Supplier [sn_fin_supplier]	Contains details about suppliers, including name, address, contact information, and payment terms
Supplier Legal Entity Mapping [sn_fin_supplier_detail]	Contains more detailed information about individual suppliers, including banking details, payment methods, and credit terms.
Supplier Payment Information [sn_fin_supplier_payment]	Stores records of payments made to suppliers, including payment dates, amounts, and methods of payment.
Subledger Balance [sn_fin_subledger_balance]	Maps general ledger accounts to specific groups for reporting purposes, ensuring proper categorization and alignment with business functions.
Tax Code [sn_fin_tax_code]	Stores various tax codes used for transactions, including sales tax, VAT, and other region-specific tax codes.
Tax Type [sn_fin_tax_type]	Contains different tax types used in financial transactions, such as VAT, sales tax, and withholding tax, along with their applicable rules.
Threshold Rule [sn_fin_gl_threshold_rule]	Defines rules for thresholds in the general ledger, such as limits for certain accounts, to ensure compliance with financial policies.
Unit of measure [sn_fin_uom]	Manages the unit of measurement (UOM) standards used across financial transactions, including different types like kilograms, liters, and hours.

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.

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Properties for Finance Common Architecture (continued)

Property	Description
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.
Description	Short description of the property.
Application	Name of the application to which the property applies.
Value	Value for the property.

4. Select **Submit**.

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

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Sourcing and Procurement Operations glossary

Learn about the terms and concepts used in Sourcing and Procurement Operations (SPO).

Glossary terms are grouped alphabetically.

C | N | P | R | S | V

C

child case

A case that is linked to and is a part of a parent case, inheriting its context and contributing to its resolution or management.

N

negotiation

Individual discussions with a supplier to track activities like pricing, product requests, or agreement terms.

negotiation event

A collective sourcing activity managing multi-supplier and multi-product negotiations, enabling streamlined tracking, supplier management, and decision-making.

Natural Language Understanding for SPO

AI models enhancing the Virtual Agent's ability to understand and respond to user queries naturally.

Now Assist for SPO

An application that uses generative AI to summarize procurement-related records and facilitate conversational procurement tasks.

P

parent case

A case that contains multiple related child cases. This hierarchical case structure is useful for managing complex scenarios that involve multiple stages and processes.

playbooks for SPO

Pre-built workflows and templates for automating common procurement tasks.

procurement case

A record used to track and manage procurement-related queries or issues.

purchase requisition

A request sent by a requester to procure specific goods or services, requiring approval.

performance analytics for SPO

Dashboards and metrics to evaluate spend, efficiency, and team performance in Sourcing and Procurement Operations.

Procurement Buyer Dashboard

A visualization tool showing individual buyer performance over a specified period.

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Procurement Team Performance Dashboard

A dashboard that provides visual insights into team performance on procurement-related tasks.

Procurement Strategy & Ops Dashboard

A dashboard that shows the year-to-date total spend, spend categorization, total savings, negotiation outcomes, spend by category and supplier, and active blanket purchase orders.

purchase order

A binding contract between a buyer and supplier that outlines item details, quantities, prices, discounts, payment terms, delivery dates, and other conditions.

R

record summarization

A feature of Now Assist for SPO that provides a concise overview, actions completed, and next steps for procurement records.

related case

A case that is associated with another case due to shared characteristics, dependencies, or interactions.

S

Source-to-Pay Workspace

A workspace that centralizes the management of suppliers, from sourcing to payment, enhancing productivity and collaboration.

Shopping Hub

An e-commerce-style interface for employees to submit self-service requests for goods and services, integrated with the organization's procurement processes.

Sourcing and Purchasing Automation

Provides workflows and automation for sourcing requests, negotiations, and purchase requisitions.

Shopping Hub catalog

A curated list of goods and services available for employees to order through Shopping Hub.

Shopping Hub Mobile

A mobile application version of the Shopping Hub, integrated with the Now Mobile app.

sourcing request

A request that is created when an item the shopper intends to buy needs to be sourced due to the lack of an active contractual price.

V

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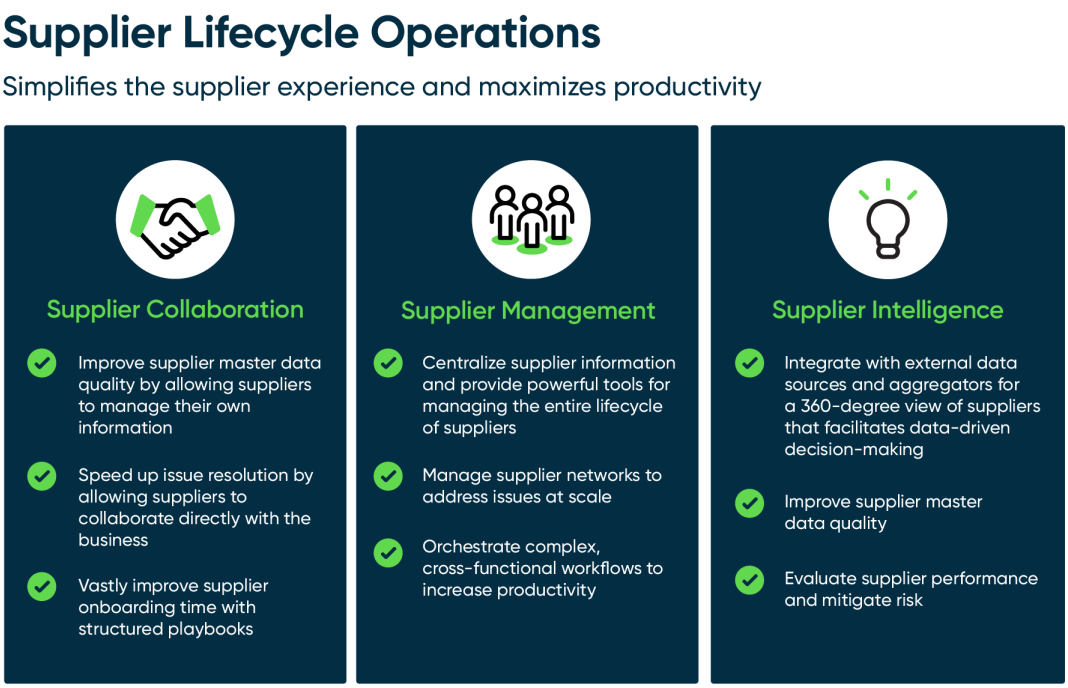
Virtual Agent

An AI-powered conversational chatbot that helps shoppers quickly find and purchase products from vendors via the Shopping Hub, accessible through the Employee Center.

Supplier Lifecycle Operations

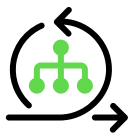
With ServiceNow® Supplier Lifecycle Operations (SLO), you can effectively collaborate with suppliers, manage supplier relationships, monitor risk, compliance, and performance across the supplier life cycle.

Supplier Lifecycle Operations value proposition



Explore	Configure	Integrate
Learn about how supplier managers and supplier contacts use Supplier Lifecycle Operations.	Plan and configure your implementation.	Extend the capabilities of Supplier Lifecycle Operations by integrating with other applications.

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Use	Reference	
		
Resolve supplier inquiries with self-service, compare suppliers, onboard suppliers, and manage supplier data.	Get details about components, such as fields, tables, and properties.	

Helpful resources

Here are some additional ServiceNow resources that can help you:

Release Notes

Learn more about what's new and changed. See the Supplier Lifecycle Operations release notes.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as SLO Implementation Essentials and more, from ServiceNow University.

Now Create

Log in to your ServiceNow account and find additional information about implementing and deploying Supplier Lifecycle Operations features at Now Create.

YouTube

Learn more about the value that you can add to your business with the Source-to-Pay suite. Watch Multiply the value of your ServiceNow platform with Source-to-Pay workflows on YouTube.

ServiceNow Community

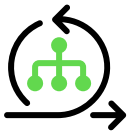
Connect with other Supplier Lifecycle Operations users at ServiceNow Community.

Now Assist for Supplier Lifecycle Operations (SLO)

Use the ServiceNow® Now Assist for Supplier Lifecycle Operations (SLO) application to guide your supplier managers through a conversation-like experience for their supplier needs.

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Get started

Explore	Configure	Use
		
Learn more about Now Assist for SLO	Configure the Now Assist for SLO application to get started	Use generative AI capabilities that are offered by Now Assist for SLO

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Further, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

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Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

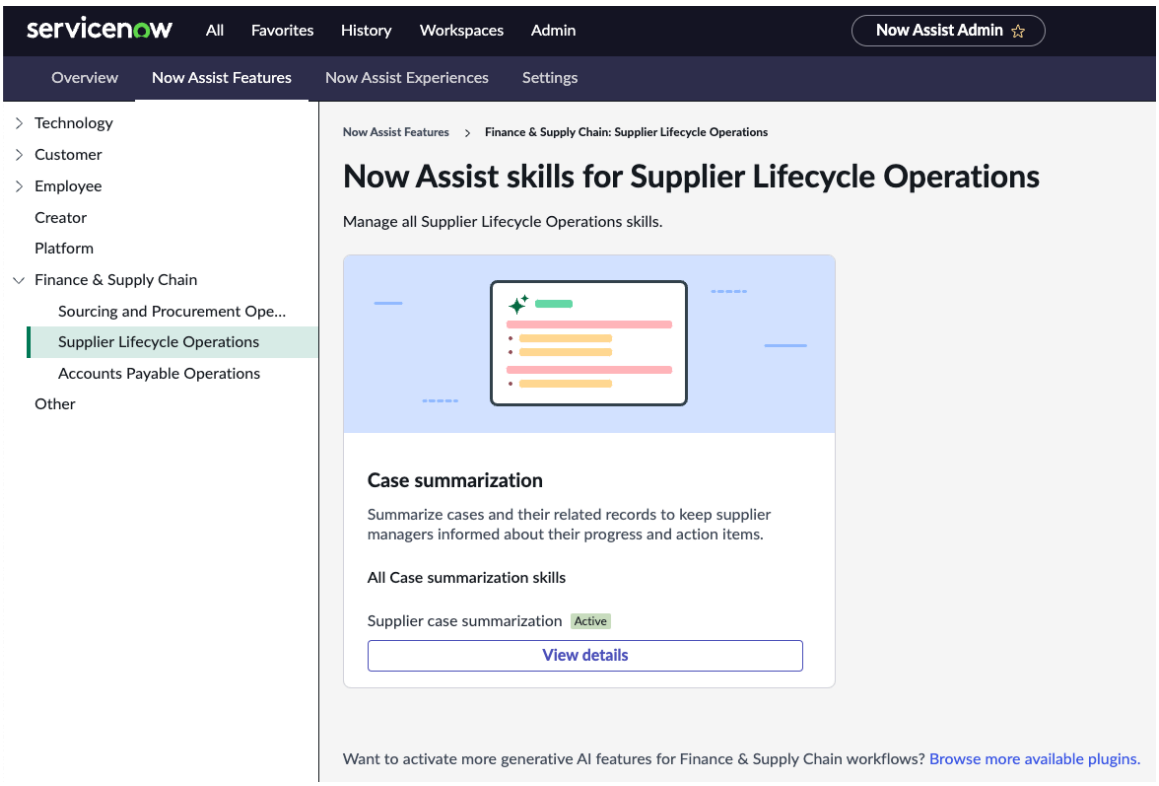
Exploring Now Assist for Supplier Lifecycle Operations (SLO)

With the Now Assist for Supplier Lifecycle Operations (SLO) application, supplier managers can summarize the details of supplier-related cases to keep them informed about their progress and action items.

Overview of Now Assist for SLO

Using the generative AI capabilities, a supplier manager can generate a summary of a case. This summary provides a supplier manager with a concise overview of the case, actions completed so far, and the next steps that need to be taken. A supplier manager gets the context by gathering information about a case and acting quickly. Supplier managers can also refresh and post the summary to the work notes or activity stream.

Now Assist skills for SLO



Now Assist for SLO feature and skill in the Now Assist Admin console

Now Assist for SLO feature	Skill
Case summarization	Supplier case summarization

Skills

The Now Assist for SLO application includes generative AI skills and features that enable supplier managers to summarize the supplier-related cases within the Source-to-Pay Workspace.

Case summarization

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Provides a supplier manager with a summary of the supplier-related cases. A supplier manager can see the status of any case in the supply process and take the necessary actions quickly.

For more information about how to summarize a case, see Summarize a case by using Now Assist for Supplier Lifecycle Operations (SLO) in Source-to-Pay Workspace.

To learn how to configure Now Assist for SLO, see Configure Now Assist for Supplier Lifecycle Operations (SLO).

To learn more about how to use Now Assist for SLO, see Using Now Assist for Supplier Lifecycle Operations (SLO).

Supporting information for Now Assist for Supplier Lifecycle Operations (SLO)

Get a quick overview of the important information that is related to the Now Assist for Supplier Lifecycle Operations (SLO) application.

Supported versions

Now Assist for SLO is supported starting with the Xanadu release.

Supported user interfaces

The Now Assist for SLO application includes the skills that are listed in the following table.

Now Assist for SLO supported interfaces

Interface	Skill
Source-to-Pay Workspace	Supplier case summarization
Core UI	Supplier case summarization

Application information

Activate the Now Assist for SLO store app (com.snc.sn_supplier_gen_ai) to use the Case summarization skill.

This store app has the following dependencies:

- Now Assist for Platform (com.sn.now.platform)
- Supplier Lifecycle Operations (com.snc.sn_supplier_mgmt)

Activate the applications in the following order:

1. Now Assist for Platform (sn_genai_platform)
2. Supplier Lifecycle Operations (com.snc.sn_supplier_mgmt)
3. Now Assist for Supplier Lifecycle Operations (SLO) (com.snc.sn_supplier_gen_ai)

For more information, see Configure Now Assist for Supplier Lifecycle Operations (SLO).

Configure Now Assist for Supplier Lifecycle Operations (SLO)

If you have the admin role, you can configure the Now Assist for Supplier Lifecycle Operations (SLO) application so that your supplier managers can use the generative AI skills in Source-to-Pay Workspace and in Core UI.

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Before you begin

Role required: admin

About this task

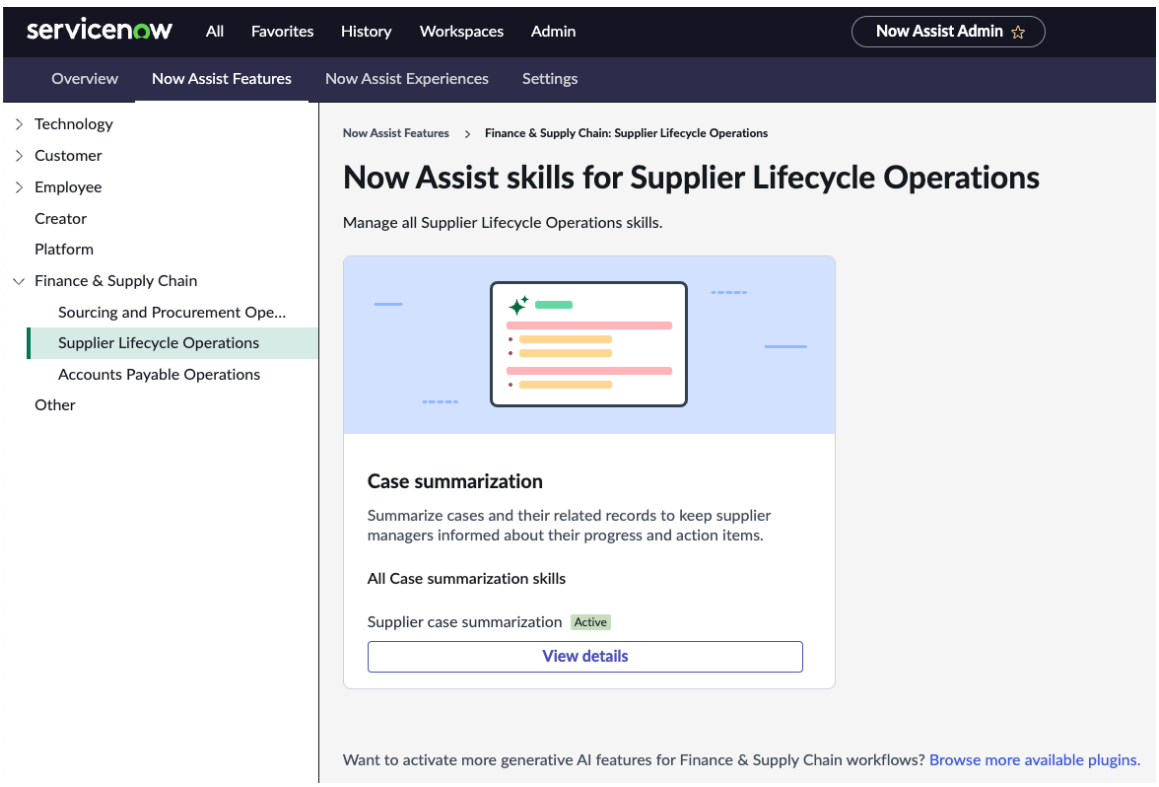
Use the Now Assist Admin console to configure Now Assist for SLO. This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Now Assist Admin console.

The following table lists the feature and skill that you can access from the Now Assist Admin console.

Now Assist for SLO feature and skill in the Now Assist Admin console

Now Assist for SLO feature	Skill
Case summarization	Supplier case summarization

Now Assist skills for SLO



Procedure

1. Install the Now Assist for Supplier Lifecycle Operations (SLO) plugin (com.snc.sn_supplier_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Supporting information for Now Assist for Supplier Lifecycle Operations (SLO).
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
3. Expand the **Finance and Supply Chain** workflow group and select **Supplier Lifecycle Operations**.

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The Supplier Lifecycle Operations feature is located under the Finance and Supply Chain workflow group. Each feature has its associated skill.

4. Activate and configure the Supplier case summarization skill for Now Assist for Supplier Lifecycle Operations (SLO).

Skill	Action
Supplier case summarization	**a.** On the Case summarization skill card, select **View details**. **b.** In the All available Case summarization skills section, activate the Supplier case summarization skill by selecting **Activate skill**.

5. Select **General Details**, review the details about the skill, and select **Save and continue** to go to the next step in the Guided Setup.
6. Configure and active a skill by using the Guided Setup.
7. Select **View Case Input** and review the base input table and input fields, and then select **Save and continue** to go to the next step in the Guided Setup.
8. **Optional:** Test the prompt on a case by selecting **Customize & Test Prompt** and then selecting **Save and continue** to go to the next step in the Guided Setup.
9. **Optional:** Define the availability of the skill by selecting **Define Availability**, and then selecting one of the following options.
10. Select **Save and continue** to go to the next step in the Guided Setup.
11. Display the Now Assist skills on forms and workspaces by selecting **Select display** and then **In-product desktop**.
12. Select **Save and continue** to go to the next step.
13. Review your choices and complete the configuration of the skill by selecting **Activate**.
14. Select **Return to Case summarization**.
    The skill is displayed in the Active skills section.

Customize a Now Assist for Supplier Lifecycle Operations (SLO) skill

If you have the admin role, you can customize a Now Assist for Supplier Lifecycle Operations (SLO) skill. By customizing a skill, supplier managers can use the generative AI skills in Source-to-Pay Workspace and in Core UI.

Before you begin
Role required: admin

About this task
From the Now Assist Admin console, you can select the input table, related records, and fields for each input template of the Case summarization skill. You can then configure the prompt headers to include them in the general summary.

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. In the **Finance and Supply Chain** workflow group, select **Supplier Lifecycle Operations** to view the skill for the Now Assist for SLO feature.

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3. Create a copy of the skill and customize the input fields.

   a. On the Case summarization feature card, select **View details**.

   b. In the Active skills section, locate the skill that you'd like to copy and select the More actions icon (⋮).

   c. Select **Make copy**.

      The copy that you make is listed in the Active skills section.

   d. Select the copied skill from the Active skills section to open it.
      A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the skill is activated.

4. In the General details step, fill in the fields.
   For information about the inputs for each skill, see Skill input for Now Assist for Supplier Lifecycle Operations (SLO).

   a. Enter a name and description for the skill.

   b. Select **Save and continue** to go to the next step.

5. View the input data for each skill, such as the base input fields and related lists for the different input templates.

   Configure the base input table fields and related lists for the different input templates for the skill.

   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   Select only those related tables that are offered as the base system, as part of the input data.

   a. For each input template state, select **+New base input field** and configure the base input table fields.

      Add multiple base input fields, as necessary.

      The following table lists the base input table fields and descriptions, including a relevant example.

Base input fields

Field	Description
Base input field	Field in the case table whose value this skill uses in its response. For example, `Short description`.
Field description	Description of the base input field value.

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Field	Description
	For example, `Short description of case, provides quick info about the case.`

b. For each input template state, configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

c. For each input template state, select **+New data source** to configure the additional related table and activity stream data, as needed.

You can add input data sources like related tables, activity streams, and relationships to provide more context to the Now LLM Service. You can also add rule conditions to these additional data sources.

The selection of the related table fields can have a direct impact on the quality of the corresponding prompt header. If a prompt header requires a specific field from a related table, but that field isn't selected as input, the summary for that prompt header contains missing information.

d. Select **Save and continue** to go to the next step.

6. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by adding new predefined sections and reordering them, as needed.

a. For each input template state, select the prompt sections from the list of available sections to include in the generated summary.

To add a section, you must configure the relevant input data prior to this step.

The available prompt sections that you can select:

- **Overview**
- **Actions completed**
- **Next steps**

The following table lists the required prompt headers.

Required prompt headers

Input template state	Required prompt header
Open	▪ Overview ▪ Actions completed ▪ Next steps

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Input template state	Required prompt header
Closed	▪ Overview ▪ Actions completed

b. Select **Save** to continue to the test response.

c. Select a record in the Test response section, and test the prompt response output format by selecting **Run Test**.

d. Select **Save and continue** to go to the next step.

7. Define how the skill is available to your users.

a. Configure the skill to be always available to users, or select conditions that must be met before the skill is available.
Selecting **Customize skill availability** displays a condition builder to filter the data further.

b. Select **Save and continue** to go to the next step.

8. Configure where to display the supplier case summarization.

a. Select **In-product desktop** to display the Now Assist skills on forms and workspaces.
For the skills that appear in the in-product desktop, select the down arrow to identify the roles that can use the skill.

b. Select **Save and continue** to go to the next step.

9. Review and activate the skill.
Review your choices and select **Activate** to complete the skill customization.
You can select **Summarize** in a record to generate the summary for the supplier case.

Skill input for Now Assist for Supplier Lifecycle Operations (SLO)

You can configure some of the inputs for a generative AI skill. Inputs permit you to determine how and when a skill is used.

Overview of skills

Inputs identify the data used for a skill. Inputs include the table and fields used to generate a case summary.

You can modify inputs, but you can't modify a skill's data source. The data source contains the tables and fields that the skill relies on.

Now Assist skill for Now Assist for SLO

The Now Assist for SLO includes the Supplier case summarization skill.

Supplier case summarization skill

Inputs for the Supplier case summarization skill identify the table and fields that are used when the summary is generated for a supplier request.

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The following table lists the inputs for the Supplier case summarization skill from the Choose input for supplier request page in the Now Assist Admin console.

Input	Description
Base input table	Supplier case [sn_slm_case] table.
Base input fields	• Short description • Description • State • Work notes • Additional comments • Assigned to • Created • Created by • Due date • Case type • Supplier • Priority • Close notes

Using Now Assist for Supplier Lifecycle Operations (SLO)

If you have the sn_slm.fulfiller or admin role, you can generate supplier-related case summaries to get a quick overview of the cases, completed actions, or pending tasks by using the Now Assist for Supplier Lifecycle Operations (SLO) application.

For more information on how to use Now Assist for SLO, see Summarize a case by using Now Assist for Supplier Lifecycle Operations (SLO) in Source-to-Pay Workspace.

Summarize a case by using Now Assist for Supplier Lifecycle Operations (SLO) in Source-to-Pay Workspace

Summarize supplier-related cases to learn more about their status, progress, and action items by using the supplier case summarization skill in the Now Assist for Supplier Lifecycle Operations (SLO) application.

Before you begin

Role required: sn_slm.fulfiller or admin

About this task

You can use the supplier case summarization skill in either Core UI or Source-to-Pay Workspace.

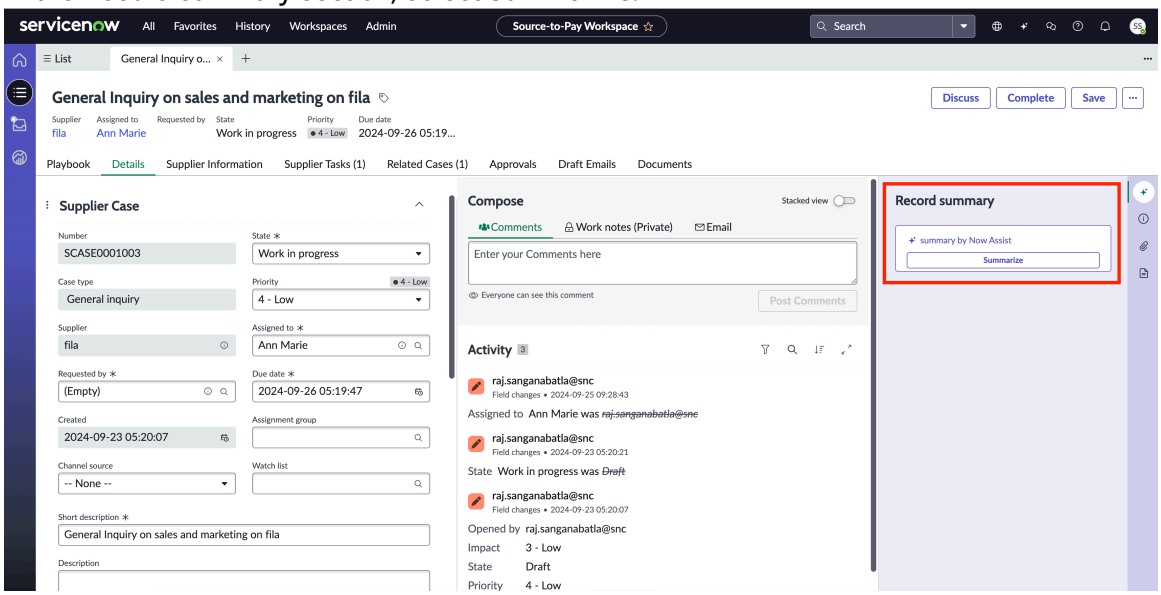
- In Core UI, the summary appears in a banner in the record.
- In Source-to-Pay Workspace, the summary is generated in the **Details** tab.

Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ).

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3. Navigate to **Lists** > **All work** and select either of the following records:
   - Cases
   - Closed cases
4. Under the Number column, select the link to the supplier case.
5. In the Record summary section, select **Summarize**.



6. Review the summary details.

   A concise summary of a case includes the overview, actions completed, and next steps. The information that is displayed is based on the type of the case:

   - **Overview**: Provides information about the case.
   - **Actions Completed**: Lists all the actions that have been taken so far.
   - **Next steps**: Lists the actions that the supplier managers must take next.
7. **Optional:** When you finish summarizing a case, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Exploring Supplier Lifecycle Operations

Use ServiceNow® Supplier Lifecycle Operations to empower suppliers with self-service to simplify operations and improve productivity.

Overview of Supplier Lifecycle Operations

Supplier Lifecycle Operations enables you to onboard suppliers quickly, effortlessly manage supplier data, add key supplier contacts, monitor supplier performance, and enhance the productivity of the teams that engage with suppliers.

Benefits of Supplier Lifecycle Operations

Supplier Lifecycle Operations provides the following benefits:

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- Faster supplier onboarding: View details about new suppliers and onboard suppliers quickly using onboarding workflows and start purchasing goods and services.
- Automatically import supplier information: Supplier Lifecycle Operations integrates with the supplier Intelligence platform, Craft, which enables you to import and view all the important supplier details.
- Supplier self-service: Enhance the supplier experience by enabling suppliers to complete onboarding tasks, get their questioned answered, and fulfill requests, such as viewing open purchase orders and submitting invoices.
- Supplier data management: Provide flexibility to suppliers to manage and update their own data, ensuring that the supplier data is current and up to date.
- Supplier case and contact management: Create and manage supplier cases, add, and manage supplier contacts.
- Minimize risk during supplier onboarding: Identify and assess potential supplier risks when onboarding new suppliers.
- Manage supplier relationship and performance: Monitor and assess supplier performance by setting up criteria for measuring supplier performance though KPIs and thresholds.
- Many-to-many (M2M) mapping between supplier contact and suppliers: A single supplier contact can be the contact for multiple suppliers, if those suppliers share a parent-subsidiary relationship.

> **Important:**
> M2M mapping between supplier contact and suppliers is available from the Xanadu December 2024 release onwards. To enable M2M mapping, see Enable M2M mapping between supplier contact and suppliers.

For more information about installing Supplier Lifecycle Operations, see Install Supplier Lifecycle Operations.

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.
Source-to-Pay Workspace **Important:** Starting with the Washington D.C. release, Supplier Manager Workspace is being prepared for future deprecation. It's hidden from the navigation and no longer is activated on new instances but will continue to be supported. Source-to-Pay Workspace provides the latest experience for this functionality.	Enables you to centralize supplier information and collaborate with suppliers to improve performance.
Craft.co Integration for Supplier Lifecycle Operations	Provides a preconfigured integration with Craft.co. Craft.co is

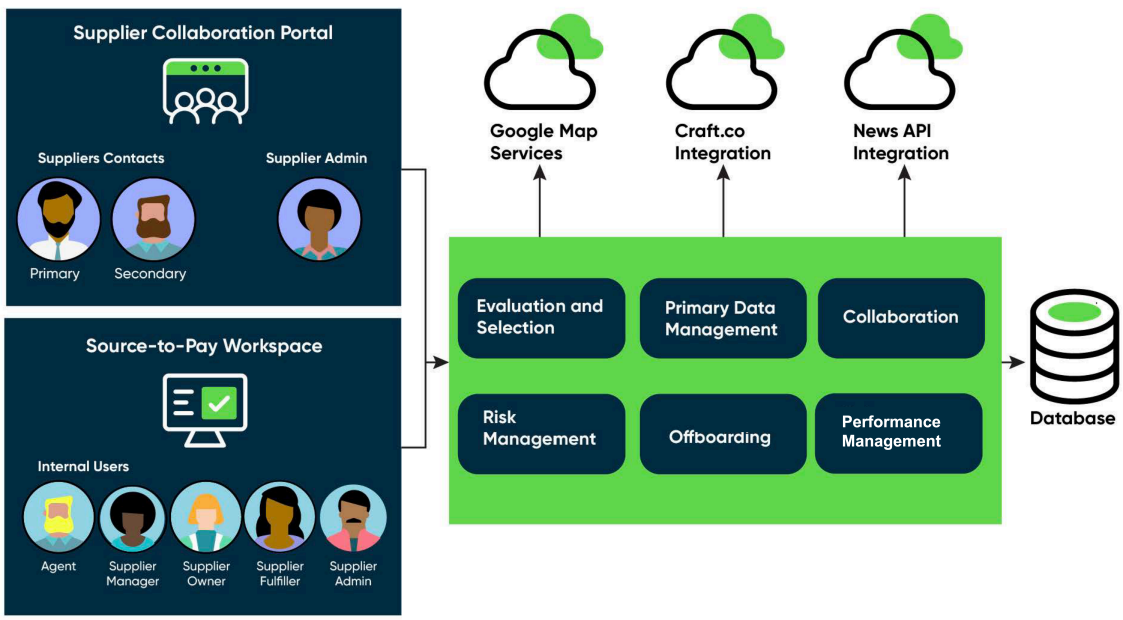
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Application	Description
	a supplier intelligence platform that offers validated and comprehensive information about suppliers with which a company engages.
News Integration for Supplier Lifecycle Operations	Retrieve recent news and other articles from preferred news channels. There's a preconfigured integration with Microsoft Bing available with this application.
Advanced Work Assignment for Supplier Lifecycle Operations	Automatically assign supplier cases to agents based on availability and capacity.
Risk Assessments Integration for Supplier Lifecycle Operations	Provides an integration with the Third-party Risk Management (TPRM) application to conduct due diligence when onboarding new suppliers.
Supplier Collaboration Portal	Provides a single, one-stop experience for suppliers to get self-service, complete tasks and make requests into an organization.
Supplier Relationship and Performance Management	Enables you to establish clear expectations and criteria for measuring supplier performance, monitor, and assess their performance against those criteria.

Supplier Lifecycle Operations functional architecture diagram

The following figure shows a high-level illustration of the various components that make up the functional architecture of Supplier Lifecycle Operations.

Supplier Lifecycle Operations functional architecture diagram



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Helpful resources

Here are some additional ServiceNow resources that can help you:

Release Notes

Learn more about what's new and changed. See the Supplier Lifecycle Operations release notes.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as SLO Implementation Essentials and more, from ServiceNow University.

Now Create

Log in to your ServiceNow account and find additional information about implementing and deploying Supplier Lifecycle Operations features at Now Create.

YouTube

Learn more about the value that you can add to your business with the Source-to-Pay suite. Watch Multiply the value of your ServiceNow platform with Source-to-Pay workflows on YouTube.

ServiceNow Community

Connect with other Supplier Lifecycle Operations users at ServiceNow Community.

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)

Source-to-Pay Workspace

As a supplier manager, you can effortlessly onboard new suppliers, work on open supplier cases, assign tasks to supplier contacts, and respond to supplier requests using the Source-to-Pay Workspace application.

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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 Xanadu 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 to the Xanadu release.

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 manage their own data
- Accelerate case resolution by enabling suppliers to complete tasks and upload required prerequisite documents

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 about installing the Supplier Collaboration Portal, see Install Supplier Collaboration Portal.

Supplier Collaboration Portal header

The portal header contains the following options:

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Options on the Supplier Collaboration Portal header

Option	Description
My Company	Opens the Supplier Profile page, which shows the supplier details. You can submit a request to update the details by selecting **Request Change**. For more information, see Update company profile using the supplier catalog. **Important:** From Xanadu December 2024 release onwards, after enabling M2M mapping between supplier contact and suppliers, the list of suppliers linked with the contact are displayed on clicking **My Company**. You can select a supplier from the list which opens the company-specific Supplier Profile page.
Tasks	Contains the following submenus. **Note:** Only the primary contact can see the Tasks menu and its submenus in the portal header. • My Tasks: Opens the My To-dos page, which lists all the tasks that are assigned to the logged-in user. **Note:** The secondary contact can view only the My Tasks option in the portal header. • All Tasks: Opens the Supplier Task List page, which lists all the tasks that are assigned to the supplier. For more information, see Viewing supplier contact tasks from the Supplier Collaboration Portal.
My Requests	Opens the My Requests page, which lists all the requests assigned to you. For more information, see View all your requests from the Supplier Collaboration Portal.
Raise a request	Option that enables you to raise a request by navigating to the General category in the Supplier catalog. For more information, see Raising requests from the Supplier Collaboration Portal.

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're looking for.

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Supplier Collaboration Portal widgets (continued)

Widget	Description
My active items	As a supplier contact, you can view and work on specific items. The information that is displayed in the tiles depends on the plugins that you have installed. Selecting a tile in the widget opens the page that provides more information about it. • Tasks • Requests • Surveys • Issues • Risk Assessments • Contracts • Supplier Products • Purchase Orders • Shipments • Invoices The Risk Assessments tile is displayed if you have installed the Third-party Risk Management plugin. The Contracts, Supplier Products, Purchase Orders, Shipments, and Invoices tiles are displayed if you have installed the Sourcing and Purchasing Automation (com.snc.sn_pr) and Source-to-Pay Common Architecture (com.snc.sn_shop) plugins. **Important:** The data for **My active items** is sourced from the **Activity Configurations** table. For all the new custom records added to **Activity Configurations** that need to be shown in **My active items**, the corresponding ACLs for sn_slm_contact must also be explicitly added. Also, for restricting the data appearing in **My active items**, you can configure the user criteria by updating the **Activity Access** list of the **Activity Configurations** table.
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. **Important:** The data for **My tasks** is sourced from the **To-dos Configurations** table. For all the new custom records added to **To-dos Configurations** that need to be shown in **My tasks**, the corresponding ACLs for sn_slm_contact must also be explicitly added.

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Supplier Collaboration Portal widgets (continued)

Widget	Description
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	This section has the following fields: • **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. Select **Details** to view details, contact information, payment information, and locations of your company.
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**. **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.
Most viewed articles	Displays a list of the most viewed articles.

For more information about using the Supplier Collaboration Portal, see Using Supplier Collaboration Portal.

Supplier Relationship and Performance Management

Managing supplier relationship and performance is a key aspect of supplier management that aims to optimize the value and quality of the products and services delivered by suppliers.

The Supplier Relationship and Performance Management (com.snc.sn_slm_perf) application enables you to establish clear expectations and criteria for measuring supplier performance, monitor, and assess their performance against those criteria, provide feedback and recognition, and implement corrective actions and improvement plans when needed.

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The Supplier Relationship and Performance Management (SRPM) application offers the following key benefits:

- **Reduced costs and risks**: By ensuring that suppliers meet the standards and specifications of the organization, SRPM can help reduce the costs of poor quality, defects, rework, delays, and non-compliance. SRPM can also help mitigate the risks of supply disruptions, fraud, corruption, and reputational damage.
- **Increased efficiency and innovation**: By fostering collaboration and communication with suppliers, SRPM can help improve the efficiency and effectiveness of the procurement process.
- **Enhanced customer satisfaction and loyalty**: By delivering high-quality products and services that meet or exceed customer expectations, SRPM can help enhance customer satisfaction and create a competitive advantage in the market.
- **Improved supplier relationships**: By providing constructive feedback and recognition to suppliers, SRPM can help build trust and mutual respect, including encouraging suppliers to invest in long-term partnerships and continuous improvement.

To install Supplier Relationship and Performance Management, the following plugins have to be installed:

- **Required plugin**: Supplier Relationship and Performance Management (com.snc.sn_slm_perf)
- **Dependent plugins**:
  - KPI Framework (com.snc.sn_kpi)
  - Supplier Common Architecture (com.snc.sn_slm)

For more information about configuring Supplier Relationship and Performance Management, see Configure Supplier Relationship and Performance Management.

For more information about using Supplier Relationship and Performance Management, see Using Supplier Relationship and Performance Management.

For more information about Supplier Relationship and Performance Management data model and primary tables, see Supplier Relationship and Performance Management reference.

Configuring Supplier Lifecycle Operations

Plan and configure your implementation for Supplier Lifecycle Operations.

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.

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- 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.sn_spend_workspace)
- Geo Map component (sn_geo_map)

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.co Integration for Supplier Lifecycle Operations (com.snc.sn_supplier_craft)

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.

For more information about using Supplier Lifecycle Operations, see Using 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 Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

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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.
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.	• decision_table_admin • sn_shop.shopper • awa_admin • sn_vdr_risk_asmt.vendor_assessor • sn_fin.supplier_payment_info_write • sn_slm.manager • sn_kpi.admin
Supplier Fulfiller [sn_slm.fulfiller]	Users with this role can do the following: • Create tasks • View suppliers related to assigned cases or tasks • View assigned cases and tasks, or tasks that are created by them	• task_editor • template_read_global • sn_shop.shopper • workspace_user • vendor_reader • canvas_user • sn_fin.finance_user • awa_agent • survey_reader

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Role title [name]	Description	Contains roles
	• Update assigned cases and tasks, or tasks that are created by them	• sn_fin.procurement_user • email_composer
Supplier Owner [sn_slm.owner]	The supplier owner can do everything the supplier fulfiller can do, plus users with this role can: • 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 **Note:** The Supplier Owner [sn_slm.owner] role can create, manage, and edit records for only the suppliers that they own.	• personalize_responses • workspace_user • canvas_user • sn_slm.fulfiller • sn_fin.finance_user • sn_fin.procurement_user • sn_vdr_risk_asmt.vendor_assessment_reviewer
Supplier Manager [sn_slm.manager]	The supplier manager can do everything the supplier owner can do, plus users with this role can: • Create suppliers using the playbook • Create cases and tasks	• sn_slm.owner • dm_user_criteria_read

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Role title [name]	Description	Contains roles
	• View all the suppliers, cases, and tasks • Update the suppliers they manage and also other suppliers • Update the cases and tasks that they create or that are assigned to them	
Supplier Agent sn_slm.agent	The supplier agent can do everything the supplier fulfiller can do, plus users with this role can: • 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]	A user with this role can do the following: • Submit requests using the supplier catalog from the Supplier Collaboration Portal • Complete assigned tasks using the Supplier Collaboration Portal	• sn_fin.supplier_payment_info_read • snc_external

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Role title [name]	Description	Contains roles
	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.	
KPI Administrator [sn_kpi.admin]	The KPI admin can define, manage, and analyze KPIs.	sn_kpi.user **Note:** Added after the Xanadu December 2024 upgrade.
KPI User [sn_kpi.user]	The KPI user can only read all the records in KPI Framework.	**Note:** Added after the Xanadu December 2024 upgrade.
KPI Data Owner [sn_kpi.data_owner]	The KPI data owner can access only specific tables and fields which are necessary to collect data for KPIs from an internal user.	**Note:** Added after the Xanadu December 2024 upgrade.

Tables installed

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.

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Table	Description
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.
Supplier Contact [sn_slm_supplier_m2m_contact]	Stores the supplier contact and supplier records. It is used for the M2M mapping of one contact with many suppliers.
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 Service Task (sn_spend_sdc_service_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.
Organization Tax Details [sn_fin_org_tax_detail]	Stores the tax registration details of the supplier. **Note:** This table has been added in the Finance Common Architecture (com.sn_fin) plugin.

Explicit Roles in Supplier Lifecycle Operations

You can grant access to your instance to both internal and external users. However, it is important to differentiate their access levels for added security. To achieve this, every user must have at least one role, allowing the instance to distinguish between internal and external users.

As of the Paris release, no user can simultaneously have the explicit roles snc_internal and snc_external. The ServiceNow AI Platform applies this mutual exclusion everywhere in the system and writes error messages to the logs for each conflict.

Groups and role containment structures also cannot include both roles, as this would result in any group member or user assigned to such a group or role automatically holding both roles. The ServiceNow AI Platform aborts any operation that would create such a scenario.

You must install the Explicit Roles [com.glide.explicit_roles] plugin while installing Supplier Lifecycle Operations. Supplier Lifecycle Operations is dependent on the Explicit Roles [com.glide.explicit_roles] plugin.

For more information about ServiceNow AI Platform explicit roles, see Explicit Roles.

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.

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Supplier Lifecycle Operations application plugin list

Plugin	Description	Dependencies
Supplier Common Architecture [com.snc.sn_slm]	Provides a common architecture to track data objects related to a supplier used in both Supplier Lifecycle Operations and Supplier Collaboration Portal.	• 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 [com.snc.sn_supplier_mgmt]	Onboard suppliers, manage supplier relationships, monitor risk, compliance, and performance across the supplier life cycle.	• 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]	Provides a single, one-stop experience for suppliers to get self-service, complete tasks and make requests into an organization.	• 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.co Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_craft]	Provides a pre-configured integration with Craft.co. Craft.co is a supplier intelligence platform that offers validated and comprehensive information	Supplier Lifecycle Operations (com.snc.sn_supplier_mgmt)

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Supplier Lifecycle Operations application plugin list (continued)

Plugin	Description	Dependencies
	about suppliers with which a company engages.	
News Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_news]	Retrieve recent news and other articles from preferred news channels. There is a pre-configured integration with Microsoft Bing available with this application.	None
Advanced Work Assignment for Supplier Lifecycle Operations [com.snc.sn_slm_awa]	Automatically assign supplier cases to agents based on availability and capacity.	• 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.co 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)

Prerequisites for upgrading Supplier Lifecycle Operations to Washington DC or later releases

Starting with the Washington DC 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.

Supplier managers are often part of procurement, which involves sourcing products and selecting the supplier that best fits the needs. As a result, the supplier manager had to switch between two different workspaces, which affected the user experience.

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The Source-to-Pay (S2P) product suite utilizes the Source-to-Pay Workspace for various activities such as procuring goods, onboarding suppliers, and processing invoices. This unified workspace is designed to streamline tasks for Procurement Specialists, Supplier Managers, and Accounts Payable Specialists by providing a consistent interface for Source-to-Pay Operations. For more information, see Source-to-Pay Workspace.

Before upgrading to Washington DC or later releases, ensure that you have installed the Vancouver version 2.4.2 of both Supplier Common Architecture and Supplier Lifecycle Operations. This step is mandatory if you plan to continue using the deprecated Supplier Manager Workspace. For more information, see the KB article KB1651502.

If you have upgraded to Washington DC or later releases 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 migrate existing data from the deprecated Action type column after upgrade.

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**.

Note:
The Properties page displays the properties for Craft only if you have installed the Craft.co 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 Lifecyle 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*	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. **Note:** Sys ID (sys_id) is a 32-character GUID (Globally Unique ID) that uniquely identifies each record in an instance. For more information, see Configure system property to send registration emails to external users.
Automatic creation of cases from email [sn_supplier.slm_email]	Automatically creates a supplier case if the incoming email address matches with the email address specified in this property. For more information, see Enable automatic creation of supplier cases from incoming emails.

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Supplier Lifecyle Management properties (continued)

Property	Action
Decide whether or not to enable google maps API functionality on Supplier manager workspace. Enablement of Geo Map method and Geo Map key/client will still be required. [sn_supplier.geo_map_enabled]	Type: Yes | No Select the check box to enable this property.
Craft Integration Properties	
API key for craft. *sn_supplier_craft.craft_api_query*	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. *sn_supplier.geo_map.google.method*	Select one of the following options from this list: • 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. *sn_supplier.geo_map.google.key*	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. *sn_supplier.geo_map.google.client*	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). *sn_supplier.geo_map.google.use_places_lib*	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. *sn_supplier_sp.allow_all_apps_configuration*	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 create a supplier case automatically from an incoming email.

Before you begin

Role required: admin

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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.

If you use the automatic case creation functionality in both Supplier Lifecycle Operations (SLO) and Sourcing and Procurement Operations (SPO), ensure that each instance is configured with a unique email address in the **Automatic creation of cases from email** property. This ensures that the instance can correctly match incoming emails to the appropriate user and create the corresponding case.

For example:

- In SLO, set the email address to supplierhelp@acme.com for creating supplier cases.
- In SPO, set the email address to procurementhelp@acme.com for creating procurement cases. For more information, see Automatic case creation from emails.

This approach enables seamless case creation and accurate email-to-user mapping.

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**.

Note:
After M2M mapping between supplier contact and suppliers is enabled, the contacts linked with multiple suppliers have to include the supplier's legal name while sending emails for automatic creation of cases. For more information, see Email format for contacts linked with multiple suppliers.

Email format for contacts linked with multiple suppliers

Contacts linked with multiple suppliers have to include the supplier's legal name while sending emails for automatic creation of cases.

When a supplier contact is mapped to only one supplier and sends an email, a case is created with that supplier. However, when the supplier contact is mapped to multiple suppliers, the supplier's legal name is retrieved from the email body.

Important:
The valid supplier's legal name must be included in the email body in the following format:

```
Supplier: <supplier legal name>
```

When a supplier contact mapped to multiple suppliers sends an email for case creation, the following scenarios can occur:

Supplier's legal name is correctly mentioned in the email

When the supplier's legal name is included in the email in the given format, the supplier case is created with the supplier name provided in the email.

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Supplier's legal name is not correctly mentioned in the email

When the supplier's name is not the exact legal name, a case is still created with the **Supplier** field set as empty. An auto-email is sent to the supplier contact requesting for the valid supplier's legal name. Once the supplier contact shares the supplier's legal name, it has to be added manually by the assigned person. The case is then assigned and the Supplier field is updated to mandatory.

Post-upgrade tasks for Supplier Lifecycle Operations

After you upgrade to Washington DC, you must review all the post-upgrade tasks and complete them as needed.

Restructured Supplier Task table

The Supplier Task table architecture has been restructured in the Washington DC release.

In releases before the Washington DC release, the Supplier Task [sn_slm_task] table extended the Task [task] table.

Starting with the Washington DC release, the Supplier Task [sn_slm_task] table extends the Service Task [sn_spend_sdc_service_task] table.

Supplier Task table structure



After you upgrade to the Xanadu release, verify that your existing supplier task data has been migrated correctly. If you notice that your active Supplier Task table did not migrate properly, use the Now Support Portal to raise a new case with the Technical Support team.

Also, after you upgrade to the Washington DC release, the fix script `glidefix_script_reparent_sn_slm_task.xml` runs to reparent the Supplier Task table on instances with huge count of records (in millions). Therefore, it's advisable to run the upgrade during a period of low interaction.

Note:
This is a mandatory one-time fix script run on instances upgrading directly to Washington DC from Vancouver or older versions.

Run Glide fix script to run the reparenting script

Run the Glide fix script to take advantage of the new enhancements in Supplier Lifecycle Operations.

About this task

This fix script is required to reparent the Task table or Supplier Task table on instances with huge count of records (in millions). It's advisable to run the fix script during a period of low interaction.

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This is a mandatory one-time fix script to be run on instances upgrading directly to Xanadu from Vancouver or older versions.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for the **glidefix_script_reparent_sn_slm_task** script.
3. Open the fix script record.
4. Select **Run Fix Script**.
   For more information, please see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB1647660.

Run fix script to migrate existing data from the deprecated Action type column after upgrade

In the May Store 2024 release, the **Action type** column in the Supplier Task (sn_slm_task) table has been deprecated.

Before you begin
Role required: admin

About this task
In the May Store 2024 release, the Supplier Task (sn_slm_task) table uses the **Action type for task** column from its parent Service Task [sn_spend_sdc_service_task] table. After you upgrade to the May Store 2024 release, ensure that you run the fix script to migrate existing data from the deprecated **Action type** column to the newly added **Action type for task** column in the Supplier Task table.

Important:
Before you run the fix script, ensure that you restructure the Supplier Task table to extend the Service Task table.

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for the **SLO - upgrade scripts for may 2024** script.
3. Open the fix script record.
4. In the **Script** field, set the batch size variable to a number equal to the number of supplier task records in your instance.
   For example, if your instance has 10000 supplier task records, set the batch size variable as follows:

   ```
   var batchSize = 10000;
   ```

5. Select **Update**.
6. Select **Run Fix Script**.

Run fix script to use the Supplier Manager Workspace after upgrading to the Xanadu release

After upgrading to the Xanadu 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.

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Before you begin
Role required: admin

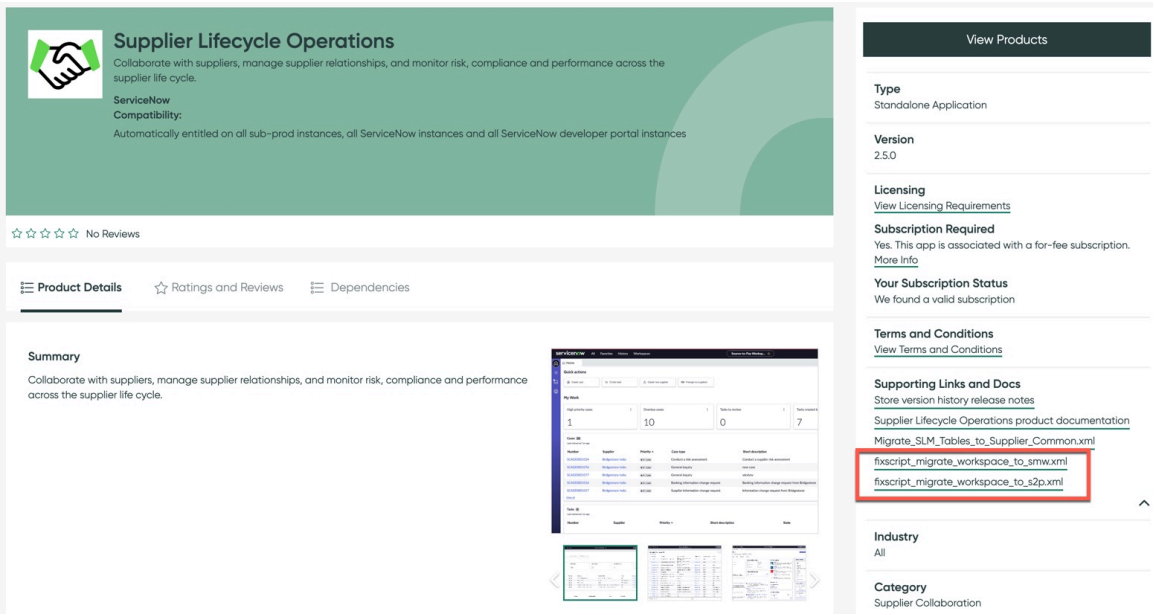
About this task

Important:
To use the Supplier Manager Workspace without any issues, ensure that you are on the latest version of the Vancouver release (2.4.4) before upgrading to Washington DC or later releases. For more information, see the KB article KB1651502.

After upgrading to the Xanadu 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 Store.



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**.

Enable deprecated case types after upgrade

After you upgrade to Xanadu, you can enable deprecated case types if you have the admin role.

Before you begin
Role required: admin

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About this task

In the xanadu release, the **Conduct a risk assessment** and **Conduct a tiering risk assessment** case types have been deprecated. However, you can perform this task to enable and use these case types after upgrade.

Procedure

1. Select **All**.
2. In the navigation filter, enter *sn_slm_case_list.do*.
   The Supplier Cases page opens listing all the supplier cases.
3. Select **New**.
4. Right-click the **Case type** field label and select **Configure Choices**.
   The Configuring Case type Choices page opens.
5. In the Available list, double-click the **Conduct a risk assessment (Deprecated)** and **Conduct a tiering risk assessment (Deprecated)** case types to move them to the Selected list.
6. Select **Save**.
   The deprecated case types now appear in the **Case type** field on the Create New Supplier Case form.

Processing the skipped supplier catalog item records after upgrade

After you upgrade to Xanadu, the latest supplier catalog items may get skipped and therefore may not be available after the upgrade.

For example, when onboarding a new supplier, the supplier onboarding flow includes a supplier task that creates a new record for supplier location and payment information using catalog items. Because the latest catalog items may not be available after the upgrade, the onboarding flow may get affected.

If you notice that the supplier catalog item records have been skipped during the upgrade, you must review the list of skipped records, evaluate how you want to resolve the conflict for these records, and take appropriate action. For more information about processing the skipped records, see Process the skipped records list.

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)

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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 Review Installation Details dialog box, any dependencies installed 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.
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.	Complete these steps:

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Option	Instruction
	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

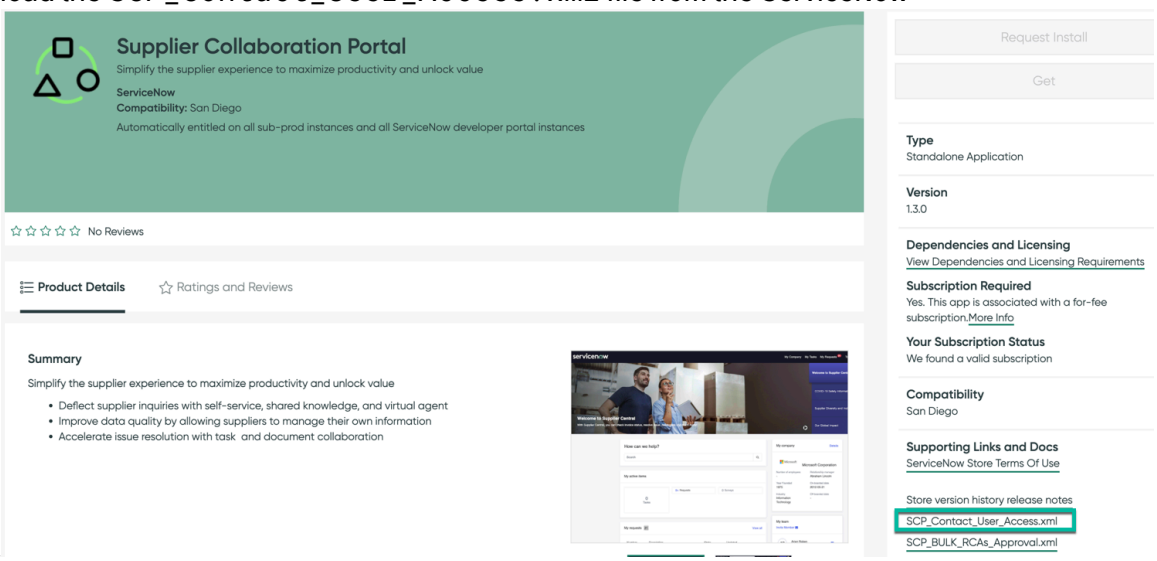
After you install the Supplier Collaboration Portal, you must run the fix script to enable access to the portal.

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.

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Before you begin

Note:
You must 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 mandatory.
   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.

```
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** 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.

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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**, **Email**, and **Supplier name** records individually.
18. In the First name variable record, select the **Mandatory** check box and select **Save**. Repeat this step for the Last name, Email, and Supplier name variable records.

    Note:
    The **Supplier name** field has been added in the Xanadu December 2024 upgrade. This field is available only after M2M mapping between supplier contact and suppliers is enabled.

19. Select **Save**.
20. For sending personalized 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** list, select **onLoad**.
24. In the **Script** box, copy and paste the code.

    Use the following code for versions before Xanadu December 2024 upgrade:

```
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);
        }
    }
}
```

    Use the following code for versions after Xanadu December 2024 upgrade:

```
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) {
```

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```
        if (getParameterValue("email")) {
            g_form.setValue("email",
getParameterValue("email"));
            g_form.setReadOnly("email", true);
        }
        if (getParameterValue("supplier_name") &&
(getParameterValue("supplier_name") != "null")) {
            g_form.setValue("u_supplier_name",
getParameterValue("supplier_name"));
            g_form.setReadOnly("u_supplier_name", true);

        }
        if (getParameterValue("relationship_contact_email") &&
(getParameterValue("relationship_contact_email") != "null")) {
            g_form.setValue("u_relationship_contact_email",
getParameterValue("relationship_contact_email"));
            g_form.setReadOnly("u_relationship_contact_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

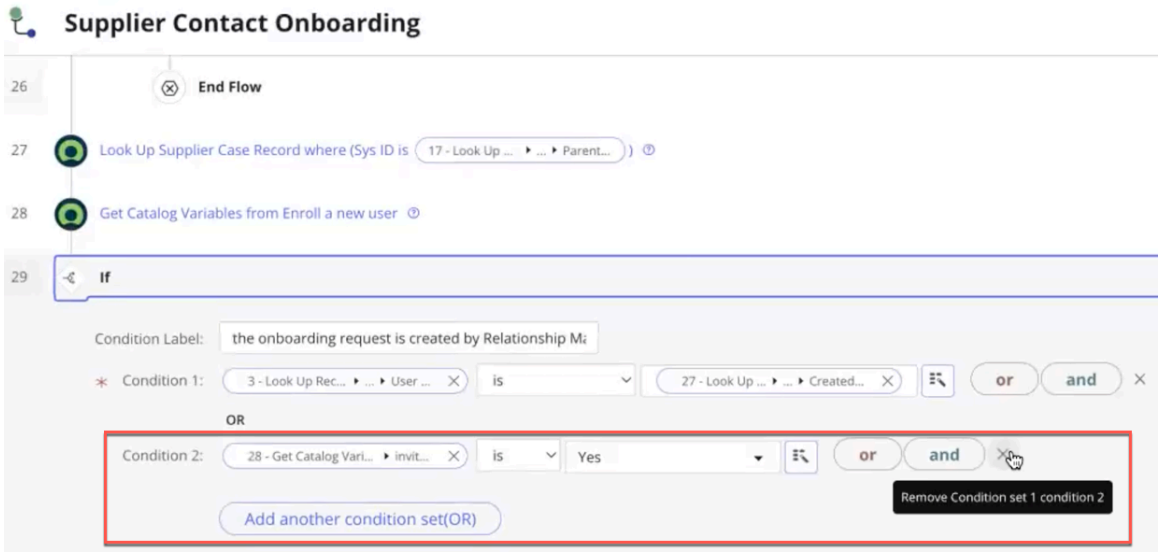
After you perform this task, an approval record is created for the Enroll a new supplier user case type, regardless of whether a supplier contact self-registers or a supplier manager invites a new supplier contact.

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Important:
Supplier Lifecycle Operations creates an approval record if the "Ask For Approval" action is a part of any SLO flow. This approval record can be approved by the user who belongs to the Supplier Administrators group (sys_user_group table). For more information, see Add a user to a group.

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.

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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

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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`.

   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

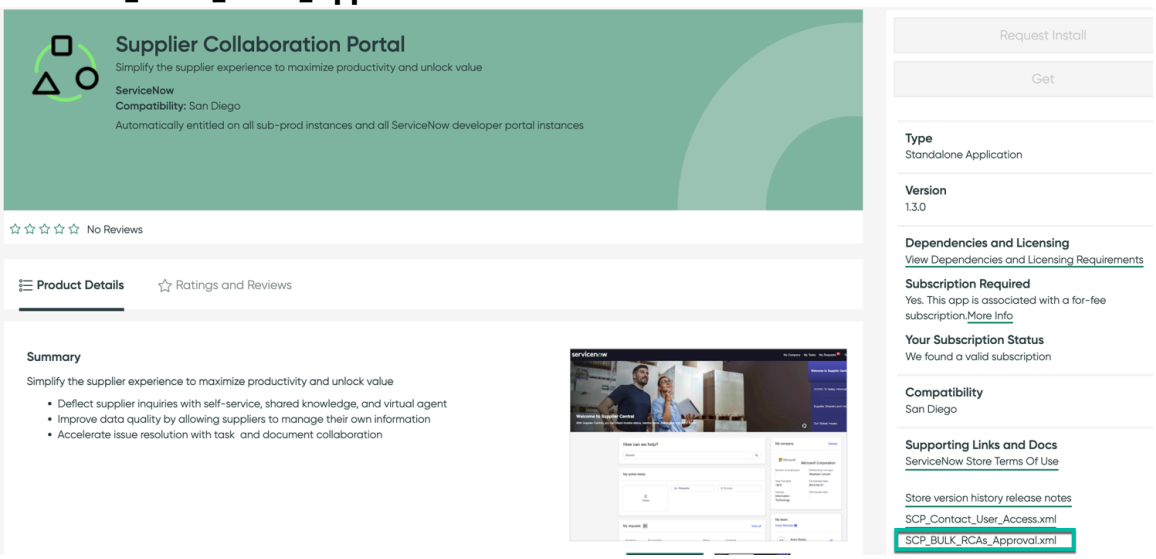
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About this task

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 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.

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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**.

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). **Note:** The GRC: Vendor Portal is installed as a dependent plugin with GRC: Vendor Risk Management.

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

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Procedure

1. Do one of the following.

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	When you want the configuration to run. The choices are: ○ **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. ○ **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	Specify who must upload the document. The choices are:

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Field	Description
	○ **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. 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. With this option, the supplier contact can upload the document from either of these locations in the Supplier Collaboration Portal: ▪ Documents widget on the My Company page ▪ Upload Document task on the My To-dos page For more information, see Manage documents from the Supplier Collaboration Portal.

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.

7. 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: ○ **Yes** ○ **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:

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Field	Description
	○ **Yes** ○ **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.

8. 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.

9. 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	The type of the document. The choices are: ○ **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	Number of days before the document expires.

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Field	Description
	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. 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. 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.
Template	Option that enables you to attach a template that specifies the expected format of the document to upload. Select the Manage Attachments icon ( ) to attach a template.
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.

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- 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.

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.

Configure the document template for the Sign document action type for supplier task

Create and configure the document template that enables you to collect e-signatures from multiple participants and generate a filled PDF document.

Before you begin
Role required: admin

About this task
Ensure that you've installed the Document Templates [com.snc.document_templates] plugin.

Important:
When you create the supplier task of action type Sign document for the very first time, the supplier task is created; however, the document task is not created. Therefore, you cannot use the first Sign document task to upload PDF or HTML documents to get signatures. When you create the Sign document task for the first time, a set of restricted caller access (RCA) records are created that you must approve. Approving RCAs is a one-time activity. After you approve the RCAs, you can create and use subsequent Sign document supplier tasks except the first Sign document task. For more information about the approving the required RCAs, see Approve application restricted caller access privileges for Sign document supplier task type.

Important:
Starting from the May Store 2024 release, the supplier task of action type Sign document uses the document template (PDF or HTML). The E-signature template is used only for KB articles.

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Procedure

1. Navigate to **All** > **Document Templates** > **All Document Templates**.
2. Select **New**.
3. The **What kind of document template would you like to create?** page is displayed.

   The following options are available on this page:

   - HTML Document Template
   - PDF Document Template
4. Do one of the following:

To	Do this
Configure an HTML document template	To configure an HTML document template: **a.** Select **HTML Document Template**. **b.** In the **Table** field, select **Supplier Task [sn_slm_task]**. **c.** On the form, fill in the fields. For a description of the field values, see Configure an HTML document template. **d.** Select **Submit** or **Save**. **e.** Select the Participants related list to create participants for the PDF document template. For more information, see Create participants for an HTML document template. **f.** Insert signatures in an HTML document template by selecting participants from the list. For more information, see Insert signatures. **g.** Select **Publish**.
Configure a PDF document template	To configure a PDF document template: **a.** Select **PDF Document Template**. **b.** In the **Table** field, select **Supplier Task [sn_slm_task]**. **c.** On the form, fill in the fields. For a description of the field values, see Configure a PDF document template. **d.** Select **Submit** or **Save**. **e.** Select the **Parse PDF** related link to automatically parse information on the PDF and store that information in the PDF Mapping table for reuse. **f.** Select the Participants related list to create participants for the PDF document template. For more information, see Create participants for a PDF document template. **g.** Select the Template Mappings related list to define the PDF field mappings. For more information, see Define a PDF field mapping.

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To	Do this
	h. Select the Mark signatures related list to choose participants and specify the area in the PDF document where you want to collect the signatures of those participants. **Note:** You can mark signatures only if you have defined participants and mapped users to those participants. For more information, see Mark a signature block. **i.** Select **Publish**.

Approve application restricted caller access privileges for Sign document supplier task type

Approve restricted caller access (RCA) privileges after you create a supplier task of action type Sign document for the very first time so that you can create and use subsequent Sign document supplier tasks.

Before you begin
Role required: admin

About this task
Approving RCAs is a one-time activity.

Procedure

1. Navigate to **All** > **System Applications** > **Application Restricted Caller Access**.
2. Open each RCA record that matches the following filter criteria:

Column	Value
Status	Requested
Target Scope	Document Templates
Source Scope	Supplier Common Architecture, Supplier Collaboration Portal, and Source-to-Pay Workspace

3. From the **Status** list, select **Allowed**.
4. Select **Update**.

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.

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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:

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- 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.

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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.

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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.

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Add or update the quick action shortcuts for live agents in the Agent Chat. For more information about configuring the toolbar controls, see Setting 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.

Enable M2M mapping between supplier contact and suppliers

Many-to-many (M2M) mapping between supplier contact and suppliers enables one supplier contact to be the contact for multiple suppliers, provided the suppliers share a parent-subsidiary relationship.

Before you begin
Role required: admin

Important:
M2M mapping between supplier contact and suppliers is available from the Xanadu December 2024 release onwards. The following steps are required to enable M2M mapping.

Procedure

1. Create and run a fix script to enable M2M mapping.
   For detailed steps, see Run the fix script.
2. Verify that the version record is created for the script `include M2MSupplierSupportUtil`.
   For detailed steps, see Verify version record.
3. Configure the Supplier Email Domain [sn_slm_email_domain] table to remove the `unique` constraint from the `Email Domains` column.
   For detailed steps, see Remove the unique constraint from Email Domain.

   Note:
   This step is required only for the upgrade scenarios (for all earlier versions upgrading to the Xanadu December 2024 release).

Run the fix script

Run the fix script to enable M2M mapping between supplier contact and suppliers.

Before you begin
Verify that the application scope is set to Supplier Common Architecture.

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Role required: admin

Procedure

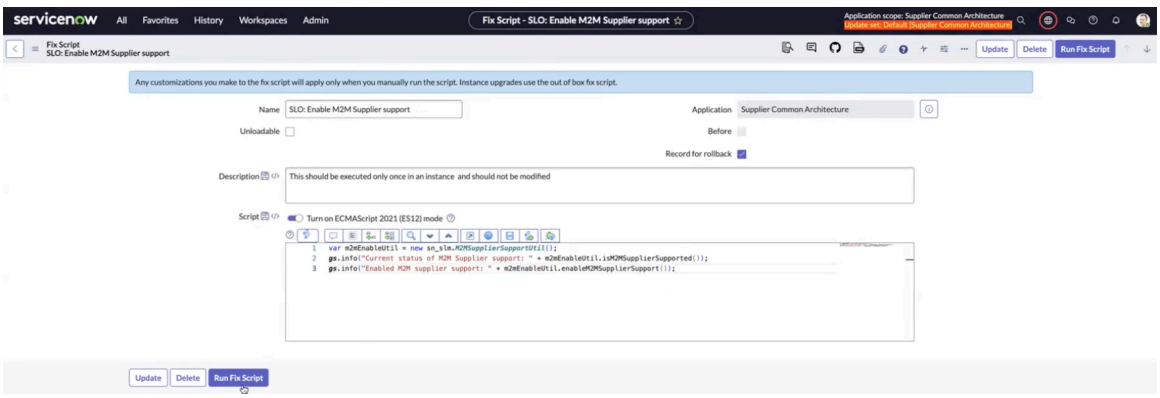
1. Navigate to **All** > **System Definition** > **Fix Scripts**.

   Verify that the application scope is set to Supplier Common Architecture.

2. Select **New**.
3. Fill in the following fields to create the fix script:

Field	Description
Name	Unique, descriptive name for the fix script.
Description	Include the disclaimer: This script is intended for a one-time execution in an instance and must remain unaltered.

Script	Enter the following code for the fix script:
	`var m2mEnableUtil = new sn_slm.M2MSupplierSupportUtil();`
	`gs.info("Current status of M2M Supplier support: " + m2mEnableUtil.isM2MSupplierSupported());`
	`gs.info("Enabled M2M supplier support: " + m2mEnableUtil.enableM2MSupplierSupport());`



4. Save and select **Run Fix Script**.
   A version record is created after the script is executed.

What to do next

Verify if the version record is created for `M2MSupplierSupportUtil script include`.

Verify version record

After the fix script is created and run to enable M2M mapping between supplier contact and suppliers, a version record must be created.

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Before you begin
Verify that the application scope is set to Supplier Common Architecture.

Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Script Include**.
2. Search for `M2MSupplierSupportUtil script include` and open it.
3. Check in the **Versions** related list if the version record is created.
   If the version record is not created, select **Update** to manually save the script and check again for the version record.

What to do next
Remove the unique constraint from Email Domain.

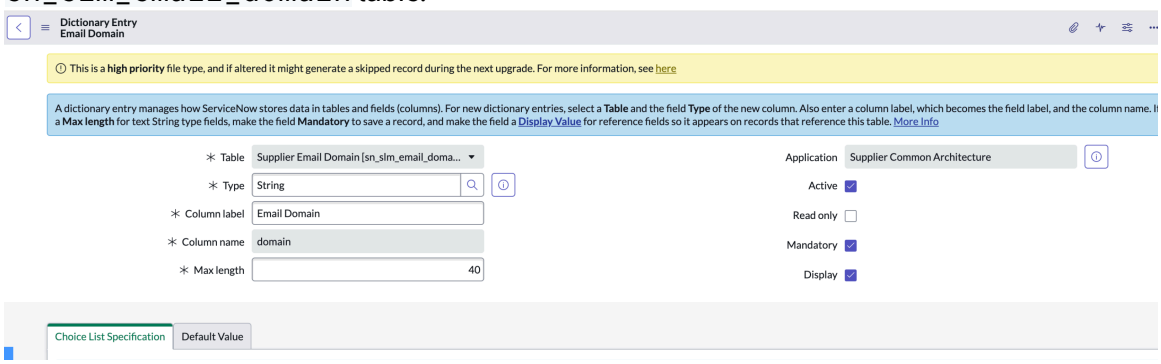
Remove the unique constraint from Email Domain

Multiple supplier records can have the same email domain after removing the unique constraint from the `Email Domain` column of the Supplier Email Domain [sn_slm_email_domain] table.

Before you begin
Role required: admin

Important:
This procedure is required only for the upgrade scenarios (for all earlier versions upgrading to the Xanadu December 2024 release).

Procedure
1. In the navigation filter, enter **sn_slm_email_domain_list.do**.
2. Hover and right-click **Email Domain** field to open the Dictionary Entry of `sn_slm_email_domain` table.



3. Select the form context menu icon ( ) and select **Configure** > **Form Layout**.
4. From the **Available** list of fields, select the **Unique** field and move it to the **Selected** column.
5. Select **Save**.
   The **Unique** field is now available in the Dictionary of the `sn_slm_email_domain` table.
6. Navigate to the Dictionary of `sn_slm_email_domain` table, clear the **Unique** check box and save the form.

Note:
If you are still unable to invite a supplier contact with duplicate domain, or if the onboarding playbook is stuck while waiting to send out an email to the supplier contact, follow the troubleshooting steps in the KB article KB1709872.

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Configure Supplier Relationship and Performance Management

Define key performance indicators (KPIs) and segmentation criteria to measure supplier performance effectively.

Configuring Supplier Relationship and Performance Management involves the following tasks:

- **Create KPI template and its thresholds**: Define KPI template and thresholds to collect the metrics systematically for evaluating supplier performance.
- **Create KPIs**: Add suppliers to a KPI template to generate corresponding KPI records and KPI collection tasks for the suppliers.
- **Configure Segmentation Rules**: Configure segmentation rules to ensure consistent measurement and comparison of supplier performance, categorize suppliers into distinct groups based on specific criteria or characteristics.

Create KPI units

Create KPI units to be used as measurement units for the quantitative performance of the supplier KPIs.

Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. In the navigation filter, enter `sn_kpi_unit.LIST`.
   The list of existing units are displayed.
3. Select **New**.
4. On the form, fill in the fields.

Create New KPI unit form

Field	Description
Active	Indicates whether the KPI unit record is active. This option is enabled by default.
Label	Symbol or label of the KPI unit.
Unit family	Category under which the unit is listed. For example, the unit **US Dollars** is listed under the **Currency** Unit family. **Note:** You can see the list of existing Unit families by selecting the look-up ( ) icon. If none is listed, you can create one by selecting **New**.
Description	Brief description of the KPI unit.
Name	Name of the KPI unit.
Format	Format in which the value is displayed. For example: ○ If Format is ${0}, $<value> is displayed. ○ If Format is {0}%, <value>% is displayed.

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Field	Description
Domain	Domain category under which the unit is listed. By default, the Domain is set as **Global**. **Note:** You can see the list of existing domains by selecting the look-up ( ) icon. If none is listed, you can create one by selecting **New**.

5. Select **Submit**.

Create KPI performance domains

Create KPI performance domains to classify various KPIs into categories. The KPIs under different performance domains can be viewed in the KPI management tab and the Performance dashboard to measure the supplier performance.

Before you begin
Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. In the navigation filter, enter `sn_kpi_domain.LIST`.
   The list of existing performance domains are displayed.
3. Select **New**.
4. On the form, fill in the fields.

Create New KPI domain form

Field	Description
Domain	Name of the KPI performance domain.
Description	Brief description of the KPI performance domain.
Active	Indicates whether the KPI performance domain record is active. This option is enabled by default.

5. Select **Submit**.

Create a KPI template

Create a KPI template to define KPIs against which you measure the supplier performance.

Before you begin
Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Do one of the following:
   - Under Quick actions, select **Create KPI template**.
   - Select the list icon ( ), navigate to **Lists** > **Performance management** > **KPI Templates**, and then select **New**.

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3. On the form, fill in the fields.

Create New KPI template form

Field	Description
Basic details	
Name	Name of the KPI template.
Description	Brief description of the KPI template.
Template owner	The person who owns the KPI template.
Type	Indicates the type of the KPI template. The available options are: ○ Quantitative ○ Qualitative
Active	This option is turned off by default. The KPI template is automatically set to active after you have added at least two thresholds for the KPI template.
KPI properties	
Performance domain	Indicates the group that the KPI belongs to.
Recommended weight	Determines the importance of the KPI in the overall performance score when multiple KPIs are collected.
Direction	Indicates whether the KPI should be minimized or maximised to show the ideal trend of the values. The available options are: ○ Maximize ○ Minimize ○ Milestone
Nature	Indicates whether the KPI is leading (predicts future), lagging (measures past performance), or current (monitors ongoing activities). The available options are: ○ Leading ○ Lagging ○ Current
Precision	Specifies the number of decimal points to be used for data collection to ensure accuracy and consistency. This field is displayed only if you select **Quantitative** in the **Type** field.
Unit	Measurement used to quantify the performance indicator. This field is displayed only if you select **Quantitative** in the **Type** field.
Data collection	
Collection source type	The user persona that provides the data. The available options are:

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Field	Description
	○ User ○ Supplier Manager ○ Supplier Contact
Collected from user	The person who provides the data. This field is displayed only if you select **User** in the **Collection source type** field.
Instructions	Populated in KPI collection tasks to give more context to the user providing the KPI data.
Collection frequency	The frequency for collecting the KPI data. The available options are: ○ Daily ○ Weekly ○ Monthly ○ Quarterly ○ Semi-annually ○ Annually

4. Select **Save**.

Create KPI thresholds

Create KPI thresholds that consist of predefined values that serve as benchmarks or limits for evaluating performance against specific objectives.

Before you begin
Role required: sn_slm.manager or sn_slm.admin

About this task
Ensure that you add at least two active thresholds to activate a KPI template. You can add a maximum of five thresholds to a KPI template.

Note:
Thresholds help determine what score the supplier receives in the **KPI management** tab and in the scorecard. For more information, see Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace.

Procedure
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ), and navigate to **Lists** > **Performance management** > **KPI Templates**.
3. In the Name column, select the link to the KPI template.
4. Select the **Thresholds** tab and select **New**.
5. On the form, fill in the fields.

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Create New KPI Threshold form

Field	Description
Name	Name of the KPI threshold.
Label	Label for the KPI threshold. **Note:** The Label field is displayed only for the Qualitative KPI templates.
Description	Brief description of the KPI threshold.
Active	Option that indicates the threshold is active for use.
Low Value	Represents the low value in the KPI threshold value range. ○ This field is displayed only for Quantitative KPI templates. ○ This value is **included** in the threshold range. ○ If left empty, the **Low Value** defaults to negative infinity.
High Value	Represents the high value in the KPI threshold value range. ○ This field is displayed only for Quantitative KPI templates. ○ This value is **excluded** from the threshold range. ○ If left empty, the **High Value** defaults to positive infinity.
Normalized value	Indicates a value that has been calculated from its original figure to fit a specific scale for easy comparison with other values. For example, a scale of 1–5.
Color	The color you select for each threshold is inherited by the Status column (showing highlighted value) in the KPI management tab on the Supplier page. For more information, see Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace.

6. Select **Save**.

Create KPIs by adding suppliers to a KPI template

You can add a new supplier whose performance you want to measure using the KPI template. Adding a supplier to a KPI template generates corresponding KPI records and KPI collection tasks for this supplier.

Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

About this task

The **Supplier** related tab for a KPI template displays the following information:

- Automatically displays suppliers that match a segmentation rule that is linked to this KPI template.
- Displays suppliers that you add manually by selecting **Add**.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ) and navigate to **Lists** > **Performance management** > **KPI Templates**.

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3. In the Name column, select the link to the KPI template.
4. Select the **Suppliers** tab and select **Add**.
   The Add supplier dialog box is displayed which shows the list of existing suppliers. You can select suppliers from this list to generate template-corresponding KPIS for the selected suppliers.
5. Select **Add**.
   Template-corresponding KPIs are created for the added suppliers and the newly added supplier is shown in the **Suppliers** related tab for the KPI template. Also, corresponding KPI collection tasks are created for the suppliers.

Note:
The same result can be achieved by adding a template to a supplier record.

What to do next
Run segmentation rule.

Create segmentation rule

Create a segmentation rule that defines criteria for categorizing suppliers into different segments based on various attributes or performance factors.

Before you begin
Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

Procedure
1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Do one of the following:
   - Under Quick actions, select **Create segmentation rule.**.
   - Select the list icon (), navigate to **Lists** > **Performance management** > **Segmentation rules**, and then select **New**.
3. On the form, fill in the fields.

Create New Segmentation rule form

Field	Description
Basic details	
Name	Name of the segmentation rule.
Description	Brief description of the segmentation rule.
Active	Option that indicates the segmentation rule is active for use.
Owner	The person who owns the segmentation rule.
Frequency	The frequency at which the segmentation rule automatically runs. The available options are: ○ Ad-hoc ○ Weekly ○ Monthly ○ Quarterly ○ Yearly

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Field	Description
Conditions	
Segmentation table	Extracts data from the specified table.
Condition	Option that enables you to build a filter by adding conditions with fields, operators, and values. Select **Edit conditions** to open the condition builder.

4. Select **Save**.

Add KPI templates to a segmentation rule

You can add new KPI templates to a segmentation rule if the existing templates used for suppliers don't meet your needs.

Before you begin

Role required: sn_slm.manager or sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ) and navigate to **Lists** > **Performance management** > **Segmentation rules**.
3. In the Name column, select the link to the segmentation rule.
4. Select the **KPI Template** tab and select **Add**.
5. On the Add KPI template form, select the check box next to the KPI template and select **Add**. The newly added supplier is shown in the **KPI Template** related tab for the segmentation rule.

Note:
The weight of the new KPI template doesn't affect the original KPI template weight or the weight of the KPI that was previously created from this template. However, this change will affect any newly created KPIs that are part of this segmentation rule after you run it by selecting Execute. For more information, see Run segmentation rule.

Add suppliers to a segmentation rule

You can add a new supplier to a segmentation rule if the existing suppliers don't meet your needs.

Before you begin

Role required: sn_slm.manager or sn_slm.admin

About this task

The **Supplier** related tab displays the list of suppliers that fall under this segmentation rule. The **Supplier** related tab shows the following information:

- Automatically displays suppliers that match this segmentation rule or other set condition after you run the segmentation rule by selecting **Execute**.
- Displays suppliers that you add manually by selecting **New**.

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Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ) and navigate to **Lists** > **Performance management** > **Segmentation rules**.
3. In the Name column, select the link to the segmentation rule.
4. Select the **Suppliers** tab and select **Add**.
   The Add supplier dialog box is displayed.
5. From the list of suppliers, select one or more suppliers and then select **Add**.
   The newly added supplier is shown in the **Suppliers** related tab for the segmentation rule.

What to do next

Select **Execute** to run the segmentation rule. For more information, see Run segmentation rule.

Integrating Supplier Lifecycle Operations with other applications

Extend the capabilities of Supplier Lifecycle Operations by integrating with other applications.

Supplier Lifecycle Operations integration framework

The Supplier Lifecycle Operations (SLO) integration framework enables you to exchange supplier data with any third-party ERP system.

The SLO integration framework facilitates inbound and outbound integration with third-party applications and ERP systems.

SLO integration framework flow

For inbound flow:

Import supplier data from a third-party ERP system by populating the SLO inbound staging tables, and then run transform maps to update the supplier data into SLO primary tables.

For outbound flow:

- As soon as the SLO primary tables are updated, the SLO outbound tables are automatically updated using subflows.
- An ERP integrator can refer to the outbound tables and export the required data into any third-party ERP system.

SLO inbound staging tables

The following table lists the SLO inbound staging tables and the application they belong to.

Application	SLO inbound table
ERP Integration Framework (com.sn_fcms_integrations)	sn_fcms_intg_imp_supplier
	sn_fcms_intg_supplier_location_inbound
	sn_fcms_intg_supplier_contact_inbound
	sn_fcms_intg_supplier_payment_inbound_stage
	sn_fcms_intg_supplier_legal_entity_inbound

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SLO outbound staging tables

The following table lists the SLO outbound staging tables and the application they belong to.

Application	SLO outbound table
Source-to-Pay Integration Framework (com.sn_spend_intg)	sn_spend_intg_outbound_supplier
	sn_spend_intg_supplier_location_outbound
	sn_spend_intg_supplier_contact_outbound
	sn_spend_intg_supplier_payment_outbound_stage

The same set of fields exist in both the SLO inbound and SLO outbound staging tables. For more information about the mandatory fields in the staging tables and their descriptions, see Inbound staging tables for Supplier Lifecycle Operations.

Add supplier inbound data in an Excel file

You can import supplier inbound table data in an Excel file.

Before you begin

Role required: admin

Procedure

1. Select **All**.
2. In the navigation filter, do one of the following:
   - To see the list of columns in the supplier location inbound table, enter **sn_fcms_intg_supplier_location_inbound_list.do**.
   - To see the list of columns in the supplier contact inbound table, enter **sn_fcms_intg_supplier_contact_inbound_list.do**.
   - To see the list of columns in the supplier payment inbound table, enter **sn_fcms_intg_supplier_payment_inbound_stage_list.do**.
   - To see the list of columns in the supplier payment inbound table, enter **sn_fcms_intg_supplier_legal_entity_list.do**.
3. Right-click any column heading and select **Export** > **.xlsx**.
4. Select **Download** to save the spreadsheet on your local system.

Result

Depending on the supplier inbound table you selected, an Excel template is created with the mandatory columns for supplier location, supplier contacts, or supplier payment information. Use this Excel spreadsheet to enter the supplier data that you want to import and store into the SLO inbound staging tables.

What to do next

Load the supplier data from the excel template into the supplier inbound staging tables. For more information, see Load supplier data.

Load supplier data

Load the supplier data from the excel template into the supplier inbound staging tables.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Load Data**.
   The **Load Data page appears**.
2. In **Import set table**, select **Existing table**.
3. From the **Import set table** list, select one of the following inbound tables depending on the type of supplier data you want to import:
   - Supplier location inbound [sn_fcms_intg_supplier_location_inbound]
   - Supplier contact inbound [sn_fcms_intg_supplier_contact_inbound]
   - Supplier payment inbound [sn_fcms_intg_supplier_payment_inbound_stage]
4. In **Source of the Import**, choose **File**.
5. Browse to the excel template that was created in 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 supplier data from the Excel file is processed successfully. That is, the relevant supplier data is extracted from the Excel file and stored in the SLO inbound staging tables.

What to do next
Run the transform map to import supplier data from the SLO inbound staging tables into the SLO primary tables.

Run transform to update supplier primary data

Use transform map and run transform to map the supplier fields from the import set into primary data target tables in Supplier Lifecycle 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 supplier data is auto populated.

   In **Selected maps, run in order** area, the target supplier table to be mapped in Supplier Lifecycle Operations is auto-populated and selected by default.
2. Select **Transform**.

Result
The relevant supplier fields from the import set staging table are mapped to the SLO primary table.

For example, if you uploaded an Excel file with supplier location information, the relevant fields are updated from the Supplier location inbound [sn_fcms_intg_supplier_location_inbound] staging table into the Supplier Location [sn_slm_m2m_location] primary table. As soon as

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the Supplier Location [sn_slm_m2m_location] primary table is updated, the Supplier location outbound [sn_spend_intg_supplier_location_outbound] table is also updated. An ERP integrator can extract this information from the outbound table and export it into the ERP system.

Monitor the integration status of the SLO inbound data import

Monitor the status of the integration after a transform runs and completes successfully.

Before you begin

Role required: admin

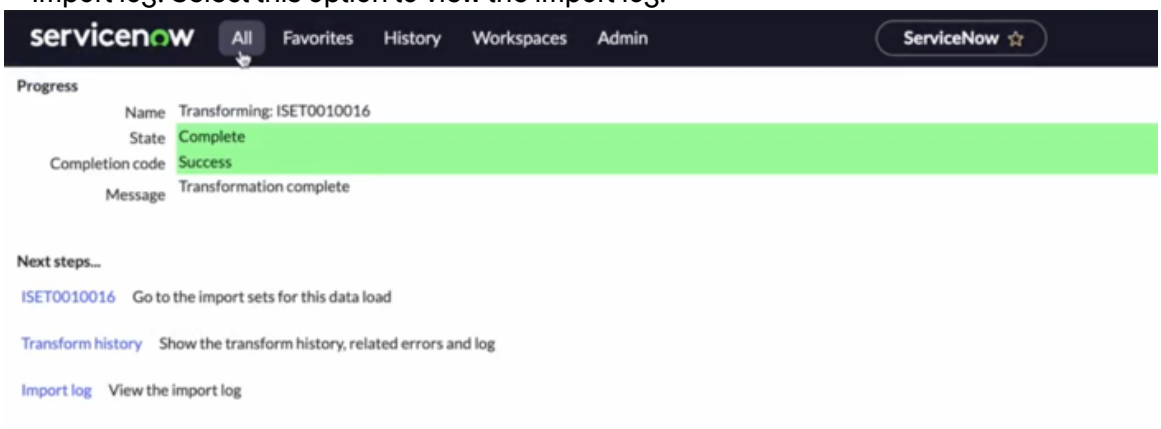
Procedure

1. After you run a transform and it completes successfully, do one of the following under the Next steps section:

   - Import set number: Select the import set number link to view the import sets for this data load.

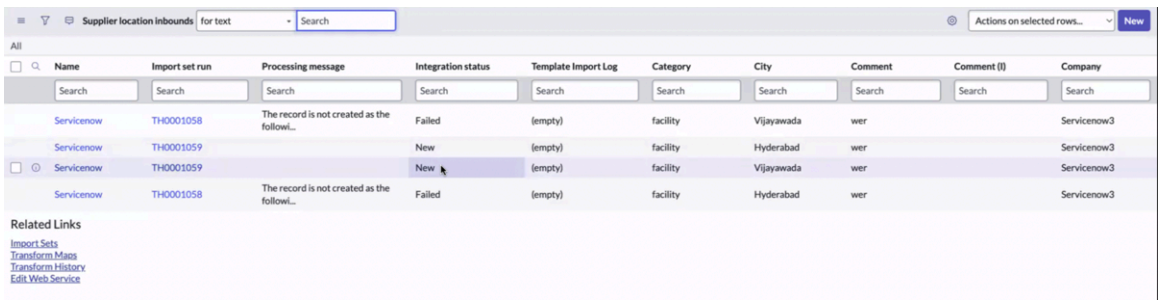
     Transform History: Select this option to view the transform history, related errors, and log.

   - Import log: Select this option to view the import log.



2. Select **All**.
3. In the navigation filter, enter the name of the SLO inbound table for which you want to check the integration status.
   For example, to check the integration status of the Supplier location inbound table, enter **sn_fcms_intg_supplier_location_inbound_list.do**.

   The Supplier location inbounds page appears.



4. Verify the following:

   - If the primary tables were successfully updated, the Integration status column displays **New** for the import set.
   - If the update to the primary tables was unsuccessful, the following occurs:

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- The Integration status column displays **Failed** for the import set.
- The Processing message column displays the issue that occurred during the transformation. You must fix the error and run the transform again. For example, if any of the mandatory fields are missing, the integration fails and displays the missing data to aid you in fixing the error.

Craft.co Integration for Supplier Lifecycle Operations

The Craft.co 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

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.co 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.

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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:

1. Create a REST message for a custom API.
2. Add and configure the Get News data resource in UI Builder.
3. Update the field names in the UX client script.

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.

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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.

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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. On the **Page Collections** tab, do one of the following:
   - For Supplier Manager Workspace, select **SLM Record page tabs**.
   - For Source-to-Pay Workspace, select **S2P SLM Record page tabs**.
3. In the About section, select **About default**.
4. From the lower-left pane, select the **+** icon next to the Data and scripts section.
5. In the Select data or script to add panel, select **Data resource**.
6. In the Select a data resource dialog box, in the search field, enter **Get News – Composite**.

   In the Select a data resource 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.
7. Select the **Get News – Composite** tile and then select **Add** to add it to your page.
8. Select the **Configure** tab and then do the following:
   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**.

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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

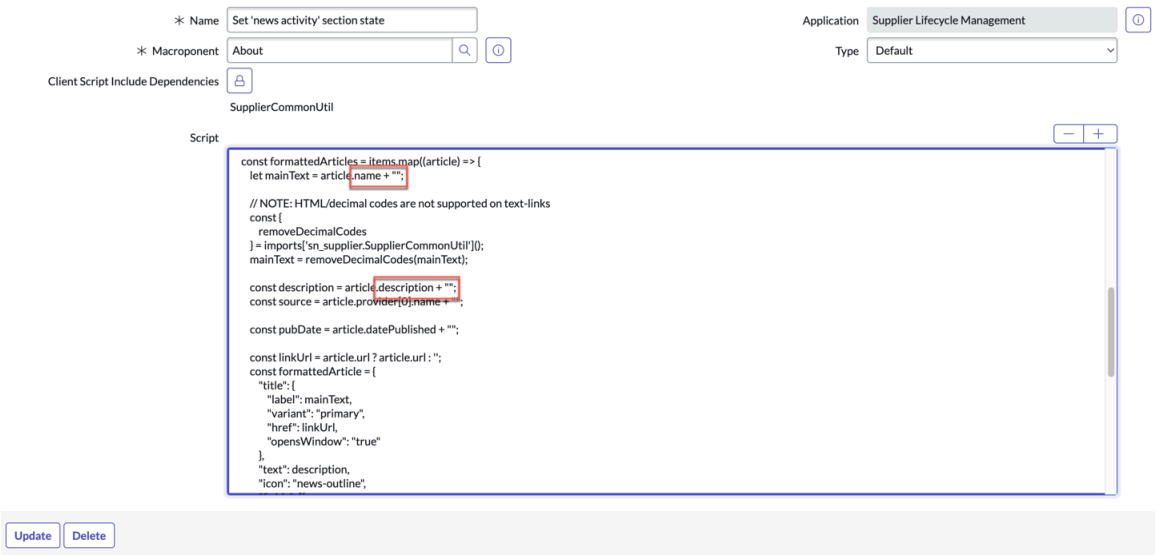
Update the field names in the UX client script to match the custom field names in the custom API response.

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.



5. Select **Update**.

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.

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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.
This supplier is owned by another company	Indicates if the new supplier is a subsidiary company. **Note:** This check box is added after Xanadu December 2024 release.
Parent company name	Name of the parent company. This field comes up if the **This supplier is owned by another company** check box is selected. **Note:** This field is added after Xanadu December 2024 release.
This supplier owns other companies	Indicates if the new supplier is a parent company. **Note:** This check box is added after Xanadu December 2024 release.
Subsidiary list	List of the subsidiary companies. This field comes up if the **This supplier owns other companies** check box is selected. **Note:** This field is added after Xanadu December 2024 release.
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.

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Field	Description
Contact title	Title of the supplier contact.
Priority	Priority of the supplier. The available options are: ○ **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 and its state moves to Work in progress.

   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.

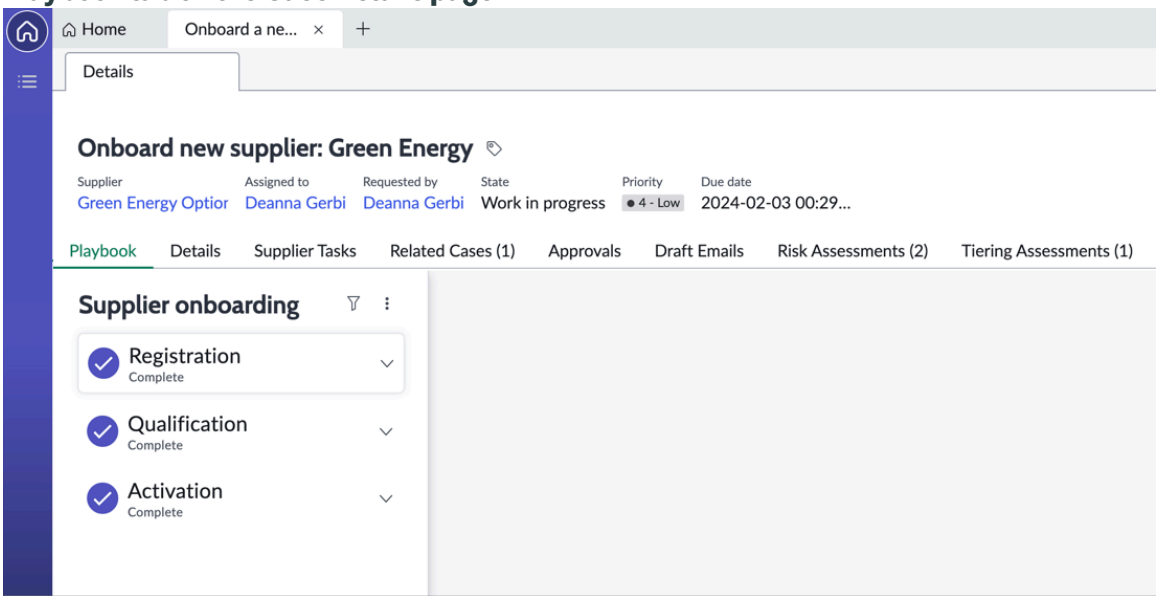
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The Supplier onboarding playbook appears in the **Playbook** tab on the Case Details page in the Source-to-Pay Workspace.

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.

Important:
Supplier Lifecycle Operations creates an approval record if the "Ask For Approval" action is a part of any SLO flow. This approval record can be approved by the user who belongs to the Supplier Administrators group (sys_user_group table). For more information, see Add a user to a group.

Playbook tab on the Case Details page



The Supplier onboarding playbook includes the following stages:

- Registration: Includes activities to register the supplier.
- Qualification: Includes activities to verify the eligibility of the supplier.
- Activation: Includes activities to activate the supplier.
- Rejection: Includes activities to reject the supplier.

Registration stage

The following table lists the activities in the Registration stage of the Supplier onboarding playbook.

Activity	Activity Details
Collecting onboarding details	Processes the supplier details collected in the onboarding request form. This activity completes automatically.
Process onboarding variables	Uses the information provided to start the onboarding activities. This activity completes automatically.

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Activity	Activity Details
Update the supplier case record	Sets the supplier case record to Work in progress. This activity completes automatically.
Show possible duplicate suppliers	Displays duplicate supplier records to ensure you are not onboarding an existing supplier. If there are no duplicate supplier records, this activity auto-completes. If duplicate supplier records exist, then select **Open List** to see the duplicate record and resolve the issue.
Show possible duplicate onboarding requests	Displays duplicate supplier onboarding request cases to ensure you are not duplicating an existing case. If there are no duplicate supplier onboarding request cases, this activity auto-completes. If duplicate supplier cases exist, then select **Open List** to see the duplicate cases and resolve the issue.
Check for supplier intelligence source	Checks if a supplier intelligence platform is installed to import supplier data.
Import supplier details from intelligent/external source	Imports supplier details from the supplier intelligence platform. Available actions: • **Import data** • **Skip**
Create new company record	Creates a new record for the supplier in the Company [core_company] table. This activity completes automatically.
Create new supplier record	Creates a new supplier record in the Supplier [sn_fin_supplier] table. This activity completes automatically.
Associate the onboarding case with the newly created supplier.	Associates the onboarding case with the supplier. The **Supplier** field shows the newly created supplier on the **Details** tab of the case. This activity completes automatically.
Sync supplier profile with the third party source	Synchronizes the supplier and company records with data from a third-party supplier intelligence. This activity completes automatically.
Invite supplier contact	Sends an email to the primary contact to register to the Supplier Collaboration Portal.
Verify that the supplier information is correct	Ensure that the supplier information is accurate and up to date. Available actions:

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Activity	Activity Details
	• **Mark complete** • **Skip** • **Update**
Waiting for supplier contact invitation to be sent out	Waits for the primary contact to be given access to the Supplier Collaboration Portal.
Set the case status to On Hold.	Sets the case status to On Hold. After this activity is completed, the playbook moves to the Qualification stage.

Qualification stage

The following table lists the activities in the Qualification stage of the Supplier onboarding playbook.

Activity	Activity Details
Check if Risk assessment for supplier plugin is installed	Checks whether the risk assessment for supplier plugin is installed.
Risk assessment decision	Lets you choose whether you need to perform risk assessment for the supplier being onboarded. Available actions: • **Continue without assessment** • **Perform risk assessment**
Perform risk assessment	The playbook starts the risk assessment process.
Waiting for risk assessment to be completed	The playbook waits for the risk assessment to be completed. A new due diligence case is created. You can see this case on the **Related Cases** tab of the Onboard a supplier case. Select the link for the due diligence case, which opens the Perform risk assessment playbook. One of the following occurs: • If you have installed only the Risk Assessments Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_tprm] plugin, the Perform risk assessment playbook triggers the flow that includes activities to verify the eligibility of the supplier by creating risk assessments. For more information, see Playbook stages and activities when only Vendor Risk Management is installed. • If you have installed both the Risk Assessments Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_tprm] and GRC: Third-party Risk Due Diligence [com.sn_tprm_onboarding] 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

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Activity	Activity Details
	conduct risk assessments for a third-party and an engagement. For more information, see Playbook stages and activities when Third-party Risk Due Diligence is installed.
Update the supplier case record	Updates the state of the case to Work in progress.
Confirm supplier is not restricted	Verify that this supplier is not on any corporate or governmental restricted list. If they are, you must reject this case. Available actions: • **Confirm not restricted** • **Reject** If you select **Reject**, the playbook opens the Rejection stage.
Confirm qualification status	Confirm if you would like to continue onboarding or reject the supplier. Available actions: • **Continue Onboarding** • **Reject** If you select **Reject**, the playbook opens the Rejection stage. After this activity is completed, the playbook moves to the Activation stage.

Activation stage

The following table lists the activities in the Activation stage of the Supplier onboarding playbook.

Activity	Activity Details
Create a task to collect banking details	Creates and assigns a task to the primary supplier contact to update the supplier banking details.
Create a task to review the supplier profile details	Creates and assigns a task to the primary supplier contact to review the supplier profile details.
Waiting for supplier to complete banking details	This activity is completed after the primary supplier contact completes the Update banking details task from the Supplier Collaboration Portal.
Waiting for supplier to validate their profile details	This activity is completed after the primary supplier contact validates the Update supplier profile task from the Supplier Collaboration Portal.
Confirm supplier activation	Confirm if you would like to continue onboarding or reject the supplier. Available actions:

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Activity	Activity Details
	• **Continue Onboarding** • **Reject** If you select **Reject**, the playbook opens the Rejection stage.
Activate supplier record	Sets the supplier record to onboarded=true.
Update supplier company status	Sets the status for the company record to **active**.
Send welcome email to supplier	Sends an email to the supplier with a welcome message.
Notify requestor of onboard completion	Sends an email to the requestor, informing them about the supplier onboarding completion status.
Set onboarding case to complete.	Updates the onboarding case to Closed completed.

Rejection stage

The following table lists the activities in the Rejection stage of the Supplier onboarding playbook.

Activity	Activity Details
Provide reason for rejection	Provide a reason for rejecting the supplier onboarding request. In the **Close notes** field, enter the reason for rejection and select **Reject Supplier**. Available actions: • **Reject Supplier** • **Skip**
Send rejection email to supplier	Sends an email to the supplier informing them that their onboarding request has been rejected.
Notify requestor of onboard rejection	Sends an email to the requestor, informing them about the supplier onboarding rejection.
Set onboarding case to rejected	Updates the onboarding case to Closed rejected.

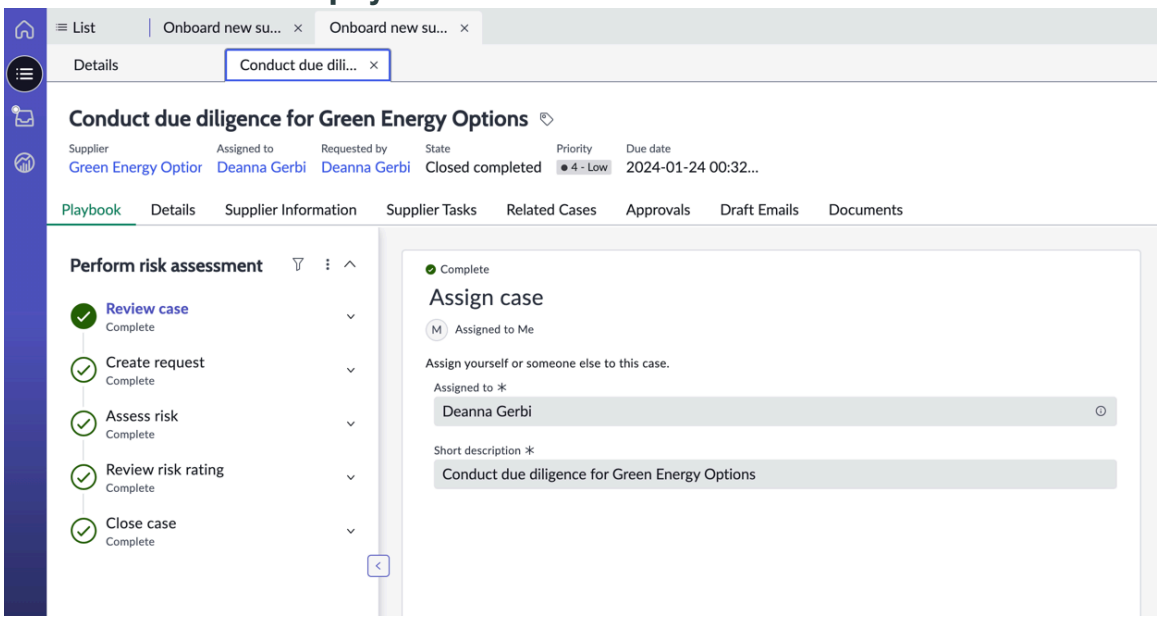
Perform risk assessment playbook

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.

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Perform risk assessment playbook



Plugins Installed	Playbook flow
Risk Assessments Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_tprm]	The Perform risk assessment playbook flow creates risk and tiering assessments to verify the eligibility of the supplier. For more information, see Risk assessment flow when only Vendor Risk Management is installed.
• Risk Assessments Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_tprm] • GRC: Third-party Risk Due Diligence [com.sn_tprm_onboarding]	The Perform risk assessment playbook flow create a due diligence request to verify the eligibility of the supplier. For more information, see Risk assessment flow when Third-party Risk Due Diligence is installed.

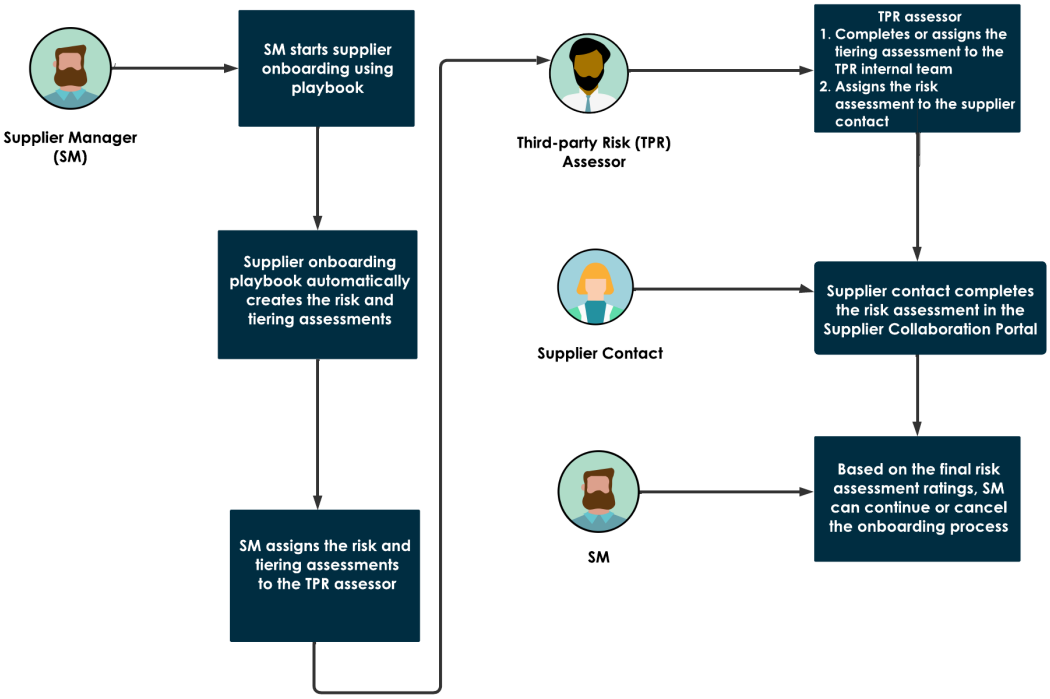
Risk assessment flow when only Vendor Risk Management is installed

If you have installed only the Risk Assessments Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_tprm] plugin, the Perform risk assessment playbook triggers the flow that includes activities to verify the eligibility of the supplier by creating risk assessments.

The Risk Assessments Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_tprm] plugin automatically installs the Vendor Risk Management [sn_vdr_risk_asmt] plugin.

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Risk assessment flow when only VRM is installed



In this flow, the following occurs:

1. The supplier manager receives a supplier onboarding request.
2. The supplier manager uses the onboarding playbook, which provides a streamlined and guided process to onboard suppliers. For more information, see Using the supplier onboarding playbook to onboard suppliers.
3. During the onboarding process, the playbook automatically creates the risk and tiering assessments. The assessment records are listed in the **Risk Assessments** and **Tiering Assessments** tabs.
4. The supplier manager assigns the risk and tiering assessments to the third-party risk assessor.
5. The TPR assessor assigns the assessments to the supplier contact.
6. The supplier contact logs in to the Supplier Collaboration Portal and completes the risk and tiering assessments. For more information, see Complete a risk assessment from the Supplier Collaboration Portal.
7. After the risk assessment has been completed, the supplier manager evaluates the risk information in combination with any other data and determines whether to continue or cancel the onboarding process.

   After the assessments are completed, you can continue with completing the activities in the Activation stage.

Playbook stages and activities when only Vendor Risk Management is installed

The following table lists the Perform risk assessment playbook stages and activities when only Vendor Risk Management (VRM) is installed.

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Perform risk assessment playbook stages and activities

Stage	Activity	Activity Details

Review case	Assign case	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.
		
		You can do the following:
		
		• 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:
		  ○ Select **Save** to save your changes.
		  ○ Select **Start work** to start working on the case.

	Update case to work in progress	Updates the state of the due diligence case to work in progress.
Assess tiering and risk	Waiting on the risk assessment to be completed	Waits for the risk assessment questionnaires to be completed by the supplier contact. Select **View Record** to see the risk assessment record.
	Mark risk assessment as completed	Select **Mark Complete** to mark this activity as completed after the supplier contact completes the risk assessment questionnaires from the Supplier Collaboration Portal.
Close case	Notify the requestor the request has been approved	Sends an email to the requestor informing them that the due diligence request has been approved. A draft email appears with pre-populated data in the **To** and **Subject** fields. The email body is pre-populated with the relevant text. Available actions: • **Send email** • **Skip**
	Close case	Add closing comments to complete the case. In the **Close notes** field, add your comments and select **Close case**. The state of the due diligence case is updated to Closed completed.

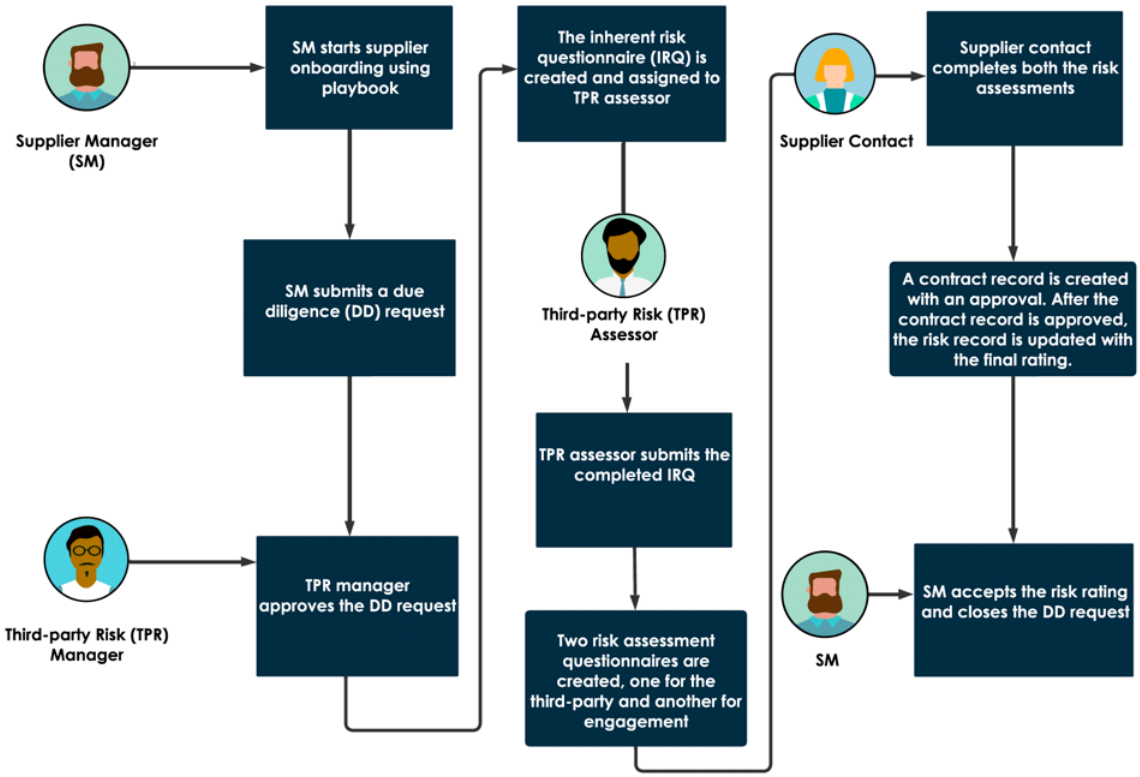
Risk assessment flow when Third-party Risk Due Diligence is installed

If you have installed both the Risk Assessments Integration for Supplier Lifecycle Operations [com.snc.sn_supplier_tprm] and GRC: Third-party Risk Due Diligence [com.sn_tprm_onboarding]

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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 and an engagement.

Risk assessment flow when Third-party Risk Due Diligence is installed



In this flow, the following occurs:

1. The supplier manager receives a supplier onboarding request.
2. The supplier manager uses the onboarding playbook, which provides a streamlined and guided process to onboard suppliers. For more information, see Using the supplier onboarding playbook to onboard suppliers.
3. The supplier manager submits a due diligence request. For more information about the fields in this activity, see Request due diligence for a third-party engagement.

   The supplier manager must fill in the details and assign the due diligence request to the TPR manager.

   Note:
   For each due diligence request, the system auto-assigns a unique ID number that starts with the prefix **DDR**.

4. If the due diligence request is approved by the TPR manager, the inherent risk questionnaire (IRQ) is sent to the TPR assessor (internal stakeholder).
5. After the TPR assessor submits the completed IRQ, the due diligence process begins.
6. The due diligence process creates two risk assessments, each containing an external due diligence questionnaire, one for the third-party and another for engagement.
7. After the supplier contacts complete and submit the external questionnaires from the Supplier Collaboration Portal, the TPR manager goes through the questionnaires and approves the due diligence request.

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8. A contract record is created with an approval. After the contract record is approved, the risk record is updated with the final rating.
9. 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.
10. The supplier manager closes the due diligence request (case).

    After the case is closed, you can continue with completing the activities in the Activation stage.

    For more information about the due diligence workflow, see Due diligence workflow.

Playbook stages and activities when Third-party Risk Due Diligence is installed

The following table lists the Perform risk assessment playbook stages and activities when Third-party risk Due Diligence is installed.

Perform risk assessment playbook stages and activities

Stage	Activity	Activity Details

Review case	Assign case	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.
		You can do the following:
		• 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:
		  ○ Select **Save** to save your changes.
		  ○ Select **Start work** to start working on the case.

	Update case to work in progress	Updates the state of the due diligence case to work in progress.
Create request	Check if TPRM is installed	Checks if the TPRM plugin is installed.
	Check for duplicate due diligence (risk assessment) requests	Reviews existing due diligence requests for this supplier. You can do the following: • **Cancel:** If there's an existing due diligence request, you can select this option to cancel this due diligence case. • **Create new request:** Creates a new due diligence request.
	Create due diligence request	Do the following: • Under Options, select **Onboard a new engagement**. • In the **Third party** field, select the supplier. • Fill in the required fields in the following sections:

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Perform risk assessment playbook stages and activities (continued)

Stage	Activity	Activity Details
		○ Third-party information ○ Third-party address ○ Engagement information ○ Engagement address ○ Engagement primary contact • Select **Submit**.
	Check the status of the due diligence request	Waits for initial approval on the due diligence request and the risk process to start. Select **View record** to view the due diligence request.
Assess risk	Waiting on IRQs to be completed	Waits for the approval of the IRQs and the due diligence to start.
	Waiting on the due diligence to be completed	Waits for the due diligence to be completed and the formal review process to start.
	Waiting on the due diligence to be reviewed and approved	Waits for the due diligence request to be reviewed and approved.
Review risk rating	Accept or reject risk ratings	Review the risk rating of the supplier and choose to accept or reject the risk rating. Available actions: • **Accept** • **Reject** If you select **Reject**, the playbook opens the Rejection stage.
Close case	Notify the requester that the request has been approve	Available actions: • **Send email:** Sends an email to the requester, informing them that the case has been approved. • **Skip:** Skips this activity.
	Close case	Add closing comments to complete the case. In the **Close notes** field, add your comments and select **Close case**. The state of the due diligence case is updated to Closed completed.

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.

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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

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Case type	Default due date
Supplier issue	3
Document change request	3
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.

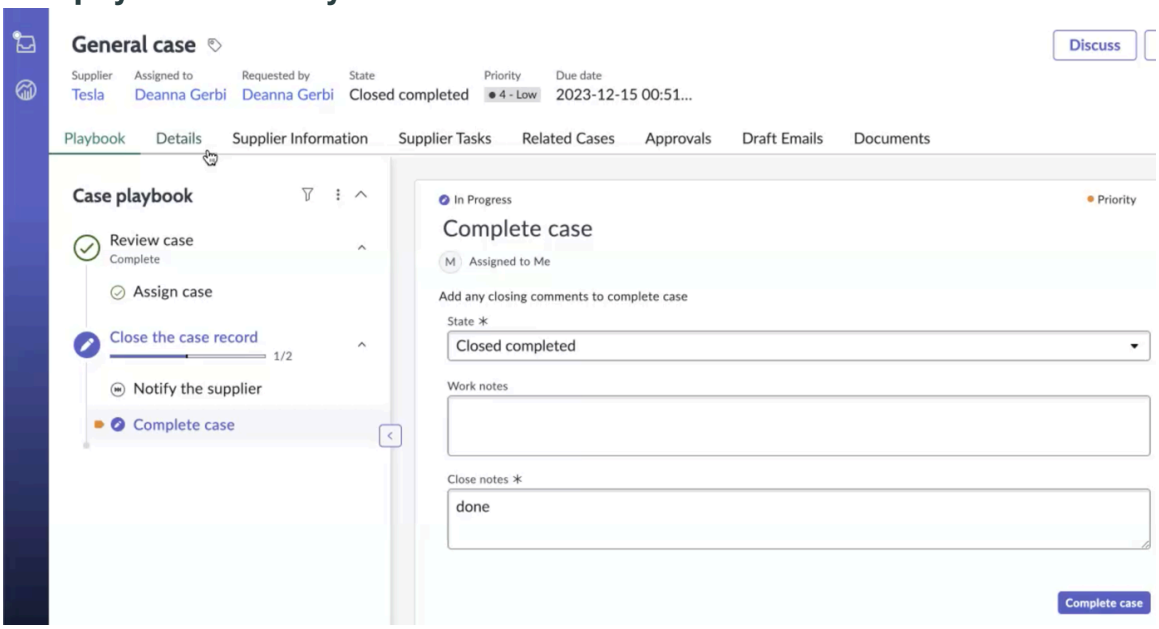
When a supplier contact submits a request using the supplier catalog item from the Supplier Collaboration Portal or when a supplier manager or fulfiller creates a case from the Source-to-Pay Workspace, the application opens the case on the **Playbook** tab on the Details page.

The case playbook is displayed only for these case types:

- Supplier issue
- Supplier support request
- General inquiry

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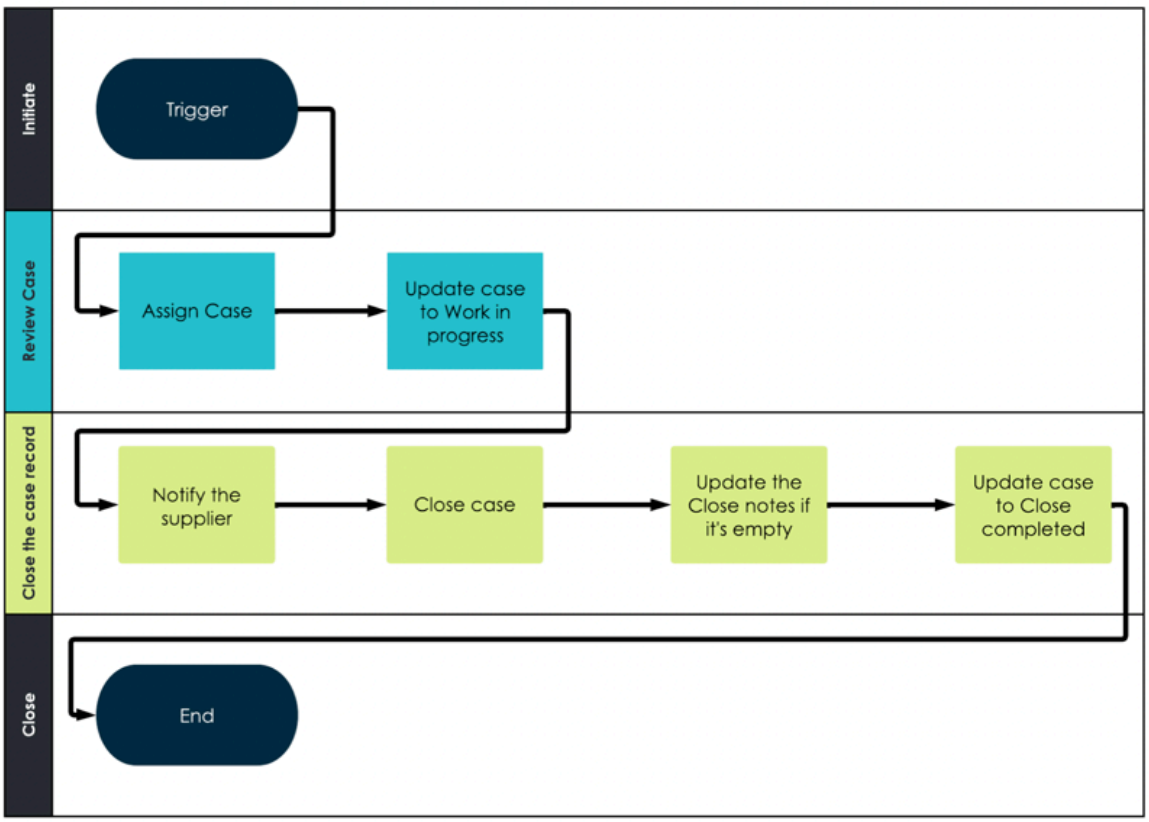
Case playbook on the Playbook tab



Case playbook flow

The following diagram illustrates the flow of the activities in each stage of the Case playbook.

Case playbook flow



Case playbook

Case playbook stages and activities

The case playbook contains the following stages and activities.

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Stage	Activity	Activity Details

Review case	Assign case	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.
		
		You can do the following:
		
		• 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:
		  ○ Select **Save** to save your changes.
		  ○ Select **Start work** to start working on the case.

Close the case record	Notify the supplier	A draft email appears with pre-populated data in the **To** and **Subject** fields. The email body is pre-populated with the relevant text. Select one of the following actions: • **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	As a supplier manager or fulfiller, you can update the state of the case and close the case. You can do the following: • 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**. Updates the case to Closed Completed.

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:

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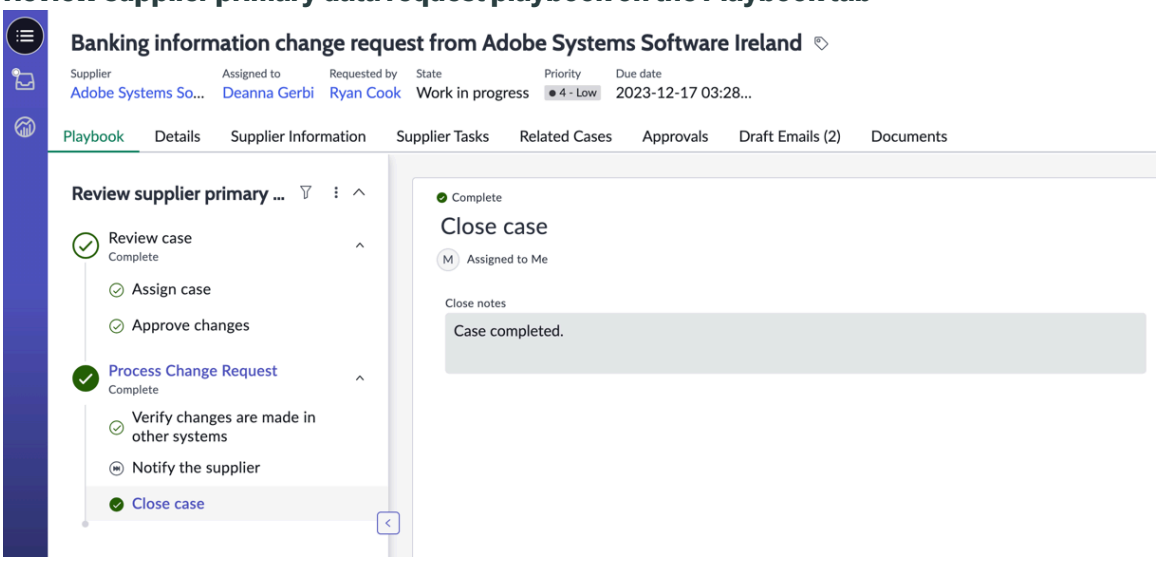
- A supplier contact submits a request for updating the supplier primary data using the supplier catalog item from the Supplier Collaboration Portal
- A supplier manager or fulfiller creates a case for updating the supplier primary data from the Source-to-Pay Workspace

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 Playbook tab

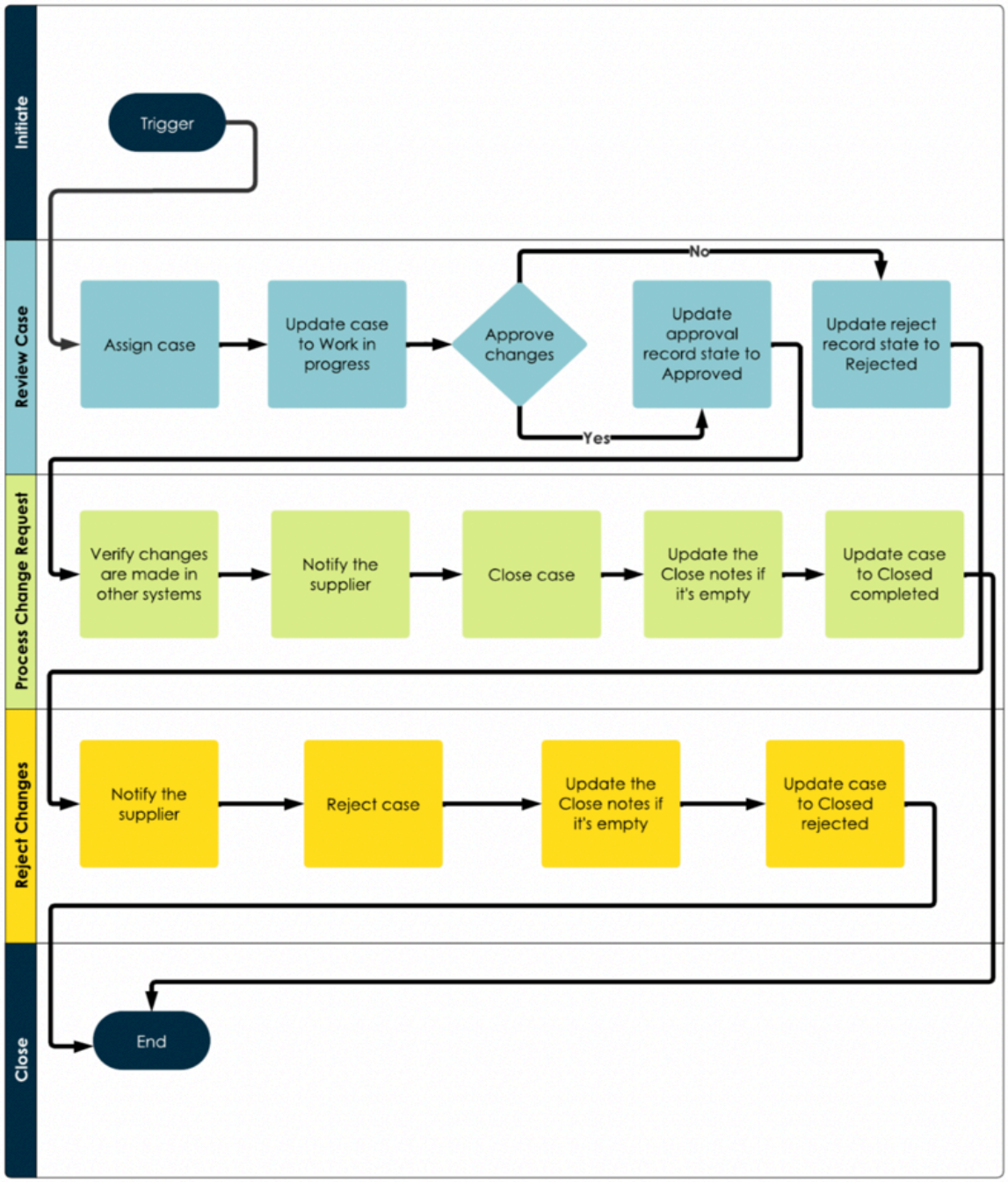


Review supplier primary data request playbook flow

The following diagram illustrates the flow of the activities in each stage of the Review supplier primary data request playbook.

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Review supplier primary data request playbook flow



Review supplier primary data request playbook

Review supplier primary data request playbook stages and activities

The playbook contains the following stages and activities.

Flow of activities in each stage of the Case playbook

Stage	Activity	Activity Details
Review case	Assign case	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.

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Flow of activities in each stage of the Case playbook (continued)

Stage	Activity	Activity Details

		You can do the following:
		• 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:
		  ○ Select **Save** to save your changes.
		  ○ Select **Start work** to start working on the case.

	Approve changes	As a supplier manager or fulfiller, you can use this activity to decide whether to approve or reject the case. This activity has the options: • Approve changes: Approves your changes. • Reject changes: Rejects your changes and opens the Reject changes stage. For more information, see Non-Interactive activities.
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. You can do the following: • **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	A draft email appears with pre-populated data in the **To** and **Subject** fields. The email body is pre-populated with the relevant text. You can do the following: • **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	As a supplier manager or fulfiller, you can update the state of the case and complete the case. You can do the following:

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Flow of activities in each stage of the Case playbook (continued)

Stage	Activity	Activity Details
		• 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**. Updates the case to Closed Completed.
Reject Changes	Notify the supplier	A draft email appears with pre-populated data in the **To** and **Subject** fields. The email body is pre-populated with the relevant text. You can do the following: • **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	As a supplier manager or fulfiller, you can update the state of the case and reject the case. You can do the following: • From the State drop-down list, select **Closed rejected**. • 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**. Updates the case to Closed Rejected.

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.

https://player.vimeo.com/video/1025480358?h=6aae08cf02&badge=0&autopause=0&player_id=0&app_id=58479

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.

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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**.
6. Select **Submit case**
   The case moves to the Open state.

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.

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**.

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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.manager, 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** > **My work** > **Open cases**.
   - View all the cases by navigating to **Lists** > **All work** > **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:

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- 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.

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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.

Managing supplier tasks from the Source-to-Pay Workspace

You can create and manage tasks for suppliers and internal users in the Source-to-Pay Workspace.

Configure due dates for tasks

Configure due dates for different task types so that the **Due date** field is auto-populated when you create tasks for internal users and suppliers.

Before you begin
Role required: sn_slm.admin

About this task
Although the **Due date** field is auto-populated for a task type, you can always update this field as required.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Administration** > **Default Due Dates for Tasks**.
   The Decision Builder opens and displays the Decision table for configuring the default due dates.

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Task type	Default due date
Mark complete	3
View link	3
Play video	3
Upload documents	3
Complete a form	3
Sign document	3
Complete checklist	3
Complete survey	3

2. Under the Default due date column, select a row next to the task type row and enter a positive number.
   The number that you enter for a task type is auto-populated in the **Due date** field the next time you create a task of that task type.

   For example, let's say that you enter 3 as the due date for the task type Mark complete. If you create a Mark complete task on September 12, the due date will be in three days from this date; that is, September 15.

3. Select **Save**.

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.

3. In the Create new task dialog box, do one of the following:

To	Do this
Create a task for a supplier	**a.** In the *Who is this task for?* section, select **Supplier**. **b.** In the **Action type** field, select one of the following task types: ▪ Complete a form ▪ Complete checklist ▪ Complete survey

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To	Do this
	▪ Mark complete ▪ Play video ▪ Sign document ▪ Upload documents ▪ View link
Create a task for an internal employee	**a.** In the *Who is this task for?* section, select **An employee at my company**. **b.** In the **Action type** field, select one of the following task types: ▪ Mark complete ▪ Play video ▪ Upload documents ▪ View link

For more information about the form fields and descriptions on the Create a new task form, see Create new task form.

4. Select **Submit**.
5. On the Task form, fill in the fields.

   For more information about the form fields and descriptions, see Task form.

6. Select **Save**.
   The task is created in Draft state.
7. Select **Submit task**.

   The task moves to the Awaiting completion state.

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.

Submit a task from the Source-to-Pay Workspace

Submit a task in Draft state to indicate that it is ready to be worked on.

Before you begin

Role required: sn_slm.manager, 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 supplier tasks by navigating to **Lists** > **All work** > **Supplier tasks**.
   - View all the employee tasks by navigating to **Lists** > **All work** > **Employee tasks**.
4. Open a task that is in Draft state by selecting the link to the task in the Number column.

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5. Select **Submit task**.
   The state of the task updates to Awaiting completion, indicating that the task is ready to be worked on.

Complete a supplier task from the Source-to-Pay Workspace

You can mark a supplier task as complete when you finish all the activities related to that task.

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 supplier tasks by navigating to **Lists** > **All work** > **Supplier tasks**.
   - View all the employee tasks by navigating to **Lists** > **All work** > **Employee tasks**.
4. Open a task that is in Awaiting completion or Work in progress state by selecting the link to the task in the Number column.
5. Select **Complete task**.
   The state of the task updates to Closed complete.

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 ( ).

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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**.

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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.

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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.
- This functionality is not available in Xanadu December 2024 release.

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.
- This functionality is not available in Xanadu December 2024 release.

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 new table page, and the contact no longer has the primary contact role.

Offboard a supplier from the Source-to-Pay Workspace

Offboard a supplier due to performance issues or when you learn that the supplier follows practices that are inconsistent or unethical.

Before you begin
Role required: sn_slm.manager, sn_slm.owner, or sn_slm.admin

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Note:
The sn_slm.owner role can offboard only the suppliers they own.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Under Quick actions, select **Create case**.
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. From the **Case type** field, **Offboard a supplier**.
5. Select **Save**.
   The application creates a case of type Offboard a supplier.
6. Select **Submit Case**.

What to do next

The supplier manager or supplier owner can continue to offboard the supplier using the Playbook tab on the Case Details page. For more information, see Offboard suppliers using the supplier offboarding playbook.

Offboard suppliers using the supplier offboarding playbook

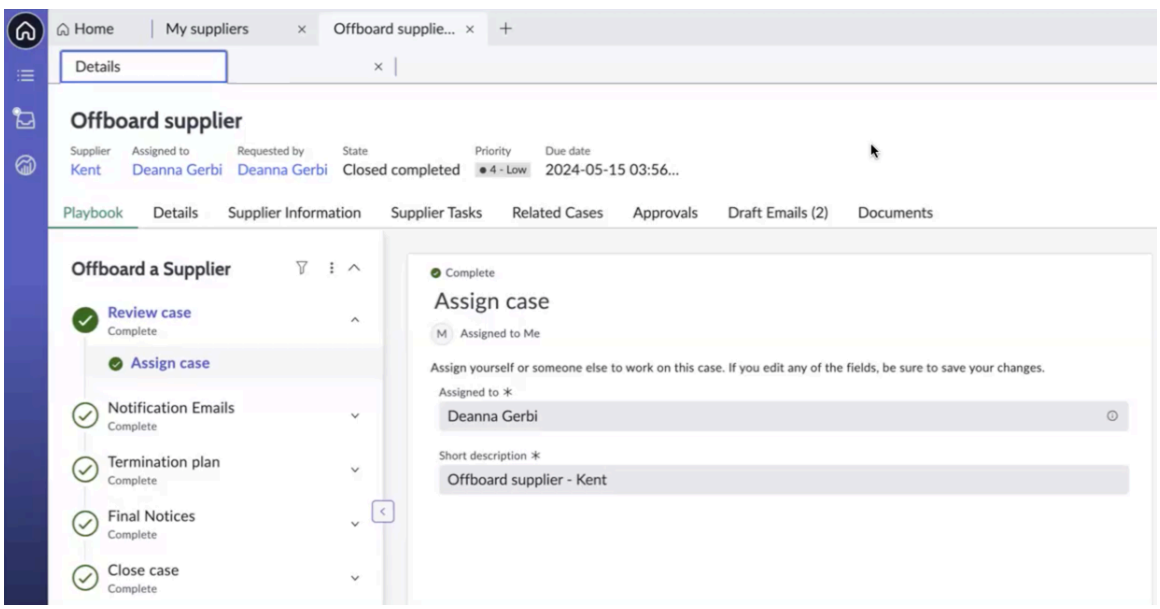
Supplier owners and supplier managers can use the supplier offboarding playbook to complete the tasks and activities that are needed to offboard suppliers.

Offboard a Supplier playbook

The Offboard a Supplier playbook playbook provides step-by-step guidance for completing various stages and activities to offboard a supplier.

When a supplier manager or supplier owner submits the Offboard a supplier case from the Source-to-Pay Workspace, the application opens the case on the Playbook tab on the Details page.

The Offboard a Supplier playbook is displayed only for the cases of type Offboard a supplier.



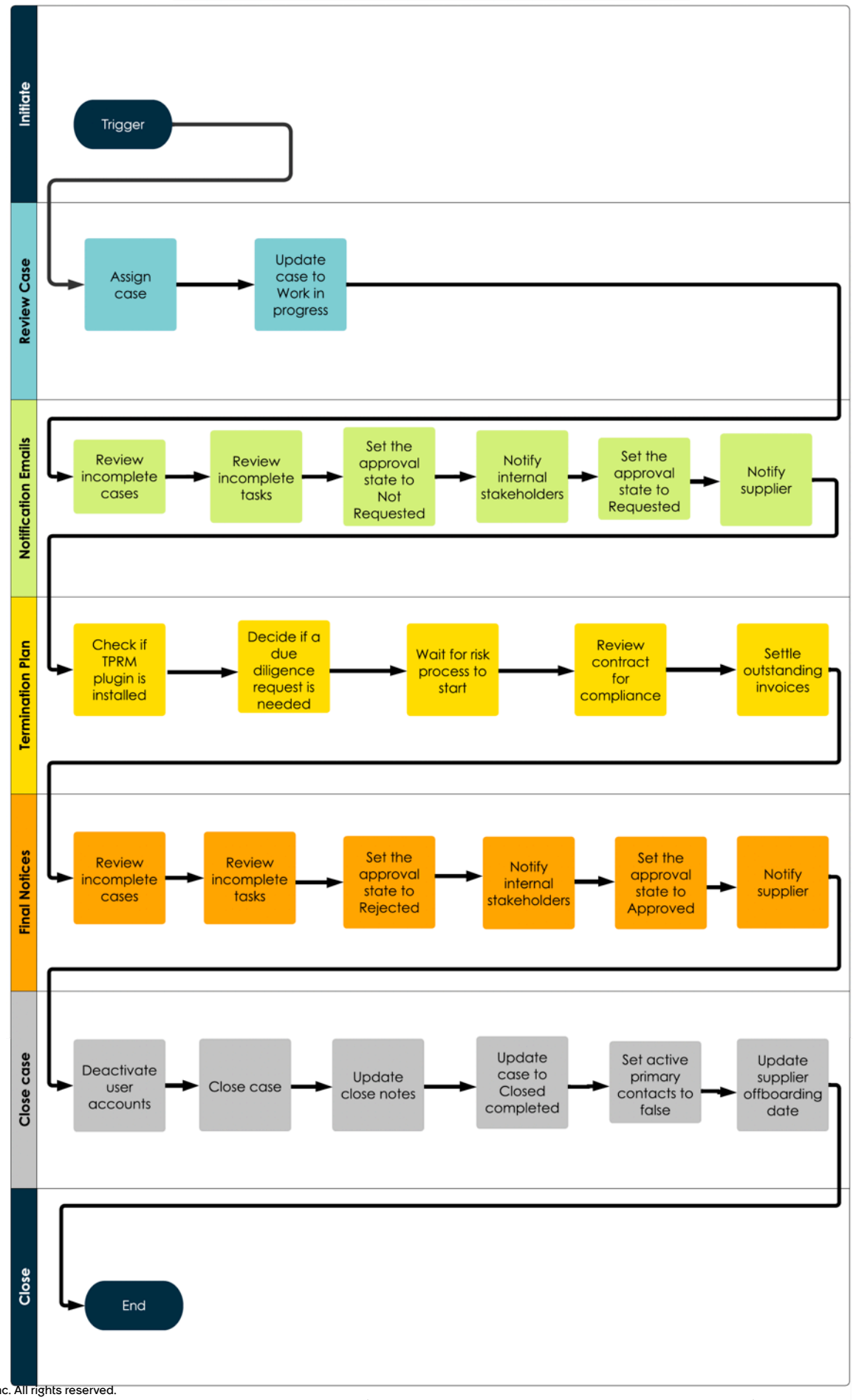
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Offboard a Supplier playbook flow

The following diagram illustrates the flow of the activities in each stage of the Offboard a Supplier playbook.

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Offboard a Supplier playbook



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Offboard a Supplier playbook stages and activities

The following table lists the stages and activities that supplier managers and owners can use to offboard suppliers.

Playbook stages and activities

Stage	Activity	Activity Details
Review case	Assign case	When a supplier manager or owner creates an supplier offboarding case, the workspace opens the Create New Onboarding Case form, and then opens the supplier offboarding playbook. 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. You can do the following: • 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 **Save**. Select **Start work** to start working on the case.
Notification Emails	Review incomplete cases	This activity shows the list of all pending or outstanding cases that you can review before offboarding the supplier. Available actions: Select **Continue** to move to the next activity.
	Review incomplete tasks	This activity shows the list of all pending or outstanding tasks that you can review before offboarding the supplier. Select **Continue** to move to the next activity.
	Notify internal stakeholders	This activity enables you to send an email to notify internal stakeholders about the decision to offboard the supplier. A draft email appears with pre-populated data in the **Subject** field. The email body is pre-populated with the relevant text. Add the relevant internal stakeholders in the **To** field. Select one of the following actions:

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Playbook stages and activities (continued)

Stage	Activity	Activity Details
		• **Send Email**: Sends an email to the internal stakeholders. • **Skip**: Skips this activity and moves to the next activity.
	Notify supplier	This activity enables you to send an email to the supplier informing about their termination. A draft email appears with pre-populated data in the **To** and **Subject** fields. The email body is pre-populated with the relevant text. Select one of the following actions: • **Send Email**: Sends an email to the supplier. • **Skip**: Skips this activity and moves to the next activity.

Termination plan	Decide if a due diligence request is needed	This activity enables you to request for due diligence for the supplier being offboarded. This helps you in assessing the impact of offboarding the supplier.
		
		Note: This activity is displayed only if you have installed both the com.snc.sn_supplier_tprm and com.sn_tprm_onboarding plugins.
		
		• Select one of the following options:
		  ○ **Offboard an engagement with due diligence**: Select this option if you want to create a due diligence request for the supplier.
		  ○ **Offboard an engagement with NO due diligence**: Select this option if you do not want to create a due diligence request for the supplier.
		• If you selected **Offboard an engagement with due diligence**, then do the following:
		  ○ In the **Third party** field, enter the name of the supplier.
		  ○ In the **User who will respond to the initial IRA questionnaire** field, specify the name of the TPRM assessor.

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Playbook stages and activities (continued)

Stage	Activity	Activity Details
		○ In the **Engagement** field, select the engagement for the supplier. ○ Select **Submit**.
	Wait for risk process to start	As soon as the Due Diligence Request moves to the IRQ in progress state, this activity auto-completes and moves to the next activity.
	Review contract for compliance	This activity lists all the open contracts for the supplier. Ensure that all the terms and clauses are being followed. Select **Continue** to move to the next activity.
	Settle outstanding invoices	Check all outstanding invoices to confirm that all payments or balances have been settled. Select **Continue** to move to the next activity.
Final Notices	Review incomplete cases	This activity shows the list of all pending or outstanding cases that you can review before offboarding the supplier. Available actions: Select **Continue** to move to the next activity.
	Review incomplete tasks	This activity shows the list of all pending or outstanding tasks that you can review before offboarding the supplier. Select **Continue** to move to the next activity.
	Notify internal stakeholders	This activity enables you to send an email to notify internal stakeholders about the decision to offboard the supplier. A draft email appears with pre-populated data in the **Subject** field. The email body is pre-populated with the relevant text. Add the relevant internal stakeholders in the **To** field. Select one of the following actions: • **Send Email**: Sends an email to the internal stakeholders. • **Skip**: Skips this activity and moves to the next activity.

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Playbook stages and activities (continued)

Stage	Activity	Activity Details
	Notify supplier	This activity enables you to send an email to the supplier informing about their termination. A draft email appears with pre-populated data in the **To** and **Subject** fields. The email body is pre-populated with the relevant text. Select one of the following actions: • **Send Email**: Sends an email to the supplier. • **Skip**: Skips this activity and moves to the next activity.
Close case Manages the case close activities.	Deactivate user accounts	This activity enables you to raise a ticket to the appropriate teams to deactivate user accounts. Select one of the following actions: • **Accept**: Deactivates the supplier user accounts. • **Skip**: Skipping this activity deactivates the supplier user accounts and moves to the next activity.
	Close case	This activity enables you to close the case. Do the following: • In the **Close notes** field, enter the details when closing the case. • Select **Complete case**. Updates the case to Closed Completed.
	Update primary contacts active to false	This activity deactivates all the contacts of the offboarded supplier. That is, the **Active** check box is deselected and the **Locked out** check box is selected for the contacts in the Vendor Contact [vm_vdr_contact] table.

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

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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.

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.
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.

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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 Supplier Lifecycle Operations

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.

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 created 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. Navigate to **All work** > **Interactions**
4. Select **New**.
5. On the form, fill in the fields.

Create New Interaction form

Field	Description
Number	System-generated, unique interaction number.
Type	Type of channel used for communication.

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Field	Description
	○ Chat ○ Messaging ○ Phone ○ Video
Assigned to	The agent to whom the interaction record is assigned.
Supplier	Name of the supplier company the supplier contact belongs to.
Supplier contact	Name of the supplier contact who initiated the interaction.
Short description	Brief description of the interaction.
Work notes	Additional information or comments added to the interaction.

6. Select **Save**.

Associate an interaction record to a supplier case

Associate an interaction record to a supplier case if your interaction is related to an existing supplier case in Source-to-Pay Workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Source-to-Pay Workspace.**.
2. Select the List icon ( ).
3. Navigate to **All work** > **Interactions**
4. In the Number column, select the link to an interaction that you want to associate with a supplier case.
5. Select More Actions and then select **Associate record**.
   The Create New Interaction Related Record form appears in a new tab.
6. In the **Supplier case** field, search for and select a supplier case that you want to associate with the interaction.
7. Select **Save**.

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

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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.

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

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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.

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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.

Important:

- The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards.
- If M2M mapping between supplier contact and suppliers is enabled, you can select the supplier from the **My Company** drop-down list of suppliers.

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.

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.

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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.

Note:

After Xanadu December 2024 release, you can also invite contacts from other email domains, provided they are part of the hierarchy.

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.

   Note:

   - First name, Last name, Email, and Supplier name are the required fields.
   - The **Supplier name** and **Relationship contact email** fields have been added after the Xanadu December 2024 upgrade.

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.

   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.

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Supplier contact self-registration

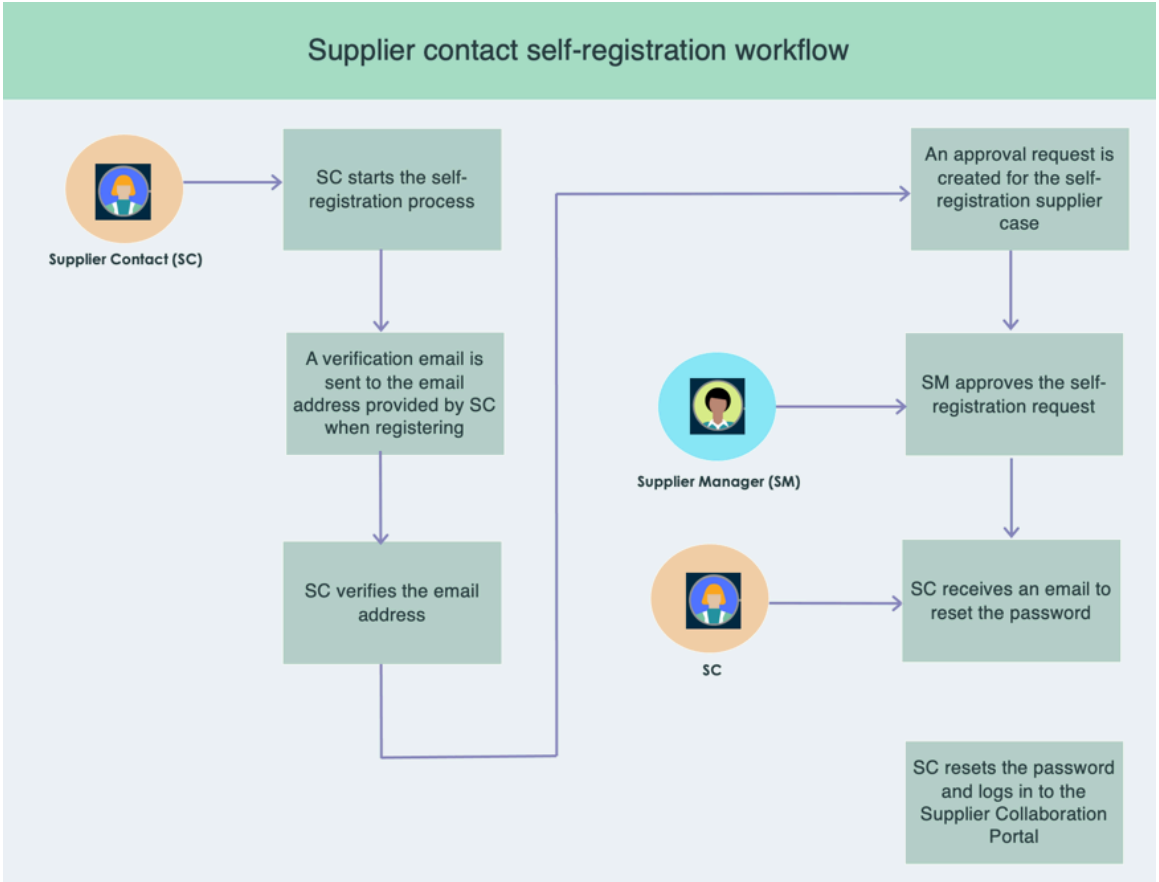
Supplier contacts can self-register to the Supplier Collaboration Portal and start working on the assigned tasks.

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 the Enroll a new supplier user case type 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.

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Approve a request associated with the Enroll a new supplier user case type 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. Open a supplier case.
3. Select the **Approvals** tab.
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**.

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.

   First name, Last name, Email, and Supplier name are required fields.

   Note:
   The **Supplier name** field has been added in the Xanadu December 2024 upgrade. This field is available only after M2M mapping between supplier contact and suppliers is enabled.

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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.

   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.

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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:

- 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.
3. Select **Reassign**.
4. In the **Assign to** field, search for and select the contact that you want to reassign this task to.

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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.

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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`.

   Note:
   If many-to-many (M2M) mapping between supplier contact and suppliers is enabled, you can see the list of all contacts associated with companies where you're designated as the primary contact.

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 that you want to remove.

   The Remove Contact dialog box is displayed.
3. Select the supplier from the **Supplier** drop-down list.

   Note:
   The **Supplier** drop-down list is available after the Xanadu December 2024 release.

4. 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.
5. In the **Comments** field, enter the reason for removing the contact.
6. 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.

Important:

- The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards.
- If M2M mapping between supplier contact and suppliers is enabled, you can select the supplier from the **My Company** drop-down list of suppliers.

The following catalog items are available in the supplier catalog:

- Add or remove location
- Enroll a supplier contact
- Remove a supplier contact
- Ask a question
- Submit an idea
- Submit an issue
- Update banking details
- Update profile details

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- Update default supplier (from Xanadu December 2024 release onwards)
- 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 are 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. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. In the portal header, select **Raise a request**.
4. Under the General category, select the **Update location details** catalog item.
   The **Supplier** field is auto-populated with the supplier you have currently selected. This field is available from the Xanadu December 2024 release onwards.
5. In the Add new or remove drop-down list, select one of the following:
   - **Add location**
   - **Remove location**
6. 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**.

7. From the **Category** drop-down list, select a category for the supplier location.
   - **Contracting address**
   - **Delivery address**
   - **Facility (default)**
   - **Headquarters**

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- **Invoice address**
- **Service center**

You can select multiple values from the drop-down list.

8. If you do not find the required supplier location in the **Search a location** search field, select the **Add new** check box.
9. On the Supplier Location form, fill in the fields.
   For a description of the field values, see Add New Location form.
10. 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

Only primary contacts can enroll a new user from the supplier catalog.

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 supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. In the portal header, select **Raise a request**.
4. Under the General category, select the **Enroll a new user** catalog item.
   The **Supplier** field is auto-populated with the supplier you have currently selected. This field is available from the Xanadu December 2024 release onwards.
5. Select **Add**.
   The Add Row dialog box is displayed.
6. In the **Email** field, enter the email address of the contact.
7. From the Primary contact list, select one of the following:
   - **Yes**: Select this option to specify that the contact you're adding is a primary contact.
   - **No**: Select this option to specify that the contact you're adding is not a primary contact.
8. Select **Add**.
9. Repeat steps 4 through 8 to add additional contacts in multiple rows.
10. **Optional:** To remove all the added rows for contacts, select **Remove All**.
    A confirmation message is displayed.

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11. **Optional:** Select **Remove**.
    All the supplier contact rows are removed.
12. 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. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.
3. In the portal header, select **Raise a request**.
4. Under the General category, select the **Deactivate user account** catalog item.
   The **Supplier** field is auto-populated with the supplier you have currently selected. This field is available from the Xanadu December 2024 release onwards.
5. In the **Contact** field, search for and select the contact you want to remove.
6. 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.
7. In the **Reason for offboarding** field, enter the reason for removing the contact.
8. 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. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

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> **Important:**
> The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. In the portal header, select **Raise a request**.
4. Under the General category, select the **Ask a question** catalog item.
   The **Supplier** field is auto-populated with the supplier you have currently selected. This field is available from the Xanadu December 2024 release onwards.
5. In the **Question** field, enter the question that you need an answer for.
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 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. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

> **Important:**
> The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. In the portal header, select **Raise a request**.
4. Select the **Submit an idea** catalog item under the General category.
   The **Supplier** field is auto-populated with the supplier you have currently selected. This field is available from the Xanadu December 2024 release onwards.
5. In the **Description** field, describe the idea you want to share.
6. Select the Add attachments icon ( ) to add attachments, such as documents and image files, to the request.
7. 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.

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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 the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. In the portal header, select **Raise a request**.
4. Under the General category, select the **Submit or report an issue** catalog item.
   The **Supplier** field is auto-populated with the supplier you have currently selected. This field is available from the Xanadu December 2024 release onwards.
5. In the Urgency drop-down list, select one of the following:
   - **High**
   - **Medium**
   - **Low**
6. In the **Description** field, describe the issue that you need help with.
7. To add attachments, such as documents and image files, to the request, select the add attachments icon ( ).
8. 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. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. In the portal header, select **Raise a request**.

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4. Select the **Update banking details** catalog item under the General category.
   The **Supplier** field is auto-populated with the supplier you have currently selected. This field is available from the Xanadu December 2024 release onwards.
5. On the Update banking details form, fill in the fields.
   For more information about the form fields and descriptions, see Update banking details form.
6. 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. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. 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.

4. On the Update profile details form, fill in the fields.
   For more information about the form fields and descriptions, see Update profile 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 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

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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. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. In the portal header, select **Raise a request**.
4. Select the **Request an access change request** catalog item under the General category.
5. 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.

6. From the Urgency drop-down list, specify how soon you want the request to completed.
   - **High**
   - **Medium**
   - **Low**
7. In the **Reason for requesting elevation** field, enter the reason for making this request.
8. Select the add attachments icon ( ) to add attachments, such as documents and image files, to the request.
9. 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.

Update default supplier

Update the default supplier when multiple suppliers are linked with your profile.

Before you begin

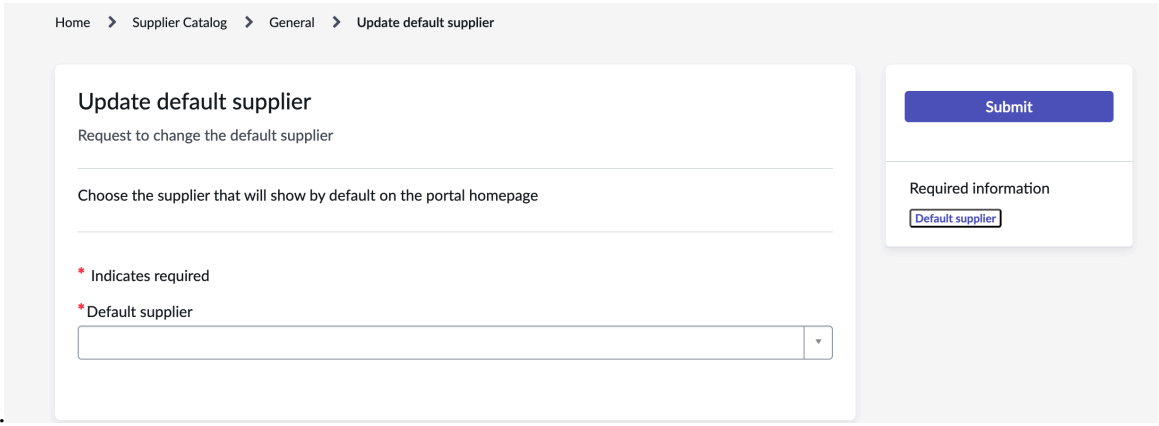
Role required: sn_slm.contact

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Important:
This catalog request item is available from the Xanadu December 2024 release onwards, only after M2M mapping between supplier contact and suppliers is enabled and more than one suppliers are linked with your profile.

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 default supplier** catalog item under the General category.



4. Select the supplier from the **Default supplier** drop-down list.
5. Select **Submit**.

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. Select the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards, only if M2M mapping between supplier contact and suppliers is enabled.

3. In the portal header, select **Raise a request**.
4. Under the General category, select the **General inquiry** catalog item.

   The **Supplier** field is auto-populated with the supplier name, but you can change its value, if required.

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5. From the **Urgency** drop-down list, select one of the following:
   - **High**
   - **Medium**
   - **Low**
6. In the **Requested for** field, enter the name of the person or organization that this request is for.
7. In the **What can we help you with?** field, enter the details explaining what you need help with.
8. Select **Add Attachments** to upload any relevant images or documents.
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.

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

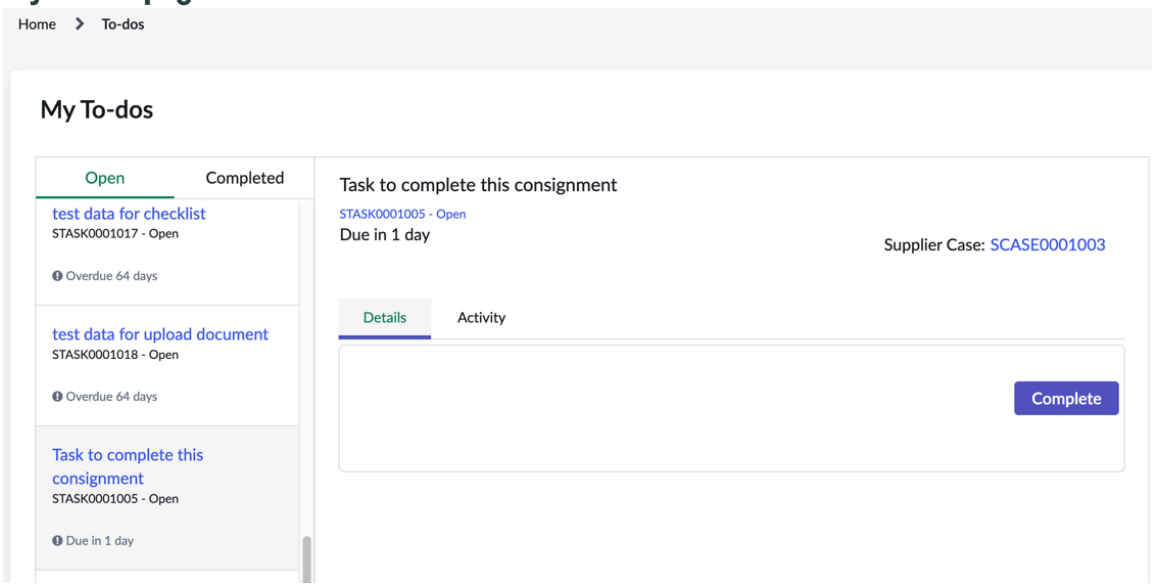
The My To-dos page lists all the tasks that are assigned to the logged-in user.

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**.

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My To-dos page



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

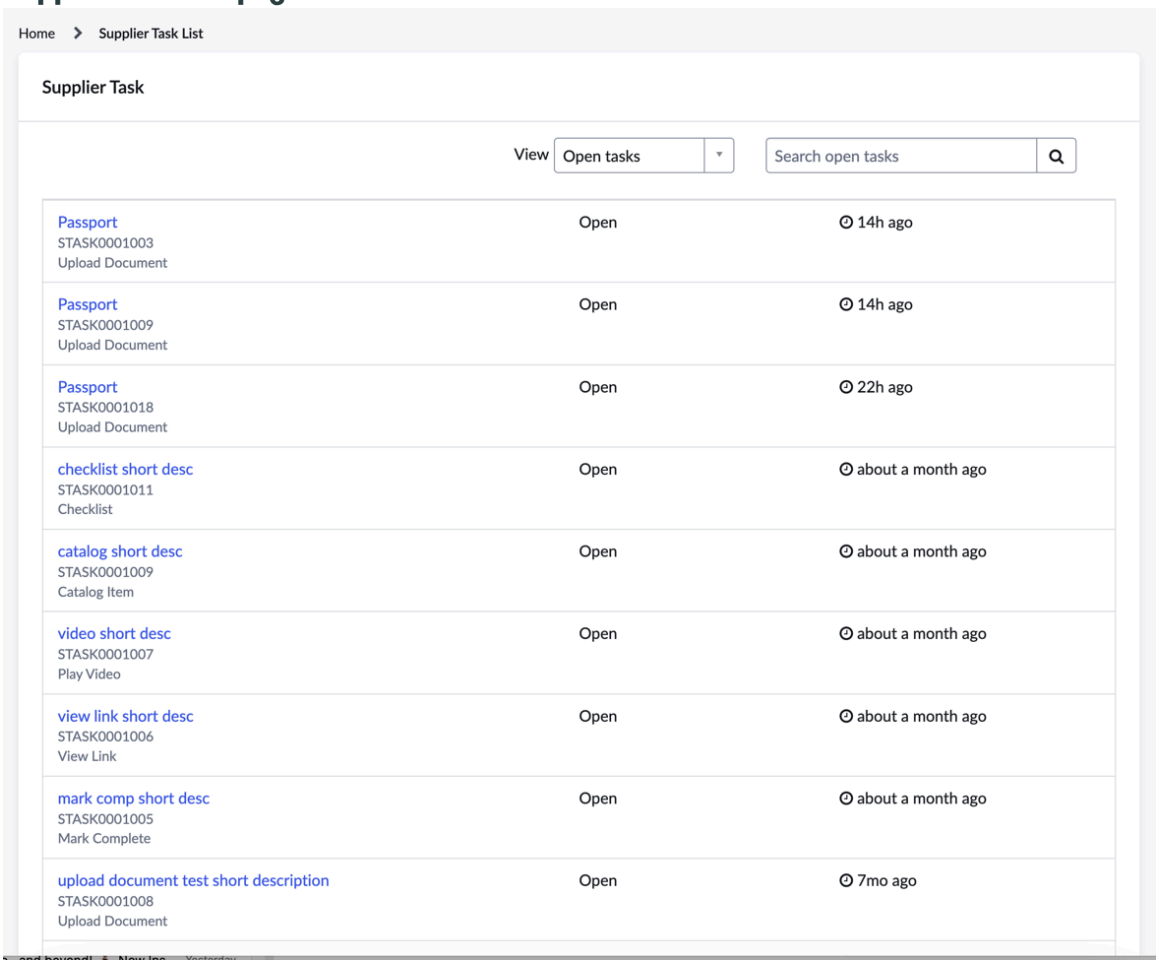
The Supplier Task List page displays both the tasks assigned to you and the tasks assigned to other contacts.

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.

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Supplier Task List page



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_slm.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.

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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.

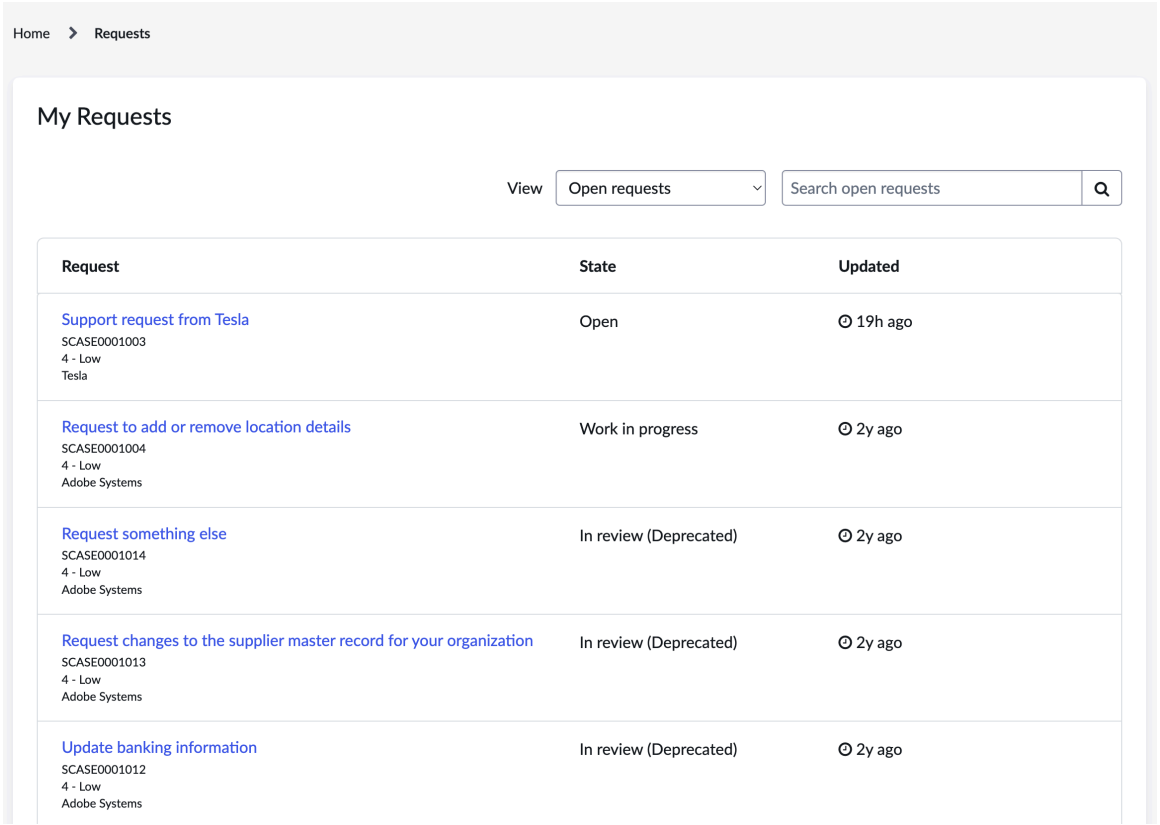
Before you begin
Role required: sn_slm.contact

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.

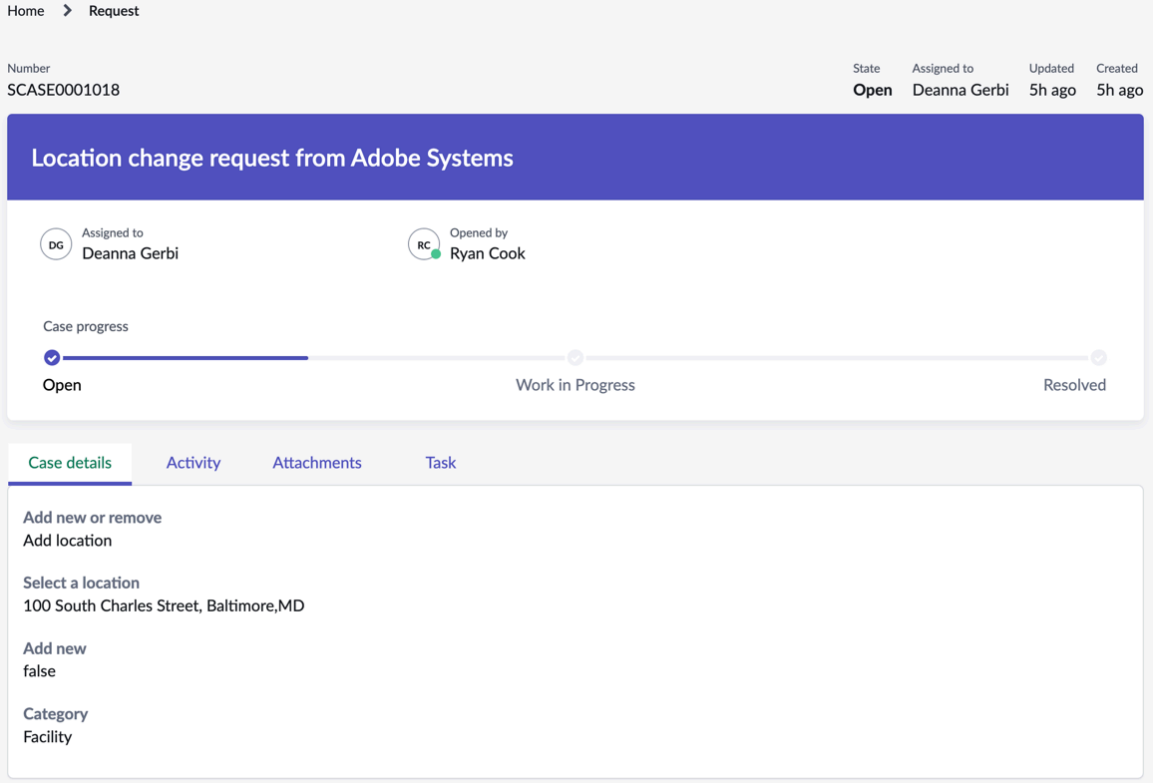
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Note:
You can see all requests from all the suppliers linked with your profile if M2M mapping between supplier contact and suppliers is enabled (available from Xanadu December 2024 release onwards).

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.

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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:

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- **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_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 the supplier from the **My Company** drop-down list of suppliers associated with your profile.

   Important:
   - The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards.
   - If M2M mapping between supplier contact and suppliers is enabled, you can select the supplier from the **My Company** drop-down list of suppliers.

3. Navigate to the **Locations** section on the Company Profile page.
   The Locations section displays the details about your locations.
4. 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 supplier location details on the Supplier Locations page, select **View all**.

Note:

You can also see location details from company page through **My Company** widget.

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_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 the supplier from the **My Company** drop-down list of suppliers associated with your profile.

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Important:

- The list of suppliers under **My Company** is available from the Xanadu December 2024 release onwards.
- If M2M mapping between supplier contact and suppliers is enabled, you can select the supplier from the **My Company** drop-down list of suppliers.

3. Navigate to the **Payment Information** section on the Company Profile page.
   The Payment Information section displays the details about your banks.
4. 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 Information 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

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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	To upload a document: **a.** In the portal header, select **My Company** **Note:** Select the supplier from the list of suppliers, if applicable. . **b.** In the Documents widget, on the tile having the document name, select **Upload**. **c.** Browse for and select the document that you want to upload. To download the document template: **a.** In the portal header, select **My Company**. **Note:** Select the supplier from the list of suppliers, if applicable. **b.** In the Documents widget, on the tile having the document name, select **Get template**. **Note:** The document template specifies the expected format of the document that you must upload. To update an already uploaded document: **a.** In the portal header, select **My Company**. **Note:** Select the supplier from the list of suppliers, if applicable. **b.** In the Documents widget, select the three vertical dots icon (⋮) on the tile having the document name, and then select **Update**. **c.** Browse for and select the document that you want to upload. To download a document:

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To	Do this
	a. In the portal header, select **My Company**. **Note:** Select the supplier from the list of suppliers, if applicable. **b.** In the Documents widget, select the three vertical dots icon (⋮) on the tile having the document name, and then select **Download**. **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.
Upload a document from the My To-dos page	To upload a document: **a.** Do one of the following: ▪ In the portal header, select **My Tasks**. ▪ (If you're a primary contact) In the portal header, select **Tasks** and then select **My Tasks**. The My To-dos page is displayed. **b.** Select the **Open** tab, select the to-do that you want to upload a document for. **c.** Select the **Details** tab and select the add attachments icon (📎) to add a document to the to-do. **d.** Select **Complete**.

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

About this task

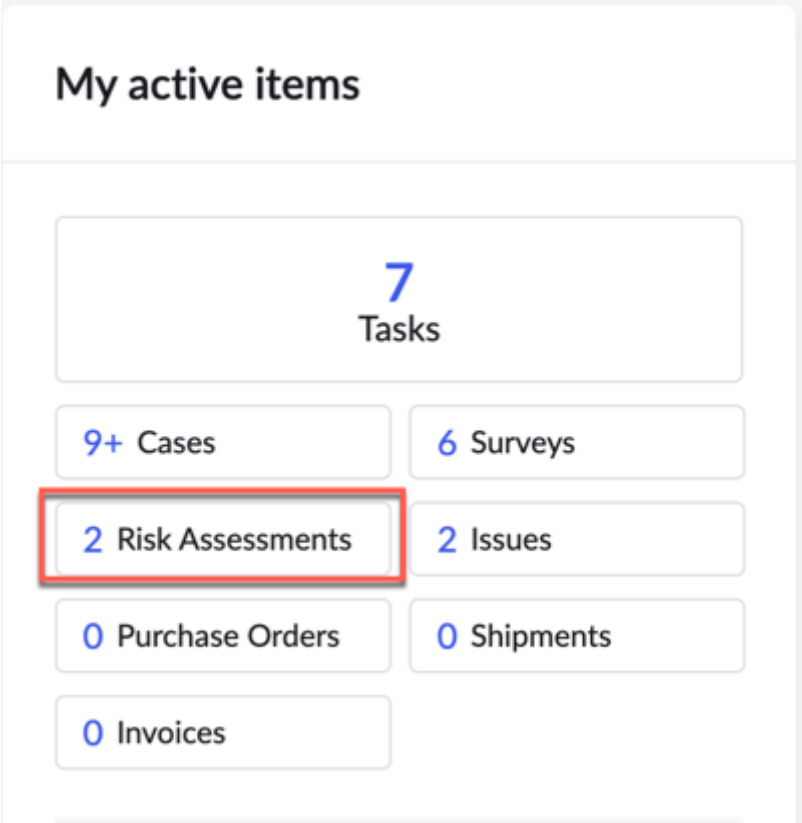
View and complete risk assessment records that a supplier manager creates when onboarding a new supplier or reassessing an existing engagement with a supplier.

The **Risk Assessments** tab shows assessments only if you've installed the Third-party Risk Management [com.sn_vdr_risk_asmt] plugin.

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**.

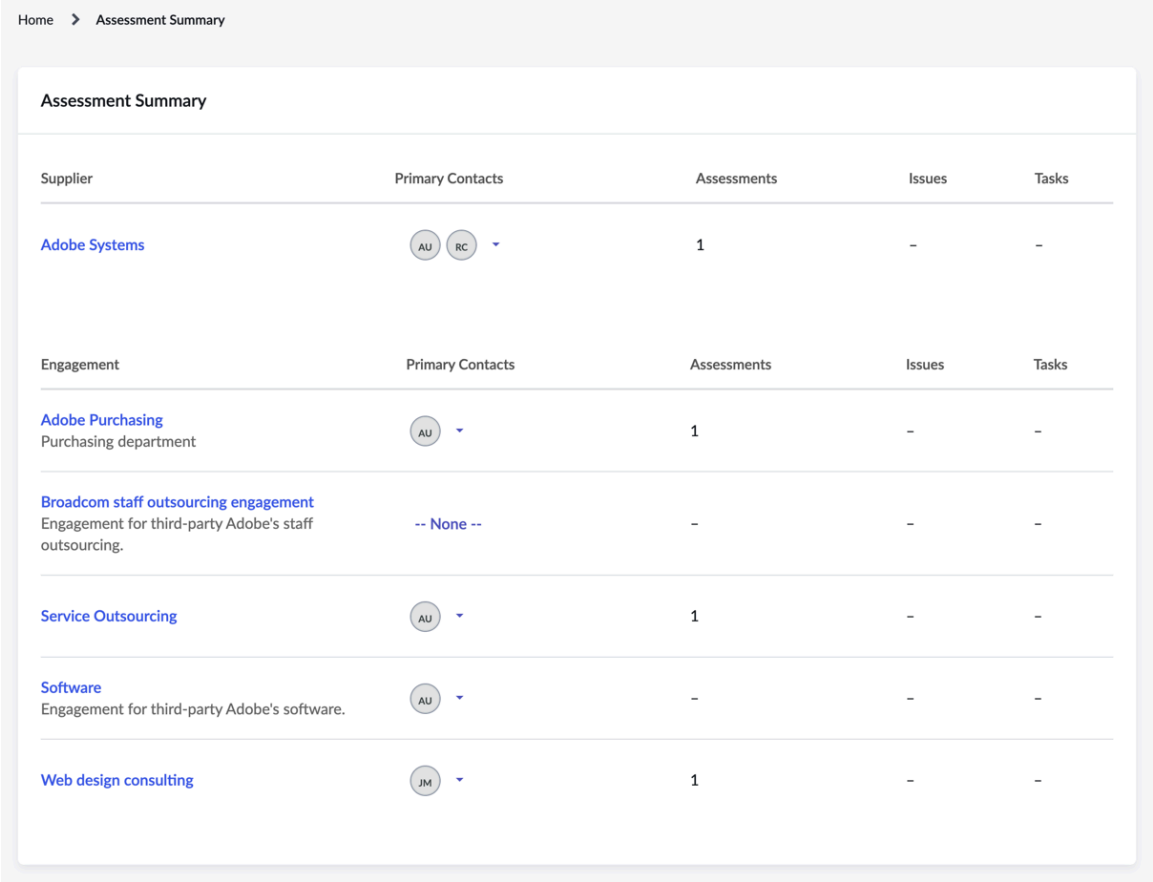
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3. The Assessment Summary page opens displaying a list of both Supplier (third-party) and Engagement risk assessments records.

Note:
Supplier Lifecycle Operations integrates with Third-party Risk Management to enable you to quickly view and work on all the assigned risk assessments.

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The Assessment Summary page contains the **Open** and **Closed** tabs. Select each tab to view the open and closed assessments.

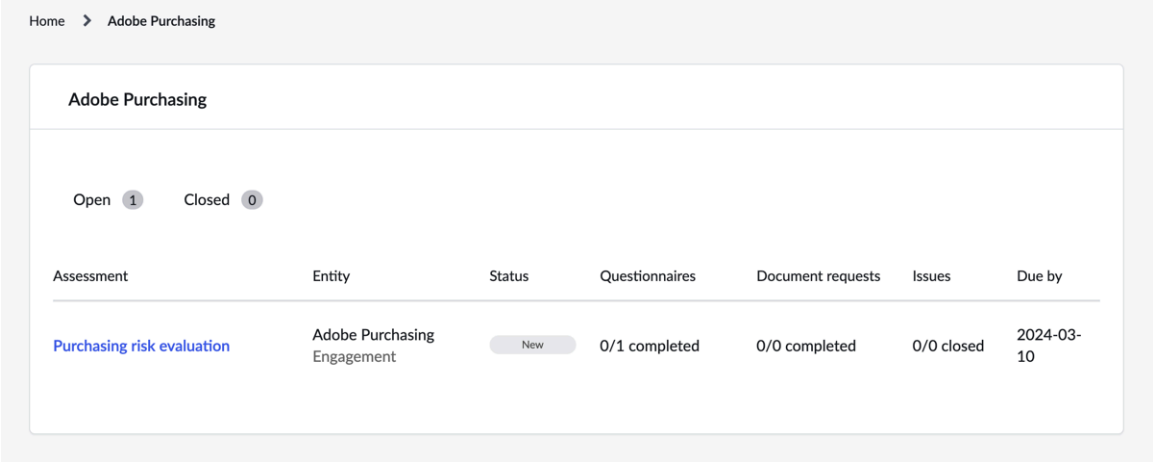
The Assessment Summary page has these columns.

- **Primary Contacts**: Primary contacts responsible for completing the assessments.
- **Assessments**: The count of assessments for a supplier or an engagement.
- **Issues**: The count of issues for a supplier or an engagement.
- **Tasks**: The count of tasks for a supplier or an engagement.

4. Under the Supplier column or the Engagement column, select the link to view more details.

   For example, under Engagement, select **Adobe Purchasing**, and then under the Assessment column, select the link to an assessment to view more details. For example, select **Purchasing risk evaluation**.

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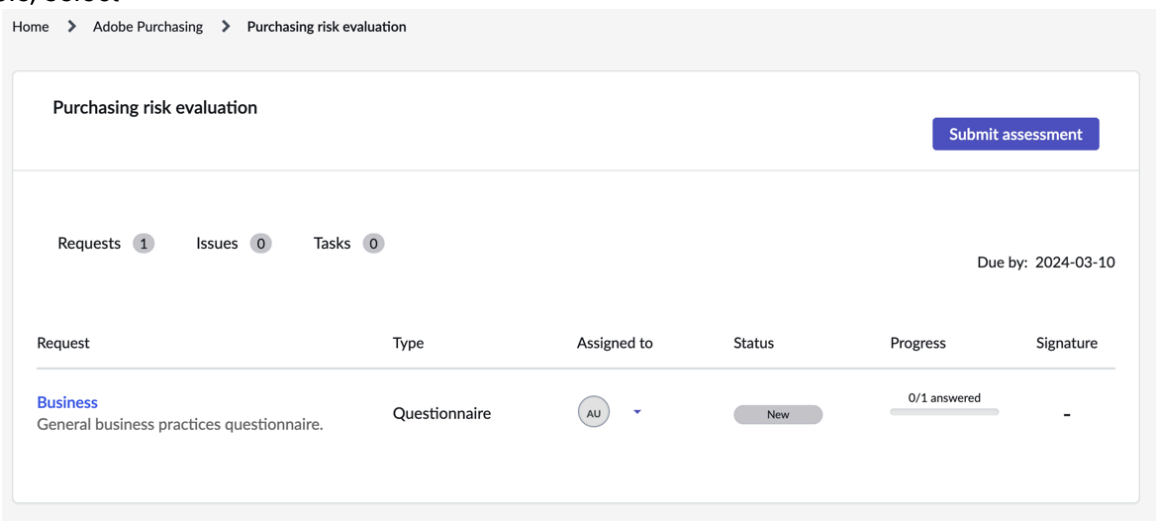


The assessment details page has these columns.

- **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.

5. Under the Request column, select the link to a request to view more details.

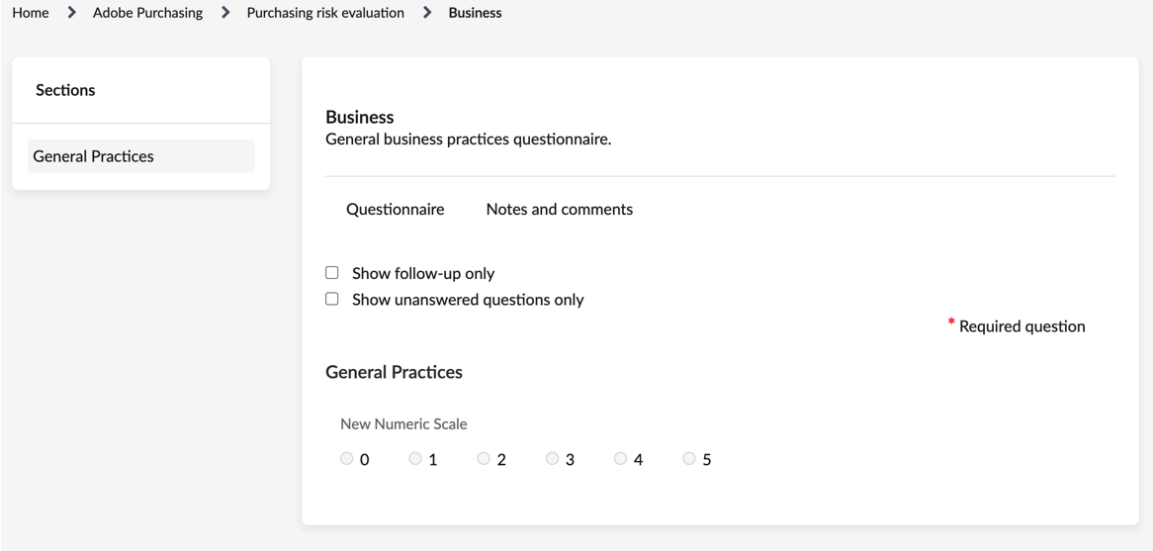
   For example, select **Business**.



   You can do the following:

   - Navigate through the various sections 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.

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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 Purchasing risk evaluation page.

7. Select **Submit assessment**.

Using Supplier Relationship and Performance Management

Use Supplier Relationship and Performance Management for monitoring and managing supplier performance.

Run segmentation rule

Run a segmentation rule to create and activate KPIs corresponding to the KPI templates and suppliers in that segment. This action also creates new collection tasks and assigns them to suppliers to collect their KPI data.

Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ) and navigate to **Lists** > **Performance management** > **Segmentation rules**.
3. In the Name column, select the link to the segmentation rule.
4. Select **Execute**.
   Running the segmentation rule does the following:

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- Generates KPIs and KPI collection tasks from the KPI templates in the segment if they were never generated before for the newly added suppliers.
- Sets the KPIs linked to this segment's KPI templates to active and creates new collection tasks for these KPIs.
- Assigns the new collection tasks to suppliers in this segment.

Note:
If the number of suppliers to be processed in the segmentation rule is too large, it may lead to a risk of a timeout.

Complete a KPI collection task from the Source-to-Pay Workspace

A KPI collection task is generated automatically each time a KPI is instantiated. A supplier manager can complete the assigned KPI collection task from the Source-to-Pay Workspace.

Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

A KPI is instantiated when:

- A segmentation rule is run.
- A supplier is added to the KPI template.
- An existing KPI template is added to the KPI management tab of a supplier.

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ) and navigate to **Lists** > **Performance management** > **KPIs**.
3. In the Name column, select the link to a KPI.
4. Select the **Tasks** tab.
5. In the Name column, select the link to a task.
6. Do one of the following:
   - If the requested KPI data is quantitative, in the **Quantitative KPI value** field, enter a numerical value.
   - If the requested KPI data is qualitative, from the **Qualitative KPI value** drop-down list, select a value.
   - If the KPI value isn't available, select the **KPI Value is not available** check box.
7. Select **Complete task**.

Complete a KPI collection task from the Supplier Collaboration Portal

A KPI collection task is generated automatically each time a KPI is instantiated. A supplier contact can complete the assigned KPI collection task from the Supplier Collaboration Portal.

Before you begin

Role required: sn_slm.contact

A KPI is instantiated when:

- A segmentation rule is run.
- A supplier is added to the KPI template.
- An existing KPI template is added to the KPI management tab of a supplier.

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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 Supplier Collaboration Portal header, select **My Tasks**.
   - (If you're a primary contact) In the Supplier Collaboration Portal header, select **Tasks** and then select **My Tasks.**
   - In the My active items widget, select **Tasks**.
3. On the **Open** tab, select the Provide KPI data task, and do one of the following:
   - If the requested KPI data is quantitative, in the **Quantitative KPI value** field, enter a numerical value.
   - If the requested KPI data is qualitative, from the **Qualitative KPI value** drop-down list, select a value.
4. Select **Submit**.

View KPI data from the List page of the Source-to-Pay Workspace

You can view the details of the existing KPIs from the List view page.

Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

Procedure

1. Navigate to **All** > **Supplier Lifecycle Operations** > **Source-to-Pay Workspace**.
2. Do one of the following steps to view KPIs In the Source-to-Pay Workspace:
   - Select the list icon (), navigate to **Lists** > **Performance management** > **KPIs**.
   - Select the list icon (), navigate to **Lists** > **Performance management** > **KPI Templates**. In the Name column, select the link to a KPI template, and then select the **KPIs** tab.
3. In the Name column, select the link to a KPI.

KPIs form

Tab	Description
Details	Displays information about basic details, KPI properties, and data collection that you specified in the in the KPI template. This tab also indicates whether the KPIs are qualitative or quantitative.
Thresholds	Lists the KPI thresholds that you configured for the KPI template.
KPI Data	Displays the KPI data that is collected based on the specified collection frequency in the KPI template.
Tasks	Lists the tasks of Action type **Provide input**. Each task is assigned to the user that you specified in the **Collection source type** field for the KPI template.

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Tab	Description
	The supplier manager completes the assigned task from the Source-to-Pay Workspace. For more information, see Complete a KPI collection task from the Source-to-Pay Workspace. The supplier contact completes the assigned task from the Supplier Collaboration Portal. For more information, see Complete a KPI collection task from the Supplier Collaboration Portal.

Manage supplier KPIs from the supplier record page of the Source-to-Pay Workspace

You can view the latest KPI data that is collected for a particular supplier from the supplier page of the Source-to-Pay Workspace.

Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

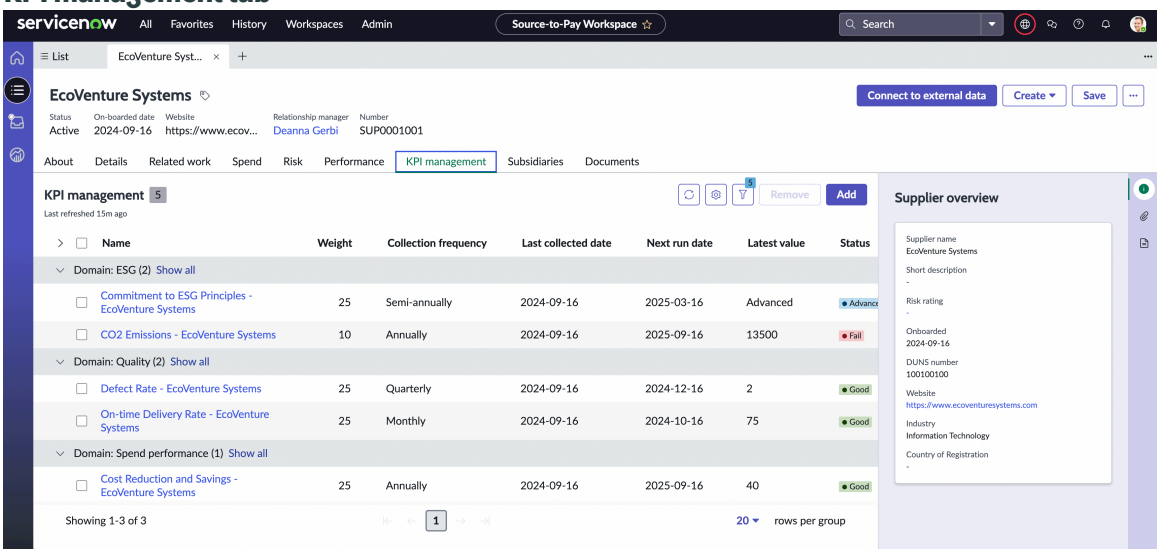
Procedure

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.
4. Select the **KPI management** tab.

   The **KPI management** tab contains columns that provide details, such as KPI, weight, collection frequency, last collected date, next run date, latest value, and status.

   All the KPIs that are listed on this tab are grouped by the KPI performance domain set in the KPI template they were created from.

KPI management tab



Note:
You can add new KPIs or remove existing KPIs for the selected supplier from the **KPI management** view.

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View supplier performance dashboard

You can view the overall supplier score, risk score, individual KPI scores, and performance domain-specific scores in the supplier performance dashboard.

Before you begin

Role required: sn_kpi.admin or sn_slm.manager or sn_slm.admin

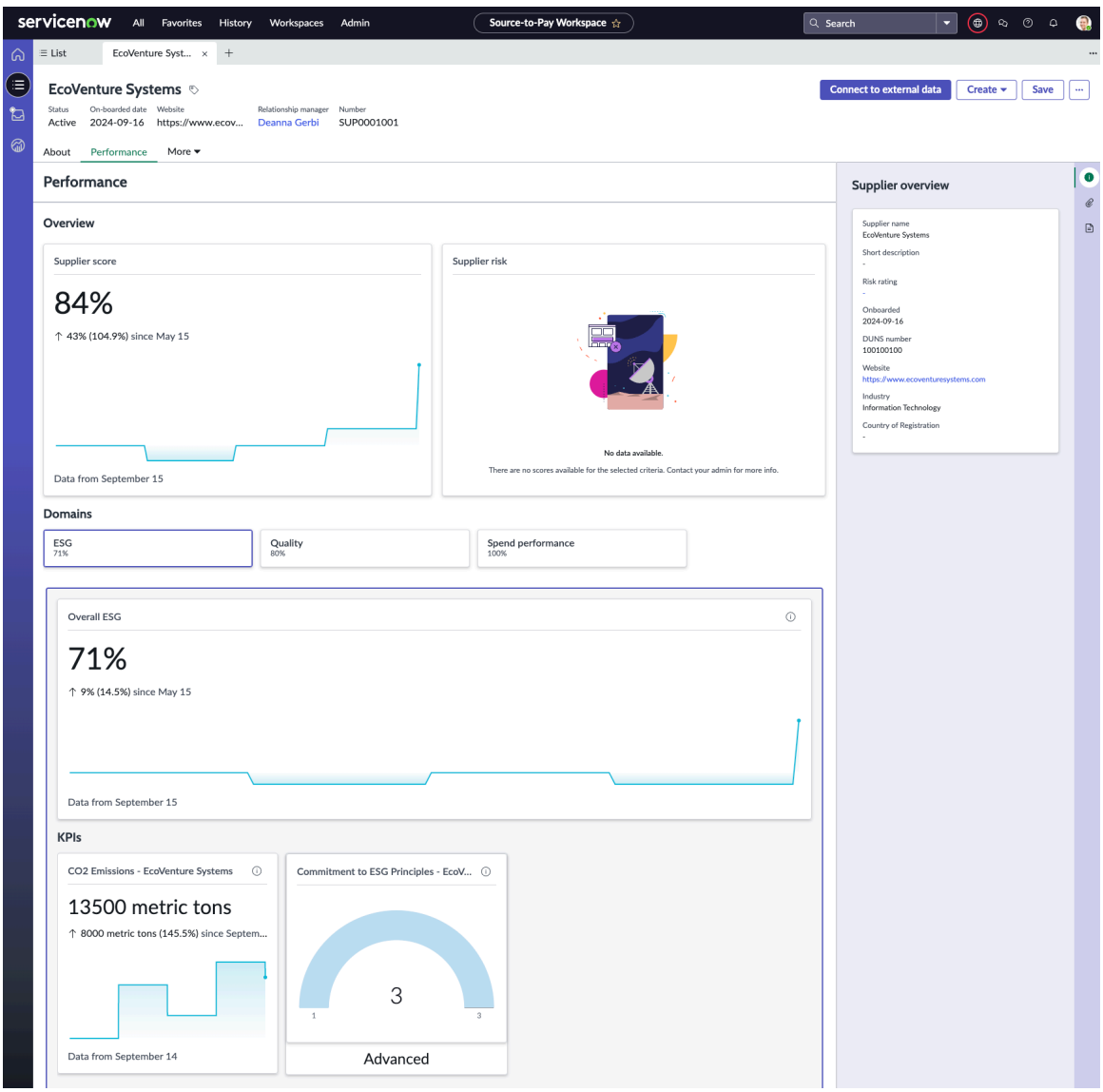
Procedure

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.
4. Select the **Performance** tab.

   The **Performance** tab displays the overall score and risk profile of the supplier. You can also view the performance domain-wise KPI scores of the supplier.

   All the KPIs are grouped by the performance domain set in the KPI template that they were created from.

Performance tab



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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	The current state of the case. The choices are: • **Draft** • **Open** • **Work in progress** • **Awaiting task completion** • **Closed completed** • **Closed rejected** • **Closed canceled**
Case type	The type of case. The choices are: • **Supplier support request** • **General inquiry** • **Banking information change request** • **Supplier information change request** • **Supplier location change request** • **Supplier issue** • **Due diligence** • **Offboard a supplier**
Priority	Indicates how quickly you must complete the case 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.

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Create New Supplier Case form (continued)

Field	Description
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.
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	Location of the supplier.
Expected start	Expected start date of the case.
Actual start	Actual start date of the case.
Actual end	Actual end date of the case.
Duration	Duration to complete the case.

Create new task form

Use the Create new task form to add a new task to a supplier case.

Create new task form

Field	Description
Who is this task for?	Option to select who this task is intended for. The options are: • **Supplier** • **An employee at my company**
Action type	Action type that defines the supplier task. The options for a supplier task are: • **Complete a form** • **Complete checklist** • **Complete survey** • **Mark complete** • **Play video** • **Sign document** • **Upload documents** • **View link** Action type that defines the employee task. The options for an employee task are:

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Create new task form (continued)

Field	Description
	• **Mark complete** • **Play video** • **Upload documents** • **View link**

Task form

Use the **Details** tab of the task form to provide details about the supplier or employee task.

Details tab of the task form

Field	Description
General	
Number	An auto-generated number that uniquely identifies the task.
State	The current state of the task. The choices are: • **Draft** • **Work in progress** • **Awaiting completion** • **Closed complete** • **Closed incomplete** • **Closed canceled**
Supplier	The name of the supplier the task is for.
Priority	Indicates how quickly you must complete the task based on its severity.
Task audience	Identifies whether the task is assigned to an internal or external user.
Assigned to	Person that you want to assign this task to.
Action type	The type of the task.
Due date	Date that this task must be completed by.
Opened by	The person who opened the case.
Created	The date that the task is created.
Watch list	Users who are notified when updates are made to the task.
Short description	Brief description about the task.
Description	Detailed description about the task.
Summary details	
Supplier case	Supplier case to associate this task with.
Related task	Task that is related to this task.
Related location	Location of the supplier.

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Details tab of the task form (continued)

Field	Description
Expected start	Expected start date of the case.
Actual start	Actual start date of the case.
Actual end	Actual end date of the case.
Duration	Duration to complete the case.

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	The category that the supplier location belongs to. The choices are: • Contracting address • Delivery address • Facility (default) • Headquarters • Invoice address • Service center You can select multiple values from the choice list.

Update banking details form

Use the Update banking details form to update the banking details of the supplier.

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Update banking details form

Field	Description
Bank Name	Name of the bank.
Primary account	Option that indicates whether this account is the primary account. **Note:** A supplier can have only one primary payment record at a given time.
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. 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)	A 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	
Supplier	Name of the supplier whose profile details have to be updated. **Note:** The Supplier field is available from the Xanadu December 2024 release onwards.
Legal name	Legal name of the supplier.
Company description	Detailed description of the supplier.

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Update profile details form (continued)

Field	Description
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	A 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: • **Yes** • **No**
Stock symbol	Stock symbol of the supplier.
Primary phone number	Primary phone number of the supplier.
Any other attributes or details 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.

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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: • **Policy** • **Guideline** • **Procedure** • **Contract**
Classification	Classification of the document. The choices are: • **Public** • **Restricted** • **Confidential**
State	The state of the document. The choices are: • **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.

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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.
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.
Valid NDA	Boolean	Status of whether the supplier has a valid non-disclosure agreement. The options are Yes or No.
Valid risk assessment	Boolean	Status of whether a valid risk assessment has been performed for the supplier. The options are Yes or No.
Customer number	String	Unique identifier for the organization to the supplier.
On-boarded by	String	The person responsible for onboarding the supplier.
On-boarded date	String	Onboarding date of the supplier.
Off-boarded date	String	Termination date of the supplier from the organization.
Preferred	Boolean	Whether the supplier is preferred. The options are Yes or No.
PO box number	String	Post office box number where the supplier correspondence and payments are made.
ERP company code	String	Company code of the supplier in the ERP system.
ERP source	String	ERP source used by the organization.
Parent entity	String	Parent organization of the supplier.

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Supplier table (continued)

Field	Data type	Description
Street address	String	Street where the supplier is located.
City	String	City where the supplier is located.
State/ Province	String	State or province where the supplier is located.
County/ District	String	County or district where the supplier is located.
ZIP/Postal code	String	Zip code or postal code where the supplier is located.
Country	String	Country where the supplier is located.
Region	String	Region where the supplier is operating. Options are AMS, APAC, EMEA, or LATAM.
Primary phone number	String	Phone number of the primary contact from the supplier side.
Fax number	String	Number to which documents can be faxed to the supplier.

Vendor Contact table

The Vendor Contact [vm_vdr_contact] table stores important information about a vendor contact.

Vendor Contact [vm_vdr_contact] table

The Vendor Contact [vm_vdr_contact] table contains the following fields.

Vendor Contact table

Field	Data type	Description
First name	String	First name of the vendor contact.
Last name	String	Last name of the vendor contact.
Vendor	Reference	The name of the vendor the vendor contact belongs to.
Email	Email	Email address of the vendor contact.
Primary contact	Boolean	Indicates whether the vendor contact is a primary contact.

Supplier Contact table

The Supplier Contact [sn_slm_contact_m2m_supplier] table stores information about supplier contacts and suppliers linked to them.

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Supplier Contact [sn_slm_contact_m2m_supplier] table

Important:

The Supplier Contact table is available from the Xanadu December 2024 release onwards.

Previously, the `Organization` field from the `Vendor Contact` table was used to fetch the mapping between the supplier contact and the supplier. From Xanadu December 2024 release onwards, the `Supplier Contact` table is used to fetch this mapping.

The Supplier Contact [sn_slm_contact_m2m_supplier] table contains the following fields.

Supplier Contact table

Field	Data type	Description
Supplier contact	Reference	Name of the supplier contact.
Supplier	Reference	Name of the supplier.
Default supplier	Boolean	Indicates whether the supplier is the default supplier for the supplier contact.
Primary contact	Boolean	Indicates whether the supplier contact is the primary contact for the supplier.

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 name (which comes after the @ symbol) of the supplier. **Note:** By default, the length of the email domain can be 2–4 characters.
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.

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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: • 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: • Contracting address • Delivery address • Facility (default) • Headquarters • Invoice address • Service center

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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. **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.
Bank identification number	String	Number that uniquely identifies the supplier payment record in an ERP system.
Beneficiary name on account	String	Name of the beneficiary.
Account number	Password2	Account number of the beneficiary.

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.

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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.

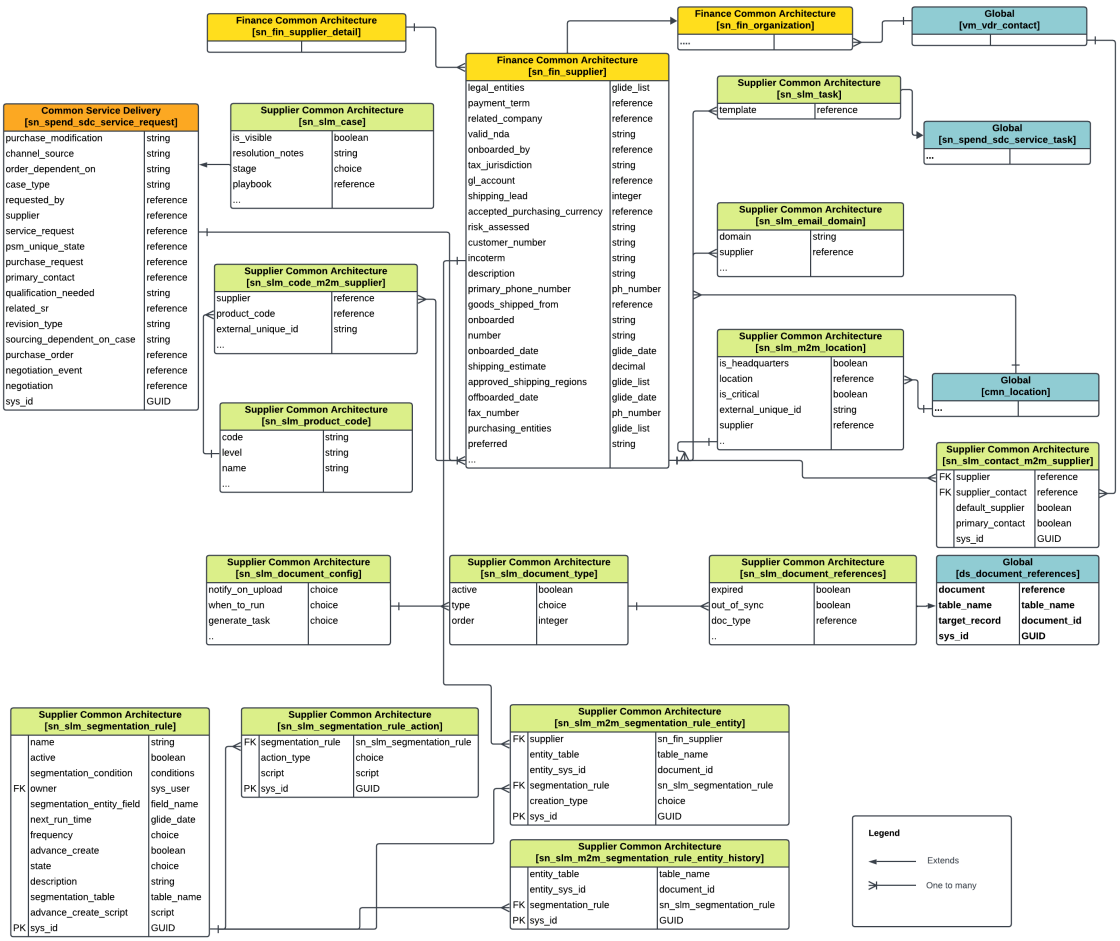
Related topics

Domain separation for service providers

Supplier Lifecycle Operations data model

The following diagram shows the tables and their relationships that comprise the Supplier Lifecycle Operations data model.

Supplier Lifecycle Operations data model



Note:
The table Supplier Contact [sn_slm_contact_m2m_supplier] is added after the Xanadu December 2024 release.

Supplier Relationship and Performance Management reference

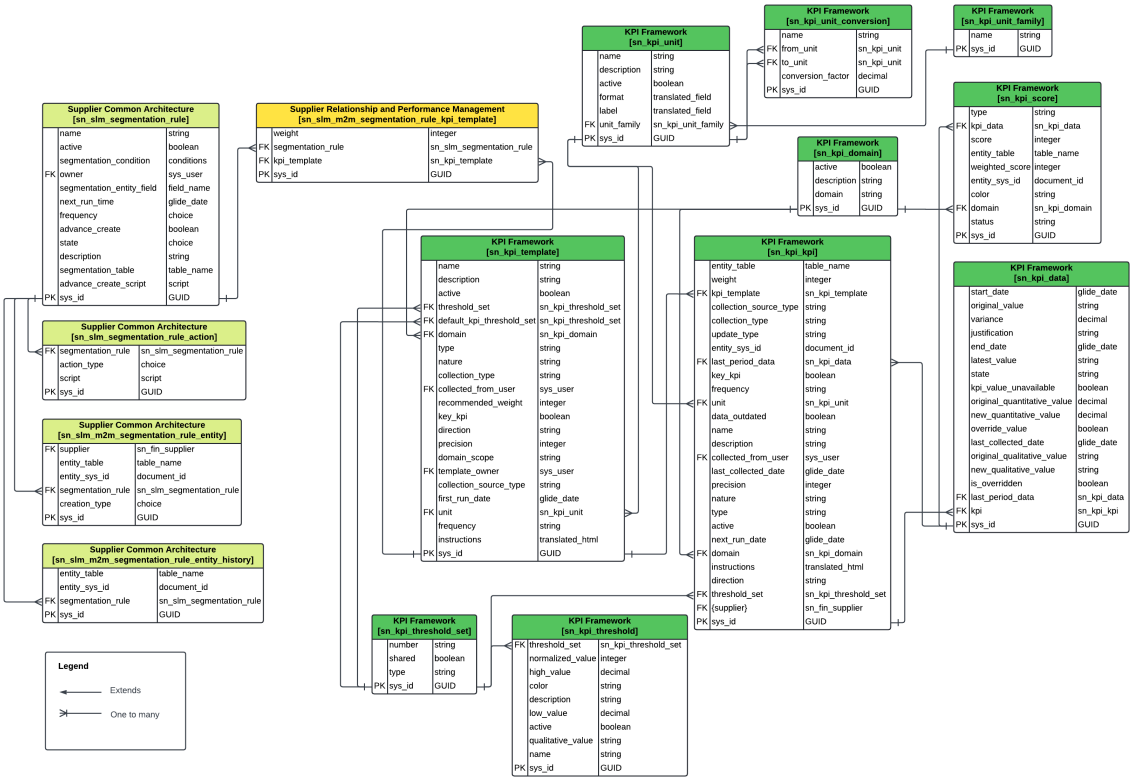
Reference topics provide additional information about Supplier Relationship and Performance Management, including its data model, lists, and forms.

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Supplier Relationship and Performance Management data model

The following diagram shows the tables and their relationships that comprise the Supplier Relationship and Performance Management data model.

Supplier Relationship and Performance Management data model



Primary data tables for Supplier Relationship and Performance Management (SRPM)

The primary data tables for Supplier Relationship and Performance Management store important information about KPI configurations, KPI data, and generated scores.

KPI Template table

The KPI Template [sn_kpi_template] table stores the configurations required to create KPIs.

KPI Template [sn_kpi_template] table

The KPI Template [sn_kpi_template] table contains the following fields.

KPI Template table

Field	Data type	Description
Name	String	Name of the KPI template.
Description	String	Brief description of the KPI template.
Active	Boolean	Status of the KPI template.
Threshold set	Reference	Set of thresholds created for this template.
Domain	Reference	Performance domain of the template.
Type	Choice	Indicates the type of the KPI template.

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KPI Template table (continued)

Field	Data type	Description
Nature	Choice	Indicates whether the KPI is leading (predicts future), lagging (measures past performance), or current (monitors ongoing activities).
Collected from user	Reference	The person who provides the data.
Recommended weight	Integer	Determines the importance of the KPI in the overall performance score when multiple KPIs are collected.
Direction	Choice	Indicates whether the KPI should be minimized or maximised to show the ideal trend of the values.
Precision	Integer	Specifies the number of decimal points to be used for data collection to ensure accuracy and consistency.
Template owner	Reference	The person who owns the KPI template.
Collection source type	Choice	The user persona that provides the data.
Unit	Reference	Measurement unit used to quantify the KPI.
Collection frequency	String	The frequency for collecting the KPI data.
Instructions	Translated html	Populated in KPI collection tasks to give more context to the user providing the KPI data.

KPI table

The KPI [sn_kpi_kpi] table stores the important information about the KPIs created.

KPI [sn_kpi_kpi] table

The KPI [sn_kpi_kpi] table contains the following fields.

KPI table

Field	Data type	Description
Name	String	Name of the KPI.
Description	String	Brief description of the KPI.
Active	Boolean	Status of the KPI.
KPI Template	Reference	KPI Template used to create the KPI.
Supplier	Reference	Supplier for which this KPI is created.
Threshold set	Reference	Set of thresholds created for this KPI.
Domain	Reference	Performance domain of the KPI.
Type	Choice	Indicates the type of the KPI.

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KPI table (continued)

Field	Data type	Description
Nature	Choice	Indicates whether the KPI is leading (predicts future), lagging (measures past performance), or current (monitors ongoing activities).
Collected from user	Reference	The person who provides the data.
Weight	Integer	Determines the importance of the KPI in the overall performance score when multiple KPIs are collected.
Direction	Choice	Indicates whether the KPI should be minimized or maximised to show the ideal trend of the values.
Precision	Integer	Specifies the number of decimal points to be used for data collection to ensure accuracy and consistency.
Collection source type	Choice	The user persona that provides the data.
Unit	Reference	Measurement unit used to quantify the KPI.
Collection frequency	String	The frequency for collecting the KPI data.
Instructions	Translated html	Populated in KPI collection tasks to give more context to the user providing the KPI data.
Next run date	Date	Next scheduled run date of the KPI to collect the data.
Last collected date	Date	Latest date on which KPI data is collected.
Last period data	Reference	Latest KPI data.
Entity table	Table name	Table in which the entity belongs.
Entity Sys ID	Document ID	Sys ID of the entity.

KPI Data table

The KPI [sn_kpi_data] table stores the collected data for all the KPIs.

KPI Data [sn_kpi_data] table

The KPI Data [sn_kpi_data] table contains the following fields.

KPI Data table

Field	Data type	Description
KPI	Reference	KPI to which this data belongs to.
Collection start date	Date	Collection interval start date.

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KPI Data table (continued)

Field	Data type	Description
Collection end date	Date	Collection interval end date.
State	Choice	State of the data.
Last period data	Reference	Previous data collected for the KPI.
Threshold set	Reference	Set of thresholds created for this KPI.
Domain	Reference	Performance domain of the KPI.
Type	Choice	Indicates the type of the KPI.
Nature	Choice	Indicates whether the KPI is leading (predicts future), lagging (measures past performance), or current (monitors ongoing activities).
Collected from user	Reference	The person who provides the data.
Weight	Integer	Determines the importance of the KPI in the overall performance score when multiple KPIs are collected.
Variance	Decimal	Variance between current data and previous data of the KPI.
Original value	String	Original value collected through the collection task.
Latest value	String	Latest value of the data.
Kpi value unavailable	Boolean	True if the value isn't available for this interval.
Override value	Boolean	Checked to override the submitted KPI data.
Is overridden	Boolean	Indicates whether the data is overridden.
Justification	String	Reason for overriding the data.

Performance Domain table

The Performance Domain [sn_kpi_domain] table stores the information about the performance domains created for the KPIs.

Performance Domain [sn_kpi_domain] table

The Performance Domain [sn_kpi_domain] table contains the following fields.

Performance Domain table

Field	Data type	Description
Domain	String	Name of the KPI performance domain.
Description	String	Brief description of the KPI performance domain.

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Performance Domain table (continued)

Field	Data type	Description
Active	Boolean	Indicates whether the KPI performance domain record is active. This option is enabled by default.

Unit table

The Unit [sn_kpi_unit] table stores the information about the units created for KPIs.

Unit [sn_kpi_unit] table

The Unit [sn_kpi_unit] table contains the following fields.

Unit table

Field	Data type	Description
Active	Boolean	Indicates whether the KPI unit record is active. This option is enabled by default.
Label	String	Symbol or label of the KPI unit.
Unit family	Choice	Category under which the unit is listed.
Description	String	Brief description of the KPI unit.
Name	String	Name of the KPI unit.
Format	String	Format in which the value is displayed.
Domain	Choice	Category under which the unit is listed.

KPI Threshold table

The KPI Threshold [sn_kpi_threshold] table stores the information about threshold values or value ranges configured for KPIs or KPI templates.

KPI Threshold [sn_kpi_threshold] table

The KPI Threshold [sn_kpi_threshold] table contains the following fields.

KPI Threshold table

Field	Data type	Description
Name	String	Name of the KPI threshold.
Label	String	Label for the KPI threshold.
Description	String	Brief description of the KPI threshold.

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KPI Threshold table (continued)

Field	Data type	Description
Active	Boolean	Option that indicates the threshold is active for use.
Low Value	Integer	Represents the low value in the KPI threshold value range.
High Value	Integer	Represents the high value in the KPI threshold value range.
Normalized value	Integer	Indicates a value that has been calculated from its original figure to fit a specific scale for easy comparison with other values. For example, a scale of 1–5.
Color	String	Color for the threshold.

Supplier Lifecycle Operations glossary

Learn about the terms and concepts used in Supplier Lifecycle Operations (SLO).

Glossary terms are grouped alphabetically.

A | C | I | N | O | P | R | S |

A

Advanced Work Assignment for Supplier Lifecycle Operations

An application that automatically assigns supplier cases to agents based on availability and capacity, ensuring efficient case handling within Supplier Lifecycle Operations.

C

Craft.co integration for Supplier Lifecycle Operations

Provides integration with Craft.co, a supplier intelligence platform, to enhance supplier data management and decision-making within Supplier Lifecycle Operations.

child case

A case that is linked to and is a part of a parent case, inheriting its context and contributing to its resolution or management.

I

inbound staging tables

Tables that temporarily store the supplier data that is imported from external systems.

N

News Integration for Supplier Lifecycle Operations

An integration that retrieves recent news and relevant articles related to suppliers from preferred news channels. Includes a pre-configured integration with Microsoft Bing News Search API.

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O

outbound staging tables

Tables that store the supplier data before it is exported to external systems. These tables are updated automatically when the corresponding primary tables are updated.

P

parent case

A case that contains multiple related child cases. This hierarchical case structure is useful for managing complex scenarios that involve multiple stages and processes.

R

Risk assessments integration for Supplier Lifecycle Operations

Provides an integration with Third-party Risk Management to conduct risk assessments during supplier onboarding or reassessment of existing suppliers.

related case

A case that is associated with another case due to shared characteristics, dependencies, or interactions.

S

Source-to-Pay Workspace

A workspace that centralizes the management of suppliers, from sourcing to payment, enhancing productivity and collaboration.

supplier

A person, business, or an enterprise that provides raw materials, goods, or services to another organization.

supplier case

A case that is opened in the Source-to-Pay Workspace to address supplier-related issues that arise during different phases of the supplier lifecycle, from onboarding to offboarding.

Supplier Collaboration Portal

A web-based interface that provides a unified portal experience for supplier contacts, enabling self-service, direct collaboration, and management of supplier-related tasks and information.

supplier contact

Person that allows individuals from the supplier side to access the Supplier Collaboration Portal, manage tasks, and interact with the buying organization.

supplier document configuration

Stores the supplier document configurations, detailing when and how documents should be managed and notified.

supplier document management

Functionality that enables you to manage supplier-related documents, including creating and running a supplier document configuration required to upload the prerequisite documents.

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supplier fulfiller

Person responsible for fulfilling tasks and cases related to suppliers, ensuring compliance with service level agreements and operational standards.

supplier integration framework

A framework that enables Supplier Lifecycle Operations to exchange supplier data with third-party ERP systems.

Supplier Lifecycle Operations

A framework that enables Supplier Lifecycle Operations to exchange supplier data with third-party ERP systems.

supplier manager

Person responsible for managing supplier relationships, overseeing supplier onboarding, tracking cases and tasks, and conducting supplier risk assessments.

supplier offboarding

The process of discontinuing a business relationship with a supplier, involving tasks such as deletion of supplier primary data, settlement of accounts, and deactivation of access to your systems.

supplier onboarding

The process of registering, qualifying, and activating suppliers to do business with the organization.

supplier owner

Person responsible for ownership and management of specific suppliers, including the ability to update supplier information and manage related cases and tasks.

supplier task

A task that is created in the Source-to-Pay Workspace and assigned to internal users or suppliers contacts to take action and complete that task.

Accounts Payable Operations

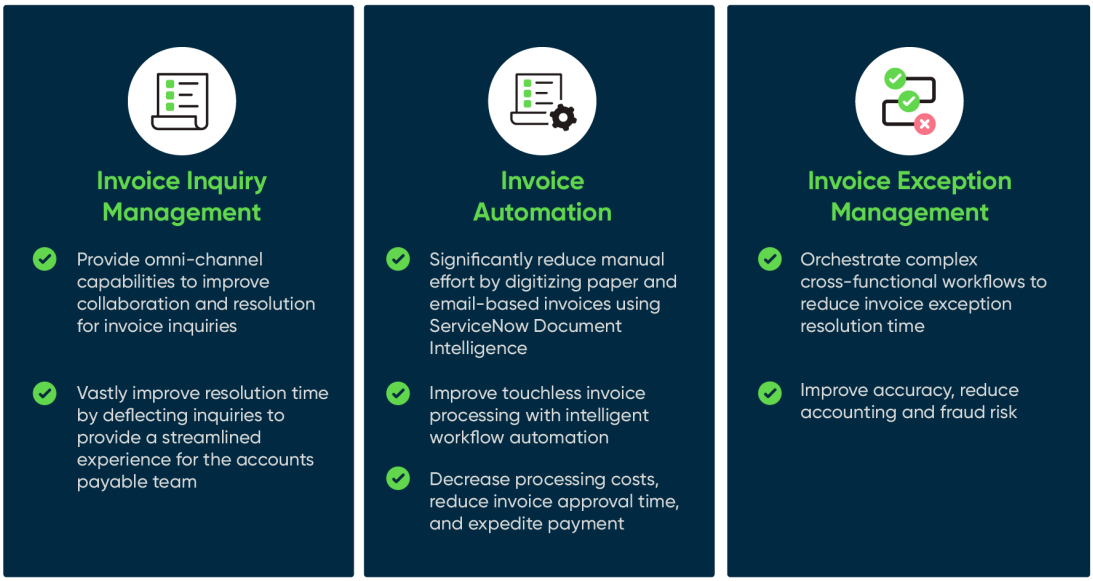
The ServiceNow® Accounts Payable Operations application enables you to efficiently manage invoices, invoice exceptions, invoice approvals, and supplier inquiries.

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Accounts Payable Operations value proposition

Accounts Payable Operations

Simplifies the accounts payable specialist experience and maximizes productivity



Explore	Configure	Integrate
Learn about how accounts payable specialists, employees, and suppliers use Accounts Payable Operations.	Plan and configure your implementation.	Extend the capabilities of Accounts Payable Operations by integrating with other applications.
Use	**Reference**	
Work on invoices, view invoice statuses, identify and resolve invoice exceptions.	Get details about components, such as fields, tables, and properties.	

Helpful resources

Here are some additional ServiceNow resources that can help you:

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Release Notes

Learn more about what's new and changed. See the Accounts Payable Operations release notes.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as APO Implementation Bootcamp and more, from ServiceNow University.

Now Create

Log in to your ServiceNow account and find additional information about implementing and deploying Accounts Payable Operations features at Now Create.

YouTube

Learn more about the value that you can add to your business with the Source-to-Pay suite. Watch Multiply the value of your ServiceNow platform with Source-to-Pay workflows on YouTube.

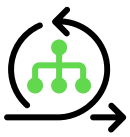
ServiceNow Community

Connect with other Accounts Payable Operations users at ServiceNow Community.

Now Assist for Accounts Payable Operations (APO)

Use the ServiceNow® Now Assist for APO application to help your fulfillers become more productive and efficient as they work. Through generative AI, you can enable your fulfillers to automatically create cases, summarize and ingest the invoices, and then use workflows to perform end-to-end invoice processing.

Get started

Explore	Configure	Use
		
Learn more about Now Assist for APO	Configure the Now Assist for APO application to get started	Use the generative AI capabilities that are offered by Now Assist for APO

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Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- Ask questions and explore other resources for Accounts Payable Operations in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Further, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Accounts Payable fulfillers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Now Assist for Accounts Payable Operations (APO)

With the Now Assist for Accounts Payable Operations (APO) application, an accounts payable (AP) fulfiller can use generative AI to summarize the details of a case to quickly get the context of the case.

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Now Assist for APOoverview

Using the summarization capability of the Now Assist for APO application, an AP fulfiller can get a concise summary of a case quickly.

A case summary enables an AP fulfiller to gather the context on pending cases or complex cases. These cases can contain many details, including the conversations with the customers or other fulfillers.

Skills

The Now Assist for APO application includes the generative AI skills that enable an AP fulfiller to understand the context of an invoice case or inquiry case so that they can propose resolutions to the customer more quickly.

Case summarization

Provides an AP fulfiller with a summary of an invoice case, including the issue, the actions completed, the status of the case, and the next steps to resolve the case. An AP fulfiller can generate a summary of a case to understand the case context, refresh the summary so that it includes the latest updates to the case, and post the summary to the case work notes.

The case summarization skill generates a case summary and displays it above the activity stream.

For invoice processing cases, the case summarization skill generates a case summary by checking the invoice status and the invoice information in the document.

For inquiry cases, the case summarization skill generates a case summary by checking the short description, description, and tasks that were created for the case.

Supporting information for Now Assist for Accounts Payable Operations (APO)

Get a quick overview of the important information that is related to the Now Assist for Accounts Payable Operations (APO) application.

Supported versions

The Now Assist for APO application is supported starting with Xanadu.

Supported user interfaces

The Now Assist for APO application includes the skills that are listed in the following table.

Now Assist for APO supported interfaces

Interface	Skill
Source-to-Pay Workspace	Case summarization for AP fulfillers involves invoice case summarization and inquiry case summarization.
Core UI	Record summarization involves invoice case summarization and inquiry case summarization.

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Application information

Activate the Now Assist for APO store app (sn_ap_gen_ai) to use the Case summarization skills.

This store app has the following dependencies:

Now Assist for Platform (com.sn.now.platform)

Activate the applications in the following order:

1. Now Assist for Platform (sn_genai_platform)
2. Now Assist for APO (sn_ap_gen_ai)

For more information, see Configure Now Assist for Accounts Payable Operations (APO).

Configure Now Assist for Accounts Payable Operations (APO)

If you have the admin role, you can configure the Now Assist for Accounts Payable Operations (APO) application so that an accounts payable (AP) fulfiller can use the generative AI skills in Source-to-Pay Workspace and in Core UI.

APO configuration overview

- Now Assist

  Use the Now Assist Admin console to configure APO. This console contains everything that you need to install the plugin [sn_ap_gen_ai] and configure the generative AI skills.

- See the Configuring Now Assist settings and features topic.

  Use the Now Assist Admin console to activate the various Now Assist applications and skills that you're entitled to.

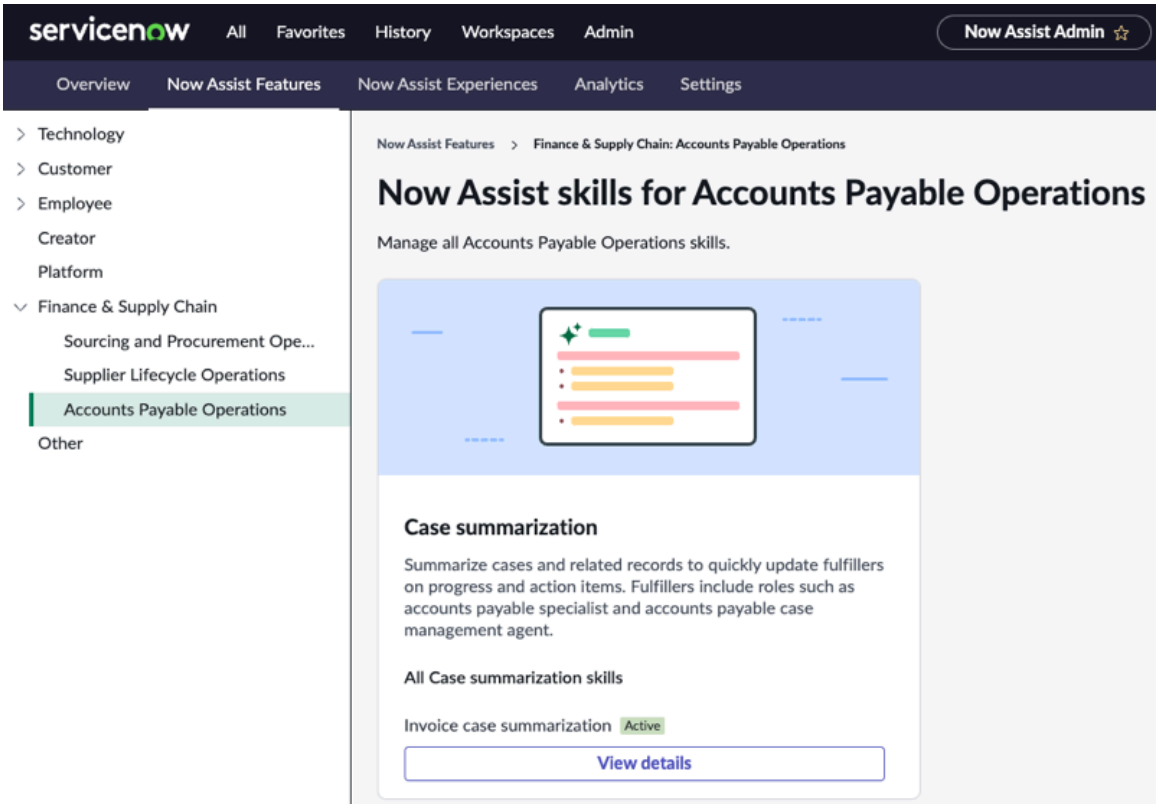
The following table lists the features and skills that you can access from the Now Assist Admin console.

APO features and skills in the Now Assist Admin console

APO features	Skills
Case summarization	Invoice case summarization

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Now Assist skills for APO



Install Now Assist for Accounts Payable Operations (APO)

Install the APO plugin [sn_ap_gen_ai] so that an accounts payable (AP) fulfiller can use the generative AI skills in Source-to-Pay Workspace and in Core UI.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. Expand the **Finance and Supply Chain** workflow group and select **Accounts Payable Operations**.

   The APO features are grouped under the **Finance and Supply Chain** workflow group. Each feature has its associated skills.
3. Activate and configure the skills for the APO application.

Skills	Action
Case summarization	**a.** On the Case summarization skill card, select **View details**. **b.** In the All available Record summarization skills section, select **Activate skill**.

4. Select **General Details**, review the details about the skill, and then select **Save and continue** to go to the next step.
5. Follow the steps to configure and activate a skill by using the Guided Setup.

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6. Select **View Case Input**, review the base input table and input fields, and then select **Save and continue** to go to the next step.
7. **Optional:** To test the prompt on a record, select **Customize and test prompt**.
8. Select **Save and continue** to go to the next step.
9. **Optional:** Select **Define Availability** and choose one of the following options.

10. Select **Save and continue** to go to the next step.
11. Select **Select display** and **In-product** to display the skill.
12. Select **Save and continue** to go to the next step.
13. Review your choices and select **Activate** to complete the configuration for the skill.
14. Complete the setup by selecting **Done**.
    The skill is displayed in the Active skills section.

Customize a Now Assist for Accounts Payable Operations (APO) skill

If you have the admin role, you can customize a Now Assist for Accounts Payable Operations (APO) skill so that an accounts payable (AP) fulfiller can use the generative AI skills in Source-to-Pay Workspace and in Core UI.

Before you begin
Role required: admin

About this task
From the Now Assist Admin console, you can select the input table, related records, and fields for each input template of the Case Summarization skill and then configure the prompt headers to be included in the general summary.

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. In the **Finance and Supply Chain** workflow group, select **Accounts Payable Operations** to view the skills for the APO features.
3. Create a copy of a skill and customize the input fields.

   a. On the Invoice case summarization for the APO specialists feature card, select **View details**.

   b. In the Active skills section, locate the skill that you'd like to copy and select the More actions icon (⋮).

   c. Select **Make copy**.

      The copy that you make is listed in the Active skills section.

   d. Select the copied skill from the Active skills section to open it.
      A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the skill is activated.

4. In the General details step, fill in the fields.

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a. Enter a name and description for the skill.

b. Select **Save and continue** to go to the next step.

5. View the input data for each skill, such as the base input fields and related lists for the different input templates.

   Configure the base input table fields and related lists for the different input templates for the skill.

   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   Select only those related tables that are offered as the base system, as part of the input data.

   a. For each input template state, select **+New base input field** and configure the base input table fields.

      Add multiple base input fields, as necessary.

      The following table lists the base input table fields and descriptions, including a relevant example.

      Base input fields

Field	Description
Base input field	Field in the case table whose value this skill uses in its response. For example, `Short description`.
Field description	Description of the base input field value. For example, `Short description of case, provides quick info about the case.`

   b. For each input template state, configure the rule conditions by using the condition builder to filter the data.

      The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

      You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

   c. For each input template state, select **+New data source** to configure the additional related table and activity stream data, as needed.

      You can add input data sources like related tables, activity streams, and relationships to provide more context to the Now LLM Service. You can also add rule conditions to these additional data sources.

      The selection of the related table fields may have a direct impact on the quality of the corresponding prompt header. For example, if a prompt header requires a specific field from the related table, but that field isn't selected as input, the summary for that prompt

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header will contain missing information. For example, as a base case, you see one related table, such as Service level agreement (SLA), that includes all the required fields and filtering conditions for the prompt header. The SLA prompt header is preselected to help you understand how the related table, its fields, and the prompt header work together to produce a summary. You can use the SLA as a reference to configure the other related tables to determine which fields to select and which description adds the requirements of their respective prompt headers. Apply any additional conditions to filter the data further.

d. Select **Save and continue** to go to the next step.

6. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by adding new predefined sections and reordering them, as needed.

a. For each input template state, select the prompt sections from the list of available sections to include in the generated summary.

To add a section, you must configure the relevant input data prior to this step.

The available prompt sections that you can select:

- **Overview**
- **Actions completed**
- **Next steps**

The following table lists the mandatory prompt headers.

Mandatory prompt headers

Input template state	Mandatory prompt header
Open	▪ Overview ▪ Actions completed ▪ Next steps
Closed	▪ Overview ▪ Actions completed

b. Select **Save** to continue to the test response.

c. Select a record in the Test response section, and test the prompt response output format by selecting **Run Test**.

d. Select **Save and continue** to go to the next step.

7. Define how the skill is available to your users.

a. Configure the skill to be always available to users, or select conditions that must be met before the skill is available.
Selecting **Customize skill availability** displays a condition builder to filter the data further.

b. Select **Save and continue** to go to the next step.

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8. Configure where to display the Case summarization.

   a. Select **In-product**.
   In-product: When selected, the Now Assist skills are displayed on the forms and workspaces.

   For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

   b. Select **Save and continue** to go to the next step.

9. Review and activate the skill.
   Review your choices and select **Activate** to complete the skill customization.
   You can now select **Summarize** in a record to generate the summary for the invoice cases.

Skill inputs for Now Assist for Accounts Payable Operations (APO)

You can configure some of the inputs for a generative AI skill. Inputs permit you to determine how and when a skill is used.

Overview of skills

Inputs identify the data that is used for a skill. Inputs include the table and fields that are used to generate a record summary.

You can modify the inputs, but you can't modify a skill's data source. The data source contains the tables and fields that the skill relies on.

Skills for Now Assist for APO

The Now Assist for APO application includes the invoice case summarization skill.

Invoice case summarization skill

The inputs for the invoice case summarization skill identify the table and fields that are used when the summary is generated for an invoice case.

The following table lists the inputs for the case summarization from the Choose input for procurement case page in the Now Assist Admin console.

Input	Description
Base input table	Invoice case [sn_ap_cm_ap_case] table
Base input fields	• Description • Supplier • Invoice due date • Invoice supplier number • Invoice date • Short description • Requested by • Caller email

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Input	Description
	• Sub category • State • Closed at • Closed by • Closure code • Closure details

Using Now Assist for Accounts Payable Operations (APO)

If you've the sn_ap_apm.accounts_payable_specialist or sn_ap_cm.agent role, you can summarize the details of an invoice case, completed actions, or pending tasks with the Now Assist for Accounts Payable Operations (APO) application.

Summarize a record by using Now Assist for Accounts Payable Operations (APO)

Summarize invoice and inquiry cases to learn about their status, progress, and action items by using the record summarization skill in the Now Assist for Accounts Payable Operations (APO) application.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist or sn_ap_cm.agent

About this task

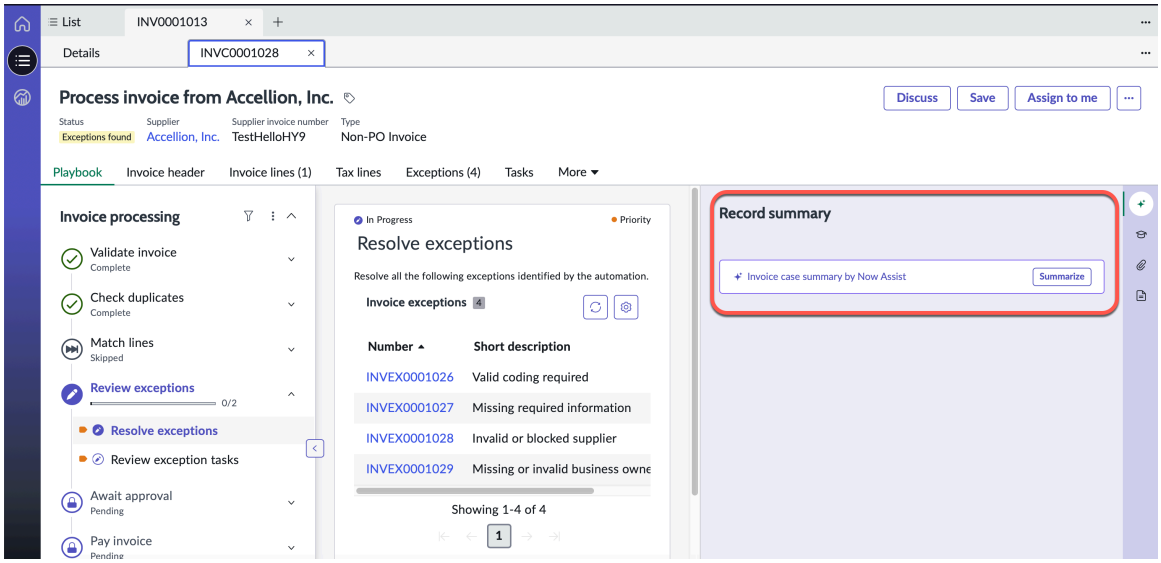
You can use these record summarization skills in either Core UI or Source-to-Pay Workspace.

- In Core UI, the summary appears in a banner in the record.
- In Source-to-Pay Workspace, the summary is generated on the **Details** tab.

Procedure

1. Navigate to **Source-to-Pay Workspace**.
2. Select the list icon ( ).
3. Generate a summary for either an invoice case record or an inquiry case record.
4. On the **Cases** tab, in the Record summary section, select **Summarize**.

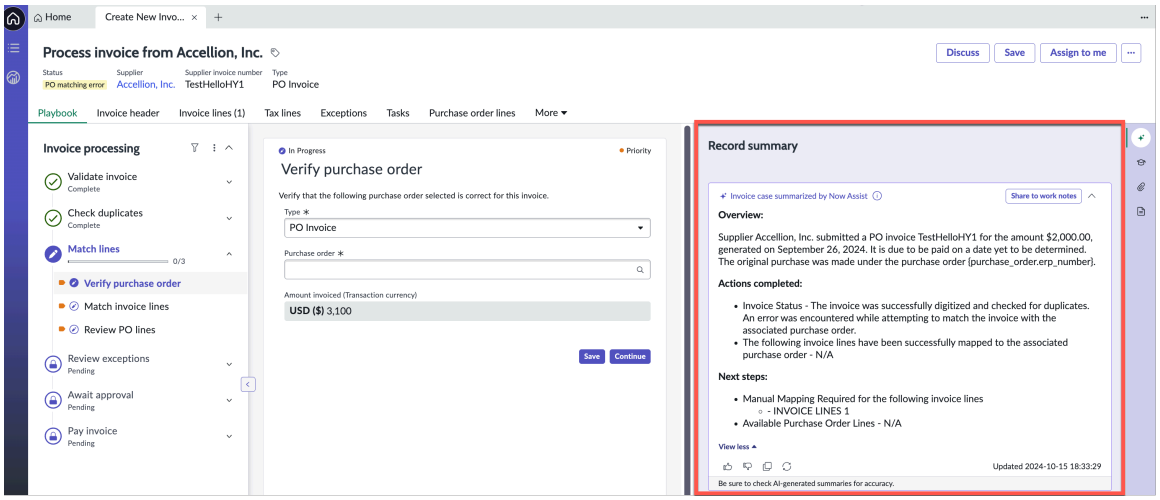
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When you opt to summarize an invoice case, you see the following message: "Now Assist is summarizing your invoice case."

> **Note:**
> Generating and displaying the summary may take several seconds.

5. Review the summary details.



A concise summary of the record, including the overview, actions completed, and next steps are displayed. The information that is displayed is based on the type of the record.

- **Overview**: Provides information about the record.
- **Actions Completed**: Lists all the actions that have been taken so far.
- **Next steps**: Lists the actions that the AP fulfillers must take next.

6. **Optional:** When you finish summarizing a record, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

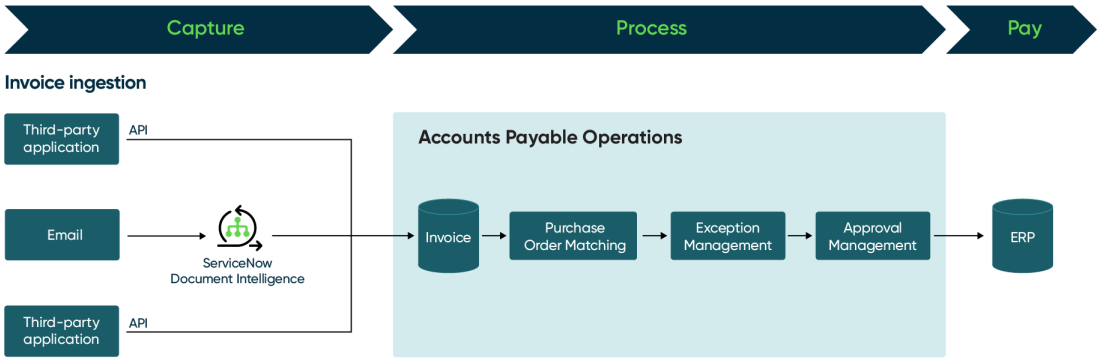
Exploring Accounts Payable Operations

Learn about the key features and capabilities of Accounts Payable Operations.

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The following figure illustrates the end-to-end invoice automation process.

End-to-end invoice automation process



Key features

Accounts Payable Operations includes the following features:

- Automatically create cases for inquiries received by email from your employees or 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 the duplicate invoices to prevent the same invoice from being paid twice
- Verify, process, and reconcile the invoices to expedite payment to suppliers
- Identify invoice exceptions to prevent the 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.

Source-to-Pay Workspace

The ServiceNow Source-to-Pay 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.

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Note:
The Source-to-Pay Workspace application 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 that are received through email or through APIs and automatically creates invoices and invoice lines in the Accounts Payable Operations application.

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**.

Source-to-Pay Workspace

The Source-to-Pay Workspace enables you to manage and work on cases and tasks related to invoices and invoice exceptions.

The Source-to-Pay 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 Source-to-Pay 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.

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Note:
The global search is available only for users with the Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist] role.

The Source-to-Pay 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 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.

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.

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- 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 Review Installation Details dialog box, any dependencies installed 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.
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.

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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. Tax manager creates tax codes, tax types to be applied on the invoice.
- sn_fin.tax_manager: Provides read, write, update and delete access to tax code and tax type 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.	• sn_ap_cm.admin • sla_admin • sn__ap_apm.accounts_payable_specialist
Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist]	• Can view and update all invoices and invoice exceptions. • Can view purchase orders, supplier details, and supplier payments.	• 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 Operations application.	• vendor_reader • sn_shop.procurement_common_reader

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Role title [name]	Description	Contains roles
Invoice tolerance admin [sn_ap_apm.invoice_tolerance_admin]	Can create and manage tolerance rules and tolerance types.	
Tax specialist [sn_ap_apm.tax_specialist]	Can perform actions on invoice tax lines and resolve tax variance exceptions.	• email composer • sn_ap_cm.task_owner • sla_manager
Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist]	Can allocate invoice line costs by cost center or ledger account.	

Flows installed

Flow	Description
Create Invoice Processing Case for Invoice	Creates an invoice processing case for an invoice that is received via email. **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 doesn't create an invoice processing case.
Start Invoice Processing for Orphan Invoices	Picks up all the invoice records in Draft state that don't have an invoice case associated with them and starts their processing. 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.

Scheduled job

Job	Description
Exception Monitoring scheduler	Runs on a regular schedule every five minutes to identify exceptions for the invoices of type PO, Non-PO, credit memo that are in **PO matching completed/Accepted** or **Exceptions found** state. You must activate the schedule job to run.

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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. Store the exception definitions for an exception.
Invoice processing detail sn_ap_apm_invoice_attribute	Stores invoice processing information
Invoice tolerance rule [sn_ap_apm_invoice_tolerance_rule]	Stores the tolerance rules for each tolerance type. The table extends the application file table.
Invoice tolerance type [sn_apm_apm_invoice_tolerance_type]	Stores the different types of tolerances. The table extends the application file table.

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
Mandatory plugins		
Invoice Case Management [com.sn_ap_cm]	Includes demo data and relatedServiceNow Store applications and plugins.	• Source-to-Pay Common Architecture [com.snc.sn_shop] • Source-to-Pay Workspace [com.sn_spend_workspace]
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.	• Finance Common Architecture [com.sn_fin] • Service Delivery Common [com.sn_spend_sdc]
Source-to-Pay Workspace [com.sn_spend_workspace]	Provides a single environment for Procurement Specialists to work on purchase requisitions, sourcing requests, negotiations,	

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Application plugin list (continued)

Plugin name	Description	Dependencies
	procurement requests, and more.	
Supplier Collaboration Portal [com.snc.sn_supplier_sp]	Includes demo data and relatedServiceNow Store applications and plugins.	Supplier Common Architecture [com.snc.sn_slm]
Accounts Payable Invoice Processing [com.sn_ap_apm]	Enables Accounts Payable specialists to ingest invoice documents and extract invoice data using Document Intelligence	• Invoice Case Management [com.sn_ap_cm] • Accounts Payable Operations integration with Document Intelligence [com.sn_ap_ic]
Optional plugins		
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.	• Advanced Work Assignment [com.glide.awa] • Agent chat [com.glide.interaction.awa]
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]
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]
Source-to-Pay integration framework (optional)	Extends Accounts Payable Operations to integrate with third-party applications.	• [app-fcms-integrations] • [app-spend-integrations]
Glide virtual agent		

Run the fix script for Accounts Payable Operations

Run the fix script for successful installation of Accounts Payable Operations.

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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: maint

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(inP
rocessInvoiceAmt);
            amtUpdated = true;
        }
```

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```
        if (!gs.nil(invoicedAmount)) {
            invoicedAmount = poCurrency + ';' + invoicedAmount;

 gr.getElement('invoiced_amount').setDisplayValue(invoicedAmoun
t);
            amtUpdated = true;
        }
        if (amtUpdated)
            gr.update();
    }
}

function getInProcessInvoicedAmount(poSysId) {
    var query =
 'invoice_amountISNOTEMPTY,^invoice_amount.amount!=0^stateINpo_m
atching_completed,exceptions_found,no_exceptions_found,pending_a
pproval,approval_recalled,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^stateINpend
ing_payment,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**.

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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. Search for **All properties** under **System properties**.
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 the default value as 4. This value indicates 4 worker threads of your instance will be used by the exception engine scheduler when it executes. You can edit the record in editing mode.
4. In the **Value** field, you can enter the value as 6, or 8.
   The exception engine scheduler makes use of 6 or 8 worker threads in your instance when it executes. This is recommended only when you have more than 2 nodes, i.e more than 16 worker threads.
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**.

Configure Antivirus Scanning

Configure Antivirus Scanning across your instance and at the table level.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Search for the table you want to exclude from the scan and select the table with Type set to collection.
3. In the **Attributes** tab, select **New**.
4. Add `Exclude_from_antivirus_scan`in the Attributes field and enter `True` in the **Value** field.
5. Select **Submit**.

Result
Antivirus Scanning is enabled in your instance, and the **List of Tables Excluded** on the Antivirus Configuration page is populated with all the tables that you excluded from the scan.

Upgrade Accounts Payable Operations

Upgrade Accounts Payable Operations from any version to the latest version.

Before you begin
Role required: admin

Procedure

1. When you upgrade Accounts Payable Operations from any version to the latest version, follow the steps mentioned in Configuring the invoice ingestion flows using Accounts Payable Operations integration with Document Intelligence with the latest use case- **DO NOT USE-Invoice Processing Vx** SYS DI Task Definition.
   X refers to the latest version.
2. Create a copy of the default Invoice Processing use case.
3. Configure the newly created DocIntel Extract Values Flow.
4. Navigate to **All** > **Process Automation** > **Flow Designer**.
5. To copy and configure the invoice attachment DI processing flow, perform the following steps:

   a. Search and use the existing flow that was copied from Copy and configure the Invoice attachment DI processing flow.

   b. Open **Flows**.

   c. 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. For more information on copying use case, refer Create a copy of the default Invoice Processing use case.

   d. Select **Save**.

   e. Select **Activate**.

6. To copy and configure the DI STP failed flow, perform the following steps:

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a. Search and use the selected flow from DI STP failed flow.

b. 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.

c. Select **Save**.

d. Select **Activate**.

Upgrade Accounts Payable Operations from version 2.0

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 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.

```
functionalignParentUseCaseSysIds(oldReadOnlyUseCaseSysId,newRead
OnlyUseCaseSysId){varoldCopyUseCaseGr=newGlideRecord("sys_di_task_de
finition");oldCopyUseCaseGr.addQuery("parent_task_definition","CONTAINS","base
_trained_model");if(oldReadOnlyUseCaseSysId){oldCopyUseCaseGr.addQuer
y("parent_task_definition","CONTAINS",oldReadOnlyUseCaseSysId).addOrCondi
tion("parent_task_definition","CONTAINS","di_source");}else{oldCopyUseCaseGr.
addQuery("parent_task_definition","CONTAINS","di_source");}oldCopyUseCaseGr.
query();while(oldCopyUseCaseGr.next()){replaceCopyUseCaseSysId(ol
dCopyUseCaseGr,oldReadOnlyUseCaseSysId,newReadOnlyUseCaseSysId);
}}functionreplaceCopyUseCaseSysId(copyUseCaseGr,oldReadOnlyUseCa
seSysId,newReadOnlyUseCaseSysId){varoldParentUseCase=copyUseCase
Gr.getValue("parent_task_definition");varoldParentUseCaseObj={};varnewPa
rentUseCaseObj={};if(!
oldParentUseCase||!oldParentUseCase.includes("base_trained_model"))
{return;}oldParentUseCaseObj=JSON.parse(oldParentUseCase);newParen
tUseCaseObj=oldParentUseCaseObj;if(oldParentUseCaseObj["sys_di_parent
"]&&oldReadOnlyUseCaseSysId&&oldParentUseCaseObj["sys_di_parent"]===o
```

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```
ldReadOnlyUseCaseSysId){newParentUseCaseObj["sys_di_parent"]=newRead
OnlyUseCaseSysId;newParentUseCaseObj["base_trained_model"]=getNewRead
OnlyUseCaseTrainingSolutionName(newReadOnlyUseCaseSysId);}elseif
(oldParentUseCaseObj["di_parent"]&&!oldParentUseCaseObj["sys_di_parent
"])
{newParentUseCaseObj["sys_di_parent"]=newReadOnlyUseCaseSysId;newPar
entUseCaseObj["base_trained_model"]=getNewReadOnlyUseCaseTrainingSolu
tionName(newReadOnlyUseCaseSysId);}else{newParentUseCaseObj["base_t
rained_model"]=getNewReadOnlyUseCaseTrainingSolutionName(newReadOnl
yUseCaseSysId);}varnewParentUseCase=JSON.stringify(newParentUseC
aseObj);copyUseCaseGr.setValue("parent_task_definition",newParentUseCase
);copyUseCaseGr.update();}functiongetNewReadOnlyUseCaseTrainingS
olutionName(newReadOnlyUseCaseSysId){vargr=newGlideRecord("sys_di_t
ask_def_solution_def");gr.addQuery("task_definition",newReadOnlyUseCaseSysI
d);gr.addQuery("solution_type","be5131acb70a2110cbc68b91ee11a981");gr.query(
);if(gr.next()){returngr.getDisplayValue("ml_capability_definition_base.solu
tion_name").toString();}else{return"";}}alignParentUseCaseSysIds("54214
afa87c32110822cb887cebb35ff","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.

Post upgrade tasks for APO

After you upgrade to Washington DC, you must review all the post-upgrade tasks and complete them as needed.

Restructured Invoice table

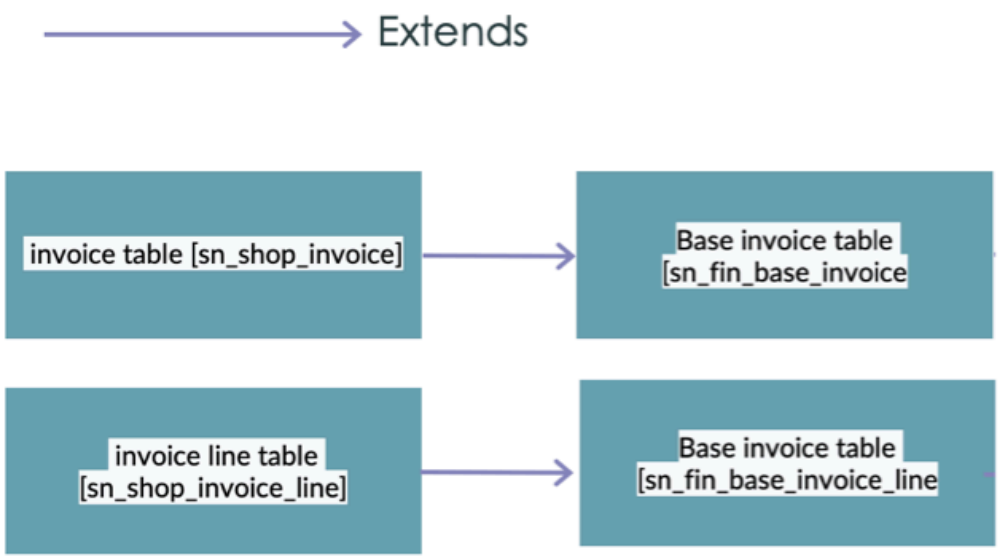
The invoice and invoice line tables are restructured in the Xanadu release.

Before Washington DC release, invoice and invoice line tables were standalone tables. With Xanadu release, the following changes are done:

- The invoice table [sn_shop_invoice] extends the base invoice table [sn_fin_base_invoice].
- The invoice line table [sn_shop_invoice_line] extends the base invoice line table [sn_fin_base_invoice_line].

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Invoice Table structure



After you upgrade from Washington DC to Xanadu release, verify that your existing invoice and invoice line data has been migrated correctly. If you notice that your invoice and invoice line tables didn't migrate properly, use the Now Support Portal to raise a case with the Technical Support team.

Run a glide fix script to migrate existing data

When you update the instance from Washington DC to Xanadu release, you must manually run the glide fix to update the invoice and invoice line tables to their respective base tables.

Before you begin

Role required: maint

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Select **New**.
   A new Fix script record opens.
3. Open the fix script record.
4. Enter **Name** as reparent invoice table.
5. Deselect the **Record for rollback** check box.
6. In the **Script** field, add the following code for the invoice line:

```
(function() {
            const invoiceLinetableToReparent =
 "sn_shop_invoice_line";
            const invoiceLineNewExtends =
 "sn_fin_base_invoice_line";
            const oldExtends = "";
var invoiceLineGr = new GlideRecord("sys_db_object");
        invoiceLineGr.get("name", invoiceLinetableToReparent);
        if(invoiceLineGr.super_class.name ==
 invoiceLineNewExtends) {
```

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```
            gs.info("{0} table already reparented to {1}.
 No reparenting required.", invoiceLinetableToReparent,
 invoiceLineNewExtends);
            return;
        }
try {

            var invoiceLinetpc = new
 GlideTableParentChange(invoiceLinetableToReparent);
            var reparentInvoiceLineResult =
 invoiceLinetpc.change(oldExtends, invoiceLineNewExtends);

        } catch (e) {
            gs.warn("Table parent change for
 sn_shop_invoice_line did not complete. Error: {0}", e);
        }
})();
```

7. In the **Script** field, add the following code for invoice:

```
 (function() {
        const invoiceTableToReparent = "sn_shop_invoice";
        const oldExtends = "";
        const invoiceNewExtends = "sn_fin_base_invoice";
var invoiceGr = new GlideRecord("sys_db_object");
        invoiceGr.get("name", invoiceTableToReparent);
        if(invoiceGr.super_class.name == invoiceNewExtends){
            gs.info("{0} table already reparented to
 {1}. No reparenting required.", invoiceTableToReparent,
 invoiceNewExtends);
            return;
        }
 try {
            var tpc = new
 GlideTableParentChange(invoiceTableToReparent);
            var reparentResult = tpc.change(oldExtends,
 invoiceNewExtends);
        } catch (e) {
            gs.warn("Table parent change for sn_shop_invoice
 did not complete. Error: {0}", e);
        }
 })();
```

8. Select**Save**.
9. Select **Submit**.
   The Fix script is created.
10. Select **Run Fix Script**.
    The parent invoice and invoice line tables are changed to respective base tables.

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.

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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 Accounts Payable Invoice Processing (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 Review Installation Details dialog box, any dependencies installed 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.
6. Select **Install**.

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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.	• 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.	• sn_ap_cm.requester • sla_manager • workspace_user • vendor_reader • canvas_user • sn_ap_cm.task_owner • email_composer
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	Extends the Service Case table. Stores the invoice case records.

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Table	Description
[sn_ap_cm_ap_case]	
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.

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.

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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	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. **Note:** This flow is installed when you install the Accounts Payable Operations integration with Document Intelligence application.
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.
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	This flow does the following: • 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.

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Tables installed

Table	Description
Invoice Stage [sn_ap_ic_invoice_stage]	Stores the invoice data extracted by Document Intelligence.
Invoice Line Stage [sn_ap_ic_invoice_line_stage]	Stores the invoice line data extracted by Document Intelligence.

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	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. 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.
Field Groups	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.
Document tasks	Includes a document task to train the Document Intelligence model to identify the correct information to extract from an invoice document.
Integration	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

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Use case information	Description
	stage and invoice line stage records. It also updates the Invoice stage status to Processing completed.

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.
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.

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List of invoice and invoice line fields included in the use case (continued)

Field	Description
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.
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	**1.** Create a copy of the default Invoice Processing use case. **2.** Do the following to configure the invoice ingestion flows:

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Configuration scenarios for invoice ingestion flows using Accounts Payable Operations integration with Document Intelligence (continued)

Scenario	Do this
	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	Copy and configure the Invoice processing case for Invoice email flow when Document Intelligence is not installed.
When Document Intelligence is installed but you want to disable the invoice ingestion flows	**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 V5** 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 V5** 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 V5 use case is created with the name entered. You can see the copied use case by navigating to **All** > **Document Intelligence**

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> **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 v3. 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 v3. 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 v3** flow to add the missing information by referring to the default **DocIntel Extract Values Flow - Invoice Processing v3** flow.

Before you begin
Role required: admin

About this task
In the **DocIntel Extract Values Flow - copied use case - Invoice Processing v3** 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 v3** flow.
3. In the **DocIntel Extract Values Flow - copied use case - Invoice Processing v3** 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 v3** 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.

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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

Scope: sn_ap_ic scope.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the **Invoice attachment DI processing** 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 Invoice Attachment DI Processing flow opens.
7. Under TRIGGER, set the trigger conditions for this flow.
8. Under ACTIONS, do the following:
   - Select **Process Attachment using DI** to reference the use case created by the customer.
   - In the **DI Task Definition [Use Case]** field, select the copy of the use case that was created using the **Duplicate use case** icon in sn_ap_ic scope. For more information on copying use case, refer Create a copy of the default Invoice Processing use case.

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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

Scope: sn_ap_ic scope.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Search for and open the **DI STP Failed** 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**, in the **Condition** field, copy "DI STP Failed" flow and update the**Use Case** field trigger condition to reference the use case created by the customer.
   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**.

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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

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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**.

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 an 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 subcategory **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 an 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 aren't 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 isn't 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:

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1. An invoice case is created with category **Invoice automation** and subcategory **Invoice processing** in Accounts Payable Operations.
2. If Document Intelligence determines that the extraction confidence is lower than the threshold value, it doesn't extract the invoice data and as a consequence an invoice isn't 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 an 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 aren't 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 isn't 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 the administrator.

You must collaborate with the administrator to resolve this issue.

Localization information

Accounts Payable Operations supports multiple languages. The current DocIntel model is trained to extract invoices in the English language only. If you want to process the invoice in multi-lingual languages supported by DocIntel, you must train the DocIntel model on your own.

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For more information on Document Intelligence, see Document Intelligence.

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

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Date format in the incoming invoice	Converted date format
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.

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- 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

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Decimal format mentioned in the incoming invoice	Converted decimal format
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	The system fetches the value by checking the following values in the order listed: **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	The system does the following: • 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	The system does one of the following: • 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. If a unique supplier record is found in any of the above, then the application populates the supplier in the invoice.
Country	The system does one of the following:

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Reference Field	Logic to fetch the field value
	• 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 amount, Other charges	The system does the following: • 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.

Using Accounts Payable Operations

Accounts Payable Specialists and agents can use Accounts Payable Operations to manage cases, invoices, route cases to agents, invoice exceptions and integrate with other applications.

Create a knowledge base article about invoice

Create a knowledge base article to share invoice information and policies with your employees and suppliers.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist

Procedure

1. Navigate to **All** > **Knowledge**.
2. Select **Create New Article**.
3. On the form, fill in the fields.

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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 Accounts Payable. 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.

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.

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	• Payment inquiry • Invoice inquiry	Agent [sn_ap_cm.agent]	You can view the invoice inquiry cases in the Source-to-Pay Workspace.

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Account Payables cases (continued)

Category	Subcategory	Role	Description
	• Expedite payment request • Payment terms issue • Invoice entry assistance		For more information, see Invoice inquiry cases.
Invoice automation	Invoice processing	Accounts Payable Specialist [sn_ap_apm.accounts_payable_specialist]	You can view the manual invoice ingestion cases in the Source-to-Pay Workspace. For more information, see Invoice processing cases.

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**

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- **Expedite payment request**
- **Payment terms issue**
- **Invoice entry assistance**
- **Other**

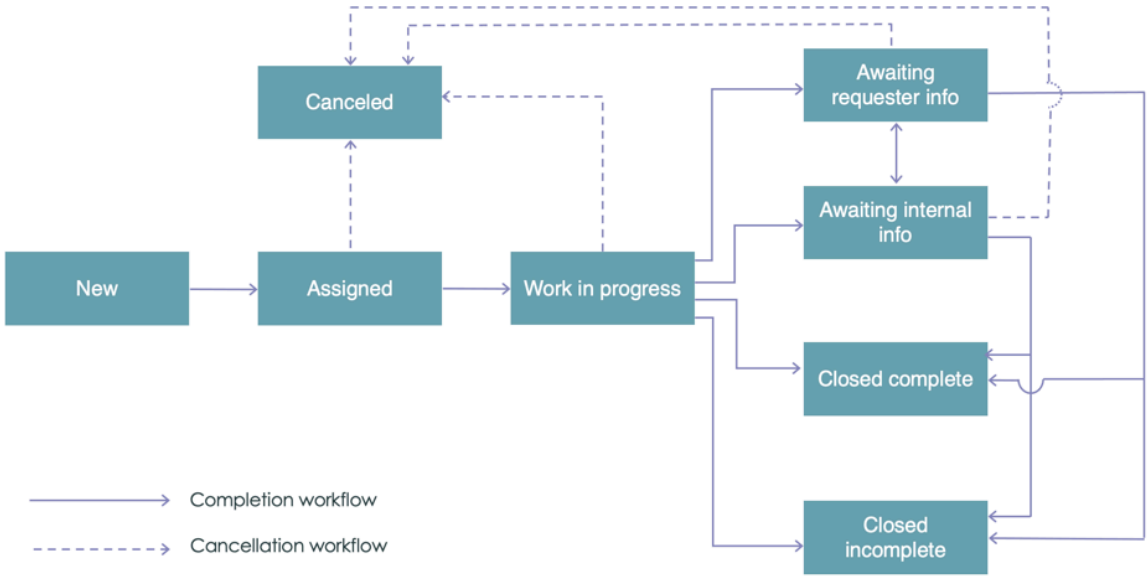
Note:
An invoice case with a category of **Inquiry** is referred to as an invoice inquiry case.

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.

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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 Source-to-Pay 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.

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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

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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

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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.

   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.

Work with 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 Source-to-Pay 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.

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Note:
Accounts Payable Operations supports invoices of type **PO Invoice**, **Non-PO Invoice**, **Credit memo**.

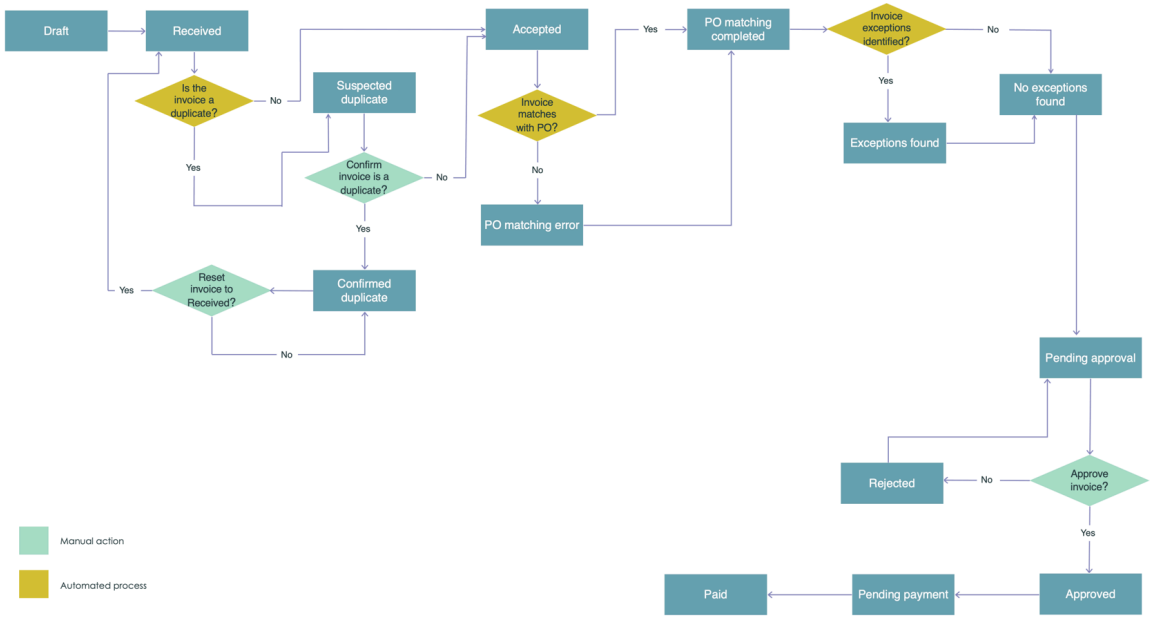
The Accounts Payable Specialist can view the invoices by doing the following:

1. Navigate to **Accounts Payable Operations** > **Source-to-Pay 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.

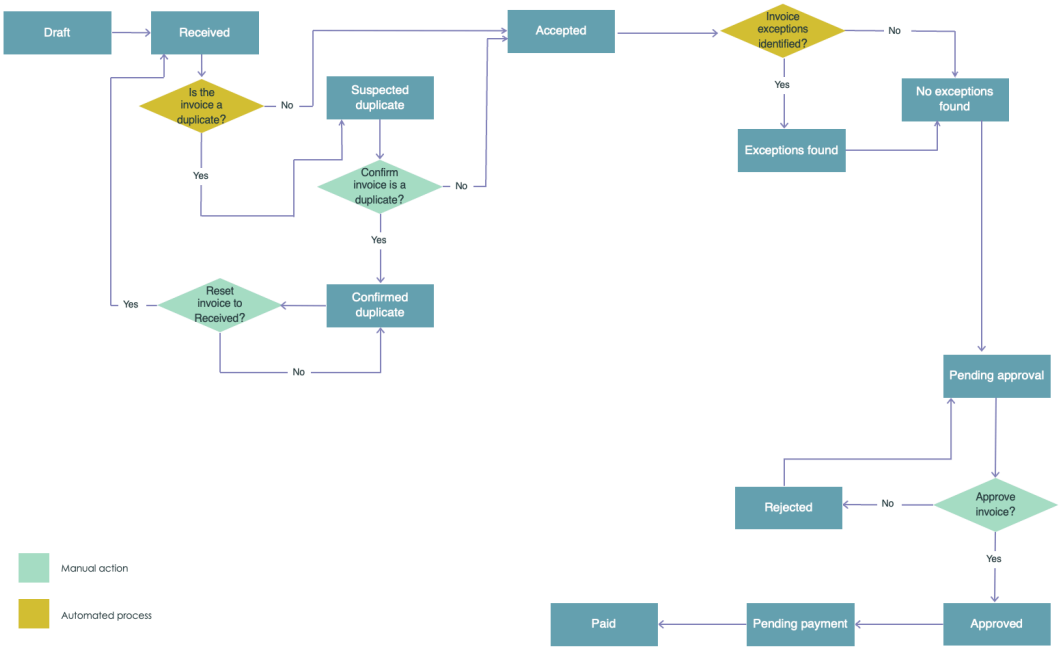
Invoice life cycle



Non-PO invoice life cycle

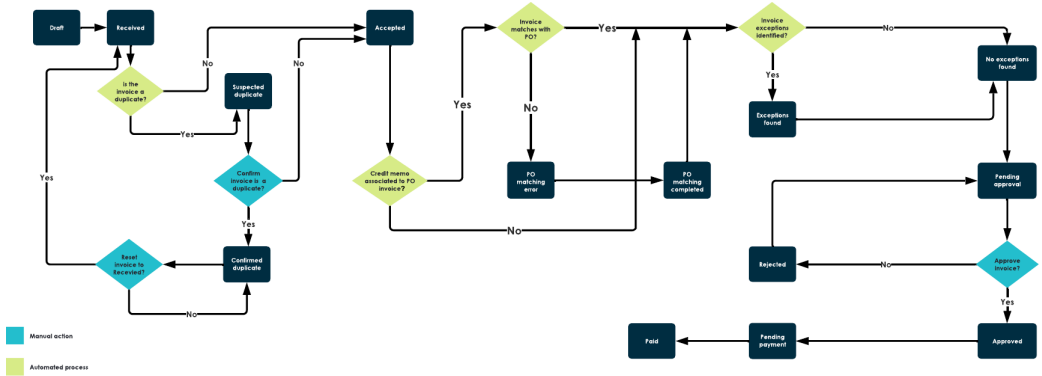
The following figure illustrates the various statuses and sub-statuses that the non-PO invoice goes through during its life cycle, from its creation to approval.

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Credit memo invoice life cycle

The following figure illustrates the various statuses and sub-statuses that the credit memo 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 Source-to-Pay 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**.

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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** > **Source-to-Pay 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**.

Credit memo

You can create Credit memo invoice. The credit memo invoice type can be of PO and Non-PO invoice.

When an invoice is ingested into the Accounts Payable Operations application recognizes if the invoice received through various channels is of type credit memo. A credit memo is a document issued between a supplier and the buyer when there's a reduction or any offset in the amount payable to the supplier. Credit memo is also applicable for any goods or services that the buyer owes to a seller. In some cases, if the buyer hasn't paid the seller, the credit memo can be used as an offset for an invoice generated in the past or future. For an invoice to be recognized as a credit memo:

- The credit memo invoice must contain one of the following:
  - Original invoice
  - Original invoice number
  - Purchase order
- Credit memos issued for purchase order or invoice number must match with purchase order lines and invoice lines
- Invoice contains negative amount fields

For more information on creating invoice, see Create New Invoice form.

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For more information on invoices ingested using document intelligence, see Invoice data transformation logic.

Invoice cost allocation

Cost allocation is a process of identifying and allocating the costs across different cost centers or ledger accounts. Accounts Payable specialists allocate invoice line cost across multiple cost centers or ledger accounts for accurate cost analysis and invoice processing.

Accounts Payable specialists can allocate invoice cost in the following ways:

- Cost allocated at purchase order level-
  - When the invoice line is matched with the purchase order line and the invoice moves to PO matching completed status, then the cost allocation related to the purchase order line is copied to the invoice line. Any existing cost allocation record is overridden.
  - When you change the invoice type from PO to non-PO invoice, you're prompted with a warning message to confirm that updating the invoice type restarts invoice processing, closes any open exceptions and deletes any cost allocations associated with the invoice. Upon confirmation, the cost allocation record is deleted.
- Manual cost allocation- add cost allocation at invoice line level. For more information on manual cost allocation, see Create invoice cost allocation manually.

Accounts Payable specialists can allocate invoice line cost by:

- Quantity
- Quantity percentage
- Amount
- Amount percentage

For more information on cost allocation, see Allocations.

- You can create a new invoice line record and cost allocation record only when the invoice is in draft state and exception found state.
- During cost allocation, you must confirm that the total allocated quantity or amount across different cost centers or ledger accounts must be equal to the invoice line quantity or subtotal, or else invoice cost allocation exception occurs.
- Approval rules are configured by the approval engine that directs the invoices to cost center owners for approvals. For more information on approvals, see Invoice approvals.
- Invoices approved by cost center managers are pushed to ERP for posting. For more information on invoice outbound cost allocation, see Outbound cost allocation staging table.

Create invoice cost allocation manually

Manually allocate invoice line cost across multiple cost centers.

Before you begin

Role required: sn_ap_apm.accounts_payable_specialist, admin

Procedure

1. Navigate to **All** > **All** > **Accounts Payable Operations** > **Accounts Payable Workspace**.
2. Navigate to **Lists** > **Invoices** > **All Open Invoices**.
3. Select an **invoice** > **Invoice line**.
   For more information on invoice line, see Create an invoice manually.

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4. Select **Cost allocations**.
5. Select **New**.
   The invoice cost allocation form displays. For more information on the cost allocation form, see Create invoice cost allocation form

   Note:

   - During cost allocation, if the total allocated quantity or amount across different cost centers or ledger accounts isn't equal to the invoice line quantity or subtotal, then the invoice cost allocation exception occurs. For more information on exceptions, see Invoice exceptions.
   - When you delete an invoice line record, you're prompted with a pop-up message to confirm the deletion of an invoice line record removes its associated cost allocation record.

6. Select **Save**.

Result
The cost allocation form is added to the invoice line.

Tax calculations

Calculate the final tax for an invoice based on the tax type and the tax tolerance variance.

The Accounts Payable Operations application enables the validation of supplier-provided taxes for enhanced tax compliance and improved operational effectiveness.

Tax specialists create tax types of either indirect tax or withholding tax. One or more tax lines are added to invoice lines. Based on the tax type, the supplier tax is calculated against the invoice line amount. If the supplier tax amount is greater than the system tax amount, an overtax amount variance is calculated. If the supplier tax is less than the system tax amount, an under-tax variance is calculated. You can choose to accept the system tax or the supplier tax,which will determine the final tax that is calculated and displayed on the invoice tax line and invoice header.

For example, for an invoice line amount of $1000, add a tax line of the indirect tax type with a supplier tax of $100. The final tax amount would be calculated as the sum of $1000 and $100, for a total of $1100. If you select the withholding tax type, the final tax amount is calculated as the difference between the invoice line amount of $1000 and the supplier tax of $100, for a total of $900.

Create tax codes to be added in an invoice

Create tax codes to be added in an invoice.

Before you begin
Role required: Tax manager

Procedure

1. Navigate to **All** > **Finance Common** > **Tax codes**.
2. Select **New**.
3. On the form, fill in the fields.

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Tax codes form

Field	Description
Invoice Case	
Tax code ID	Unique tax code generated from the ERP source.
Name	Name of the tax code.
Description	The details of the tax code displayed in transactions or financial activities.
Country	The country for which the tax code is applied to.
State	The state for which the tax code is applied to.
Active	Option to make the tax code available.
ERP source	The ERP source from which the tax code is generated.

4. Select **Save**.

Result
The tax code details are added to the invoice.

Create tax types to be used in an invoice

Create tax types to be added in the invoice.

Before you begin
Role required: Tax manager

Procedure
1. Navigate to **All** > **Finance Common** > **Tax types**.
2. On the tax type page, select **New**.
3. On the Tax types form, fill in the fields.

Tax types form

Field	Description
Invoice Case	
Code	Unique tax code generated from the ERP source.
Category	Name of the tax category. The available values are: ○ Sales tax ○ Use tax ○ Value-added tax ○ Goods and service tax ○ Withholding tax
Name	The tax type used in transactions or financial activities.
Active	Option to make the tax type available.

4. Select **Save**.

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Result
The tax type details are added to the invoice.

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

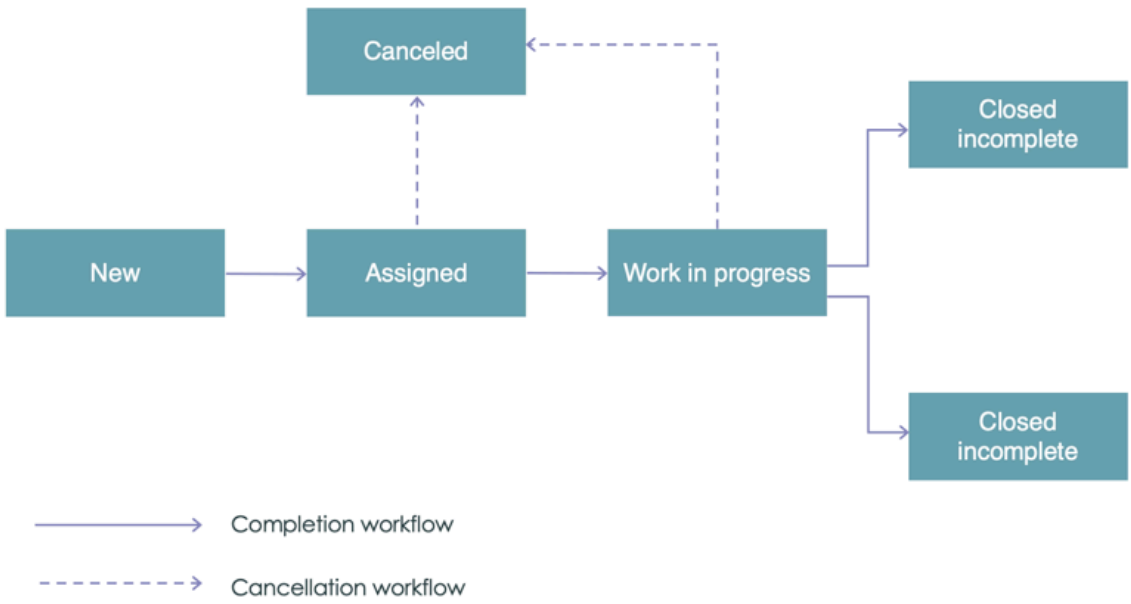
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category of **Invoice automation** and sub-category of **Invoice processing** is created. For more information, see Install Accounts Payable Operations integration with Document Intelligence.

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.

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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 Source-to-Pay 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 Work with 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	If a processing error occurs in Document Intelligence, the invoice processing case displays the following error: `Invoice has a data extraction error. Review invoice with automation to continue processing.` For more information, see Review an invoice in Document Intelligence.
Enter the missing required information in the invoice	If a transformation error occurs in Document Intelligence, the invoice processing case displays the following error: `Required information for invoice has one or more errors. Review required fields`

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To	Do this
	`and currency in "Details" tab to continue processing.` For more information, see Enter the missing required invoice information and submit an invoice.

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, seeConfirm 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.

   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.

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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.

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 Invoice approvals.

    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.

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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.

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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**.

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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	**a.** Select **Not a duplicate**. A message appears asking you for a confirmation. **b.** Select **Yes**. The status of the invoice changes to Accepted.
To mark an invoice as a duplicate	**a.** Select **Confirm duplicate**. A message appears asking you for a confirmation. **b.** Select **Yes**. The status of the invoice changes to Confirmed duplicate and the state of the invoice processing case changes to Closed incomplete.

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**.

   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**.

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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**.

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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.

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**.

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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.

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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:

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- **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 Source-to-Pay 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 the 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	This exception occurs in one of the following scenarios: • The supplier information is missing on the invoice. • The supplier information on the invoice doesn't match the information on the purchase order if invoice is of type PO. • The Supplier Legal Entity Mapping (sn_fin_supplier_detail) table doesn't have a record with a combination of Invoice.supplier and	To resolve this invoice exception, do the following: • If the supplier information is missing on the invoice, do the following: 1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. 2. Populate a valid supplier and legal entity. • If the supplier information on the invoice doesn't match with that on	PO invoice and Non-PO invoice

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
	Invoice.legal_entity fields • In the Supplier Legal Entity Mapping (sn_fin_supplier_detail) table, the supplier has one of the following attributes set to true: ○ 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 This exception is a header-level exception.	the purchase order, do the following: 1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. 2. Update the supplier information on the invoice to match with that on the purchase order. • If the Supplier Legal Entity Mapping (sn_fin_supplier_detail) table, doesn't have a record with a combination of Invoice.supplier and Invoice.legal_entity, do the following: 1. Log in with the Supplier Enablement Manager (sn_fin.supplier_payment_info_write) role. 2. Add a record with the combination of Invoice.Supplier – Invoice.LegalEntity fields in the Supplier Legal Entity Mapping (sn_fin_supplier_detail) table. • If the supplier's Hold Payment and Hold Posting attributes are set to true in the Supplier Legal Entity	

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
		Mapping table, do the following: 1. Log in with the Supplier Enablement Manager (sn_fin.supplier_payment_info_write) role. 2. Take the necessary actions to remove holds from invoices to enable payment and posting of the invoices.	
Insufficient Funds (Quantity variance)	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. This exception is a line-level exception. To resolve this invoice exception, you must edit the purchase order. For more information, see Edit a purchase for an Insufficient Funds invoice exception.	To resolve this invoice exception, you must edit the purchase order. For more information, see Edit a purchase for an Insufficient Funds invoice exception.	PO invoice
Insufficient Funds (Line amount variance)	This exception occurs when purchase order lines don't have sufficient funds left to process the current invoice, which is in-process.	To resolve this invoice exception, you must edit the purchase order. For more information, see Edit a purchase for an Insufficient Funds invoice exception.	PO invoice

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
	This exception is a line-level exception.		
Insufficient Goods Receipt	This exception occurs when one or more lines of an invoice don't have sufficient receipts to process the invoice. This exception is a line-level exception.	**Resolving the Insufficient Goods Receipt exception when PSM is installed** 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 tasks** tab of the exception form. For more information, see Invoice exception form. The receipt task is assigned to the	PO invoice

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
		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. For more information, see Confirm receipt of your order from Employee Center. **Resolving the Insufficient Goods Receipt exception when PSM isn't installed** If Sourcing and Procurement Operations isn't installed, then the Accounts Payable Specialist must manually create an exception	

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
		task, which is assigned to the business owner. The business owner must mark this task as complete in Employee Center. For more information, see Mark an exception task as complete from Employee Center.	
Valid coding required	This exception occurs when one or more lines of an invoice are missing the following information: • Ledger account • Tax code • Cost center This exception is a line-level exception.	To resolve this invoice line exception, do the following: **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.	PO Invoice and Non-PO invoice
Missing required information	This exception occurs when one or more fields of the following are missing on the invoice: • Payment terms • Invoice type	To resolve this invoice exception, do the following: **1.** Log in to the application with the Accounts Payable Specialist	PO Invoice and Non-PO invoice

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
	• Supplier • Invoice amount • Invoice date • Legal entity This exception is a header-level exception.	(sn_ap_apm.accounts_payable_specialist) role. **2.** Populate the following fields on the invoice: ○ Payment terms ○ Invoice type ○ Supplier ○ Invoice amount ○ Invoice date ○ Legal entity	
Missing or Invalid Business Owner	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). This exception is a header-level exception.	To resolve this invoice exception, do the following: **1.** Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. **2.** Update the valid business owner field in the invoice line.	PO Invoice and Non-PO invoice
Over tax amount variance	This exception occurs when the supplier tax amount is greater than the system tax amount.	To resolve this invoice exception, do the following: **1.** Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. **2.** Make necessary corrections to the supplier tax, system tax on all the invoice lines.	PO Invoice, Non-PO invoice, and Credit memo

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
		3. You can choose to either accept system tax or supplier tax.	
Under tax amount variance	This exception occurs when the supplier tax amount is lesser than the system tax amount.	To resolve this invoice exception, do the following: **1.** Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. **2.** Make necessary corrections to the supplier tax, system tax on all the invoice lines. **3.** You can choose to either accept system tax or supplier tax.	PO Invoice, Non-PO invoice, and Credit memo
Invoice isn't balanced	This exception occurs when sum of the subtotals of the invoice lines must match the sub total amount in the header.	To resolve this invoice exception, do the following: **1.** Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. **2.** Make necessary corrections to the sub total so that the sum of sub totals of invoice lines match with the invoice header amount.	PO Invoice, Non-PO invoice, and Credit memo
Insufficient Funds (Header amount variance)	This exception occurs when purchase order doesn't have sufficient balance left to process the invoice.	To resolve this invoice exception, do the following:	PO invoice

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
		1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. 2. Make necessary corrections to invoice amount so that the sum of amount of all invoices related to PO (in progress or paid) amount must be less than the total PO amount.	
Line unit price variance	This exception occurs due to difference in unit price of invoice line and PO.	To resolve this invoice exception, do the following: 1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. 2. Make necessary corrections to unit price on invoice line so that it's equal to unit price of PO line.	PO invoice, Credit memo
Incomplete credit memo	This exception occurs when any of the following are missing on a credit memo invoice: • Original invoice number • Original invoice • Purchase order	To resolve this invoice exception, do the following: 1. Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. 2. Make necessary corrections on the invoice by populating the Original invoice number, Original	Credit memo

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Invoice exception type (continued)

Invoice exception	Description	Do these steps to resolve the invoice exception	Applicable to
		invoice, and purchase order fields.	
Insufficient billing amount on purchase order	This exception occurs when purchase order doesn't have sufficient billing quantity or amount to process the credit memo invoice.	To resolve this invoice exception, do the following: **1.** Log in to the application with the Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. **2.** Make necessary corrections to invoice line amount such that the line amount doesn't exceed the sum of PO line amount and other credit memo (approved or pending approval) related to the PO line.	Credit memo
Invoice cost allocation	This exception occurs when the cost allocated on invoice lines is not equal to the sub total of the invoice lines amount.	To resolve this invoice exception, do the following: **1.** Log in to the application with Accounts Payable Specialist (sn_ap_apm.accounts_payable_specialist) role. **2.** Make necessary corrections to invoice line amount such that the line amount is equal to the sub total of the invoice line amount.	

By default, the exception engine is configured to run once every 5 minutes through the **Exception Monitoring Job**. This is a scheduled job, which is inactive in the state by default. For information on how to activate the scheduled job, see Activate the Exceptions Monitoring Scheduler.

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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 Source-to-Pay 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.

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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	**a.** Do one of the following: ▪ Navigate to **Lists** > **My Work** > **My open invoice exceptions**. ▪ Navigate to **Lists** > **All Work** > **All open invoice exceptions**. **b.** Select the link to the invoice exception under the Number column to open the exception and view its details.
View exceptions from an invoice processing case	**a.** 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**. **b.** Open an invoice processing case that contains exceptions. **Note:** If an invoice processing case contains exceptions, the following message is shown at the top of the case: `Invoice has one or more exceptions. Resolve all issues in "Invoice exceptions" to continue processing.` **c.** Select the **Invoice Exceptions** tab. **d.** Select the link to the invoice exception under the Number column to open the exception and view its details.

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**.

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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	**a.** Do one of the following: ▪ Navigate to **Lists** > **My Work** > **My open tasks**. ▪ Navigate to **Lists** > **All Work** > **All open tasks**. **b.** Select **New**. The Create New Invoice task page is displayed. For a description of the field values, see Create New Invoice task form. The **Type** field is set to **Case task** by default. **c.** In the **Parent case** field, select the parent case for the invoice. **d.** In the **Invoice exception** field, select the exception for which you want to create an exception task. **e.** After you select an exception, the Type field changes from **Case task** to **Exception task**. **Note:** The **Type** field is read-only. **f.** Enter the required information in the **Assignment group**, **Assigned to**, **Short description**, and **Description** fields. **g.** Select **Save**.
Create an exception task from an invoice exception	**a.** Do one of the following: ▪ Navigate to **Lists** > **My Work** > **My open invoice exceptions**. ▪ Navigate to **Lists** > **All Work** > **All open invoice exceptions**. **b.** In the Number column, select the link to an invoice exception to open it. **c.** Select the **Exception tasks** tab and then select **New**.

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To	Do this
	The Create New Invoice task page is displayed. For a description of the field values, see Create New Invoice task form. The **Parent case**, **Invoice exception**, and **Type** fields are auto-populated. **d.** Enter the required information in the **Assignment group**, **Assigned to**, **Short description**, and **Description** fields. **e.** Select **Save**.
Create an exception task from an invoice processing case	**a.** Navigate to **Lists** > **All Work** > **All open invoice processing cases**. **b.** In the Number column, select the link to an invoice processing case to open it. **c.** Select the **Tasks** tab and then select **New**. The Create New Invoice task page is displayed. For a description of the field values, see Create New Invoice task form. The Parent case field is auto-populated. The **Type** field is set to **Case task** by default. **d.** In the **Invoice exception** field, select the exception for which you want to create an exception task. **e.** After you select an exception, the **Type** field changes from **Case task** to **Exception task**. **Note:** The **Type** field is read-only. **f.** Enter the required information in the **Assignment group**, **Assigned to**, **Short description**, and **Description** fields. **g.** Select **Save**.

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.

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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 Shopping Hub Home.

Bypass an invoice exception

Bypass an invoice exception if you find that it is not applicable to the invoice.

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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	**a.** Do one of the following: ▪ Navigate to **Lists** > **My Work** > **My open invoice exceptions**. ▪ Navigate to **Lists** > **All Work** > **All open invoice exceptions**. **b.** Select the link to the invoice exception under the Number column to open the exception and view its details.
View exceptions from an invoice processing case	**a.** 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**. **b.** Open an invoice processing case that contains exceptions. **Note:** If an invoice processing case contains exceptions, the following message is shown at the top of the case: *One or more exceptions have been identified on this invoice. Review the identified invoice exceptions and take appropriate action to resolve them.* **c.** Select the **Exceptions** tab. **d.** Select the link to the invoice exception under the Number column to open the exception and view its details.

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.

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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.

Create an invoice exception definition

You can create invoice exception definition for invoices of types PO, Non-PO, credit memo.

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Before you begin

Role required: sn_ap_apm.admin

This video shows you how to create an invoice exception definition.

https://player.vimeo.com/video/983170290?h=5c81ae0349&badge=0&autopause=0&player_id=0&app_id=58479

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. Example: Missing business owner or legal entity.
4. Select **Active**.
5. Select **Applicable to** as PO invoice.
6. Enter the order number by which the exception must be executed.
7. Select and hold (or right-click) on the form and **Save**.
   The form is saved.
8. Configure the subflow that you want to choose from the drop-down list.

   For more information on sub flows, see Create subflow in workflow studio.
9. Select **Save**.
10. Open an invoice record with all fields configured and click **View invoice processing case**.
    For more information on creating an invoice record, see Create an invoice manually. The exception engine runs and displays exceptions in the **Review exceptions** activity card of the playbook.
11. Click **Resolve exceptions** activity card.
    The exceptions are displayed. Navigate to the invoice details and populate the valid business owner details.
12. Navigate to the invoice details and populate the valid business owner details.
13. Click **Save**.
14. Click **Check exceptions**.
    The exception is raised and resolved successfully.

Create subflow in workflow studio

Use subflows to configure conditions that are applied on the invoice and raise an exception.

Before you begin

Role required: admin

This video shows you how to create subflow in workflow studio.

https://player.vimeo.com/video/1017692662?h=de32932dcd&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **Workflow Studio** > **New** > **Subflows**.
   The subflow page appears.

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2. Enter the **Subflow name**.
3. Enter the **Description**.
4. Choose the **Application** as Accounts Payable Invoice Processing in the drop-down list.
5. Click **Build subflow**.
6. Configure Inputs and Outputs for Subflow.
   Example: In Subflows, you must fetch the invoice record based on sys_id. Traverse through the invoice record and check if the condition business owner or legal entity is empty. If the condition matches, then the system raises an exception.

   a. In the **Inputs** area, enter **Label** as invoice Sysids.

   b. Enter **Name** as invoice_sysids.

   c. The **Type** drop-down is auto-populated with String.

   d. Select **Done**.

   e. In the header area, click **Flow variables**.
   The Flow variables pop-up appears.

   f. Enter **Label** as Condition result.

   g. Enter **Name** as Condition result.

   h. Choose **Type** as True/False.

   i. Select **Save**.

7. In **Actions** area, perform the following steps:

   a. Select **Action** as **Look Up Records** from the drop-down list.

   b. In the **Table** field, search for**invoice [sn_shop_invoice]**.

   c. Configure the **Conditions** as **sys_id is one of invoice SysIDs**.

   d. In **Actions** > Accounts Payable Invoice Processing > Look Up Records.

   e. Select **Table** as Invoice [sn_shop_invoice]

   f. Set the **Conditions** > **SysID** > **is one of** > **Subflows- Inputs** > **invoice Sysids**.

   g. Select **Done**.

   h. Create **Flow logic** > **For Each item in** > **Look Up Records** > **Invoice Records > Done**.

   i. Select **If** > **Condition1** > **For Each** > **Invoice Record** > **Business owner** > **is empty**.

   j. Select **If** > **Condition2** > **For Each** > **Invoice Record** > **Legal entity** > **is empty**.

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k. Select **then** >  icon.

l. Click **Done**.

m. Add a flow logic as **Set Flow variable**.

n. Choose **Condition result** from the drop-down list.

o. Select the **Data** check-box.

p. Select **Done**.

q. Add a **Flow logic** as **Set Flow variables**.

r. Choose **Condition result** from the drop-down list.

s. Select **Done**.

t. Select **Save**.

u. Choose **Action** > **Accounts Payable Invoice Processing** > **Generate Exception and Line Exceptions** from the drop-down list.

v. Choose **Condition result** as **Flow Variable**.

w. Choose **Exception Definition Record** as Missing BO or LegalEntity.

x. Choose the **Invoice** as For Each > Invoice record.

y. Enter the description.

z. Select **Done**.

aa. Select **Save**.
Success message appears as the subflow is saved successfully.

8. Select **Publish**.
You are prompted with an alert message "Are you sure you want to publish this subflow? Your changes will be applied to all instances where this subflow is being used."
The subflow is successfully created.

Tolerance Rules and Variances for invoices

Setting tolerance rules to determine the permissible amount of variance applied on an invoice's total value enables you to avoid payment delays and make payment processing more efficient.

You can customize tolerance rules that compare invoices with defined tolerance percentages and values. If the differential is within the limit, the invoice is considered valid for payment. If it is greater than the tolerance limit, exceptions are raised.

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Tolerance types

Accounts Payable Operations supports the following tolerance types:

- **Line amount tolerance**: Avoid payment delays by defining the acceptable difference between the expected and actual total amount for specific items or services of the invoice.
- **Line quantity tolerance**: Ensure easy payment processing by defining the acceptable range between the expected and actual quantities of items or services listed on an invoice. This is a line level of tolerance.
- **Line unit price tolerance**: Avoid small discrepancies from impacting payment processing and supplier relations by establishing a tolerance range for the difference between the purchase order line unit price and the actual price of an invoice. This is a line level of tolerance.
- **Overbilling amount tolerance**: Avoid overbilling between an invoice and the corresponding purchase order by setting a tolerance range for the difference between the actual amount value and the expected amount. This is a header level tolerance.
- **Over tax amount** and **under tax amount** variances: Confirm smooth payment processing by defining an acceptable range between the supplier-provided tax and system-calculated tax amounts that indicates acceptable minor differences within the defined tolerance range.

> **Note:**
> If the tax amount variance for a tax line is within the tolerance range, then supplier tax amount is copied over to the final tax amount field by default.

Define a custom invoice tolerance type

Define a custom invoice tolerance type that you can use in an exception definition to make payment processing more efficient.

Before you begin

Role required: sn_ap_apm.invoice_tolerance_admin

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > > **Tolerance types**.
2. On the Invoice tolerance types list, select **New**.
3. On the form, fill in the fields.

Invoice tolerance type

Field	Description
Name	Name of the tolerance type.
Application	The scope of the application, which should be Accounts Payable Invoice Processing.
Line level	Option to make the tolerance type applicable at the line level.
Description	Optional brief description of the tolerance type.

4. Select **Submit**.

Result

The invoice tolerance type record is added to the invoice tolerance types list.

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Associate invoice tolerance type with invoice exception definition

Define a new tolerance type and associate it with an invoice exception definition.

Before you begin
Role required: sn_ap_apm.admin

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Administration** > **Invoice exception definition**.
   For more information on configuring **invoice exception definition**, see Invoice exception definition form.
2. Populate the tolerance type on the invoice exception definition form.
   For more information on the tolerance type, see Define a custom invoice tolerance type.
3. You must update the **Subflow** logic to include associated tolerance type logic.
4. Select **Submit**.

What to do next
Associate the invoice tolerance type with invoice exception. For more information, see Define an invoice tolerance rule.

Define an invoice tolerance rule

Configure an invoice tolerance rule definition for a tolerance type to be applied to invoices matching the invoice filter's conditions.

Before you begin
Role required: sn_ap_apm.invoice_tolerance_admin

Enable sn_ap_apm.reader role to access invoice filters for tolerance rules.

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Tolerance rules**.
2. On the **Invoice Tolerance rule** list, select **New**.
3. On the form, fill in the fields.
4. Select **Submit**.
   The tolerance rule is created and added to the Invoice tolerance rules list. You can apply the tolerance rule to an invoice.

View tolerance form

View the invoice processing cases with exceptions in the tolerance form with **Tolerance details** at header level and **Variance details** at line level.

Before you begin
Role required: sn_ap_apm.accounts_payable_specialist

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **All Work** > **All open invoice processing cases**.
   A list of **All open invoice processing cases** is displayed.
2. Open an invoice case.

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3. Select **Exceptions**.
4. Open any invoice exception record with **Status** as **Open** and contains **Tolerance type**.
5. In the **Details** tab.

   a. For header level exception- View **Tolerance** and **Variance details**.

   b. For line level exception- View **Tolerance** details.
   You can view the variance details of each invoice line under **Invoice line affected** tab in list view and form view.

   Note:
   If the variance value and variance percentage exceed the set limit, the values are highlighted in yellow color with a warning  icon suffixed with **Exceeds** and **Within** labels. Grey color indicates that the variance value and variance percentage are within the set limits or closed with the check  icon.

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.

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Approval rule types

Approval rule type	Description
Cost Center Managers	Approvals are created and sent to cost center managers. The approval routing method is restricted to just sending approvals in parallel to cost center owners associated with the cost allocation records. **Note:** Invoice cost center managers must have [sn_shop_invoice_owner] to view the approval rules for cost allocation.
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. The approval routing method can be parallel or sequential, and the approval decision method can be all approvers or any approver.
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.

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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.

Note:
When rejecting a request, you must provide your justification for rejection on the Reject request window.

View invoice documents in the Source-to-Pay Workspace

View the invoice documents directly in the Source-to-Pay Workspace using Document Viewer without having to download them.

Before you begin

Configure Antivirus Scanning

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 **Source-to-Pay 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.

Advanced Work Assignment in Accounts Payable Operations

Advanced Work Assignment (AWA) automatically assigns work items to Accounts Payable Operations agents based on their availability, capacity and skills. AWA pushes work to qualified

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agents using work item queues, routing conditions, and assignment criteria that you define. The work items are available in **Agent workspace inbox**.

Customers use different channels to request service, for example, email, chats, cases, or incidents. Requests from customers create task or interaction records that store information about these objects, called work items. AWA automatically routes work items to queues that focus on certain types of support, using criteria (such as priority or customer status) that you provide.

For more information about AWA, refer Advanced Work Assignment .

Setting up Advanced Work Assignment for Accounts Payable Operations

Set up the AWA and required plugins through the plugin page after selecting any `Get [plugin]` button on the Advanced Work Assignment home page.

Set up the following components for AWA in Accounts Payable Operations

- Service channels- A means of assigning specific tasks to APO agents and specialists. You can configure base channels which define the means through which a query is answered by the agents. Base channels may include chats, invoice inquiry cases, messenger, and walk-up centers. You can create service channel of your choice and set attributes such as agent capacity, agent skills for each service channel which will define the work handled by the agent or agent group.
- Work item- Work handled by the agent from start to completion.
- Work item queue- Queue that stores work items for a service channel.
- Assignment groups- Agents belonging to specific groups categorized by the type of work assigned to them.
- Agent capacity- Number of items on a service channel that an agent can work within defined time.
- Agent availability- States that indicate whether an agent is busy, available or offline. AWA uses agent availability 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 Account Payable Operations workspace.

For more information about AWA components, refer Exploring Advanced Work Assignment .

Configure Advanced Work Assignment for Accounts Payable Operations

Configure AWA for APO to ensure that requests or queries received via email, chat, messenger are routed to the respective APO agents belonging to defined groups.

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 about creating service channels, see . Service channels specific to Accounts Payable Operations are:
   - Invoice Inquiry Cases
   - Chat

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Note:
You can customize the service channel of your choice for any work that would have come through by any mode other than email, chat, messenger.

After you've created the service channel, do the following.

a. Configure the agent capacity to determine the number of work items that can be assigned to agents belonging to a defined group. For more information, see .

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 .

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 on work item, see .

Define or modify a work item queue, which determines the work items to be routed automatically to agents assigned to a service channel. For more information on queues, see .

3. To assign queues, work items to agents, follow steps 3–5 from Configure Advanced Work Assignment for Source-to-Pay Operations.

Configure the Accounts Payable Operations queues

Configure AWA for Accounts Payable Operations queues so that email, chat, and requests raised by suppliers are routed to respective agents belonging to the Accounts Payable supplier group.

Before you begin
Role required: admin

Procedure

1. Navigate to **Source to Pay Workspace** > **All** > **Advanced Work Assignment** > **>Queues**.
2. Select one of the following mentioned queues for Account Payable Operations.
   - Invoice Inquiry case
   - Chat
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.

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c. Select **Save**.

> **Note:**
> The users that you add to this assignment group are automatically granted the awa_agent role.

Configure Agent chat for Accounts Payable Operations

Configure agent chat settings to interact with an Accounts Payable Operations agent.

Before you begin
Role required: admin

Procedure

1. Navigate to **Source-to-Pay workspace** > **All** > **Conversational Interfaces** > **Settings** > **Agent control**.
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 Configuring Agent Chat.
4. Select **Save**.

Using Advanced Work Assignment for Accounts Payable Operations

AWA enables suppliers to interact with Accounts Payable Operations agents inquire or resolve invoice-related queries.

Use AWA for the following benefits:

- Suppliers can initiate chat sessions using virtual agent assist by logging in to the Supplier Collaboration Portal to interact with Accounts Payable agents.
- Accounts Payable agents are notified of incoming requests on new work items. By default, no more than five requests are assigned to an agent at a time. Accounts Payable agents accept requests from the Source-to-Pay workspace inbox to interact with suppliers. Accounts Payable agents can also reject requests or transfer requests to other queues or agents if needed.
- Accounts Payable agents use various features such as response templates, knowledge-based articles, agent assist, and so on, to resolve invoice-related queries or cases.
- Accounts Payable agents can create an invoice inquiry case if the supplier query needs more investigation. For more information on creating a case, see Create New Invoice case form.
- Accounts Payable agents receive invoice email from suppliers. Invoice inquiry cases are created through the **Create Inquiry Case on Invoice email** flows if email subject contains keywords such as invoice inquiry, inquiry.

Working with Advanced Work Assignment

Suppliers interact with APO agents for invoice inquiry cases using the live chat.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Supplier Collaboration portal**.
   Suppliers interact with APO live agent for invoice inquiry cases. The interactions between supplier and APO live agent is recorded in an auto-generated interaction record. For more information regarding interaction record, refer Interaction management in Accounts Payable Operations.
2. Click **Create a case** through the interaction record to create an inquiry case.
   For more information about invoice case, refer Create New Invoice case form.

Interaction management in Accounts Payable Operations

Any request for assistance made to an Accounts Payable specialist via email, chat, phone is logged in an auto-generated interaction record. Agents can choose to create a case from the interaction record, create a request, and associate an interaction record with an existing invoice case record.

The **Details** tab in interaction record contains the following fields:

Field	Description
Number	Auto-generated unique interaction number
Type	The means through which interaction was created. Example:Chat
State	Status of the interaction
Application	The type of application. Example: Invoice Case Management
Short description	Brief description of the interaction
Work notes	Additional notes about the interaction record
Opened for	Name of the user
Assigned to	Name of the assigned agent

For more information, see Create new interaction.

.

Create new interaction

An interaction record is automatically created when an agent accepts a supplier's chat request through the chat queue in the Supplier Collaboration Portal.

Before you begin

Role required: Account Payable Operations agent

Procedure

1. Navigate to **All** > **Source-to-Pay Workspace**.
   Based on the supplier interaction with the agent, an interaction record is auto-created. For more information about the fields in an interaction record, see Interaction management in Accounts Payable Operations.
2. Click**Create a case**.
   If the supplier chat has a new inquiry, then use create a case. For more information about creating invoice inquiry case, see Invoice inquiry cases.

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3. Click **Save**.
   New Interaction record is created.

Associate an interaction record in Accounts Payable Operations

Associate an interaction record to an invoice case if your interaction is related to an existing invoice case in Source-to-Pay workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Source-to-Pay Workspace.**.
2. Select the List icon (**Interactions** > **All**.
3. Search for an existing interaction record using the interaction ID from the list of records.
4. Associate a record with an existing invoice case.

   a. Select More Actions  and then select **Associate record**.
   The **Create New Interaction Related Record** form appears in a new tab.

   b. On the form, fill in the fields.

Create New Interaction Related Record form

Field	Description
Interaction	System-generated interaction number.
Record Type	Type of record created for a case or knowledge topic. By default, this task is auto-populated.
Document table	Invoice case name that you want to associate with the interaction record.
ID of related record	Auto-populates after the **Document table** field is filled.

View interaction record in Accounts Payable Operations

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 invoice case, which needs an Accounts Payable Operations agent involvement for investigation.

Before you begin
Role required: Account Payable agent

Procedure

1. Navigate to **All** > **Source-to-Pay Workspace**.
2. Select the List icon () and select **Interactions** >**All**.
3. View interactions in the desired category to associate a record with an invoice case.

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- Assigned to me- Interactions assigned to an agent
- 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 Account Payable agent assigned to the interaction record
Transcript	Text record of the conversation between an agent and the supplier

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 an invoice case. To open the email client, select **Compose Email** from the more actions icon (a ) 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.

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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 Source-to-Pay Workspace

Compose and send emails directly from an invoice inquiry case or an invoice processing case in the Source-to-Pay 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**.

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Playbook for updating the invoice primary data

Playbooks provide Accounts Payable admins or specialists to visualize invoice processing workflows in a simplified, task oriented, actionable view.

Playbook provides a visual representation of step by step process involved in processing an invoice processing case. The structured workflow helps Accounts Payable admins or specialists to visualize and understand the status of an invoice processing case and take necessary action when required. With playbooks, it is easier to know what to do next, and also understand what happened in the past with the invoice processing case. With playbooks, the Accounts Payable admins or specialists quickly view and analyse the state of an invoice processing case leading to quicker turn around with suppliers and results in enhanced business operations.

Playbooks in Accounts Payable Operations provides step by step process involved in processing an invoice processing case such as validating the invoice, checking for duplicates, matching invoice lines and purchase orders, validating exceptions, checking for approvals, and processing the payment of the invoice.

You can perform the following actions using playbook:

- View the different stages and activities of an invoice
- View status indicators that display the state of the current stage or action

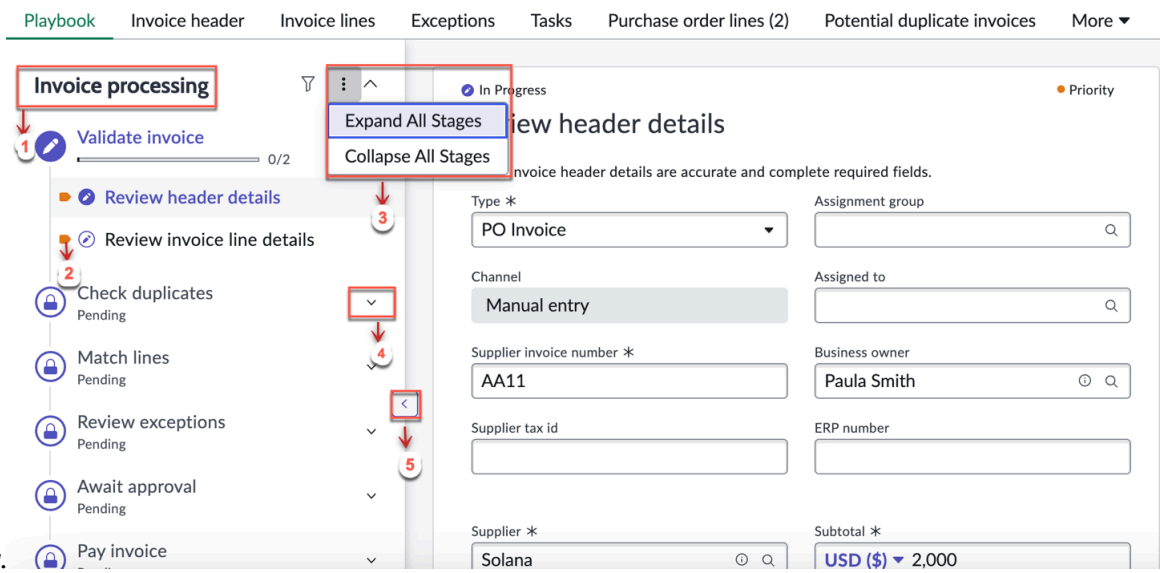
For more information about the workflow of playbooks, see Process Automation Designer.

View the Playbook activities

Playbooks in Accounts Payable Operations displays step by step process involved in processing an invoice processing case through activity views.

The playbook life cycle provides the context as to where an Accounts Payable specialist is within the playbook, including information for each stage and activity and any dependencies between stages. For stages with multiple activities, the playbook life cycle provides step-by-step guidance for completing the stage.

The figure below displays the playbook workflow.



The stages and activities in a playbook life cycle are configured using Process Automation Designer (PAD). Refer to the table below for the Playbook activity.

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Playbook details

Indicator	Field	Description
1	Playbook header	Displays the title of the playbook
2	Progress indicators	Displays the state of the playbook
3	Playbook action menu	Allows you to expand or collapse stages in the playbook resulting in focussed view. You can use the filter option to refine activities by the assigned user or by the activity status
4	Expand and collapse	Allows you to expand or collapse stages in the playbook
5	Show/hide playbook pane	Allows you to view or hide playbook pane

The playbook work area appears in the center part of the playbook section. It displays the action taken for the current activity, depending on the configured activity view.

Using Playbook in Accounts Payable Operations

Configure a playbook and visualize the step-by-step actions performed by an Accounts Payable specialist while processing an invoice.

Before you begin

Role required: Accounts Payable specialist

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed.
3. Select **Invoices >All invoices.**
   You can create an invoice manually. For more information on invoices, see Work with invoices.
4. Select **View Invoice processing case**.
   A playbook is available for the Invoice processing case. You can view the stages and activities of Invoice processing in the **Playbook** tab.
5. Select **Validate invoice**.
   The invoice opens and you must verify the invoice details.

   a. Select the **Review header** details.
      Review the invoice header details and make any required changes.

   b. Select **Save**.

   c. Select **Continue** to move to the next activity in the playbook.

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d. Select the **Review invoice lines** activity.
Manually review the invoice lines associated with the invoice processing case.

e. Select **Add new invoice lines** to create invoice lines.

f. Select **Continue** to move to the next activity in the playbook.

g. Select the **Review invoice tax line details** activity.
The **Review invoice tax line details** displays the list of invoice tax lines.

h. Select **Add tax**.
The **Add tax lines to the invoice** pop-up box displays. You can choose to add tax lines associated with invoice line. For more information on the fields of tax lines, see Invoice Tax lines fields.

i. Select an **Invoice line** in which you would like to add the tax lines.

j. Select the **Apply to all invoice lines** check box if you want to add the tax lines to all the invoice lines.

k. In the **Enter tax details** area, perform the following steps.

l. Select the **Tax type** to be associated with the invoice line.

m. Enter the **Supplier tax rate** details.

n. Enter the **Taxable amount** details.

o. Enter the **Supplier tax** details.

p. Select **Add tax**.
The tax lines are added to the invoice line.

q. Select **Submit invoice**.
The invoice is submitted with tax lines.

6. Select **Check Duplicates**.

a. The **Check Duplicates** activity enables you to check if the invoice processing case is a suspected duplicate.
The **Review Duplicates** activity is auto-selected if the invoice is a suspected duplicate. If the invoice isn't a suspected duplicate, then the activity is set to auto-complete.

b. Select **Confirm duplicate**.
If the invoice is found to be duplicate, then select confirm duplicate. The invoice moves to a confirmed duplicate State and the playbook is set to **Cancelled**

c. Select **Notify supplier**.

d. Select **Not a duplicate** if the invoice isn’t duplicate.

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A pop-up box displays prompting the user to enter the reason for the non-duplicate invoice.

e. To reset the invoice to the received state after setting, it as confirmed duplicate follow the steps from Reset an invoice to the Received status.

7. Select the **Match lines** card.
   If the invoice is a PO invoice or credit memo invoice of type PO and the invoice doesn't run into a matching error, then the **Match lines** card is set to auto-complete. However, if the invoice is of type Non-PO invoice or a credit memo invoice of type Non-PO, the stage is skipped.

   a. Verify the **Match invoice lines** card.

   b. You can edit the changes to the purchase order form and select **Update**.

   c. Select **Continue** after you save the changes.

   d. In the **Review the PO Lines** card, review the PO lines associated with the purchase order to identify the lines that is mapped to the invoice line.

   e. You can edit the invoice lines and match the invoice lines with the corresponding purchase order lines.

   f. Verify the **Verify Purchase Order** card.
      Verify the purchase order details associated with an invoice.

8. Select **Review exceptions**.
   The list of exceptions raised for the invoice is listed. For more information on exceptions, see Invoice exceptions. This stage is set to auto-complete if the invoice doesn't run into exceptions.

   a. Review the exceptions generated for the invoice using the **Resolve exceptions** card, and resolve exceptions if any.

   b. Select an **Check exceptions** action to reevaluate the exceptions.

   c. Select **Review exception tasks** to resolve exception tasks if any.

   d. Select **Create new task** to create an exception task.
      For more information on exception tasks, Work on an invoice exception.

9. Select the **Await approval** card.
   This stage is set to auto-complete after the invoice is approved.

   Note:
   Use **Review approvals** generated for the invoice. In the **Notify supplier** activity, you can review the emails sent to the supplier when an invoice is rejected.

10. Select the **Pay Invoice** card.

    a. In the **Review Integration errors** activity, review the integration errors generated for the invoice.
       For more information on integration errors, see Integration errors.

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b. The playbook auto-selects a **Review payments** activity.
You can view the payment details of the invoice. For more information on the payment form, see Payment terms

The invoice processing case is completed with status set to **Paid**.

Document Intelligence processing with playbook

Invoices ingested through Document Intelligence require Accounts Payable specialists or admins to perform manual actions depending on Document Intelligence availability and invoice processing using Document Intelligence.

The following scenarios occur when Document Intelligence process a document:

- When Document Intelligence is processing the document, and if you select the **Capture invoice details** card, you're prompted with the message: `Invoice is currently being processed by DocIntel. This process might take some time to complete. Check back for updates.`
- When Document Intelligence processing is completed and the data is extracted successfully, the **Capture invoice details** card is auto-completed and displays the message as: `Invoice extraction is successfully completed`.

Extract data with Document Intelligence

You can manually extract data from the document when Document Intelligence completes the processing but fails to auto-extract data.

Before you begin

Role required: Accounts Payable admin, Accounts Payable specialist

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed.
3. Select **Invoices >All invoices.**
   You can create an invoice manually. For more information on invoices, see Work with invoices.
4. Select **View invoice processing case**.
   A playbook is created for the invoice processing case.
5. Select **Validate invoice** >**Capture invoice details** activity card.
   An alert message displays as: `Review the invoice details captured by DocIntel and provide any missing information.`
6. Select **Review invoice**.
   The document extraction dashboard opens in a tab. The document extraction dashboard extracts the invoice fields.

Note:

- When the document extraction is completed either automatically or manually and all the required invoice details are populated, then the invoice is submitted automatically. The **Review header details** and **Review invoice lines** cards are set to auto-complete.
- When the document extraction is completed either automatically or manually, but the required fields are missing, then manually populate the invoice line fields or add invoice lines using **Review invoice lines**.

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For more information on manual creation of invoice, see Using Invoice Case Management.

7. Select **Submit**.

Extract data when Document Intelligence fails

You must manually create an invoice for processing when Document Intelligence fails to process the task.

Before you begin

Role required: Accounts Payable admin, Accounts Payable specialist

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed.
3. Select **Invoices >All invoices.**
   You can create an invoice manually. For more information on invoices, see Work with invoices.
4. Select **View invoice processing case**.
   A playbook is created for the invoice processing case.
5. Select **Validate invoice**>**Capture invoice details** activity card.
   An alert message displays as: `Invoice extraction has run into some technical issues. Please contact your system administrator. To continue processing, manually create an invoice or close the case.`
6. Select **Create invoice** manually for creation of an invoice.

   Note:
   You can choose to close the case if you do not want to proceed.

   For more information on manual creation of invoices, see Using Invoice Case Management
7. Select **Review header details** to populate the header fields.
8. Select **Review invoice lines** and add the invoice line fields or populate the required fields.
9. Select **Submit**.
   If no further processing is required, then you can close the invoice case. A pop-up window prompts you to enter the reason for closing the invoice processing case. The playbook is canceled and the supplier is notified about the closure of the invoice processing case. The **Notify supplier** card is activated by default and displays the email sent to the supplier.

Extract data when Document Intelligence is unavailable

You must manually create an invoice for processing when Document Intelligence is unavailable.

Before you begin

Role required: Accounts Payable admin, Accounts Payable specialist

Procedure

1. Navigate to **All** > **Accounts Payable Operations** > **Source-to-Pay Workspace**.
2. Select the list icon ( ).
   A list of options within the workspace is displayed.
3. Select **Invoices >All invoices.**

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You can create an invoice manually. For more information on invoices, see Work with invoices.

4. Select **View invoice processing case**.
   A playbook is created for the invoice processing case.
5. Select **Validate invoice**>**Capture invoice details** activity card.
   An alert message displays as: `DocIntel is unavailable to process the invoice. To continue processing, manually create an invoice or close the case.`
6. Select **Create invoice** manually.

   Note:
   You can choose to close the case if you do not want to proceed.

   For more information on manual creation of invoices, see Using Invoice Case Management
7. Select **Review header details** to populate the header fields.
8. Select **Review invoice lines** and add the invoice line fields or populate the required fields.
9. Select **Submit**.
   If no further processing is required, then you can close the invoice case. A pop-up window prompts you to enter the reason for closing the invoice processing case. The playbook is canceled and the supplier is notified about the closure of the invoice processing case. The **Notify supplier** card is activated by default and displays the email sent to the supplier.

   Note:
   Invoices ingested through integration or manually, the **Capture invoice details** activity card isn't displayed under **Validate invoice**.

Using Supplier Collaboration Portal in APO

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.

Configuring the Supplier Collaboration Portal

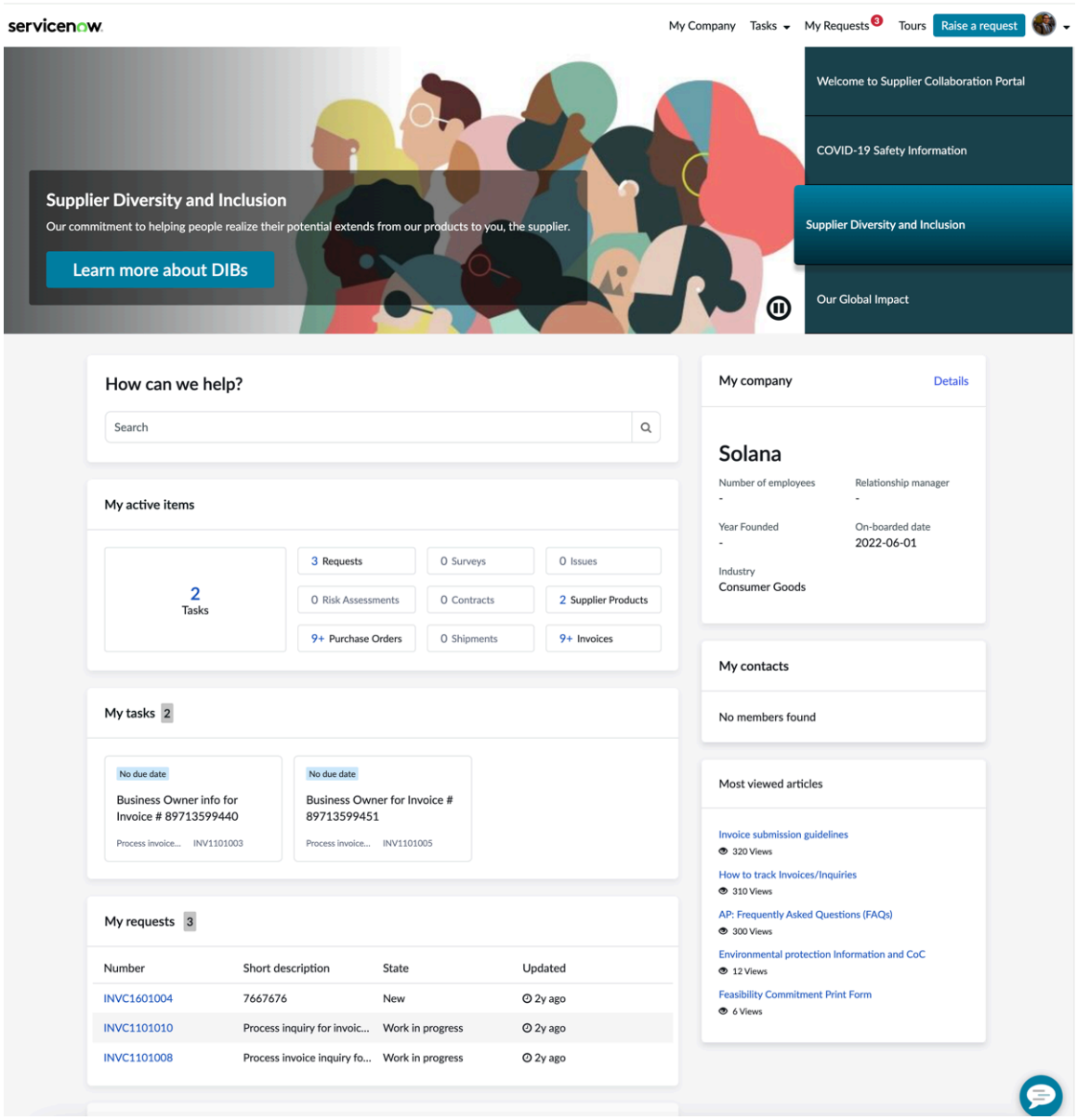
To configure the Supplier Collaboration Portal, see Install Supplier Collaboration Portal.

Note:
APO users while installing the Supplier Collaboration Portal must grant access to supplier records in the restricted access table to avoid any kind of access issues. For more information on restricted access approval, see Restricted caller access approvals for Supplier Collaboration Portal.

Supplier Portal Collaboration header

The portal header is located at the top-right corner of the home page contains the following options.

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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.

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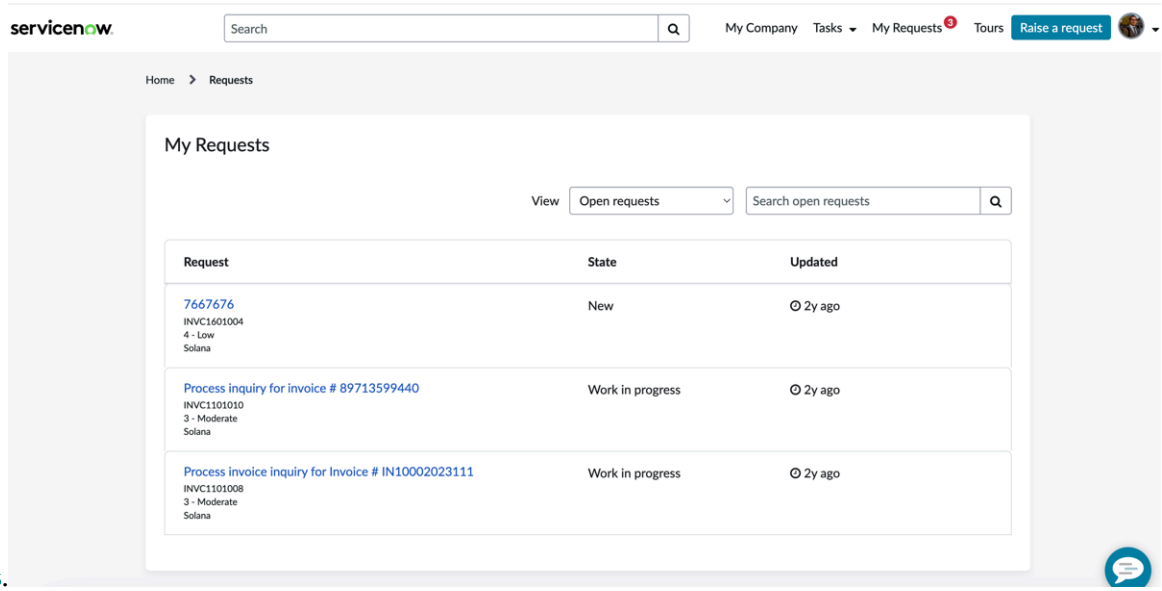
My active items widget

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	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. **Note:** From the invoice form, you can submit an inquiry case. For more details on inquiry case, see Submit Invoice Inquiry .

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 the **My Requests** widget, see Working with My Requests.



For more information on installing the Supplier Collaboration Portal, see Configuring Supplier Lifecycle Operations.

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Explicit roles plugin

You can give both internal users and external users access to your instance. However, you might not want both types of users to have the same level of access. To provide added security, every user must have at least one role so that the instance can distinguish between internal and external users.

As of the Paris release, no user can have both of the explicit roles (snc_internal and snc_external). Groups and role containment cannot include both roles, either, since that would cause any group member or user who is assigned to such a group or such a role to automatically have both roles. The ServiceNow AI Platform aborts any operation that would create such a scenario.

You must install the Explicit Roles [com.glide.explicit_roles] plugin while installing Accounts Payable Operations. The Accounts Payable Operations plugin is dependent on the Explicit Roles [com.glide.explicit_roles] plugin.

Before you install the Accounts Payable Operations plugin, you must perform comprehensive analysis of the Explicit Roles [com.glide.explicit_roles] plugin configuration to avoid conflicts or adjustments; ensure seamless integration and operation of the plugins.

The installation of the Accounts Payable Operations plugin may cause access issues to the existing functionality that are controlled by the Explicit Roles [com.glide.explicit_roles] plugin. You may have to manage or reconfigure certain roles and permissions managed by the Explicit Roles [com.glide.explicit_roles] plugin for seamless integration and operation of existing functionalities. For more information on explicit roles, see Explicit Roles.

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.

2. On the **Exception task** form, you can view the following details.

3. On the **Invoice case** task form, you can view the following.
   Supplier selects **Mark complete**. The status of the task changes to **Closed complete**. For more information on invoice case, seeUsing Invoice Case Management.

Working with My Requests

View and respond to invoice inquiries.

Before you begin

Role required: Supplier

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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.
   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.
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.

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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.
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.

Virtual agent flows

Suppliers can check the invoice and inquiry statuses, create inquiry cases in the supplier portal using the chat channel. Suppliers can also use the virtual agent to view predefined chatbot topics.

Suppliers can switch between a virtual agent and a live agent to address their issues. The customer service virtual agent topics (chatbot conversations) help suppliers complete common self-service tasks. The supplier initiates a conversation topic that consists of dialogs with the virtual agent chatbot to accomplish a goal.

Natural Language understanding (NLU) is integrated with the virtual agent chatbot to help suppliers with invoice and inquiry-related queries. NLU also helps suppliers to analyze, understand, and navigate to the right topic.

For more information, see Connect and Virtual Agent.

Accounts Payable Operations Virtual agent flows

Supplier can choose to view the following Virtual agent flows.

Check invoice status

The supplier provides an invoice number and the virtual agent displays the status of the invoice. The invoice status is a clickable link, which navigates suppliers to view invoice case details. For more details about the invoice, see Work with invoices.

The chatbot prompts the supplier to perform the following.

1. Add new comment-comment on the inquiry or invoice case that the supplier requested for
2. Talk to a live agent- Accounts Payable Operations agent interacts with a supplier for an invoice or inquiry-related query
3. Search for something else- Redirects suppliers to point 1
4. All good thanks- Ends the chat

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Live Agent support

Suppliers are routed directly to a live Accounts Payable Operations to initiate conversations and skip the virtual agent conversation greeting. Live agents can also create Interaction records and associate with an existing invoice case. For more information on interaction records, see Interaction management in Accounts Payable Operations. If an agent isn't available, the message **No agent available** is displayed to the user.

Check inquiry status

The supplier provides an invoice number and the virtual agent displays the status of the inquiry. The Accounts Payable Operations agent can create a new inquiry on the invoice.

Create new inquiry

The supplier can choose to create an inquiry case related to the invoice using the **Create inquiry** link. The **Create inquiry** link enables suppliers to choose the type of inquiry case. Suppliers use **Add new comment** to add comments related to the inquiry.

For more information on creating inquiry case, see Submit Invoice Inquiry.

Prechat Survey

Pre-chat survey is available to supplier if the Accounts Payable admin installs the `app-supplier-awa`plugin into the system. Depending on the response received from the supplier, the chatbot directs the supplier to choose between **Talk to Live Agent** and **Accounts Payable** options. For more information on the options, see Configure the chat channel and Advanced Work Assignment in Accounts Payable Operations.

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Configure the chat channel

Activate the virtual agent chatbot (chat channel) in the supplier portal for suppliers to complete Accounts Payable Operations related self-service tasks.

Before you begin
Activate the following plugins for the chat channel in the supplier portal to be available to access predefined conversation topics:

- The Virtual Agent (com.glide.cs.chatbot)
- Advanced Work Assignment with Supplier life cycle Operations (com.snc.sn_slm_awa)

Role required: Accounts payable specialist, Accounts payable agent, supplier.

Procedure

1. Navigate to **Supplier Collaboration Portal** > **Chat window**.
2. Choose a flow, which you want to view.
   For more information on flows, refer Virtual agent flows.

Integrating APO with other applications

Extend the capabilities of Accounts Payable Operations by integrating with other applications.

For more information on APO integration, see Accounts Payable Operations integration framework,Inbound staging tables for Source-to-Pay Operations and Outbound staging tables for Source-to-Pay Operations.

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Accounts Payable Operations integration framework

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.

External systems can securely submit invoices into the accounts payable system in a structured and automated manner using APIs. For more information on injecting invoices through API, see AP Invoice API.

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.

Integration errors

The ERP integration framework enables Accounts Payable Operations specialists to work on system-generated integration error tasks that record integration issues associated with invoices posted to the ERP system.

When the invoice is posted to an outbound staging table in the Accounts Payable Operations application, sometimes due to poor data connection, or missing data, the ERP integration can fail. Such integration failures are tracked in the form of system-generated integration error

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tasks. The integration error tasks are created and auto-assigned to the Accounts Payable Operations specialist involved in the processing of invoice case. With playbooks, Accounts Payable Operations specialist uses the **Review integration errors** activity card to review the error tasks associated with the invoice processing case, make required changes to the invoice header, invoice lines and resubmits the invoice to ERP by integration.

When invoices are ingested through DocIntel or integration, you can determine the ERP source for certain fields like Purchase order, Legal entity, Original invoice, Supplier tax id and Supplier. You can populate the reference fields matching the ERP source.

Integration admins are notified about the integration errors through **Integration Error Tasks** caused due to issues such as system time outs. If there are system issues, the integration admin can execute jobs of type scheduled, on-demand or auto-schedule to handle integration error tasks. The scheduled job triggers the posting of erroneous invoices.

Playbooks are designed to auto-create an error task and attach the error task to the respective invoice case.

The Accounts Payable Operations specialists can also view the ERP posting errors through the Accounts Payable Operations home page. For more information on the home page, see APO landing page.

Working with Integration error tasks

Integration admin works on system-related integration error tasks and reposts invoices to ERP. Integration admin can run schedule job, on-demand, or auto-schedule bulk invoices after closing the error tasks.

Before you begin

Role required: Integration admin

Procedure

1. Navigate to **All** > **Integration Error tasks**.
   List of integration error tasks are displayed.
2. Select **Send to ERP**.
   The invoice is resubmitted to the ERP.
3. You can manually select the error tasks to be closed or create a schedule job, on-demand, or auto-schedule to close the error tasks.
   For more information on scheduled jobs, see Scheduled jobs.
   System-related integration error tasks are closed and invoices are auto-synchronized to outbound tables.

Example of ERP posting error workflow

The ERP posting error example shows the different stages involved in closing integration issues using the error task.

Before you begin

Role required: Accounts Payable admin

Procedure

1. Navigate to **All** > **Source-to-Pay Workspace** > **Accounts Payable Operations**.
   The Accounts Payable Operations landing page appears.
2. Select **ERP Posting error**.
   The **ERP Posting error invoices** page lists the invoice cases with **ERP integration status** as **Failed**.

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3. Select an invoice case.
   The **Pay invoice** playbook card auto-opens **Review integration errors** card. An error message displays the reason for integration failure. Example: There was an integration error for this invoice. Complete the tasks to ensure that the invoice details are correct.
4. Select the error task in **Review integration errors** page.
   The **Review integration error for XXXXX** form opens. Review the error description which explains the reason for integration failure. Example: Network failure. For more information about the ERP posting error task, see ERP Posting error form.
5. Open the **Invoice header** form and edit the invoice fields with appropriate details.
6. Open the **Invoice Lines** form and edit the invoice fields with appropriate details.
7. Select **Save**.
   The changes to the forms are saved.
8. Select **Send to ERP**.
9. As an alternate step, you can also open the playbook of invoice processing case and select**Send to ERP**.
   In the outbound table, an invoice with status **New** is created. The integration status in the outbound invoice is updated to **Processed**. In case of cost allocation records, when an invoice is submitted for approval and if the ERP fails to process the invoice, then an integration task is created. Accounts Payable specialists review the integration error task and manually process the invoice using **Send to ERP**. The outbound staging record displays the invoice lines, tax lines and cost allocation details.
10. In the invoice **Details** tab, the **Status** is auto-updated as **Pending payment**.
11. Select **Review Payments**.
    For more information on payment fields, see Inbound invoice payment fields.

Result

The ERP integration error tasks are closed and the invoice is successfully processed for payment.

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.

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a. In **Create an Excel template file to enter data**, select 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.

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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**.

Result

The invoice is extracted for payment and the invoice status is set to **Paid**.

Accounts Payable Operations reference

Reference topics provide additional information about the lists and forms that you use in Accounts Payable Operations.

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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.
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.
Tax Details	
Supplier tax	The total tax amount charged on the invoice line item by the supplier.
System tax	The total tax amount for the invoice line item calculated by the third-party tax calculation engine.
Final tax	The total tax amount paid for this invoice line item.
Unit	The unit or rate in which this product is billed by the supplier.

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Create New Invoice Line form (continued)

Field	Description
Supplier part number	The part number of the supplier product.

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: • **Web** • **Email** • **integration** • **Virtual agent**
Supplier tax id	The tax ID of the supplier.
Supplier tax	The total tax amount charged by the supplier.
System tax	The total tax amount calculated by the third party tax calculation engine.
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.

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Create New Invoice form (continued)

Field	Description
	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.
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.

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Create New Invoice form (continued)

Field	Description
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.
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

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Invoice Imports (continued)

Column	Description	Data type
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
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.

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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
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

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

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Invoice Imports (continued)

Column	Description	Data type
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)
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 exchangedin Currency Code ISO 4217 format (USD, GBP, INR, etc)	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

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Invoice Imports (continued)

Column	Description	Data type
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 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

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Invoice Imports (continued)

Column	Description	Data type
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	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

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 invoice cost allocation form

Allocate invoice line cost across multiple cost centers.

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Create invoice cost allocation form

Field	Description
Invoice cost allocation	
Allocation type	Type of cost distribution (cost center or ledger account).
Invoice line	Cost allocated to the invoice line
Allocate by	Determines if the cost allocation is made by the following: • Quantity • Quantity percentage • Amount • Amount percentage
Allocation details	
Cost center	Cost center that incurs the cost of the allocated transaction amount.
Allocation amount	Amount of the cost allocated.
Allocation percentage	Percentage of the cost allocated. This field is visible only if the allocation by is set to Percentage
Allocation quantity	The quantity of goods/services allocated.
Ledger account	Ledger account that incurs the cost of the allocated transaction amount.

Outbound cost allocation staging table

The outbound cost allocation [sn_spend_intg_outbound_invoice_cost_allocation] staging table stores important data about cost allocation information so that an ERP integrator can export this data to a third-party ERP system.

Outbound cost allocation staging table

The following table lists fields for the outbound cost allocation [sn_spend_intg_outbound_invoice_cost_allocation] staging table.

Outbound cost allocation staging table

Field	Data type	Description
Number	String	An auto-generated number that uniquely identifies the invoice.
Allocation type	Choice	The cost allocation type that you would like to assign cost to.
Cost center	Reference	Cost center for which the invoice is generated.
Ledger account	Reference	A reference field for the account used to generate the#nvoice.
Allocate by	String	Determines whether the cost allocation is based on amount or percentage.
Allocation amount	String	Amount that is allocated.
Invoice line	Reference	Line items on the invoice.

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Outbound cost allocation staging table (continued)

Field	Data type	Description
Integration status	Choice	Status of the integration process.

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: • **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.
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	The closure code for the case. The options are: • **Duplicate request** • **Canceled/False inquiry** • **Canceled by requester**

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Create New Invoice case form (continued)

Field	Description
	• **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.

Invoice status messages

Invoice-related status messages are displayed in the Accounts Payable Operations application.

Invoice statuses

Invoice status	Description
No invoice	When an invoice encounters data extraction issue, this status is updated. You must review the invoice details and line items using DocIntel to ingest the required data and submit.
Draft	This status is updated in 2 scenarios: • When an invoice can extract most of the data from DocIntel, the invoice is being updated with the missing required information and is yet to be submitted. • When an invoice is created manually until it's ready for submission.
Received	The invoice created with options such as manual, digitized or through API is moved to Received state.
Suspected duplicate	After the invoice is updated with required details, Accounts Payable Specialist checks if the same invoice (supplier invoice number) is previously submitted by the same supplier. If the invoice is submitted by the supplier, then the invoice is updated with **Suspected duplicate** State.
Accepted	This status is updated in one of the following scenarios:

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Invoice statuses (continued)

Invoice status	Description
	• As part of invoice processing, the invoice moves from **Received** to **Accepted** State if no duplicate invoices are identified by the system • Accounts Payable Specialist confirms the invoice is not duplicate. • System recognizes the invoice as duplicate and Accounts Payable Specialist confirms it as non-duplicate.
PO matching error	This status is updated in one of the following scenarios: • An invoice is updated with PO matching error when PO is missing on the invoice. • PO line mapping is missing from invoice lines. • The currency on the PO is different from the invoice currency.
PO matching completed	When all the invoice lines are mapped to PO lines and if no discrepancies are found between PO and invoice currency, then the invoice is updated to PO matching completed.
Exceptions found	An invoice is updated with the status Exceptions found, when it finds any one or more of the exceptions that were defined in Accounts Payable Operations. For more information on exceptions, see Invoice exceptions.
No exceptions found	This status is updated in one of the following scenarios: • When there are no exceptions with an invoice or invoice lines. • When all the identified exceptions are fixed, then the invoice is moved to No exceptions found state.
Pending approval	After all the invoice exceptions are resolved (no exceptions found), then the invoice is submitted for approval and the invoice changes to **Pending approval** State.
Rejected	When an invoice is rejected through email, custom APIs, the invoice status is updated as rejected.
Approval recalled	After the invoice is submitted for approval (pending approval), Accounts Payable Specialist can recall the approval to edit the invoice if needed.
Approved	After the invoice us submitted for approval (pending approval), if the user approves the invoice, then the invoice is moved to **Approved** state.
Pending payment	After the invoice is approved, then the invoice is integrated with ERP system. If no integration errors are found, then the invoice status changes to **Pending payment**.
Confirmed duplicate	When the system identifies the invoice as suspected duplicate, and then Accounts Payable Specialist confirms the invoice as duplicate, the status changes to **Confirm duplicate**.
Canceled	When Accounts Payable Specialist cancels the invoice, then State is auto set to **Cancelled**.

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Invoice statuses (continued)

Invoice status	Description
Paid	After the invoice is posted to ERP and paid in the ERP, the payment is posted back to Accounts Payable Operations without integration error. Then, the invoice moves to **Paid** State.

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	Invoice exception for an invoice. **Note:** This field is displayed only when you create an exception task from within an invoice exception.
Type	This field is set to Exception task by default. This field is read-only. **Note:** This field is displayed only when you create an exception task from within an invoice exception.
State	The current state of the task. At task creation, the State defaults to New. The available task states are: • 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.

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Invoice task form tabs

Tab	Description
Details	Details about the task.
Invoice exception lines	Details about exceptions on invoice lines for line-level invoice exceptions. 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).

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.

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Invoice processing case form (continued)

Field	Description
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.
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 details

Accounts Payable Specialists can use the Invoice processing detailed form to view the invoice details. Invoice processing detail is found in the the `sn_apm_invoice_attribute`table.

Invoice attributes form

Tab	Description
Approval date	Approved invoice date in DD/MM/YYYY format.

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Invoice attributes form (continued)

Tab	Description
Auto approved	A boolean value is set to either true if the invoice is auto approved, or else it is set to false.
Created	Timestamp of the invoice created in DD/MM/YYYY and HH:MM:SS format.
Created by	Name of the person who created the invoice.
Exceptions	Exception engine evaluates the invoice. A boolean value is set to true if the invoice gets stuck with exceptions, or else it is set to false.
Extraction failed	A boolean value is set to true if any of the invoice fields fails during extraction, or else it is set to false.
Invoice	Name of the invoice.
Last exception check time	Timestamps of the last exception check performed on the invoice in DD/MM/YYYY and HH:MM:SS format.
Manual review in ingestion	The boolean value is set to true if invoice is manually submitted by Accounts Payable specialist instead of automated process, or else it is set to false.
Matching error	A boolean value is set to true for invoices that run into **PO matching error**state, or else it is set to false.
Rejected	A boolean value is set to true if the invoice is rejected by an approver, or else it is set to false.
Suspected duplicate	A boolean value is set to true for invoices that run into **Suspected duplicate** state, or else it is set to false.
Sys_id	Unique ID of the invoice processing detail record.
Tags	Invoice processing detail-related tags.
Tolerance applied	A boolean value is set to true if any tolerance rule is applied on the invoice that helps prevents it from creating an exception, or else it is set to false.
Updated	Timestamp of the invoice processing detail updated in DD/MM/YYYY and HH:MM:SS format.
Updated by	Name of the person who updates the invoice processing detail record.
Updates	Integer value set if any updates are performed on the invoice processing detail record.

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.

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Invoice processing case form tabs (continued)

Tab	Description
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.
Exceptions	Exception engine evaluates the invoice and then raises exceptions if necessary.
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.

ERP Posting error form

The ERP posting error form includes mandatory fields that must be updated by the Accounts Payable admin to close the ERP integration error task.

ERP Posting error form tabs

Tab	Description
Details	Details about the task. • Number- Unique error identification task number • Sub type- auto populates Invoice ERP Integration • State- Displays the state of the error task. By default the task is **Open**. Once you fix the integration errors, change the state to Closed. • Assignment group- The default assigned group is AP- Invoice operations • Assigned to- Name of the Accounts Payable admin • Short description- Brief description of the integration error • Description- Detailed explaination of the integration failure
Invoice header	Details about the invoice header. This is typically used to compare the invoice header details along with the invoice attachment.
Invoice lines	Details about the invoice line fields
Emails	Invoice related emails are created

Invoice tolerance rule form

Create tolerance rules that can be applied on an invoice.

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Invoice tolerance rule

The following table displays the fields in the invoice tolerance rule form.

Field	Description
Name	Name of the tolerance rule.
Active	Option to make the tolerance rule to be available for invoice processing.
Type	The tolerance type is associated with the tolerance rule.
Order	Priority in which you would like to process the tolerance rule. The lowest order is applied on the invoice. Example: If there are 2 rules applicable with the orders set as 10 and 20. Rule with order 10 is applied on the invoice.
Tolerance value	The permissible variance limit of type numeric and positive numbers only. Example: 200
Tolerance percentage	The permissible variance percentage.
Condition type	Determine whether the value and percentage both need to be met or whether one of the other needs to be met to skip an exception. Determine whether the value and percentage both need to be met or whether one of the other needs to be met to skip an exception. • **AND**- If both the **Tolerance value** and **Tolerance percentage** values should be met. • **OR**-If either the **Tolerance value** or Tolerance percentage values should be met.
Invoice filters	Filter condition to determine the invoices for which the tolerance rule is applicable. For example: **[Type][is][PO invoice] AND [Supplier]]is][X]**. You can concatenate additional filters by using **New Criteria**.

Tax lines

The Tax lines tab lists the tax line associated with the invoice line.

Tax lines tab

The following table displays the fields in the tax lines tab.

Field	Description
Invoice Case	
Number	A unique system-generated number, which identifies the tax line.

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Field	Description
Tax type	Type of the tax applicable on the invoice.
Supplier tax rate	The tax rate charged by the supplier.
Supplier tax	The amount charged by the supplier.
System tax rate	The tax rate calculated by the third-party tax calculation engine.
Final tax	The tax amount paid for this invoice
Invoice line	Invoice line for which the tax is applicable.
Invoice	Invoice for which this tax is applicable.

Invoice Tax lines fields

Use the tax lines tab to record tax lines on purchases that are invoiced.

Invoice Tax lines fields

The following table displays the fields in the invoice tax lines tab.

Field	Description
Invoice Case	
Number	A unique system-generated number, which identifies the tax line.
Tax type	Type of the tax applicable on the invoice.
Taxable amount	The amount of tax applicable on an invoice.
Supplier tax rate	The tax rate charged by the supplier.
Supplier tax	The amount charged by the supplier.
System tax rate	The tax rate calculated by the third-party tax calculation engine.
Final tax	The tax amount paid for this invoice
Invoice line	Invoice line for which the tax is applicable.
Invoice	Invoice for which this tax is applicable.

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.

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Invoice exception form (continued)

Field	Description
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.
Purchase Order Lines	Purchase order lines corresponding to the invoice lines for which the invoice exception has been raised. This tab is shown only for invoice exceptions of type Insufficient Funds (Quantity variance) and Insufficient Funds (Amount variance).
Receipts	Goods receipts for all the purchase order lines of a purchase order. For more information, see Receipts.
Related invoices	Related invoices from the same supplier. This tab is shown only for invoice exceptions of type Insufficient Funds (Quantity variance) and Insufficient Funds (Amount variance).
Exception tasks	Exception tasks for the invoice exception.
Related tasks	If Sourcing and Procurement Operations is installed, the following tasks are shown: • 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, only the Milestone task is shown.

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Invoice exception form tabs (continued)

Tab	Description
	Note: This tab is shown only for an Insufficient Goods Receipt (IGR) exception.

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
- Tax code fields
- Tax type fields
- Organization tax details

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	A unique identifier generated within an ERP system for the purchase order.
Business owner	Reference	The user who placed the order.

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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:

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Field	Data type	Description
		• Good • Service • Handling fee
Goods receipt required	Choice list	Applicable only if product type is “Good”. The values are: • Yes • No
Acknowledgement type	Choice list	Applicable only if product type is “Service” or “Handling fee”. The values are: • Milestones • Service acknowledgement • Two way match
Expected delivery date	Date	Applicable only if product type is “Good".
ERP line number	String	A unique identifier generated within an ERP system for the purchase order line.
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.
Unit	Choice list	The unit of rate at which product or service is sold by supplier. The values are: • 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.

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Field	Data type	Description
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.

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Field	Data type	Description
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: • AMS • APAC • LATAM • EMEA
Local currency	Reference	Local currency of the entity.
Reporting currency	Reference	Reporting currency of the entity.

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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.

For more information on cost centers and how it is referenced within financial systems, see Cost Management.

cmn_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.
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.
Manager	String	A reference to the user who manages the cost center.
Parent	String	A reference to the parent cost center in the hierarchical structure of cost centers.

Ledger account

A reference field for the account used to generate the#nvoice.

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.

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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: • 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”.

Tax code fields

As a Tax manager, you can create tax codes to be applied in an invoice.

Tax code fields

The following table displays the fields in the tax code form.

Field	Description
Invoice Case	
Tax code ID	A unique tax code generated from the ERP source.
Name	Name of the tax code specified by the user.
Description	The details of the tax code used in transactions or financial activities.
Country	The name of the country for which the tax code is applied to.
State	The name of the state for which the tax code is applied to.
Active	The status of the tax code.
ERP source	The name of the ERP source for which the tax code is generated.

Tax type fields

As a Tax manager, you can create tax types to be applied to an invoice.

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Tax type fields

The following table displays the fields in the tax code form.

Field	Description
Invoice Case	
Code	A unique tax code generated from the ERP source.
Category	Name of the tax category. • Sales tax • Use tax • Value-added tax • Goods and service tax • Withholding tax
Name	The name of the tax type used in transactions or financial activities.
Active	The status of the tax type. By default the active check box is inactive.

Organization tax details

Accounts Payable specialist uses the organization tax table to view the supplier's tax registration details.

Organization tax table

The organization table `sn_fin_org_tax_detail` stores supplier or organization tax details.

Field	Data type	Description
Organization	Reference	The supplier or organization name.
Country of registration	Reference	Name of the country where the supplier or organization details are registered.
State/Province	String	Name of the state or province where the supplier or organization details are registered.
Tax ID	String/Numeric	Unique reference ID issued against an organization or supplier
Active	Boolean	The status of the tax registration of the organization or supplier.

Invoice exception definition form

Use the Invoice exception definition form to provide details about the new invoice exception definition.

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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	The Invoice exception definition on which the new invoice exception definition depends on. 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. The dependent invoice exception definition record must have a lower order value than the new invoice exception definition record that you are creating.
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	Object you're seeking approval for. The following options are available: • **Invoice** • **Purchase Order** To create an approval rule for an invoice, select **Invoice**.
Approving line	Approving object line that you're seeking approval for. For Invoice approving object, the approving line is defaulted to Invoice Line.

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Approval Rule form fields (continued)

Field	Description
Approval rule type	The type of approval rule that determines how approval plans are generated and routed when conditions are met. The following options are available: • Cost center Managers • Dynamic Users or Groups • Managerial Job Code Hierarchy • Managerial Hierarchy • Specified Users or Groups Depending on the rule type that you select, the associated fields appear. For more information, see Approval rule types.
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.

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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>.

Accounts Payable Operations glossary

Learn about the terms and concepts used in Accounts Payable Operations (APO).

Glossary terms are grouped alphabetically.

A | D | E I |S | T | V | W

A

Accounts Payable

The process of managing and paying invoices from suppliers.

Approval workflow

The sequence of steps required to approve an invoice.

Advanced work assignment for Accounts Payable Operations

An application that automatically assigns work items to agents based on their availability, capacity, and skills to resolve invoice cases within Accounts Payable Operations.

Agent workspace

The interface where APO agents view and manage their assigned work items.

Assignment rules

Guidelines that determine how work items are assigned.

D

Data capture

The process of collecting and digitizing invoice data.

Document intelligence

ServiceNow® AI-powered tool for extracting data from invoices.

Data security

Measures to protect sensitive information within the system.

E

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Enterprise resource planning systems

Enterprise resource planning (ERP) systems used for managing business processes.

Exception management

Handling and resolving issues that arise during Accounts Payable Operations invoice processing.

I

Invoice approval

The process of verifying and authorizing an invoice for payment.

Invoice exception

Issues identified during invoice processing that require resolution.

Invoice ingestion

The process of receiving and entering invoices into the system.

Invoice processing

The end-to-end handling of invoices from receipt to payment.

P

Purchase order

A document issued by a buyer to a seller, detailing the items or services to be purchased.

S

Supplier management

The process of managing relationships and transactions with suppliers.

T

Tolerance rules

Limit set on invoices to determine acceptable variances before they require further review.

V

Virtual agent

An AI-driven assistant for handling common requests and inquiries.

W

Work item queue

A storage area for work items waiting to be assigned to agents.

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